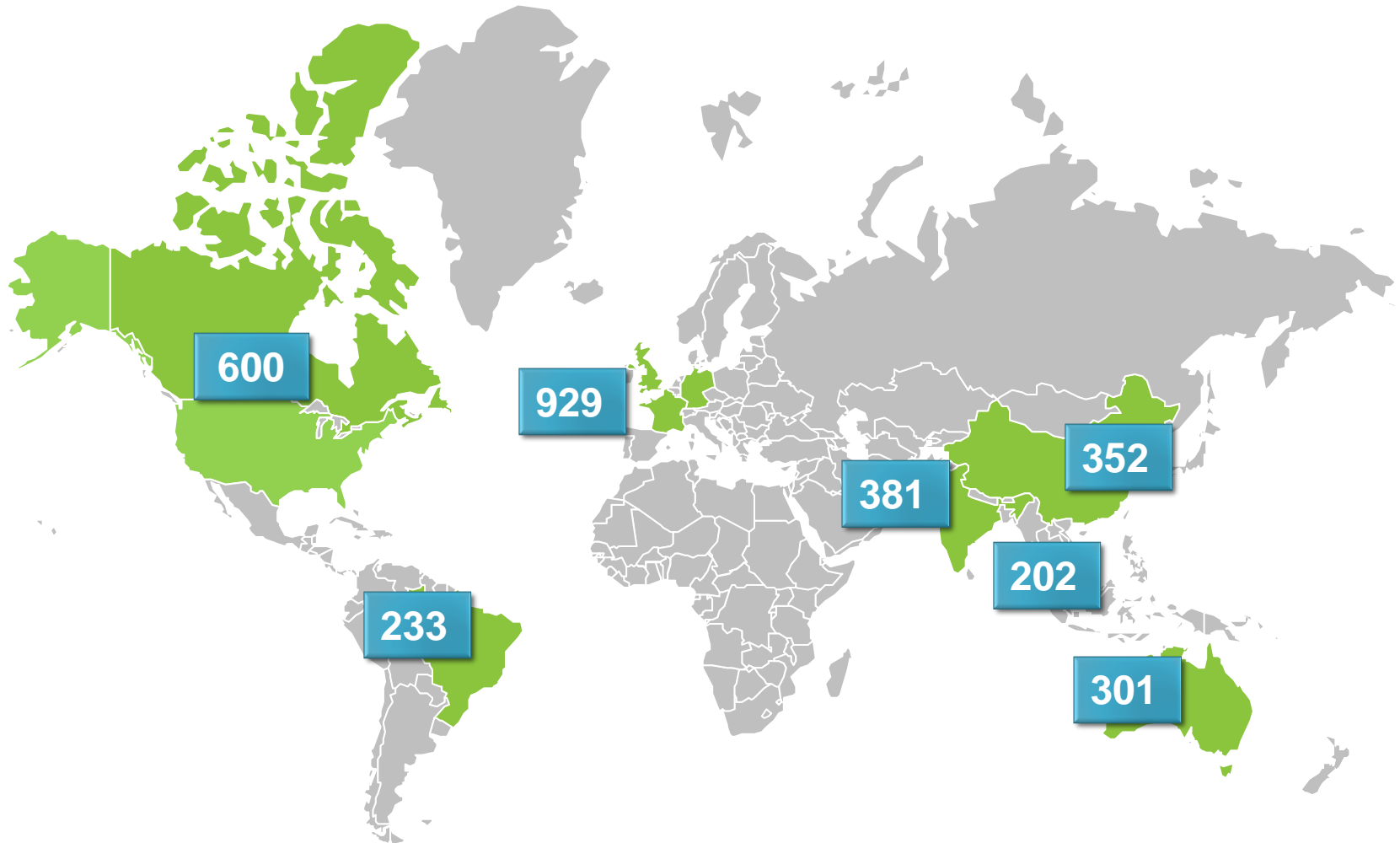


# ENERGY EFFICIENCY INDICATOR

## *2013 China Results*



The 2013 Energy Efficiency Indicator survey drew over 3,000 respondents from 10 countries, 352 from China



Thank you to all of our partners!

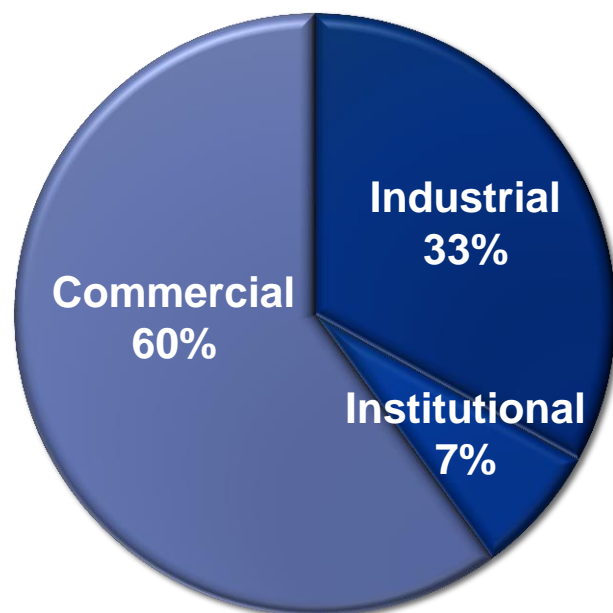
A global survey of decision makers responsible for energy use in buildings – examines trends in priorities and practices

