

NORTH AMERICA: SELECTED FINDINGS

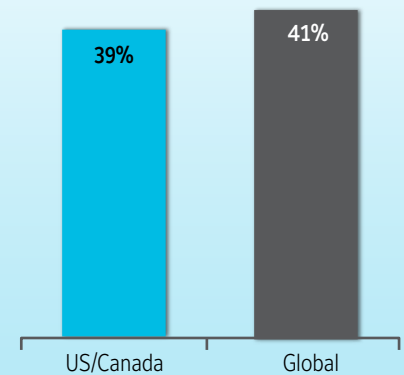
The 2013 Energy Efficiency Indicator (EEI) survey, conducted by the Johnson Controls Institute for Building Efficiency, analyzes the energy efficiency technologies, practices and investments made by more than 3,000 executive decision-makers around the world. This year's respondents come from 10 countries and are responsible for a variety of commercial, industrial and institutional (hospital, school, and government) facilities. The survey has been conducted annually since 2006 and has included North America since inception. There were 600 North American respondents this year. The full results will be released October 2-4 at the International Facility Management Association's World Workplace 2013 in Philadelphia.

SELECTED FINDINGS RELEASED IN JUNE 2013 INCLUDE:

- 37% of executives said they were paying "a lot more attention" to energy efficiency – the same as in 2012.
- North American respondents were on par with global respondents on the importance of energy management: 39% said it was "extremely important" to their organizations, compared to 41% globally.
- The top five drivers of energy efficiency action in North America were energy cost savings, government and utility incentives and rebates, increased asset value, enhanced brand or public image, and energy security (availability, reliability, and security of supply).
- 31% of North American executives identified lack of available capital for projects as the top barrier to energy efficiency. This was followed by inability to meet internal financial criteria (20%) and uncertainty about savings from energy efficiency projects (17%).
- North America executives reported that they expect advanced lighting technologies and smart building technologies to achieve the greatest increase in market adoption in the next 10 years, followed by advanced building materials and electric and plug-in vehicles.

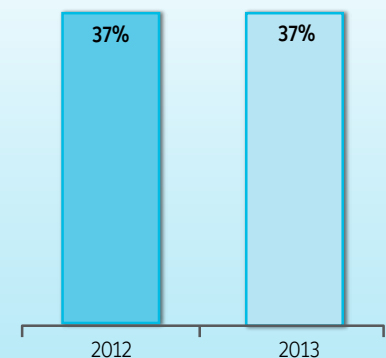
RESULTS: NORTH AMERICA

Importance of Energy Management



How important is energy management to your company/organization? (Extremely important)

Attention to Energy Efficiency



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

NORTH AMERICA: SELECTED FINDINGS

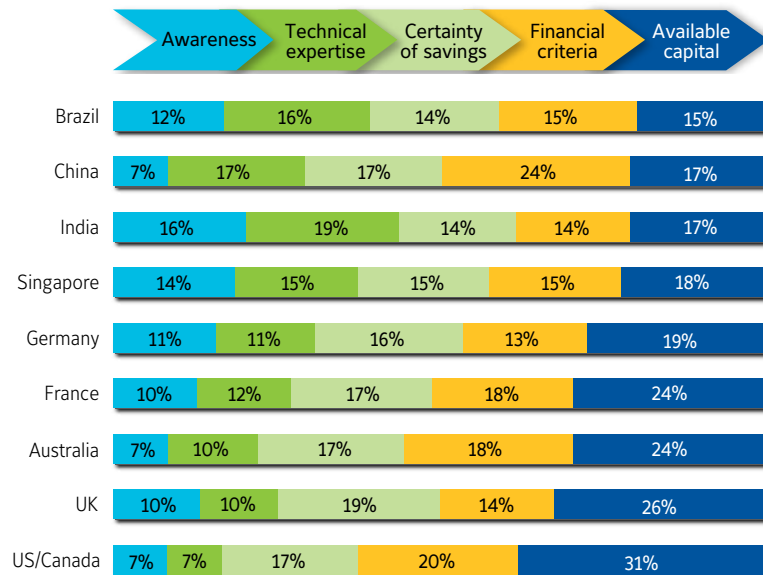
Drivers of efficiency

	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.