

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 Germany.



GERMANY

GLOBAL

INTEREST AND INVESTMENT IN ENERGY EFFICIENCY AND SMART BUILDING TECHNOLOGY

81% of organizations are paying more attention
83% of organizations plan to increase energy efficiency and renewable energy investments
17% 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. Enhanced brand / reputation
3. Greenhouse gas footprint reduction
4. Attracting / retaining employees
5. Customer attraction / retention

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

38% Lack of technical expertise to evaluate or execute projects
17% Uncertainty regarding savings and performance
15% Lack of organizational ownership / dedicated attention to energy efficiency

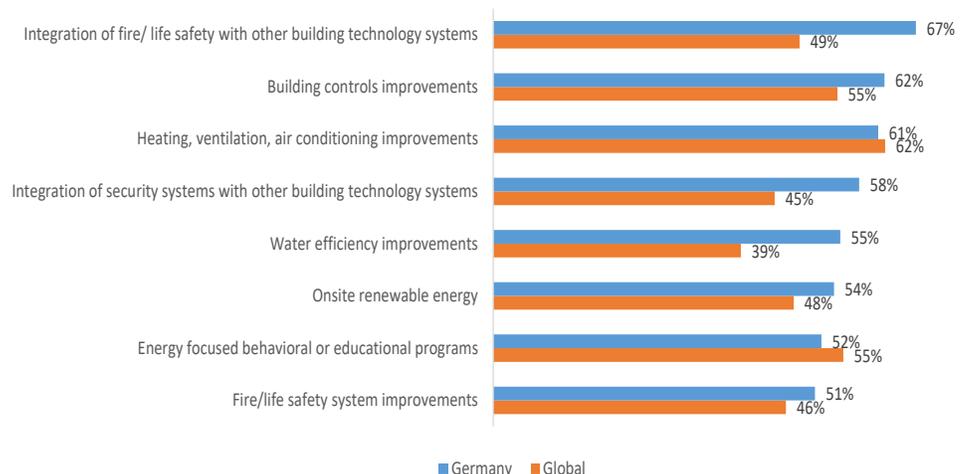
28% Lack of technical expertise to evaluate or execute projects
22% Lack of funding to pay for improvements
18% Uncertainty regarding savings and performance

TOP ENERGY EFFICIENCY MEASURES

PAST 12 MONTHS

1. Building controls improvements
2. Heating, ventilation and air-conditioning improvements
3. Integration of fire / life safety systems
4. Energy focused behavioral programs
5. Building systems integration
6. Onsite renewable energy
7. Integration of security systems
8. Security system improvements

NEXT 12 MONTHS



2018 ENERGY EFFICIENCY INDICATOR SURVEY

GERMANY

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

- Building systems integration is on the rise with almost half of the respondents in Germany indicating they would invest over the coming 12 months.
- In Germany, **cybersecurity**, **systems integration**, and **systems interoperability standards** 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.

	GERMANY		GLOBAL
GREEN BUILDING CERTIFICATION	21%	Already achieved voluntary green building certification	14%
	50%	Plan to in the future	44%
GREEN BUILDING TENANT SPACE	60%	Willing to pay a premium to lease space in a certified green building	51%
NET ZERO ENERGY/ CARBON	63%	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	56%	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 Germany 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 Germany 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.