7<sup>th</sup> annual survey led by the Institute for Building Efficiency, in partnership with the International Facility Manager Association and the Urban Land Institute

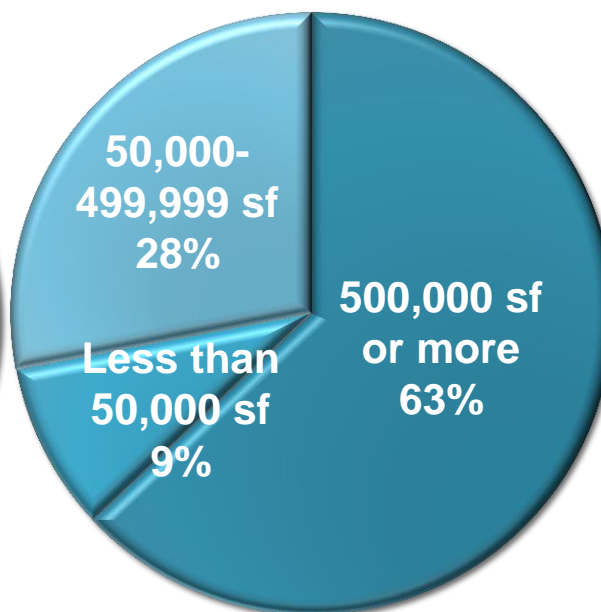


## 352 Chinese respondents represented a diverse mix of global decision makers

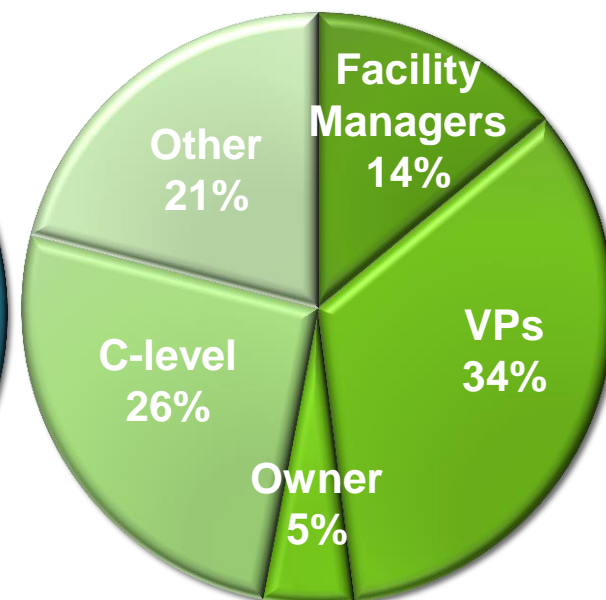
**Sector**



**Facility Size**



**Job Title**



### Criteria:

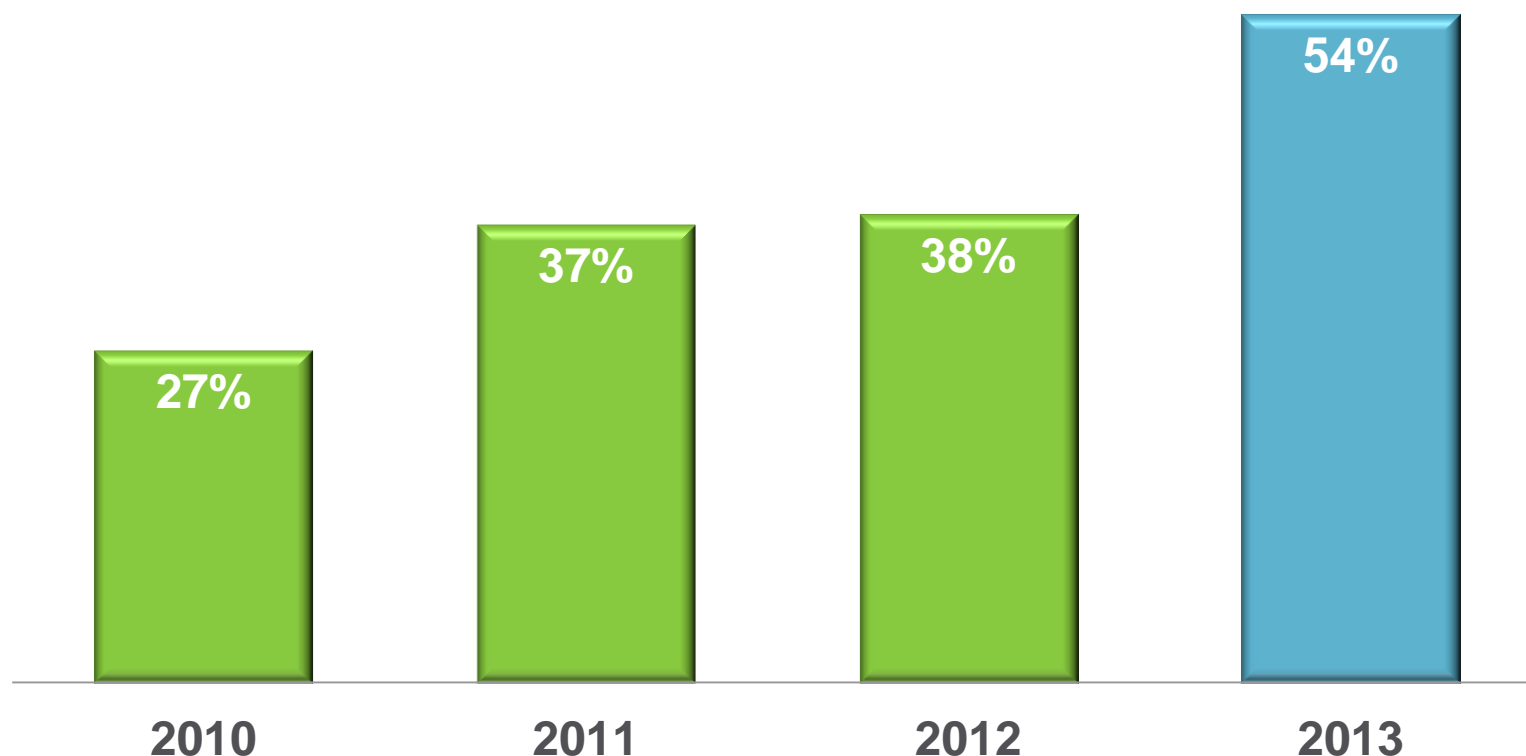
- 1 **Must have budget responsibility** for their organization's facilities.
- 2 **Job responsibilities must include** reviewing or monitoring energy usage, and/or proposing or approving initiatives to make organization's facilities more efficient.

