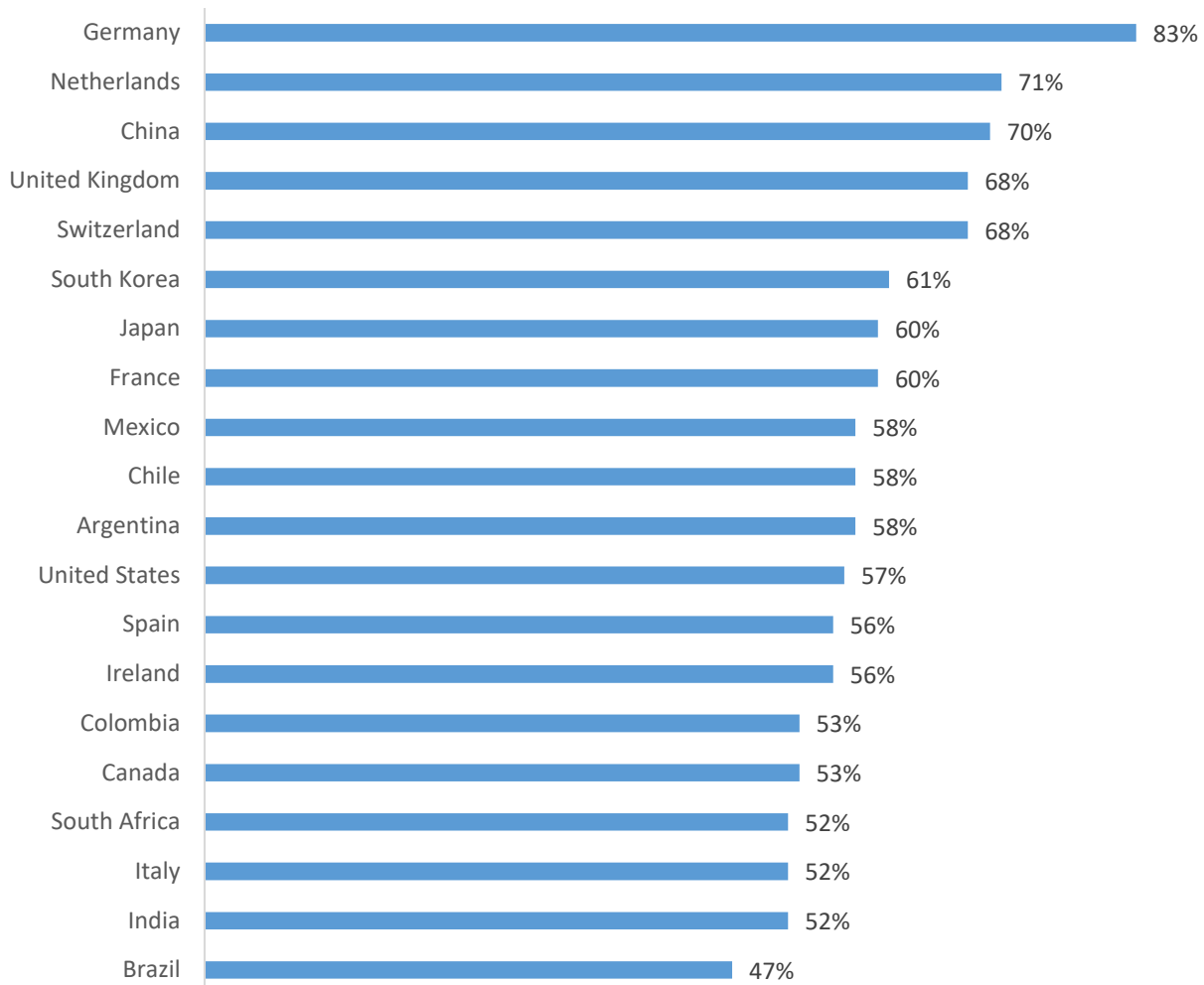


Johnson Controls conducts an annual Energy Efficiency Indicator survey tracking current and planned investments, key drivers, and organizational barriers to improving energy efficiency in facilities. Since the first survey was released in 2007, almost 26,000 energy and facility management leaders have been surveyed. This year marks the 12th edition of the survey with over 1,900 respondents represented from twenty countries, including Argentina, Brazil, Canada, Chile, China, Colombia, France, Germany, India, Ireland, Italy, Japan, Mexico, Netherlands, South Africa, South Korea, Spain, Switzerland, United Kingdom, and the United States.



