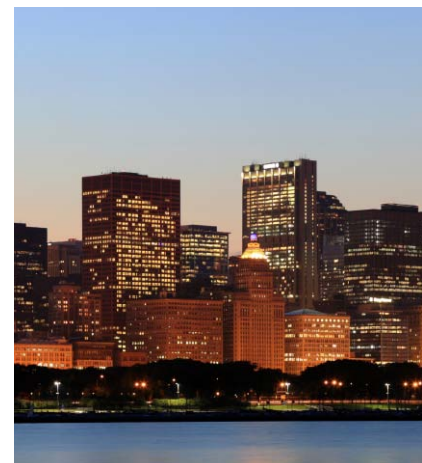


2011 ENERGY EFFICIENCY INDICATOR SURVEY: AUSTRALIA RESULTS

The 2011 Australia results provide insights into the priorities, practices and investments being made by decision-makers in Australia today, and offer a glimpse into the expectations for technologies of tomorrow. The survey had 155 respondents that serve a variety of roles within their organizations and come from both the private and public sectors.

KEY POINTS FROM 2011 AUSTRALIA EEI RESPONSES:

- There is strong interest in energy efficiency among Australia's building executives: 63% of executives said energy management is very or extremely important to their organizations, and 78% said they are paying more attention to energy in 2011 compared with 2010.
- Energy cost savings and government/utility incentives led as drivers for energy efficiency action followed by GHG footprint reduction and pending government policy. Compared to other regions green market forces played a smaller role in Australia as respondents ranked enhanced brand or public image seventh in importance while it ranked third globally.
- The 2011 survey shows more respondents planning to pursue green building certification in existing buildings than for new construction (27% compared to 18%). Eighteen percent said they had certified at least one green building, and thirty-one percent had incorporated green building elements without earning certification.
- Among the efficiency actions taken in the past year lighting improvements top the list by a significant margin (72% of respondents), followed by HVAC or controls improvements (51%) and low cost/behavioral improvements (48%). A quarter of respondents also indicated they have installed onsite renewable energy generation.
- When asked which on-site technologies they expected to see the greatest market adoption in the next 10 years, executives selected lighting technologies, solar PV, and advanced building materials as their top three choices.



OVERVIEW

The Global Energy Efficiency Indicator (EEI) survey 2011 reveals the energy priorities, practices, investment plans and barriers facing executives responsible for energy investments and activities in their companies. The global survey included nearly 4,000 facility managers and building owners. The 2011 survey is the 5th global survey conducted by Johnson Controls through its Institute for Building Efficiency.

- Financial challenges are the most significant barrier to pursuing energy efficiency projects in Australia: 32% said their top barrier to pursuing energy efficiency is lack of funding followed by insufficient payback/ROI. Of those who identified funding as their number one concern, fifty-seven percent cited insufficient internal capital budget. Interestingly, nineteen percent indicated insufficient government or utility incentives as their top financial barrier even as incentives ranked as a top driver of action.
- The longest allowable payback indicated was 3.3 years; the global average was 3.7.
- 14% of Australian respondents indicated that the NABERS program has had an extremely or very significant impact on their real estate transactions and/or energy efficiency investment decisions. 44% of respondents either weren't sure of the program's impact or said that it was not applicable.
- 31% of respondents expect the Emissions Trading Scheme to influence either a significant or moderate increase in energy efficiency investment.

SURVEY RESPONDENT DEMOGRAPHICS

The survey is conducted anonymously. To qualify, 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.

Among Australian respondents, 61% classified their facilities as commercial, 14% as institutional and 23% as industrial. Facilities ranged in size from less than 50,000 square feet (61%) to more than 500,000 square feet (12%). Twenty-two percent of respondents were responsible for 50,000 to 500,000 square feet.

For additional information on the Australia and global results, visit the EEI 2011 survey on the Institute for Building Efficiency website: www.institutebe.com/Energy-Efficiency-Indicator.

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.

