

2020 Johnson Controls Energy Efficiency Indicator Study

COVID-19 pulse survey

The 14th edition of our Energy Efficiency Indicator study surveyed 150 commercial, institutional and industrial facility executives in the U.S. in September 2020. The COVID-19 pulse survey included questions on coronavirus-related improvements, investments and impacts.



Flexibility, health and safety drive COVID-19 building investments

With the pandemic, facility managers have new concerns about building health, changing their motivation for building investments. Increasing building flexibility to respond to coronavirus and other emergency conditions was second in priority only to cost savings in driving investment during the pandemic.

81%

said increasing the flexibility of facilities to quickly respond to a variety of emergency conditions (e.g., pandemic, natural disaster) was extremely or very important as a driver of investment.

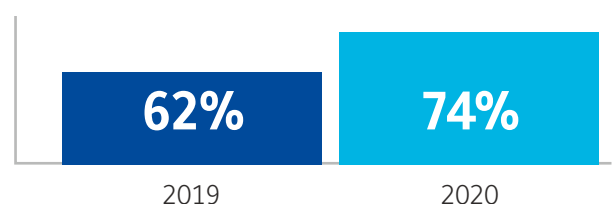
63%

said protecting the health and safety of building occupants during the coronavirus pandemic was extremely or very important as a driver of investment.

Improving occupant health and safety while reducing energy costs during both pandemic and “new normal” occupancy conditions are also high priorities for these organizations.

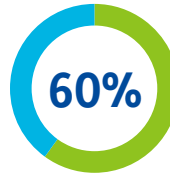
The percentage of organizations saying that improving occupant health and wellness was an extremely or very important driver of investment increased from **62 percent to 74 percent** in 2020.

85 percent said energy cost savings was an extremely or very important driver of investment.



Air treatments and ventilation represent top COVID-19 building investments

Industry, trade and public health organizations have recommended various changes to indoor spaces to help control the spread of the virus. In addition to increasing work schedule flexibility and reducing occupancy density, more than half of organizations have performed indoor air quality assessments, introduced elevated temperature scanning systems, and increased air filtration.



More than 60% plan to install air treatment solutions, increase outdoor ventilation, and recommission building systems and equipment.

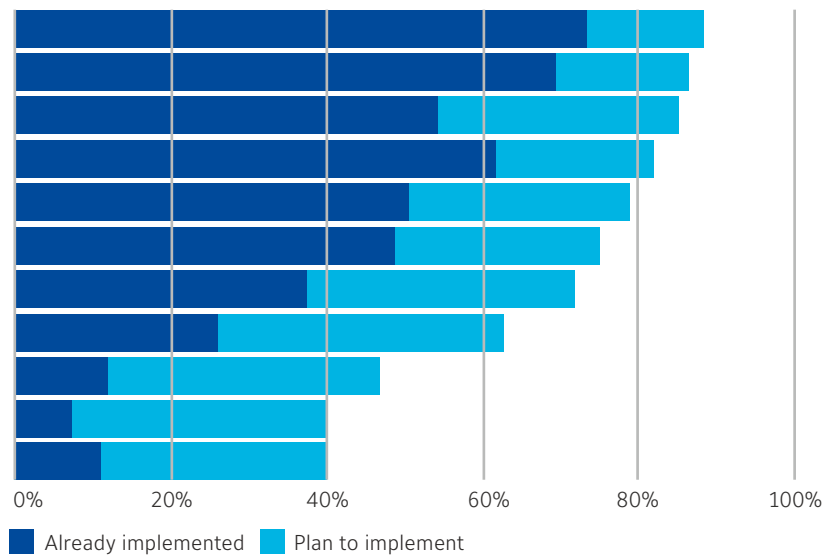


20% of organizations used economic stimulus and recovery funds to pay for building improvements.

COVID-19 – related building investments

- Increase work schedule flexibility
- Perform an indoor air quality assessment
- Introduce occupant elevated temperature scanning systems
- Reduce occupant density
- Increase air filtration
- Install air treatment system (e.g., UV-C, bi-polar ionization)
- Increase outdoor air ventilation rates
- Recommission building systems and equipment
- Introduce touchless entry and access
- Add pre-scheduled occupant isolation rooms
- Introduce social distance tracking and tracing systems

Percentage of Organizations Making Investments



COVID-19 did not significantly reduce building energy consumption, despite less occupancy

Increasing outdoor air ventilation and air filtration can significantly increase energy use depending on building type and locations. This creates real potential for energy efficiency. During the pandemic, less than 10 percent of organizations have experienced an energy use reduction of greater than 20 percent despite significantly reduced building occupancy.

How facility energy use changed during the COVID-19 pandemic

