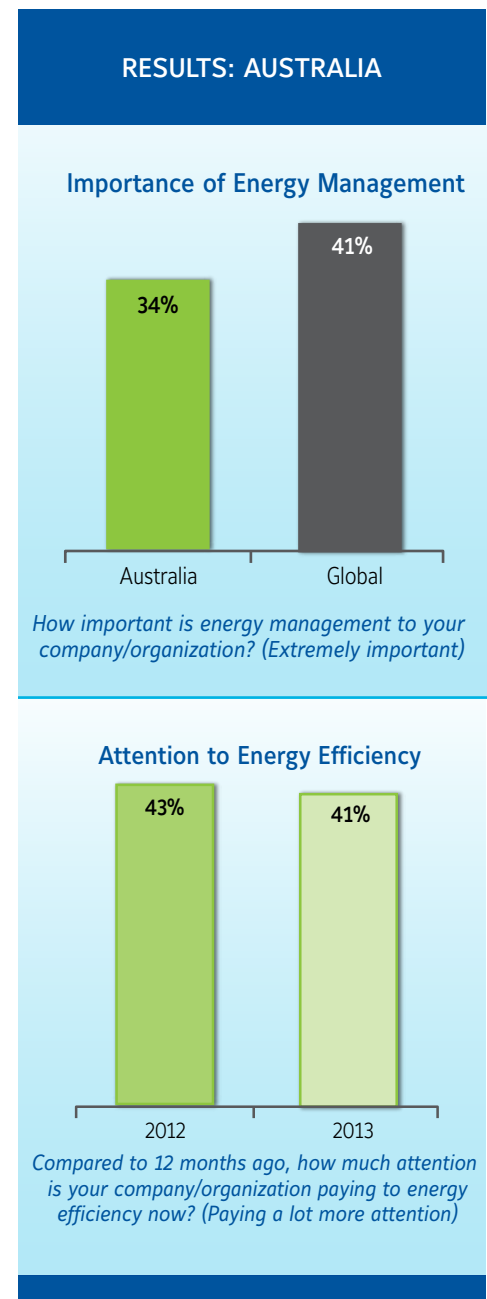


AUSTRALIA: SELECTED FINDINGS

The 2013 Energy Efficiency Indicator (EEI) study, conducted by the Johnson Controls Institute for Building Efficiency, analyzes the energy efficiency technologies, practices and investments made by over 3,000 executive decision-makers around the world. This year's respondents come from 10 countries and are responsible for a variety of commercial, industrial and institutional (hospital, school, and government) facilities. The study has been conducted annually since 2006. This was the third year in which it included Australia, drawing 301 respondents. The complete analysis of the Australia survey results will be announced in September 2013.

SELECTED FINDINGS RELEASED IN JUNE 2013 INCLUDE:

- For two years running, slightly more than 40% of executives reported they were paying "a lot more attention" to energy efficiency than in the past year.
- Energy management is viewed as "extremely important" to the respondent's organization by one third of executives, compared to the global average of 41%. Executives who viewed energy management as "extremely important" to their organization was flat from 2012-2013, but up from 26% in 2011.
- For Australian executive decision makers, the top drivers for pursuing efficiency were energy cost savings, incentives and rebates, improving real estate asset values, customer attraction and retention, and existing government policy. Australia joined French and the U.S./Canadian respondents in signaling that improving asset value is an emerging driver of action.
- Also similar to the U.S./Canadian respondents, the top barriers reported in Australia were internal financial criteria, such as payback requirements (18%) and funding availability (24%). Few executives reported barriers associated with awareness (7%) or ability to evaluate technical options (10%).
- Advanced building materials and new lighting technologies are expected to have the greatest market penetration in the Australian market in the next 10 years out of over a dozen on-site technologies, according to respondents. Globally, Australia had the greatest number of respondents who believe that advanced building materials will have significant market penetration (37%). Smart building technologies and solar technologies were also expected to have strong market penetration.



AUSTRALIA: SELECTED FINDINGS

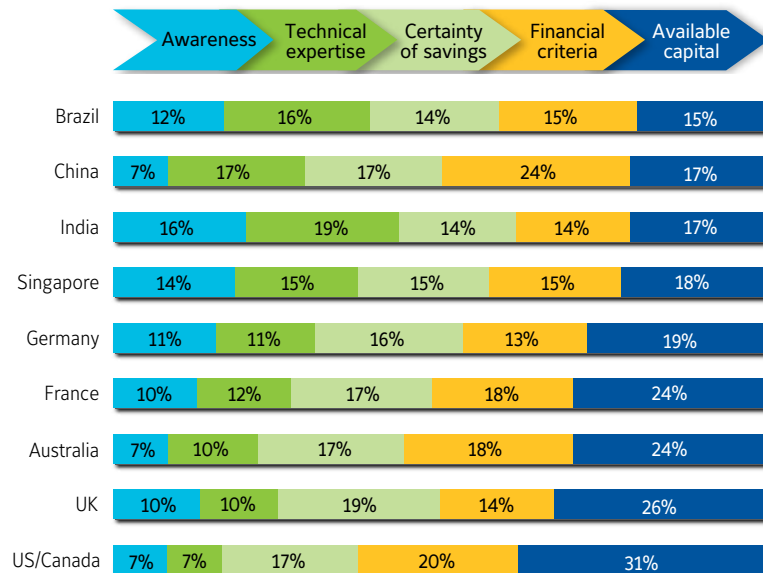
Drivers of efficiency

	US/CAN	UK	Germany	France	Brazil	India	China	Australia	Singapore
Energy cost savings	1	1	1	1	1	1	1	1	1
Government and utility incentives/rebates	2	2	4	2				2	2
Increased asset value	3	5		3				3	
Energy security	5	3	2	5	2	2	2		
Customer attraction and retention			5		3	3	5	4	
Existing government policy							3	5	3
Enhanced brand or public image	4		3	4	5	5	4		5
GHG footprint reduction		4			4				
Attracting, retaining employees						4			4

Which of the following on-site technologies do you expect to have the greatest increase in market adoption over the next ten years?

	US/CAN	UK	Germany	France	Brazil	India	China	Australia	Singapore
Lighting technologies	54%	40%	33%	22%	35%	33%	23%	36%	46%
Smart building technology	34%	24%	27%	22%	26%	32%	37%	31%	35%
Advanced building materials	31%	25%	23%	29%	24%	23%	32%	37%	25%
Solar photovoltaics (PV)	22%	21%	32%	26%	26%	28%	35%	25%	26%
Solar thermal		22%	24%	26%	34%	29%	36%	19%	23%
Electric and plug-in electric vehicles	23%		25%		22%		26%		19%
Advanced cooling technologies	20%		15%		19%	21%			19%
Small wind generators					21%	19%			
Geothermal/ground source heat pumps				27%					

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



institute
for **building
efficiency**
an initiative of Johnson Controls

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.

If you are interested in contacting the authors, or engaging with the Institute for Building Efficiency, please email us at: InstituteforBE@jci.com.