# China Summary Trend Analysis

## Importance of Energy Efficiency

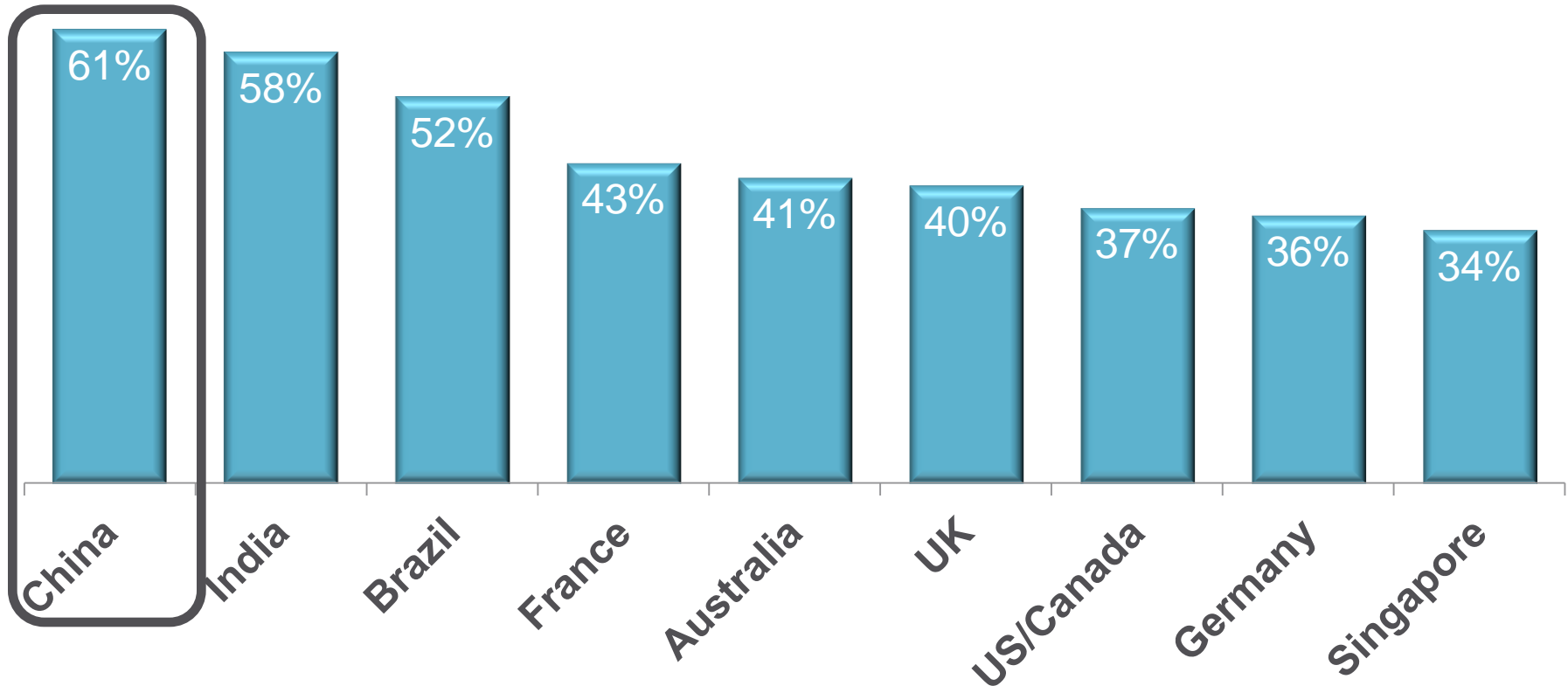


**In 2013, 54% of Chinese organizations say energy management is  
EXTREMELY important to their company**



**How important is energy management to your company/organization?**

## Percentage of organizations paying “a lot more attention” compared to last year



**Compared to 12 months ago, how much attention is your company paying to energy efficiency? (a lot more attention)**

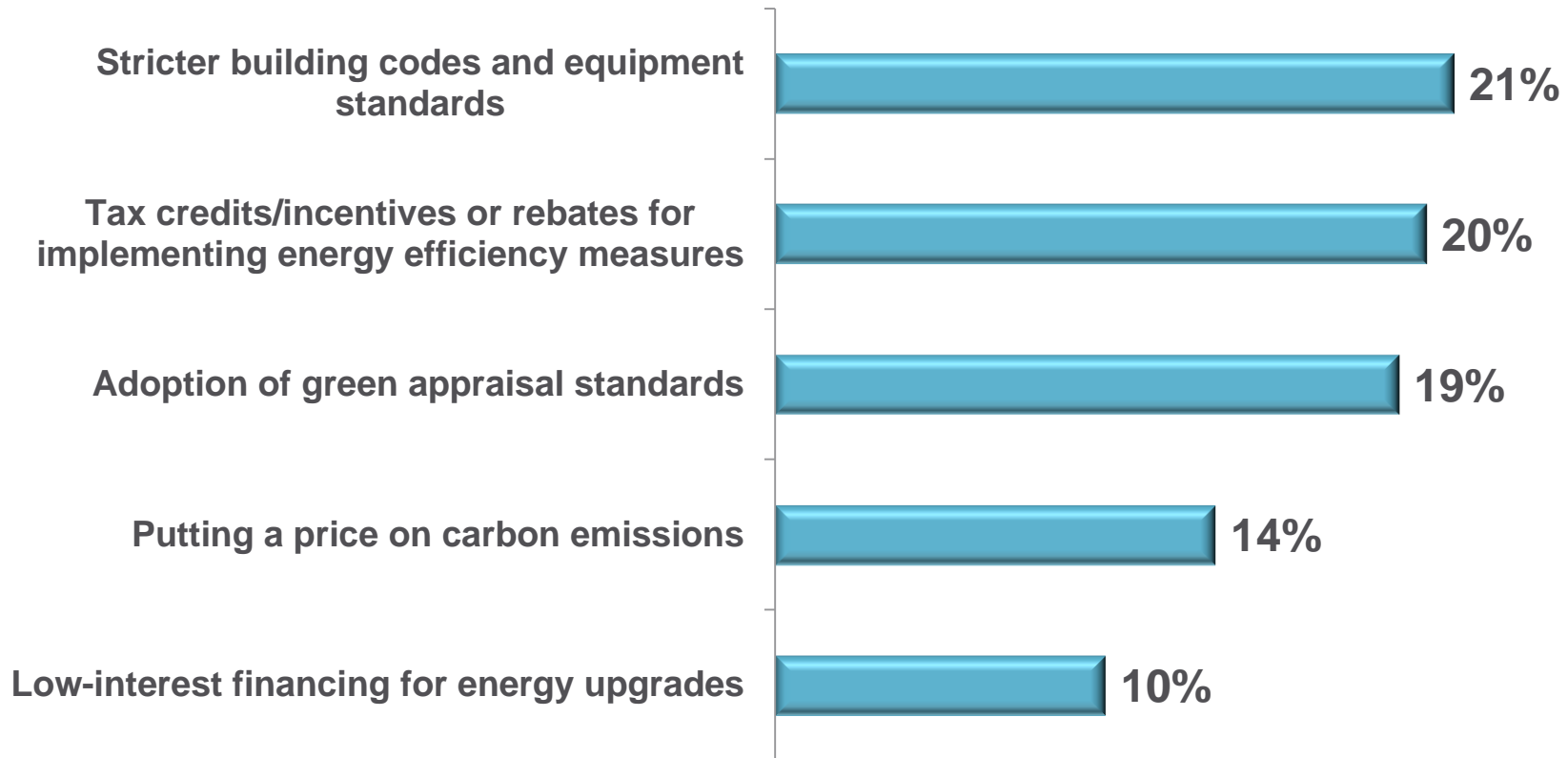
## Cost savings, security and government policy most significant drivers of energy efficiency in China

Drivers of Efficiency	India	China	Brazil	Singapore
Energy cost savings	1	1	1	1
Government & utility incentives/rebates				2
Increased asset value				
Energy security	2	2	2	
Customer attraction & retention	3	5	3	
Existing government policy		3		3
Enhanced brand or public image	5	4	5	5
GHG footprint reduction			4	
Attracting, retaining employees	4			4