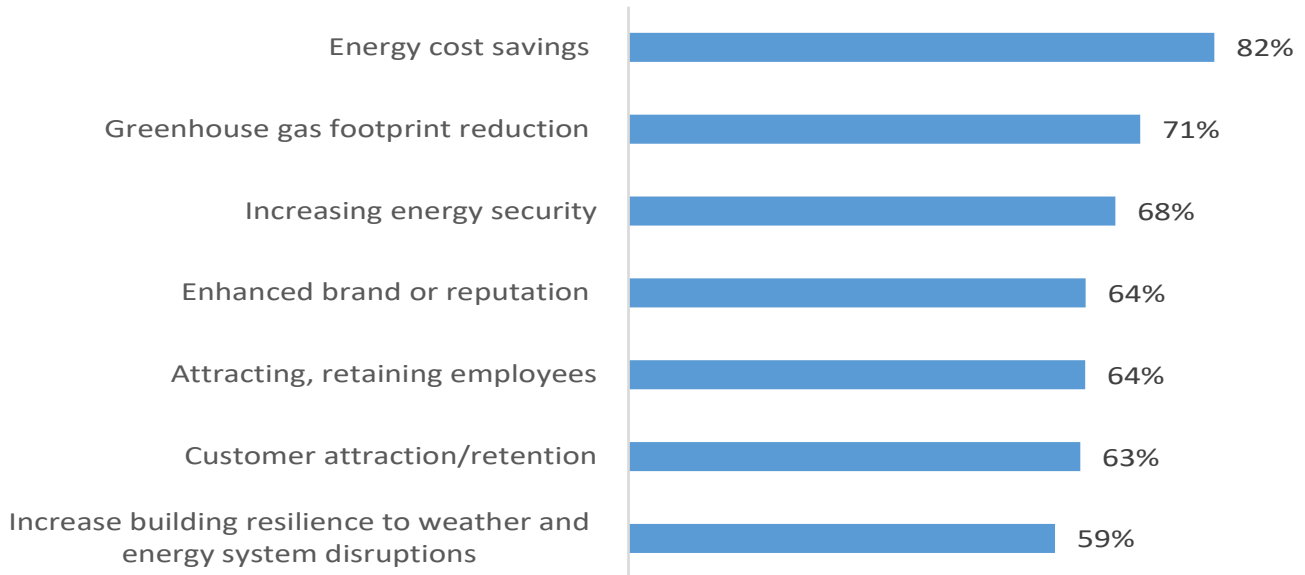
INVESTMENT IN ENERGY EFFICIENCY AND SMART BUILDING TECHNOLOGY

Organizations planning to increase investment in energy efficiency, renewable energy and smart building technology over the next 12 months



ENERGY COST SAVINGS IS THE TOP DRIVER OF INVESTMENT GLOBALLY

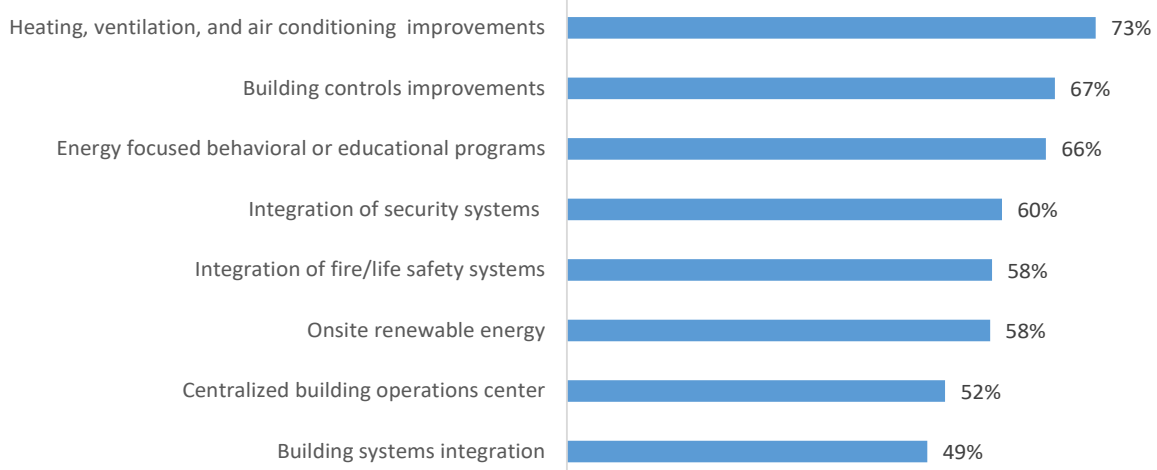
Organizations rating as very or extremely important driver in building energy and technology investment decisions



