Johnson Controls

2026 AI & Digitalization in Facilities Management Report

How today's organizations are leveraging AI, integrated systems and energy intelligence to turn buildings into business growth engines

Contents

Executive summary

From attendance to performance: Organizations are scaling AI and digital solutions to optimize facilities but integration and security will determine how much value they ultimately unlock

After years of uncertainty and volatility in work arrangements, organizations are shifting focus away from return-to-office (RTO) and are instead prioritizing improving the productivity of their people and the optimization of their facilities. To better understand how they're going about this, we surveyed 760 U.S.-based business leaders representing organizations with more than 200 employees in the finance, government, healthcare, higher education, manufacturing, pharma, real estate and technology sectors. Their responses revealed a business landscape where resistance to technology adoption has evaporated as leaders look for tools that will help them accelerate business growth, reduce costs and enhance sustainability.

Recognizing that the performance and reliability of facility systems and equipment is increasingly crucial to achieving business goals, we also surveyed 260 U.S.-based facility managers (FMs) representing organizations with more than 200 employees to gauge their view on issues including technology adoption and operational challenges.

Key finding #1

As AI expands across workplace technology, integration emerges as the biggest hurdle to maximizing value

Adoption of workplace management technology has become commonplace. The results of our 2025 survey show that **85%** of organizations use them to help with a range of functions that include space management, workplace analytics and room and desk booking.

As organizations have expanded implementations of workplace management technology, **ease of integration with other systems has emerged as the primary friction point.** When asked what they would most like to change about their current workplace management system, business leaders cite ease of integration over ease of use or cost.

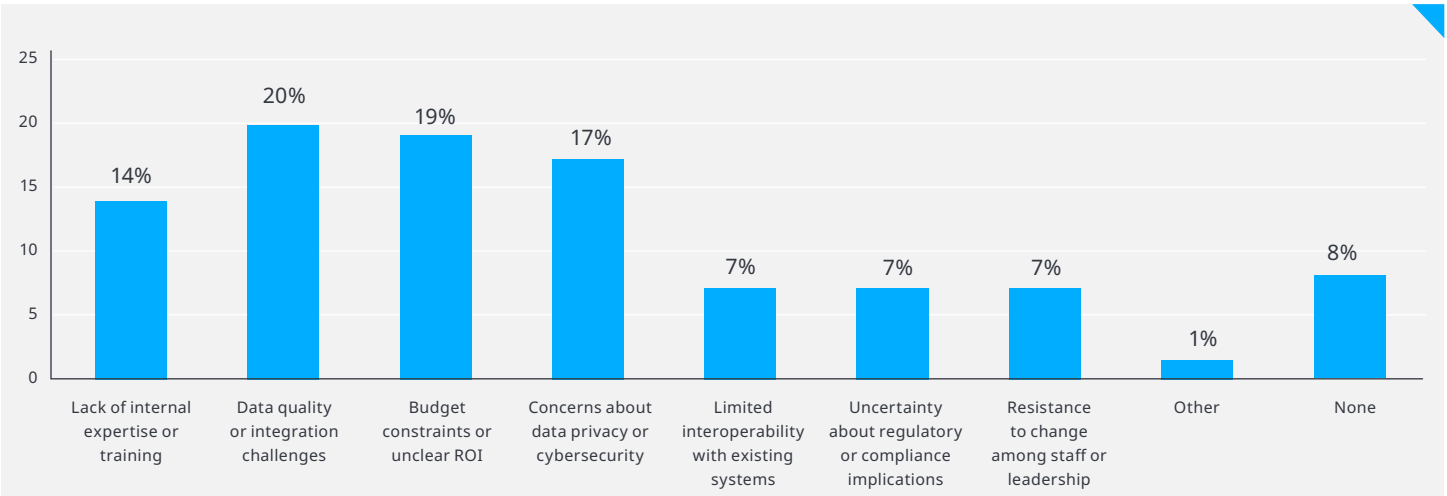
85% of business leaders use workplace management technology