**How significant are the following in your organization's energy efficiency decisions? (extremely significant shown and ranked)**

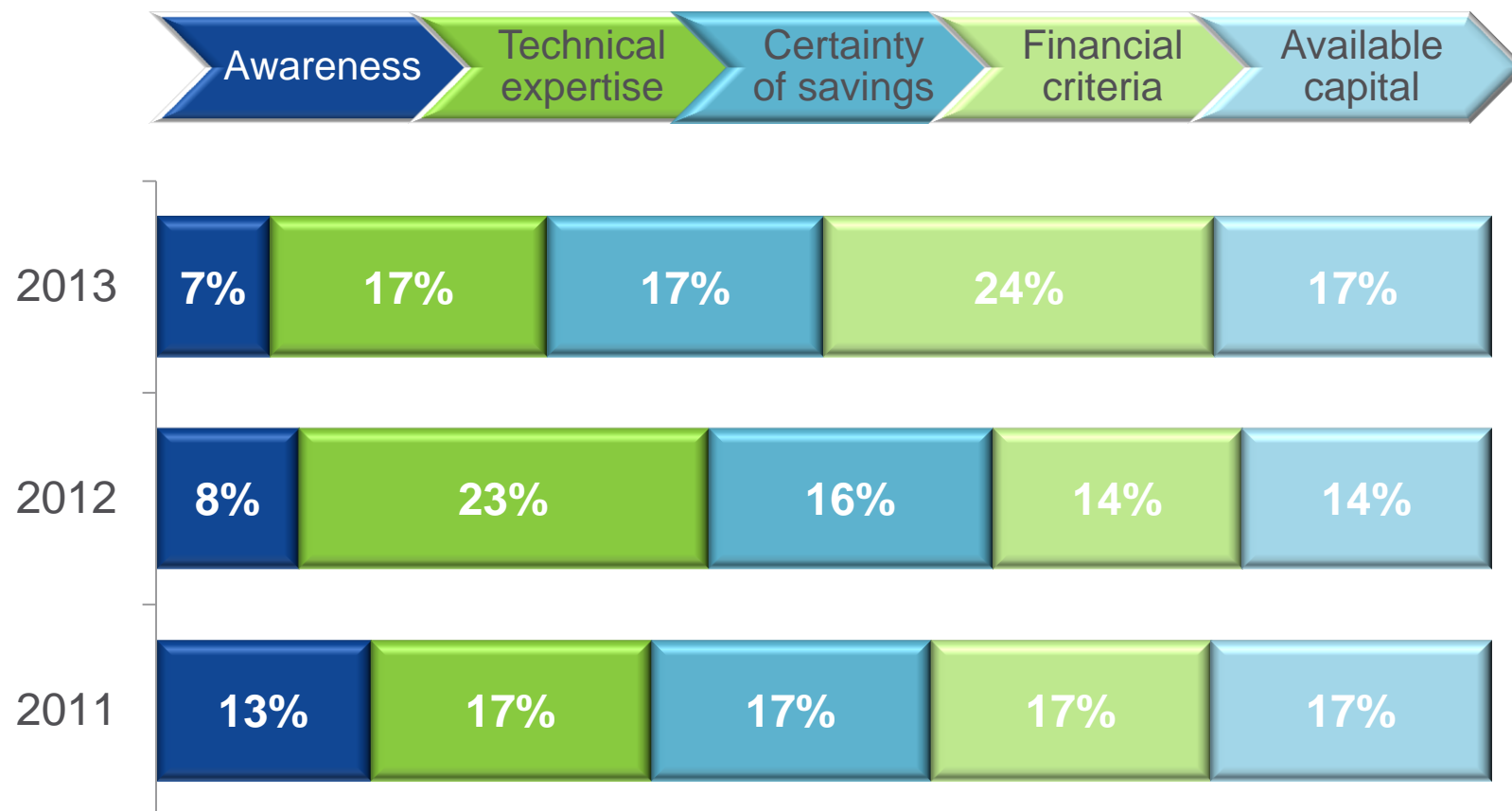


### Stricter building codes/equipment standards have the greatest impact on improving energy efficiency for Chinese organizations