TOP BARRIERS TO INVESTMENT	
ASIA	<p>24% Insufficient internal capital budget</p> <p>16% Appropriate financing options not available</p> <p>15% Insufficient government or utility incentives available</p>
EMEA	<p>31% Lack of technical expertise to evaluate or execute projects</p> <p>22% Lack of funding to pay for improvements</p> <p>15% Uncertainty regarding savings/performance</p>
LATIN AMERICA	<p>28% Lack of technical expertise to evaluate or execute projects</p> <p>25% Lack of funding to pay for improvements</p> <p>16% Uncertainty regarding savings/performance</p>
NORTH AMERICA	<p>21% Appropriate financing options not available</p> <p>20% Competition from other capital investments</p> <p>18% Insufficient internal capital budget</p>

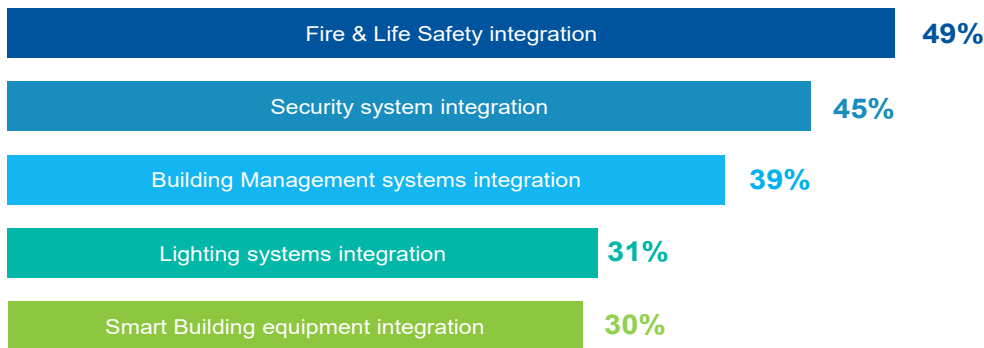
TOP ENERGY EFFICIENCY MEASURES FOR PAST 12 MONTHS

Percentage of global respondents that invested in the past 12 months



PLANNED INVESTMENT IN SYSTEMS INTEGRATION

Global organizations investing in the next 12 months



The trend towards building systems integration will continue with strong investment planned in the next year

POLICIES DRIVING ENERGY EFFICIENT IMPROVEMENTS IN BUILDINGS

Organizations rating as very or extremely important



2018 ENERGY EFFICIENCY INDICATOR SURVEY

GLOBAL

For more information on the study, please visit www.johnsoncontrols.com

	ASIA*	EMEA*	LATIN AMERICA*	NORTH AMERICA*
GREEN BUILDING CERTIFICATION Already achieved or plan to achieve voluntary green building certification	54%	62%	45%	74%
GREEN BUILDING TENANT SPACE Willing to pay a premium to lease space in a certified green building	54%	53%	48%	45%
NET ZERO ENERGY/ CARBON Extremely or very likely to have one or more facilities that are nearly zero, net zero or positive energy or carbon status in the next ten years	46%	52%	43%	65%
OPERATE OFF THE GRID Extremely or very likely to have a facility that will operate off the grid in the next ten years	48%	52%	48%	54%
RESILIENCE Indicated that it is an extremely or very important factor when considering future energy and building infrastructure investments.	69%	74%	70%	72%

*Asia includes China, India, Japan, and South Korea; EMEA (Europe, Middle East, and Africa) includes France, Germany, Ireland, Italy, Netherlands, South Africa, Spain, Switzerland, and the United Kingdom; Latin America includes Argentina, Brazil, Chile, Colombia, and Mexico; North America includes Canada and the United States

2018 Global Survey Demographics

To qualify, respondents must have facility budget responsibility and propose or approve energy efficiency initiatives for their organization. The survey was administered anonymously by a third party partner. For the 2018 global survey, there was a representative mix of respondents from institutional, commercial, and industrial organizations. In addition, there was a range of organizational titles, including C-level executives, vice presidents, directors and managers.