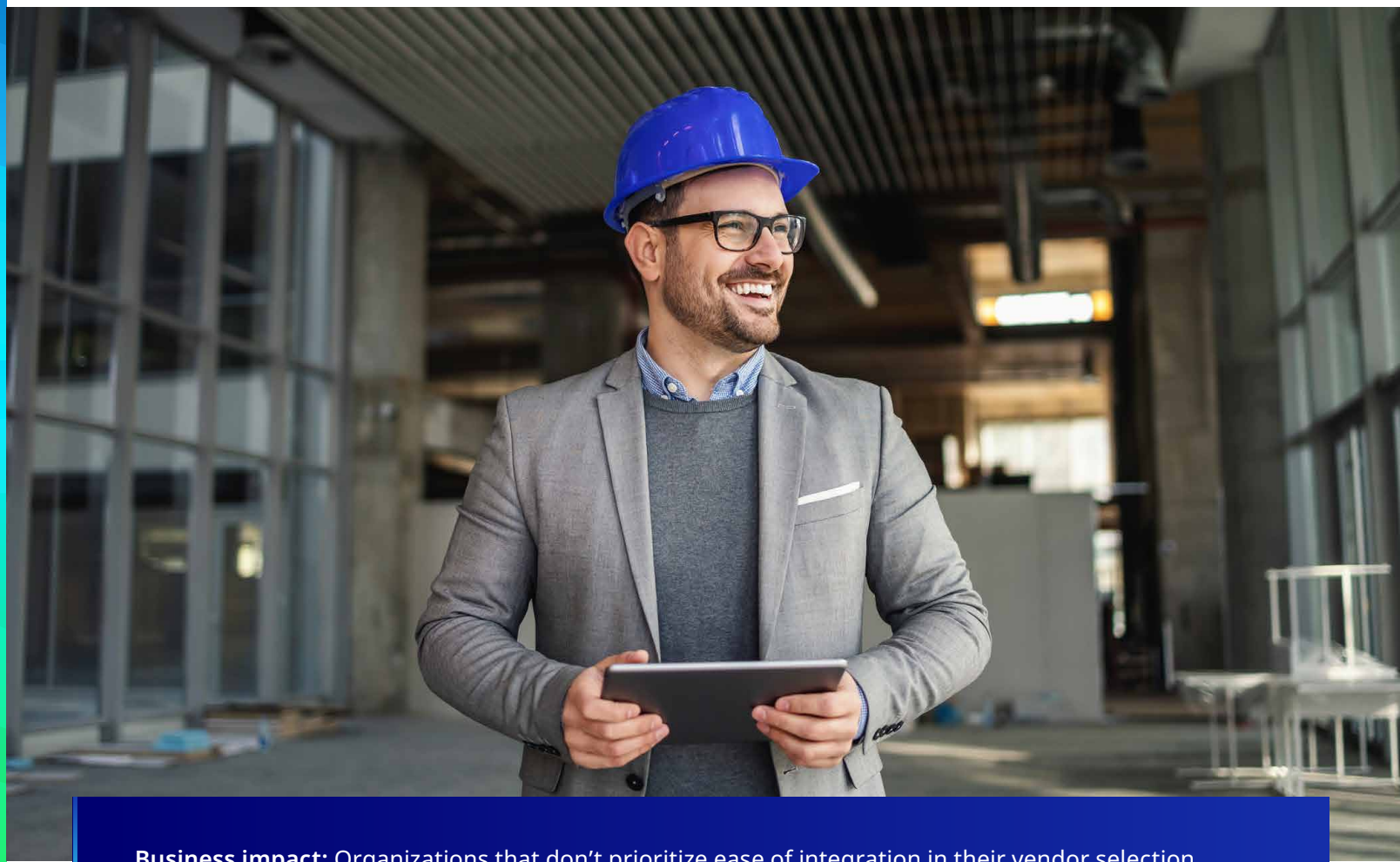
Business leaders: What would you most like to change about your current workplace management system?

- **65%** of business leaders and **67%** of FMs say their organization is already using AI to improve the operation, utilization and maintenance of their facilities.
- **65%** of business leaders and **61%** of FMs say their organization plans to implement or expand AI use in the next year.
- For FMs, data quality or integration challenges are the biggest barrier to expanding the use of AI for facility operations. It ranks higher than budget constraints, cybersecurity concerns and lack of internal expertise.

Fragmented software ecosystems make it harder to connect data, workflows and insights across the enterprise. As a result, organizations may struggle to realize the full value of their technology investments and to fully capitalize on AI, even as our research shows adoption is high and continues to grow.

Facility managers: What is the biggest barrier your organization faces in expanding the use of AI for facility operations?





