

# Healthcare

An overview of what energy, facilities, and finance leaders in healthcare are prioritizing, and where they're facing challenges. Based on [EnergyCAP's comprehensive survey of nearly 200 organizations](#) and 40 years of experience serving teams at hospitals and healthcare systems.

## Utility management in healthcare

24/7 operations, life-safety systems, and a stringent regulatory environment create a uniquely high-stakes context for healthcare utility management. Our data reflects a sector that understands those stakes: healthcare organizations set the highest goals, run the largest energy teams, and track the most financially precise metrics of any sector we surveyed. Their challenge isn't ambition, it's the data infrastructure needed to match their responsibilities.

**88%**

of hospitals and clinics saw utility budgets increase in the past year—the highest of any sector

**3 in 5**

healthcare organizations are confident in their utility budget accuracy

**50%**

of healthcare organizations have 7 or more people on their energy team, the largest of any sector

## The healthcare challenge

U.S. hospitals occupy just 4% of commercial floorspace but consume 9% of commercial building energy—**more than double their proportional share**. Many of the standard energy-saving measures available to other sectors are simply not available to healthcare; strict ventilation requirements, precise temperature controls, and 24/7 clinical operations limit what can be reduced without impacting patient safety or compliance. Nearly one-third of respondents describe their energy management approach as entirely or mostly manual, and only 21% plan to add software, yet confidence in meeting energy management goals remains paradoxically high. If **as much as 30%** of a typical hospital's energy use can be eliminated through better insights, audits, and smarter upgrades, it's time to rethink the case for energy management software.

**1 in 3**

describe their energy management approach as completely manual or only partially automated.

**79%**

aren't planning to add new tools, but 21% want to add software in the next 12 months.

**1.4x**

more likely to report double-digit utility cost spikes than the cross-industry average.

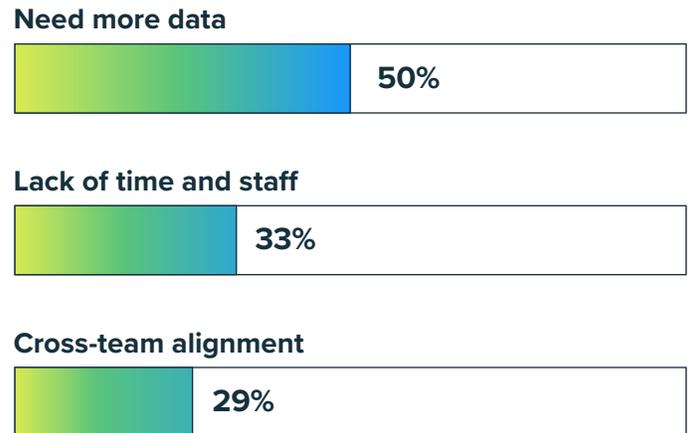
**30%**

of hospital energy use could be cut through better visibility, fewer billing errors, and smarter upgrades.

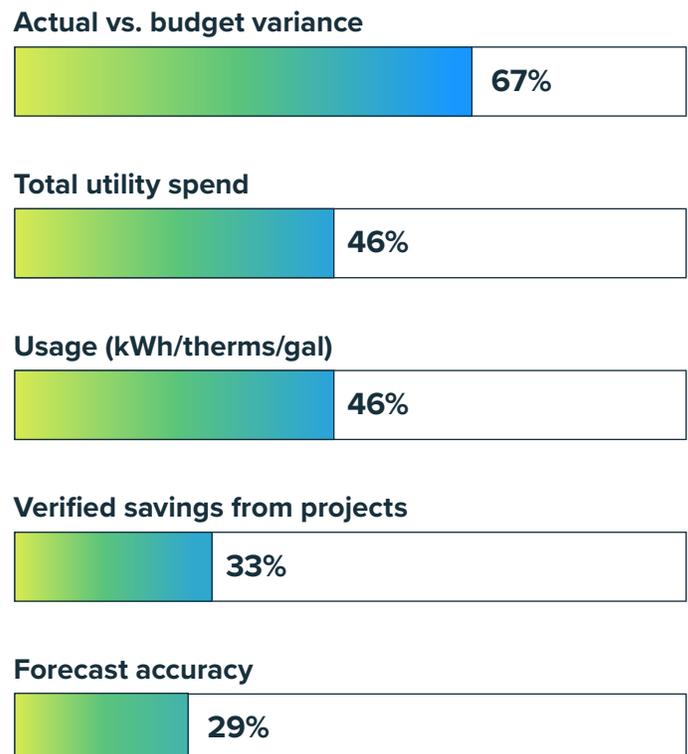
## Top 2026 goals for healthcare organizations

