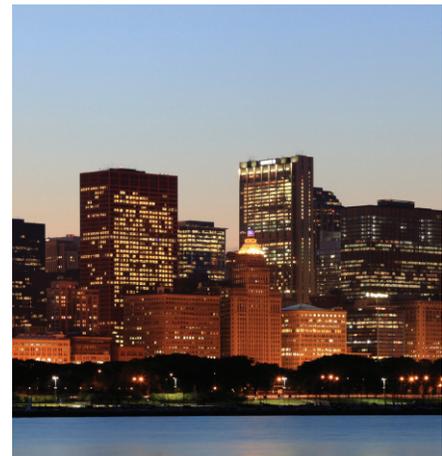


# 2012 ENERGY EFFICIENCY INDICATOR SURVEY: EUROPE RESULTS

The Johnson Controls Institute for Building Efficiency conducts an annual Energy Efficiency Indicator survey tracking the energy priorities, practices and investments being made by executive decision-makers for building in markets around the world. In the 2012 survey, nearly 3,500 executives from the commercial, industrial and institutional sectors provided insights into their energy management practices, the barriers to energy efficiency they face, and what motivates them to act. This is the third year the survey has extended to Europe, where there were 944 respondents this year. Respondents were concentrated in the UK (331), Germany (307), and France (296). The complete results can be found at [www.InstituteBE.com](http://www.InstituteBE.com).

## FINDINGS FROM THE 2012 EUROPE EEI SURVEY RESPONSES:

- Interest in energy efficiency among building executives in Europe jumped by 15%. Seventy-nine percent said energy management was very or extremely important to their organizations, compared to 61% in 2011. Seventy-seven percent said they were paying more attention to energy in 2012 than in 2011. Interest in energy management was highest in the UK.
- Investments in energy efficiency by European executives in the past 12 months were not as widespread as in other nations, but over 50% reported that they did make investments (Figure 1). Europeans did show widespread investments in renewable energy, leading the world along with China and India.
- Broader financial challenges may be slowing spending: 39% of business executives said they planned to increase spending in the next 12 months, the lowest of any region, while 36% expected investment to stay the same.
- Energy cost savings, increasing energy security, and government or utility incentives or rebates led as drivers for energy efficiency action. Globally, the main drivers were energy cost savings, government or utility incentives or rebates, and enhanced brand or public image.
- Green building certification continues to grow as a trend in Europe. Fifty five percent of respondents now have at least one certified green building. Thirty five percent of respondents planned to pursue certification in new buildings (compared to 31% in 2011) and 44% percent in existing buildings (compared to 36% in 2011) (Figure 2).
- The top three energy efficiency measures adopted in the past 12 months included lighting improvements (57%), HVAC and/or controls improvements (49%), and water efficiency improvements (35%).