Business impact: Organizations that don't prioritize ease of integration in their vendor selection process risk ending up with a system that limits scalability, slows decision making and reduces the overall return on their technology investments.

Key finding #2

AI-driven predictive maintenance leads tech investments for 2026

As organizations move from experimentation to execution in their implementation of facility performance and optimization technology, business leaders and FMs are prioritizing solutions that improve reliability, uptime and operational performance. Planned investments over the next year point to a shared focus on **preventing failures, improving visibility into system health and enabling teams to operate more efficiently** amid ongoing cost, labor and infrastructure pressures.

Across both business leaders and FMs, **AI-driven predictive maintenance** emerges as the top planned investment, signaling a shift toward proactive, performance-driven operations. Environmental monitoring, integrated workplace experience platforms and mobile workforce enablement also rank highly, reflecting the need for real-time insight, faster response and better coordination across facilities and portfolios.

Business leaders: Which of the following technologies are you planning to implement to assist with the operation and maintenance of your facilities and workplaces over the next year?

AI-driven predictive maintenance

- 45% of business leaders
- 51% of FMs

Mobile-first workforce enablement tools

- 26% of business leaders
- 30% of FMs

Integrated workplace experience platforms

- 40% of business leaders
- 38% of FMs

Carbon intelligence platforms

- 16% of business leaders
- 23% of FMs

Environmental monitoring and indoor air quality solutions

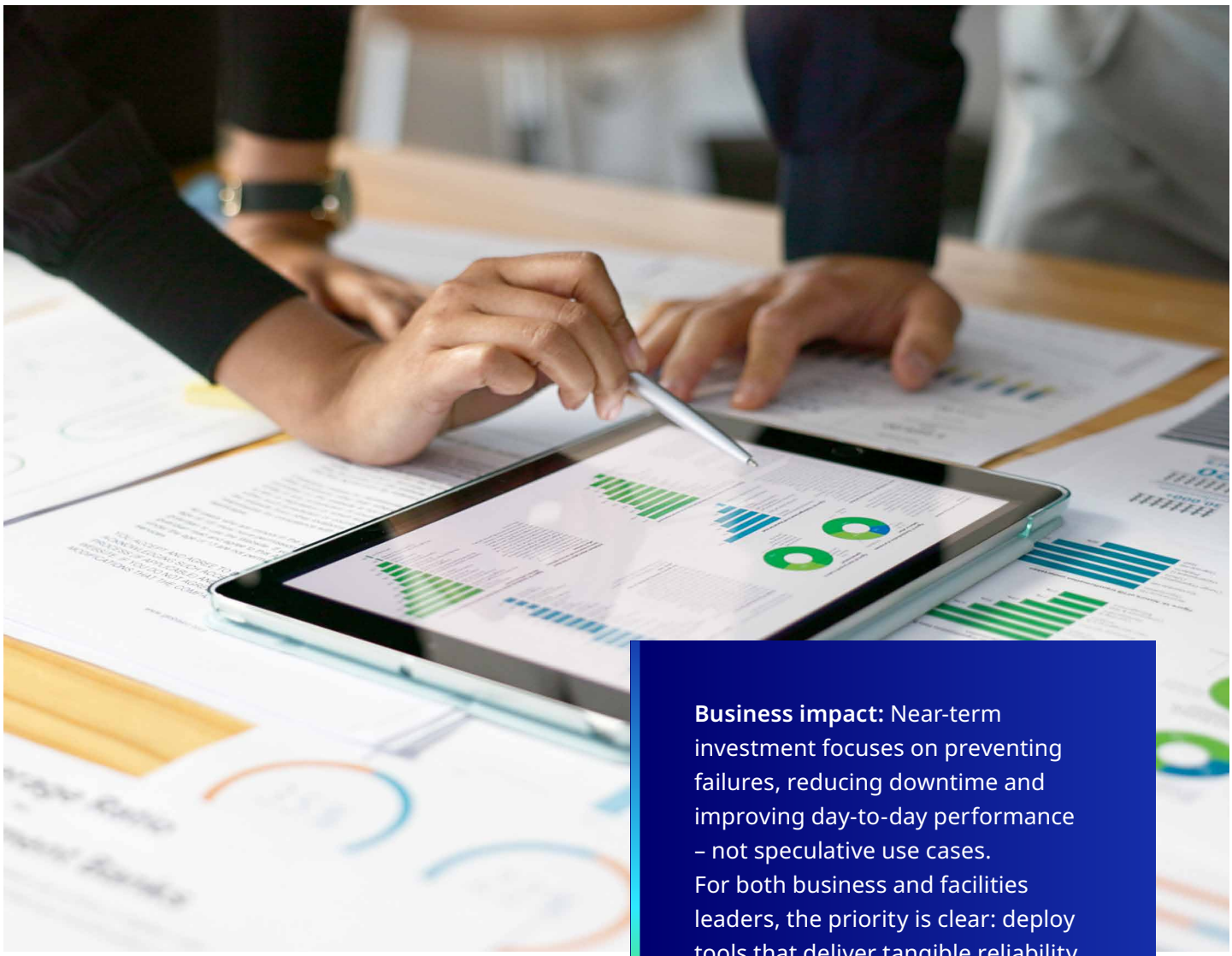
- 31% of business leaders
- 37% of FMs

Digital twin ecosystems

- 18% of business leaders
- 18% of FMs

Enabling predictive maintenance is also a focus of current and future deployments of AI.