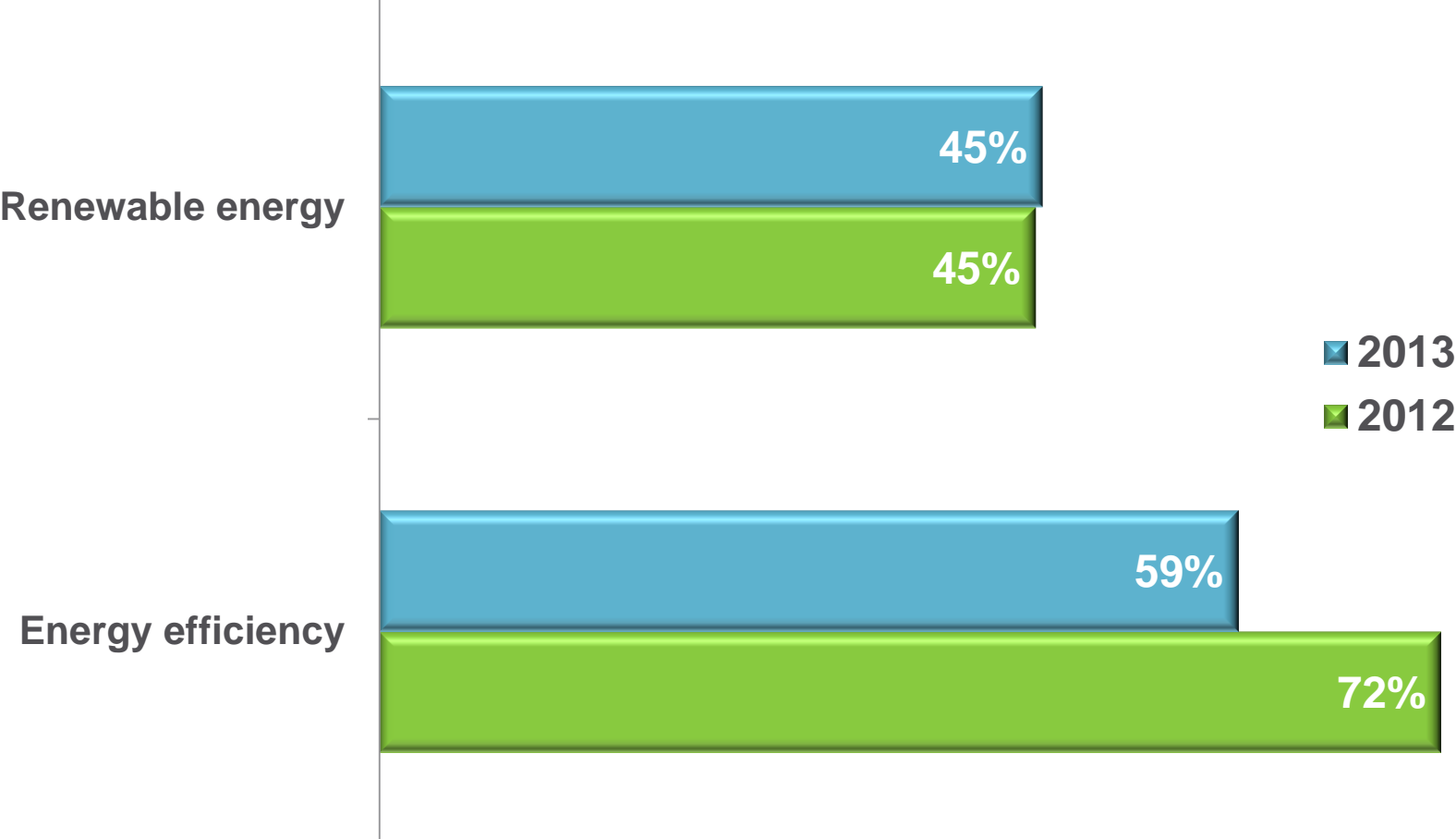
**Which of the following energy policies would have the greatest impact on improving energy efficiency in buildings?**

## Barriers to efficiency in China shifting as market awareness rises, technical capacity grows - financial criteria emerge as top challenge



**What is the top barrier to pursuing energy efficiency for your organization?**

Fewer Chinese organizations invested in energy efficiency projects last year, renewable energy investment was consistent

