

2020 Energy Efficiency Indicator Survey

U.S. Results



The fourteenth edition of the Energy Efficiency Indicator Study surveyed 150 energy and facility management executives across the U.S.

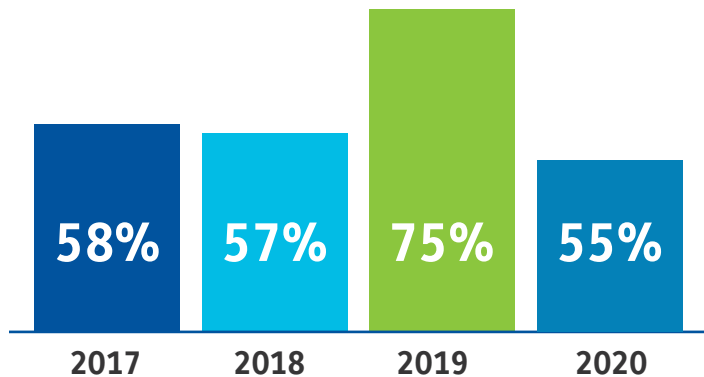
Survey respondents meet one of at least the following criteria:

- They review or monitor the amount of energy used by organization’s facilities
- They propose or approve energy efficiency or smart building initiatives
- They have budget management or investment responsibility for organization’s facilities

Survey respondents			
Commercial	27%	C-Level	18%
Industrial	23%	Vice President/Director	33%
Institutional	37%	Manager	49%
Other	13%	Other	0%

Investment in energy efficiency, renewable energy and smart building technology is expected to match 2017 and 2018 levels next year

Percentage of organizations that will increase investment in energy efficiency, renewable energy or smart building technology over the next 12 months



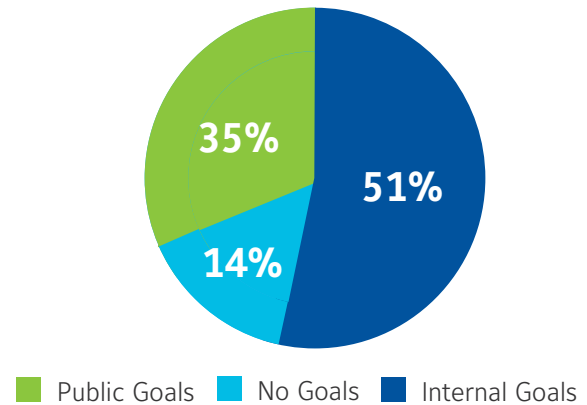
Energy cost savings, increasing facility flexibility, and protecting occupant health and safety in an emergency are the biggest drivers of investment.

Rated as 'extremely or very significant' by organizations

Energy cost savings	85%
Increasing the flexibility of facilities to quickly respond to a variety of emergency conditions	81%
Protecting the health and safety of building occupants during emergency situations	76%
Increasing energy security	75%
Improving life safety and security	75%
Improving occupant health and wellness	74%
Customer attraction / retention	73%
Enhanced brand or reputation	72%
Improving operational efficiency	70%
Government / utility incentives / rebates	69%
Increasing building resilience	69%
Greenhouse gas footprint reduction	68%

Organizations without energy and/or carbon reduction goals are not planning to increase investment next year

Percentage of organizations with goals for energy and/or carbon reduction



Percentage of organizations that will increase investment in energy efficiency, renewable energy or smart building technology over next 12 months

0%

No goal for energy or carbon reduction

65%

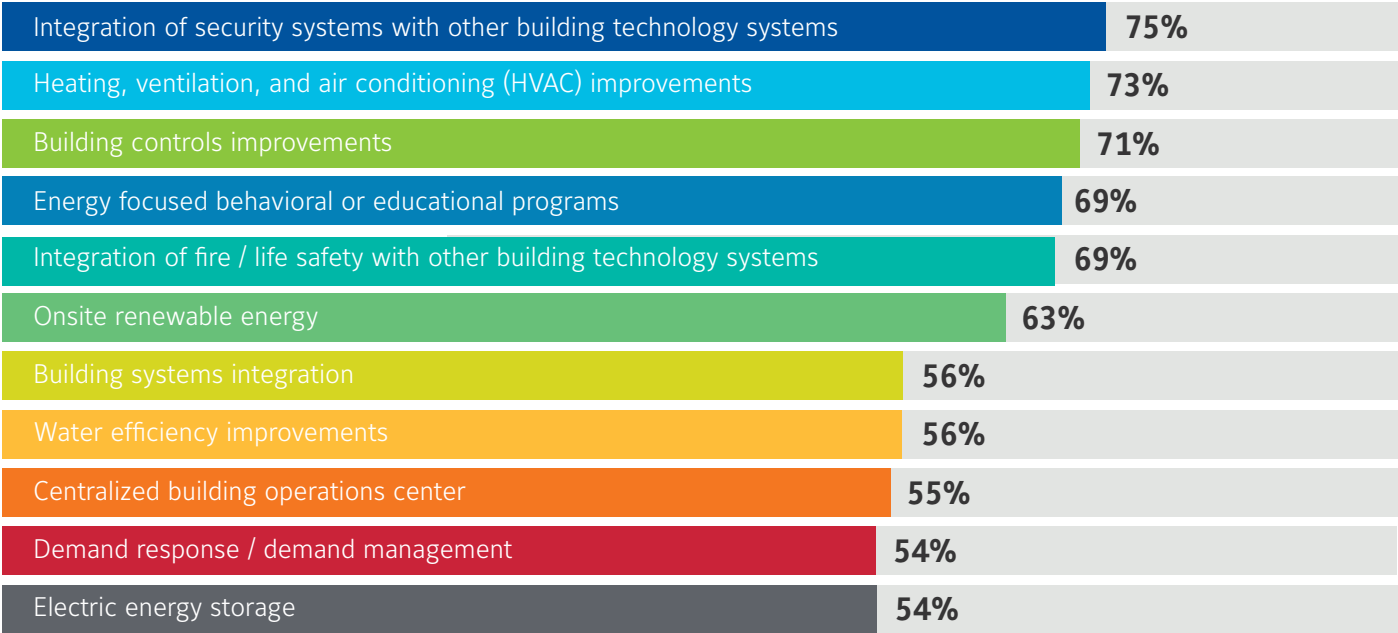
Internal or public goal for energy or carbon reduction