- Among organizations that have already deployed AI to improve the operation, utilization and maintenance of their workplaces and facilities, **42%** of business leaders and **47%** of FMs use it to **enable predictive maintenance**.
- Among organizations planning to implement AI in the next year, **47%** of business leaders and **52%** of FMs are **adopting a solution to enable predictive maintenance**.
- When asked where AI holds the greatest long-term potential, **enabling predictive maintenance** is the third-most popular response from both business leaders and FMs (14% for FMs, 15% for business leaders).



Business impact: Near-term investment focuses on preventing failures, reducing downtime and improving day-to-day performance – not speculative use cases.
For both business and facilities leaders, the priority is clear: deploy tools that deliver tangible reliability and operational impact now.

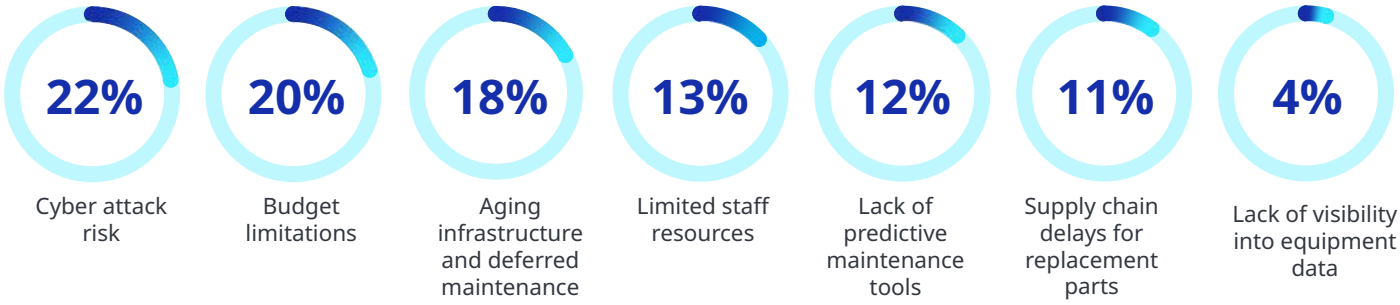
Key finding #3

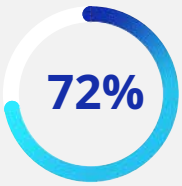
Facilities leaders are navigating rising risk with limited resources

Facilities teams are operating under increasing operational pressure as they contend with **rising energy costs, constrained budgets, labor shortages** and **aging infrastructure.** At the same time, the growing connectivity of building systems is blurring the traditional lines between facilities and IT, as operational technology (OT) increasingly relies on networks, data and cybersecurity practices long managed by IT teams.

When asked to identify the biggest threats to maintaining equipment performance and uptime, respondents point to a combination of financial constraints and escalating risk factors. They highlight **a growing imbalance between what facilities teams are responsible for and the resources available to them.**

Business leaders: What do you consider the biggest threat to maintaining equipment performance and uptime in your facilities?