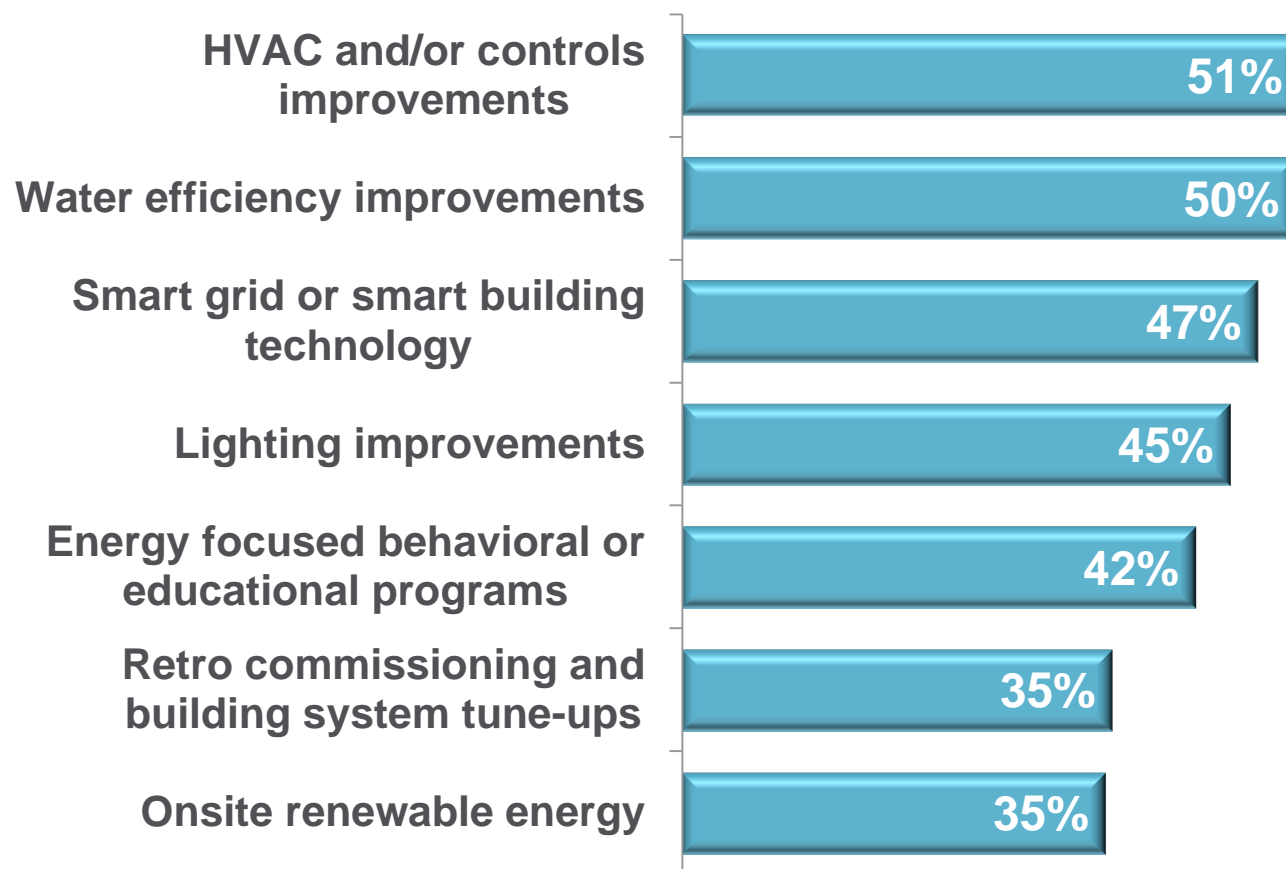


Have you invested in energy efficiency projects in the past year?

# China Summary Trend Analysis

## Technologies and Practices

## HVAC, water efficiency, and smart building technology emerge as priorities for Chinese organizations

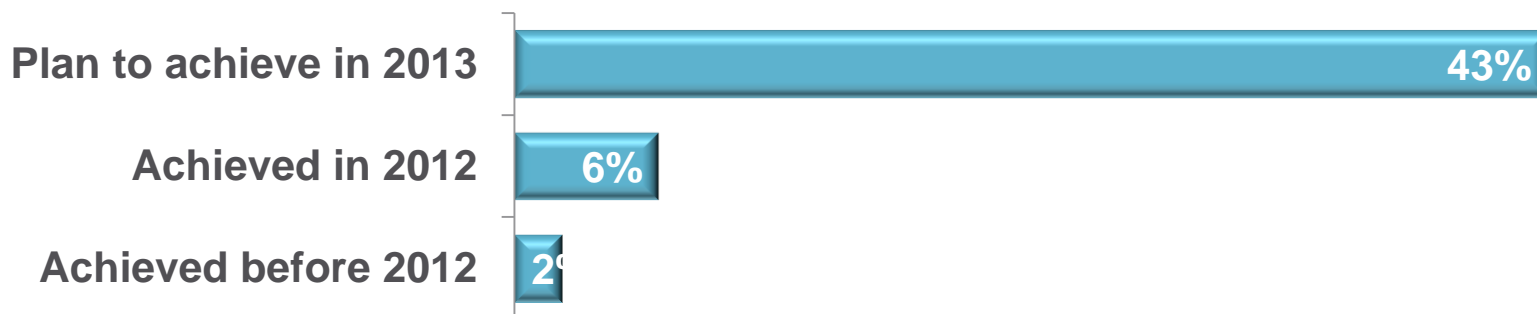


Smart building technology expected to have the greatest increase in market adoption over the next 10 years

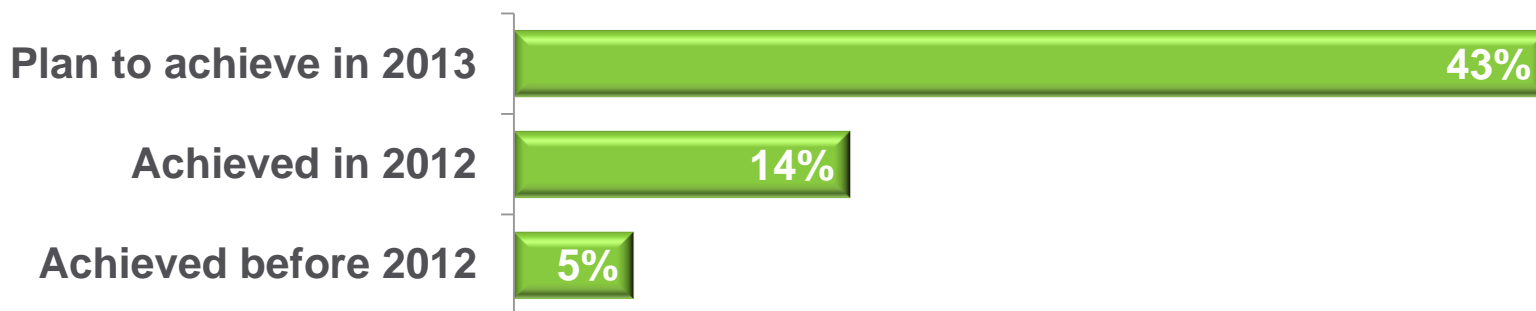
**What is the relative priority for investment of the following measures over the next 12 months? (high priority)**