Technology continues to evolve, with numerous technologies expected to impact implementation of smart buildings in the next 5 years.

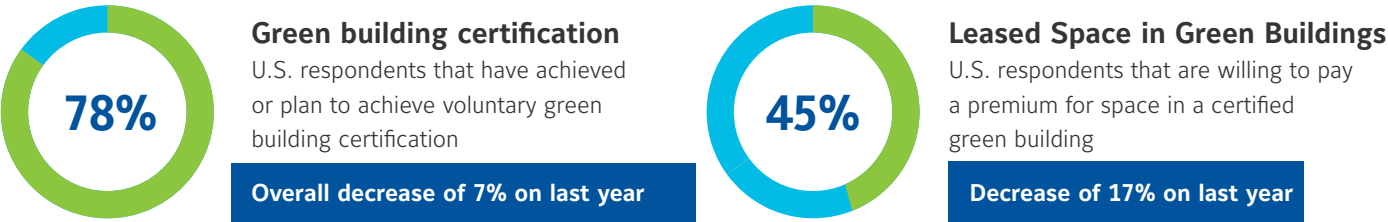
Technology trends rated as 'extremely or very important' by organizations		Change from 2019
Data analytics / Machine learning	79%	5%
Internet of Things	75%	1%
Cybersecurity	73%	-2%
Data privacy	72%	5%
Advanced controls	66%	3%

Security integration, HVAC equipment and controls top of the list of investments planned for next year

Organizations investing in the next 12 months

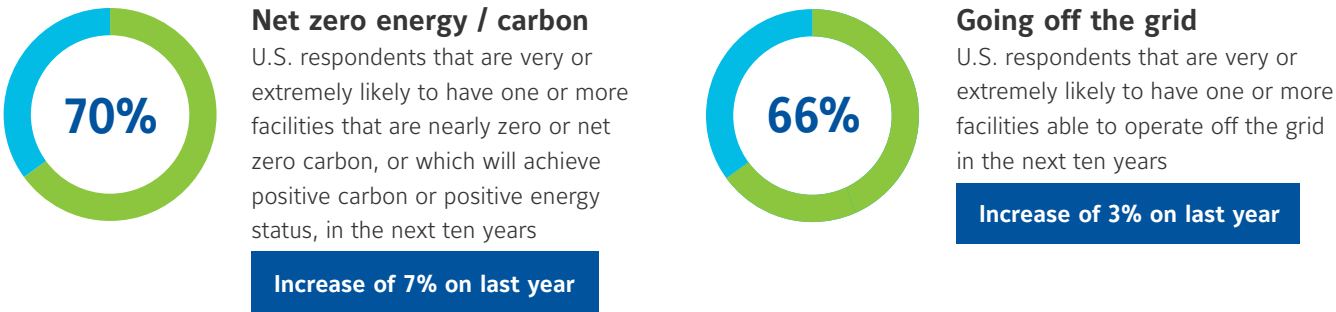


Interest in achieving green building certification and leasing space in green buildings has decreased from 2019



28% have achieved (+3% from 2019)
50% plan to achieve (-10% from 2019)

Interest in net zero carbon buildings and resiliency continues to increase



Investment in demand management and flexibility expected to show significant growth in 2021

Technology	2021 investment	% Increase over 2020
Integration of building technology systems with distributed energy resources	33%	15%
Non-renewable distributed energy generation	31%	19%
Integration of building technology systems with the utility grid	29%	16%

Funding sources changed in 2020, with 20% of respondents utilizing economic stimulus and recovery funds to pay for building infrastructure projects

Funding mechanism	Percentage utilizing	Change since 2019
Internal capital budget	71%	+11%
Internal operating budget	57%	+2%
Government or utility incentives - grants, rebates or tax credits	34%	-4%
Energy services agreement or contract	24%	+4%
Use of economic stimulus and recovery funds	20%	NA
External financing	18%	-5%
Energy or climate specific set asides within capital budget	9%	-23%

Policies driving energy efficient improvements in buildings

Organizations rating as very or extremely important

Performance benchmarking and certifications	97%
Building owner and occupant partnerships	79%
Building energy codes and product performance standards	75%
Financial incentives and programs	72%
Government leadership	63%
Building efficiency targets	62%
Utility data access	61%
Private sector engagement	60%

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