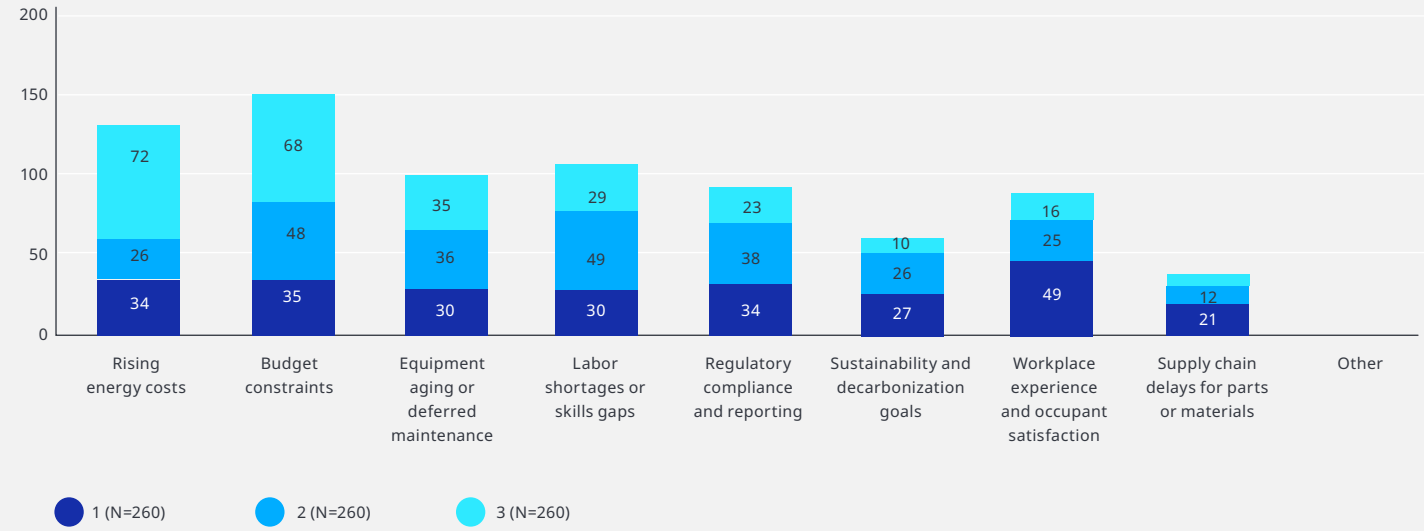


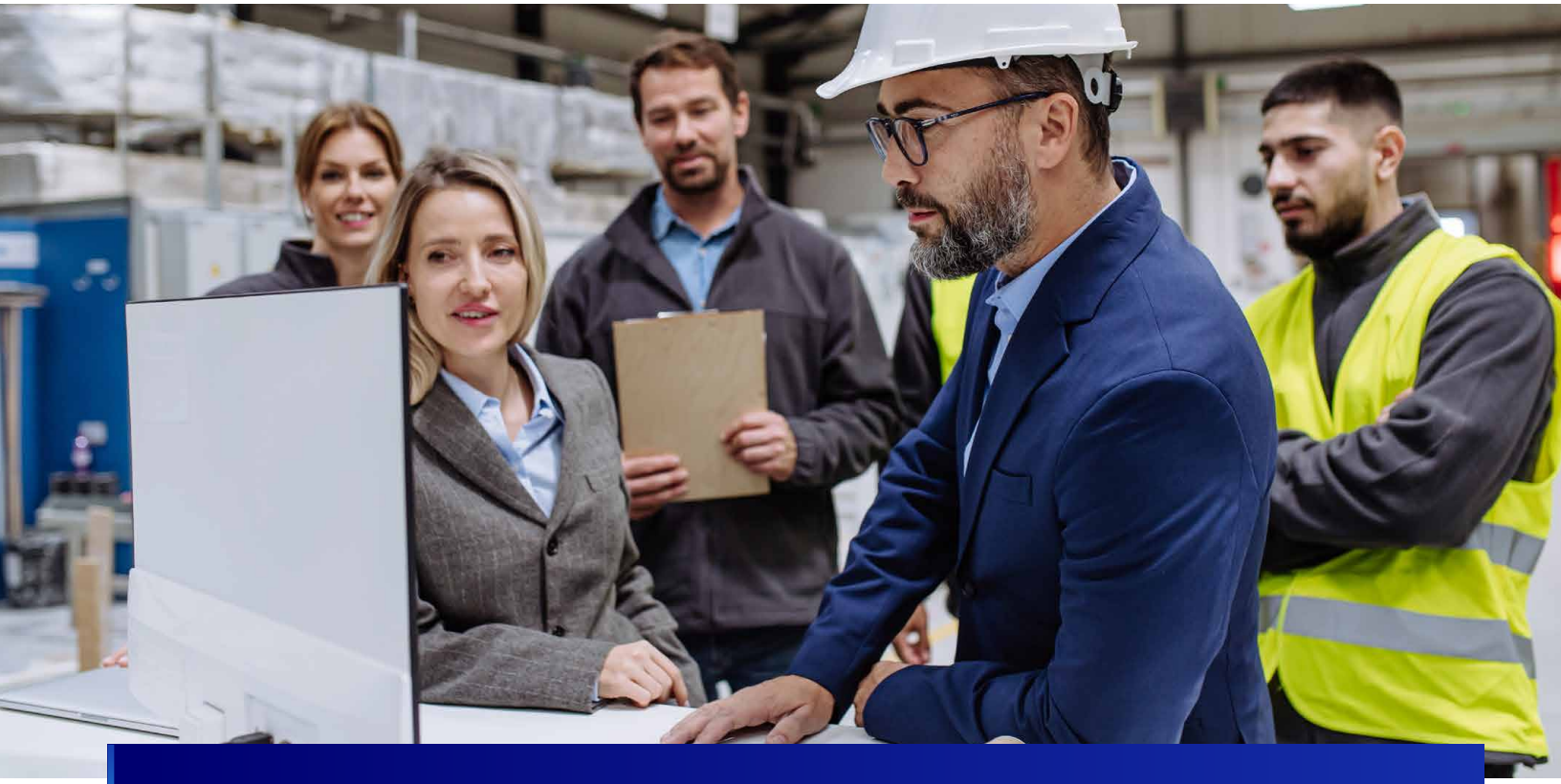
Meanwhile, **72%** of FM respondents say **labor shortages** have a moderate to severe impact on their ability to meet operational goals.

