



Climate Control Systems Installed in New Dwellings in Australia 2007

A PROPOSAL FROM BIS SHRAPNEL



BUILDING AND CONSTRUCTION

INTRODUCTION

This is the inaugural edition of *Climate Control Systems Installed in New Dwellings in Australia*. It is envisaged that the study will be produced biennially.

We have examined climate control systems in new dwellings through a previous report:

- *Household Appliances Installed in New Dwellings and Renovations, 2003*

An update of this information is now overdue; the new report will provide a more comprehensive analysis of climate control systems (including ducted gas heating) installed in new dwellings, by combining the strengths of the above report with additional analyses.

The primary objective of the study is to focus specifically on climate control systems installed in new dwellings, covering ducted air conditions, non-ducted air conditioning, ducted evaporative cooling and ducted gas heating systems – all from the perspective of residential builders.

In summary, BIS Shrapnel Pty Limited has been analysing and monitoring building and construction activity and household appliance markets in Australia for 25 years through private and multi-client studies. This study builds on our experience and expertise in analysing these markets.

METHODOLOGY

The general methodology used for this study is the product of over 40 years of methods research and development by BIS Shrapnel.

We will employ a qualitative-quantitative approach to information collection.

Initially we will conduct face-to-face interviews with four or five climate control manufacturers/ suppliers in Australia. We will endeavour to determine key issues of interest to them in regards to installation in new dwellings and discuss current trends and industry drivers and their expectations for the future.

We will then collect quantitative feedback from around 150 residential builders across Australia, via our established *Residential Builders Panel* (a quarterly online survey of builders across Australia). While the focus is on builders of detached houses, we also include semi-detached and multi-unit dwellings.

Any issues that arise via the initial manufacturer/supplier interviews will be tested in the builders' survey.

Each respondent will be weighted to represent the total number of dwellings built; results will then be weighted to represent all new residential dwellings in Australia in 2007.

The interviews will be conducted in September 2007.

MARKET COVERAGE

The study will be presented in one volume.

Climate control systems to be analysed are:

- Ducted air conditioning
- Non-ducted air conditioning
- Ducted evaporating cooling
- Ducted gas heating

We can add building materials or additional appliances for subscribers on a customised basis if required.

SCOPE OF THE REPORT

The report will include the following information:

Executive summary

The report will include a clear, concise executive summary, providing the most relevant attitudinal and quantitative findings of the study.

Economic and Housing Outlook to 2009

BIS Shrapnel is Australia's largest independent economic and building forecasting consultancy.

We will present a situational analysis of the domestic economy, along with forecasts through to 2009.

Emphasis will be on key drivers that effect new dwelling construction and consumer spending. This will include:

- An examination of the economy and our expectations for inflation, interest rates and employment.
- A thorough review of the new housing market and forecasts
- An analysis of household renovations and additions and future expectations
- A discussion on consumer sentiment and retail trade expectations.

Manufacturer Interviews (Qualitative Research)

We will report findings from our interviews with climate control system manufacturers. This will include their feedback on trends, drivers and future expectations.

We will also include relevant verbatim comments.

Residential Builders Survey (Quantitative Research)

Results from the survey of around 150 residential builders will be presented in an easy to read format.

This includes builder ratings on leading climate control system manufacturers, based on their experience. The following attributes will be rated: reputation; price; availability of products; innovation; and ordering efficiency (i.e. on time and what you ordered).

Climate control systems...

- Incidence of installation by segment:
 - Ducted air conditioning
 - Non-ducted air conditioning (including split systems versus window/wall)
 - Ducted evaporating cooling
 - Ducted gas heating
- Who installs the climate control system
- Key decision maker on type of system installed
- Key reasons for type of system installed
- Brand of system installed
- Manufacturer ratings
- Who drives industry trends
- Future expectations

Additional...

- Should any issues arise from the climate control system manufacturer/supplier interviews, these topics will be incorporated into the builders' survey and included as part of the report.

SPECIAL QUESTIONS

Early-bird subscribers can ask questions specific to their own needs. If such information is of general interest or requested by a number of subscribers, it may be incorporated in the report (conditional on available questionnaire space).

Should subscribers prefer confidential questions a higher price will be charged.

PRESENTATION

The survey results will be presented in a user friendly report; all clients receive two hard copies and a PDF electronic version.

Wherever possible, results will be displayed by state.

COST AND TIMING

BIS Shrapnel plans to commence the fieldwork for this study in September 2007. We expect the report to be published in November 2007.

If subscribers require specific information prior to publication, we will meet these needs wherever possible.

Companies who subscribe by Friday 31 August will receive a substantial discount.

The price schedule is:

	Early Bird Price (A\$) By Fri 31 August	Standard Price (A\$) From Mon 3 Sept
<i>Climate Control Systems Installed in New Dwellings in Australia, 2007</i>	7,000 + GST (7,700)	9,000 + GST (9,900)

BIS SHRAPNEL

BIS Shrapnel Pty Limited is Australia's largest independent business research and forecasting company. We offer an unmatched combination of strengths: economic analysis and forecasting, coupled with marketing intelligence gathering and analysis. For further details visit the BIS Shrapnel website at: www.bis.com.au.



Climate Control Systems Installed in New Dwellings in Australia 2007 Subscription Form



APPLIANCES AND POWER TOOLS

Full Report

Subscription Price (A\$)

\$7,700

Total Subscription: A\$ _____

All prices include GST.

Mr/Mrs/Ms: _____

Title: _____ Company: _____

Street address: (for courier) _____

Postal address: _____ Postcode: _____

Phone: (0) _____ Fax: (0) _____

Email: _____

A cheque for \$ _____ is enclosed.

I confirm that these report(s) are for the internal use of my organisation and its branches or subsidiaries only, and will not be made available or copied for the benefit of other organisations.

Signature: _____ Date: _____

Please fax to: **BIS Shrapnel Pty Ltd**
Fax (02) 9959 5795
Tel (02) 9959 5924
www.bis.com.au

or post to: **BIS Shrapnel Pty Ltd**
Level 8, 181 Miller Street
North Sydney NSW 2060
AUSTRALIA

For further enquiries please contact:

Paul Giles (pgiles@bis.com.au) or Ross Trewartha (rtrewartha@bis.com.au) at our Sydney office.