- 1 Control or reduce total utility spend**  
**75% of healthcare respondents**  
Healthcare leads all sectors in both overall cost increases and double-digit spikes, making spend control the defining mandate of 2026–2027.
- 2 Improve budget and forecast accuracy**  
**71% of healthcare respondents—1.5x the cross-industry average**  
Hospitals prioritize budget accuracy more than any other industry. No surprise considering they budget utilities months in advance across sprawling, complex campuses, with costs tied to critical clinical operations.
- 3 Find and fix waste faster**  
**54% of healthcare respondents**  
ENERGY STAR® estimates 30% of a hospital's energy use could be eliminated through best practices. Finding that 30% requires data, and many healthcare organizations don't yet have it.
- 4 Reduce usage intensity**  
**50% of healthcare respondents**  
For healthcare, where energy intensity already runs at more than double the commercial average, understanding EUI at the facility level is what separates teams that are managing costs from teams that are controlling them.
- 5 Meet reporting and compliance requirements**  
**42% of healthcare respondents**  
Healthcare's compliance environment is uniquely layered: EHS policies governing ventilation, air changes, and temperature standards sit alongside building performance standards, state sustainability mandates, and Scope 1–3 emissions disclosures.

## Top healthcare blockers to progress



## How success is measured



# Where healthcare energy management is heading in 2026

Healthcare energy teams manage some of the most complex and consequence-driven utility portfolios for any sector. These are the trends shaping what healthcare energy leaders are navigating in 2026.



## Financial pressure shines a harsh spotlight

Healthcare reported the highest rate of utility cost increases for any sector in the survey, which raises the stakes for budgeting, forecasting, and cost control.



## Reporting expectations are becoming more concrete

Hospitals are facing a more structured reporting environment for energy use and emissions in some markets, increasing the value of defensible, audit-ready data.



## Reliability and cost control are the same problem

In healthcare, utility management is not separate from operations. Energy performance affects patient comfort, ventilation, and EHS compliance across the campus. As a result, cost control is increasingly viewed alongside risk reduction and operational continuity.



## System growth is making standardization harder

Mergers, acquisitions, and financial distress are reshaping portfolios, making it harder to maintain one consistent view of utility data, cost drivers, and building performance across the enterprise.



## Expectations are high

Healthcare organizations are managing rising costs, complex facilities, and growing reporting needs with disparate internal resources. Most respondents reported energy management spread across facilities, finance, AP, and operations rather than centralized in a dedicated team.



## For academic medical centers, research funding adds more pressure

NIH funding changes and proposed cuts are creating added strain for research-intensive organizations, which makes tighter operational cost control even more important.

## The opportunity ahead

Three things EnergyCAP consistently sees work for healthcare energy teams, regardless of team size or tooling.

### Investigate sooner

Spend vs. budget variance is already the top KPI in healthcare. The key is to review that variance early enough to investigate usage changes, billing issues, and operational problems before they balloon the budget, putting healthcare's goals within reach.

### M&V is table stakes

With 42% of healthcare respondents prioritizing savings validation, the highest of any sector, teams that can't produce auditable M&V are leaving budget justification on the table. Document savings from the first project and the next one gets funded faster.

### Data completeness

Healthcare prioritizes budget accuracy above any other industry, yet the #1 blocker is still lack of data. Before investing in forecasting sophistication, ensure every account, meter, and facility is captured in one place and updated on a reliable cadence.

## How EnergyCAP helps

### Designed for the clinical stakes of healthcare operations

Healthcare energy teams are larger than any other sector we surveyed, but those teams still cite data gaps as their #1 blocker. EnergyCAP gives healthcare systems the data infrastructure their teams need: a centralized, audit-ready platform that closes the gap, surfaces savings that's actually feasible, and supports the financial and compliance reporting leadership and regulators demand.

#### Close the data gap

Healthcare's #1 blocker is lack of data. EnergyCAP centralizes utility bill, meter, emissions, and interval data across your portfolio into a single source of truth. Energy, finance, and facilities teams work from the same accurate, audit-ready dataset with the exact tools each team needs.

#### Built for finance and facilities

Healthcare respondents are nearly as likely to measure usage as budget variance. EnergyCAP offers bespoke tools for finance teams while giving facilities the consumption data to manage operations and validate savings. When both teams work from the same platform, the financial and operational case reinforce each other, accelerating decisions and unlocking resources.

#### Savings within your constraints

Healthcare facilities can't reduce air changes or cut operating hours like other industries. EnergyCAP finds savings in the places that don't require any of that: billing errors, usage outliers, and compliant operational changes that lead to massive savings.

#### Meet your #1 goal: control costs

Less than 1/3rd of healthcare respondents plan to add new energy management tools, but with the steepest utility cost increases of any sector we surveyed, the ROI case is hard to ignore. Most EnergyCAP customers see 10% year-over-year bill savings.

### What this looks like in practice

At University of Texas Medical Branch (UTMB), EnergyCAP helped the team turn utility data into a case for action. Using data from across four campuses, they identified savings opportunities and supported a plant renovation request, including a chiller replacement project with 7.3 million kWh in projected annual savings. The required data took 20 minutes to pull instead of multiple days.

[Read UTMB's EnergyCAP success story →](#)