When asked to list the top challenges impacting their ability to manage their facilities effectively, **more than 19%** of FMs point to **budget constraints** as the top response.

Taken together, these findings reveal a critical tension. Facility leaders are expected to protect increasingly connected, aging and mission-critical systems from cyber risk and failure while operating within tight budget and staffing constraints. As equipment performance, uptime and resilience become more dependent on connected systems and networks, this pressure is no longer confined to facilities teams alone – it spans both IT and OT domains. This dynamic makes reactive approaches untenable and increases the cost of unplanned downtime or security incidents.

Business leaders: What are the top three challenges currently impacting your ability to manage your facilities effectively?





Business impact: Technology adoption is increasingly a response to economic and workforce realities – not innovation for innovation's sake. With rising energy costs, labor shortages and aging assets stretching teams thin, FMs are turning to analytics and and AI—and partnering with IT counterparts—to reduce risk, prioritize limited resources and maintain performance in increasingly **complex environments.**

Key finding #4

Return-to-work (RTO) has stabilized as organizations shift focus from attendance to performance

While RTO grabbed headlines at the beginning of 2025, many organizations appear to have landed on attendance models that balance flexibility with in-person collaboration. Business leaders report **high satisfaction** with current in-office attendance arrangements, with **76%** indicating that they're happy with the amount of time employees are spending in the office. RTO strategy, implementation and enforcement is no longer the dominant workplace challenge; instead, organizations are increasingly focused on **how buildings and workplaces perform.**

Of the **67%** of business leader respondents who say their organization is using workplace management technology, **75%** indicate it's being used for **space management and planning**, up from **70%** last year. **More than half (56%)** of respondents who say their organization is planning to implement a workplace management solution in the next year are adopting a **space management and planning** solution, while **40%** of respondents say they're deploying an **integrated workplace experience platform**.

What's the difference?

Space management and planning tools help organizations understand how space is used and design more efficient layouts. They typically enable functions like utilization tracking, move planning, occupancy forecasting and scenario modeling.

