

## UNITED KINGDOM: SELECTED FINDINGS

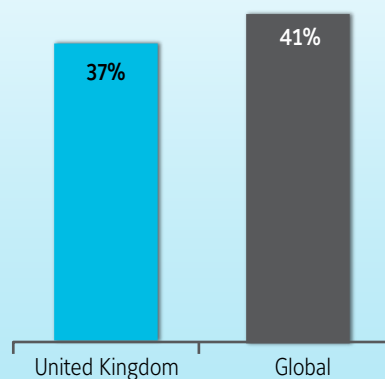
The 2013 Energy Efficiency Indicator (EEI) survey, conducted by the Johnson Controls Institute for Building Efficiency, analyzes the energy efficiency technologies, practices and investments made by over 3,000 executive decision-makers around the world. This year's respondents come from 10 countries and are responsible for a variety of commercial, industrial and institutional (hospital, school, and government) facilities. The survey has been conducted annually since 2006. This was the fourth year it included the United Kingdom, and it drew 309 respondents. The complete analysis of the survey results for France, Germany and the United Kingdom will be announced in September 2013 at an Institute for Building Efficiency Roundtable Dialogue in Brussels, Belgium.

### SELECTED FINDINGS RELEASED IN JUNE 2013 INCLUDE:

- 37% percent of executive decision-makers in the U.K. indicated that energy management was "extremely important" to their organizations, very close to the global average.
- The number of U.K. executives who stated they were paying "a lot more attention" to energy efficiency decreased somewhat this year from the high reached in 2012.
- The top drivers for energy efficiency investment and action were energy cost savings, government incentives and rebates, energy security concerns (energy reliability, availability, and security of supply), GHG reductions, and increased real estate asset value. The U.K. and Brazil were the only two countries that had GHG reductions as a top driver in 2013.
- Availability of capital and uncertainty around the energy savings or performance were the top barriers reported by the U.K. respondents.
- 40% of U.K. executives indicated they were expecting advanced lighting technologies to have the greatest increase in market adoption in the U.K. in the next 10 years.

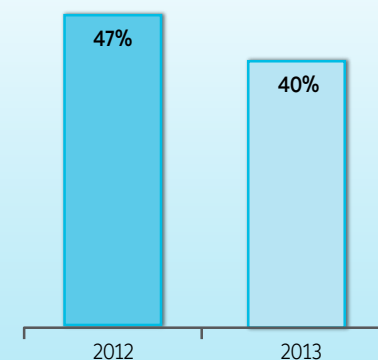
### RESULTS: UNITED KINGDOM

#### 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)*

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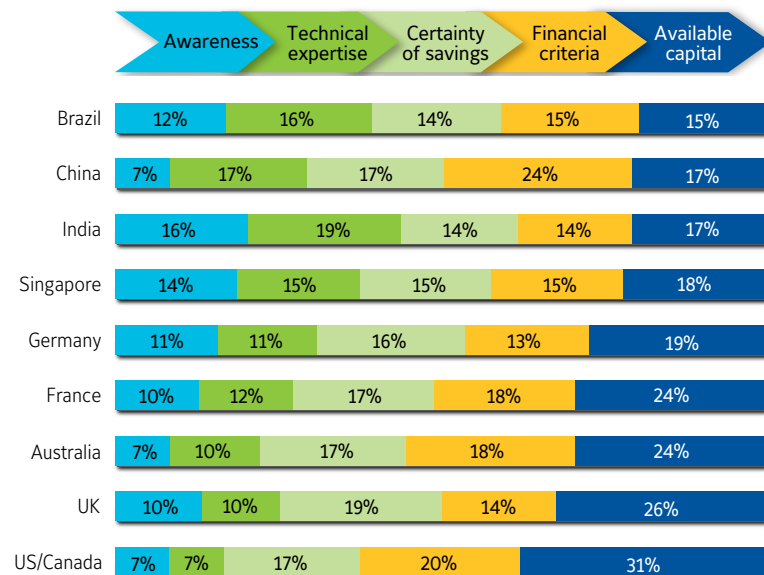
## Drivers of efficiency

	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				
Enhanced brand or public image						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  
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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](mailto:InstituteforBE@jci.com).