## Green building certification aspirations high, strong growth in voluntary green buildings certification

### New construction projects



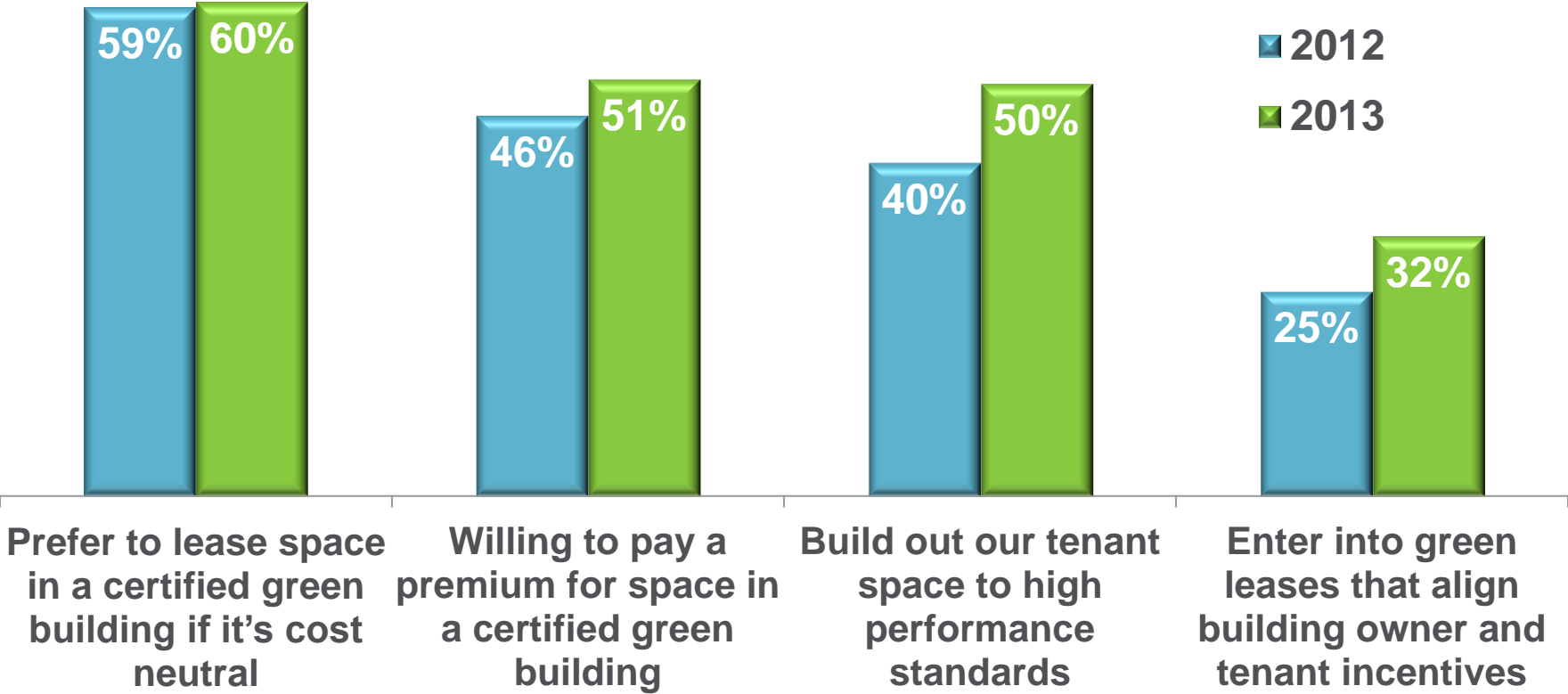
### Existing building projects



**Does your organization intend to achieve voluntary green building certification for any facilities? (prior 12 months, prior years, next 12 months)**



Over 50% of Chinese organizations are willing to pay a premium for tenant space in certified green buildings



What practices does your organization follow for leased office space?

The 2013 survey results **highlight five key findings** based on the input from energy and facility management executives in China

- Importance in energy management up over 40% since 2012
- Almost a quarter of Chinese organizations see financial criteria as top barrier to energy efficiency for first time in 2013
- Green building certification expanding in China market
- HVAC and control improvements are the highest priority investments for the next year
- Smart building technology expected to have the greatest increase in market adoption over the next 10 years