2018 Energy Efficiency Indicator Survey | South Africa

Johnson Controls

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 100 leaders from South Africa.

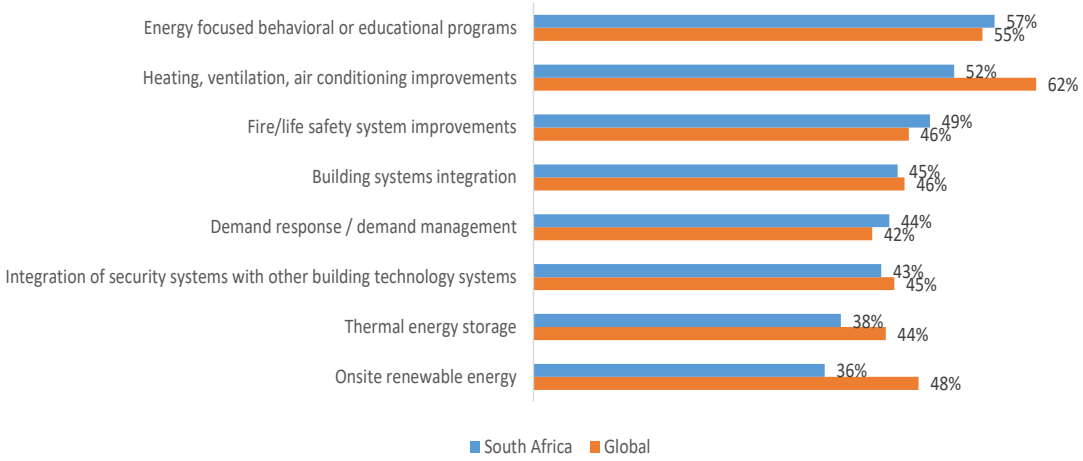
	SOUTH AFRICA	GLOBAL
INTEREST AND INVESTMENT IN ENERGY EFFICIENCY AND SMART BUILDING TECHNOLOGY	**65%** of organizations are paying more attention **52%** of organizations plan to increase energy efficiency and renewable energy investments **33%** plan to keep their investment level the same	Globally, **59%** of organizations plan to increase investment, up slightly from **58%** last year
DRIVERS IN ENERGY INVESTMENT DECISIONS	1. Energy cost savings 2. Attracting / retaining employees 3. Increasing energy security 4. Increasing building resilience 5. Greenhouse gas footprint reduction	1. Energy cost savings 2. Greenhouse gas footprint reduction 3. Increasing energy security 4. Enhanced brand or reputation 5. Attracting / retaining employees
TOP BARRIERS TO INVESTMENT	**30%** Lack of technical expertise to evaluate or execute projects **19%** Lack of funding to pay for improvements **16%** Insufficient payback / return-on-investment	**28%** Lack of technical expertise to evaluate or execute projects **22%** Lack of funding to pay for improvements **18%** Uncertainty regarding savings and performance

TOP ENERGY EFFICIENCY MEASURES

PAST 12 MONTHS

1. Heating, ventilation and air-conditioning improvements
2. Energy focused behavioral programs
3. Integration of fire / life safety systems
4. Integration of security systems
5. Fire / life safety system improvements
6. Demand response / demand management
7. Onsite renewable energy
8. Centralized building operation center

NEXT 12 MONTHS



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

- Building systems integration is on the rise with forty-five percent of the respondents in South Africa indicating they would invest over the coming 12 months.
- In South Africa **cybersecurity, the Internet of Things** and **data analytics / machine learning** were identified as the technology trends and issues to have the biggest impact on the implementation of smart buildings over the next five years. Globally, the top technology trends were identified as cybersecurity, systems integration, and the Internet of Things.

	SOUTH AFRICA		GLOBAL
GREEN BUILDING CERTIFICATION	10%	Already achieved voluntary green building certification	14%
	38%	Plan to in the future	44%
GREEN BUILDING TENANT SPACE	39%	Willing to pay a premium to lease space in a certified green building	51%
NET ZERO ENERGY/ CARBON	38%	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.	50%
OPERATE OFF THE GRID	44%	Extremely or very likely to have a facility that will operate off the grid in the next ten years	50%
RESILIENCE	72%	Indicated that it is an extremely or very important factor when considering future energy and building infrastructure investments.	72%

2018 South Africa 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 South Africa 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.

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