## OVERVIEW

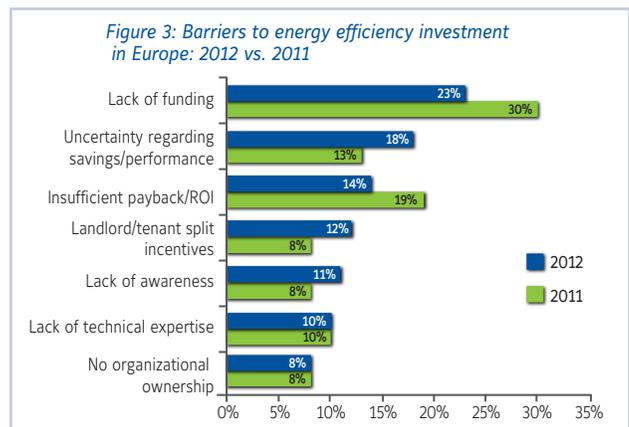
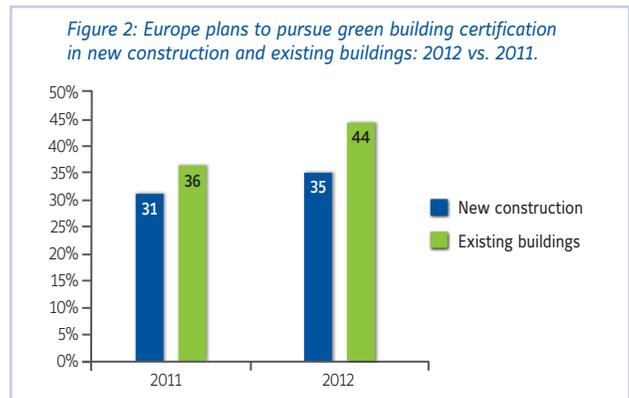
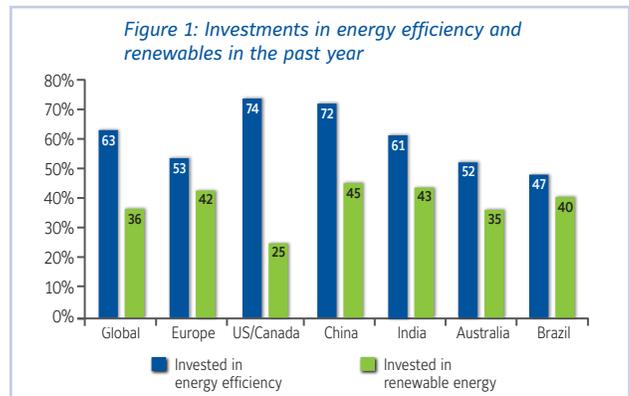
The 2012 Global Energy Efficiency Indicator (EEI) survey reveals the energy priorities, practices, investment plans and barriers facing building decision-makers responsible for energy investments and activities in their companies. The global survey included nearly 3,500 facility managers and building executives and owners. The 2012 survey is the sixth global EEI survey conducted by Johnson Controls through its Institute for Building Efficiency.

- When asked which on-site technologies they expected to see the greatest market adoption in the next 10 years, executives selected lighting technologies (29%) followed by solar PV (25%) and advanced building materials (23%) as their top three choices.
- Finances remained as the major barrier to pursuing energy efficiency for European respondents, though less so than in 2011. The top barrier was lack of funding to pay for improvements (23% compared to 30% in 2011), followed by uncertainty regarding savings/performance (18% compared to 13% in 2011) and insufficient payback/ROI (14% compared to 19% in 2011) (Figure 3).
- The average allowable payback on efficiency projects averaged 3.4 years, the same as in 2011 and equal to the 2012 global average. The UK had the longest average allowable payback of the three EU countries at 3.7 years.
- When asked which energy policy would have the greatest impact on improving energy efficiency in buildings, 28% of executives said tax credits/incentives or rebates, 19% selected low-interest financing for energy upgrades, and 16% chose stricter building codes and equipment standards.
- The top three energy management practices already adopted in European respondents' facilities were tracking and analyzing data (49%), measuring and verifying energy project savings (45%), and performing energy audits of facilities or equipment.

## SURVEY RESPONDENT DEMOGRAPHICS

To qualify for the EEI survey, respondents must have budget responsibility for at least one nonresidential building, and their responsibilities must include energy use, either through monitoring of usage or proposing or approving energy-related projects. The EEI survey is conducted anonymously.

Among European respondents, 61% classified their facilities as commercial, 16% as institutional (government buildings, hospitals and schools), and 23% as industrial. Forty-two percent of respondents managed more than 500,000 square feet.



The Institute for Building Efficiency is an initiative of Johnson Controls providing information and analysis of technologies, policies, and practices for efficient, high performance buildings and smart energy systems around the world. The Institute leverages the company's 125 years of global experience providing energy efficient solutions for buildings to support and complement the efforts of nonprofit organizations and industry associations. The Institute focuses on practical solutions that are innovative, cost-effective and scalable.

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