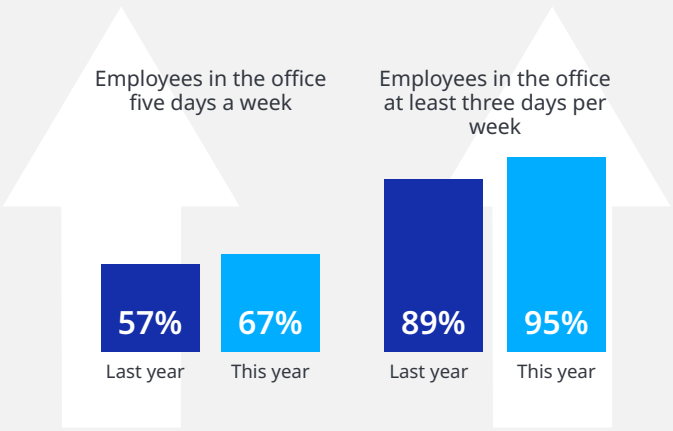
Learn more

Integrated workplace experience platforms go a step further by connecting space usage with the end-user experience. These platforms often combine wayfinding, room booking, amenities, communications and services into a single interface for employees. They also provide broader visibility for facilities and real estate teams.

Learn more

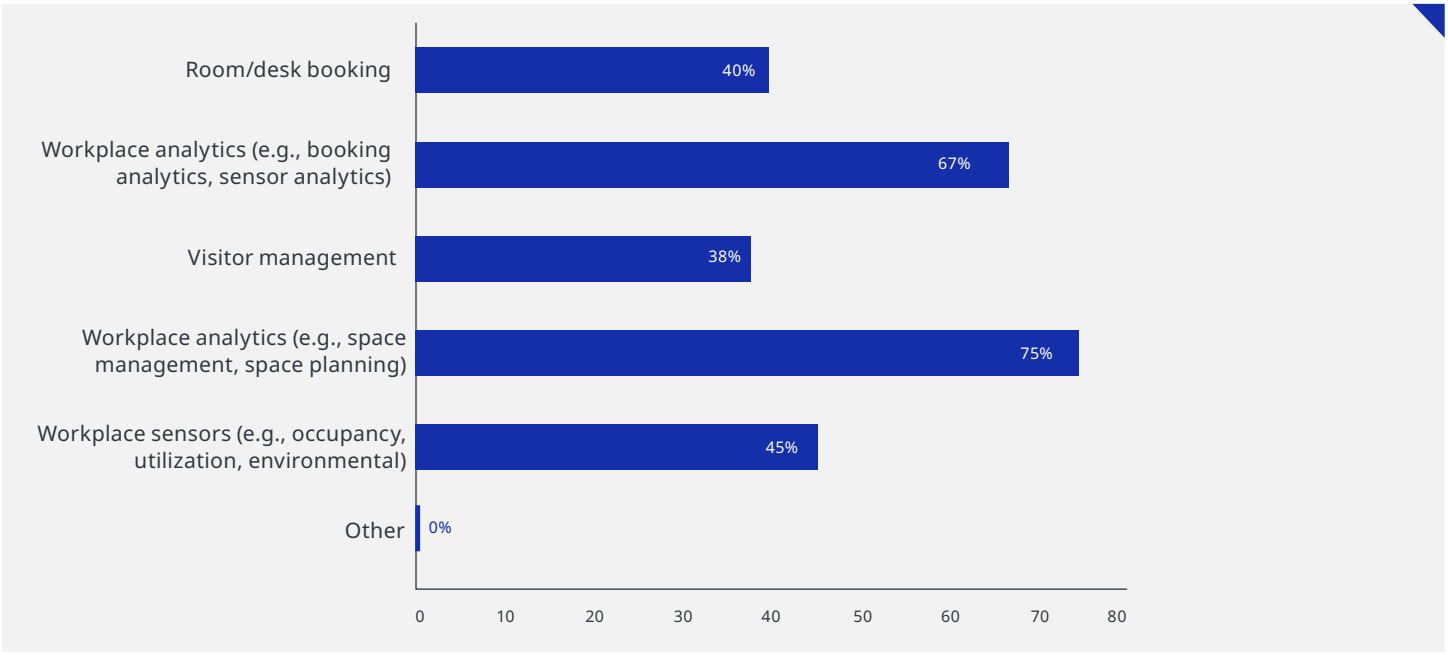
Business leaders report that employee attendance patterns have largely normalized across organizations:

- **67%** of employees are now in the office **five days per week**, up from **57%** last year
- **95%** of employees are in the office **at least three days per week**, up from **89%** last year
- Only **8%** of business leaders want employees in the office more often, while **9%** indicated they want them there less often

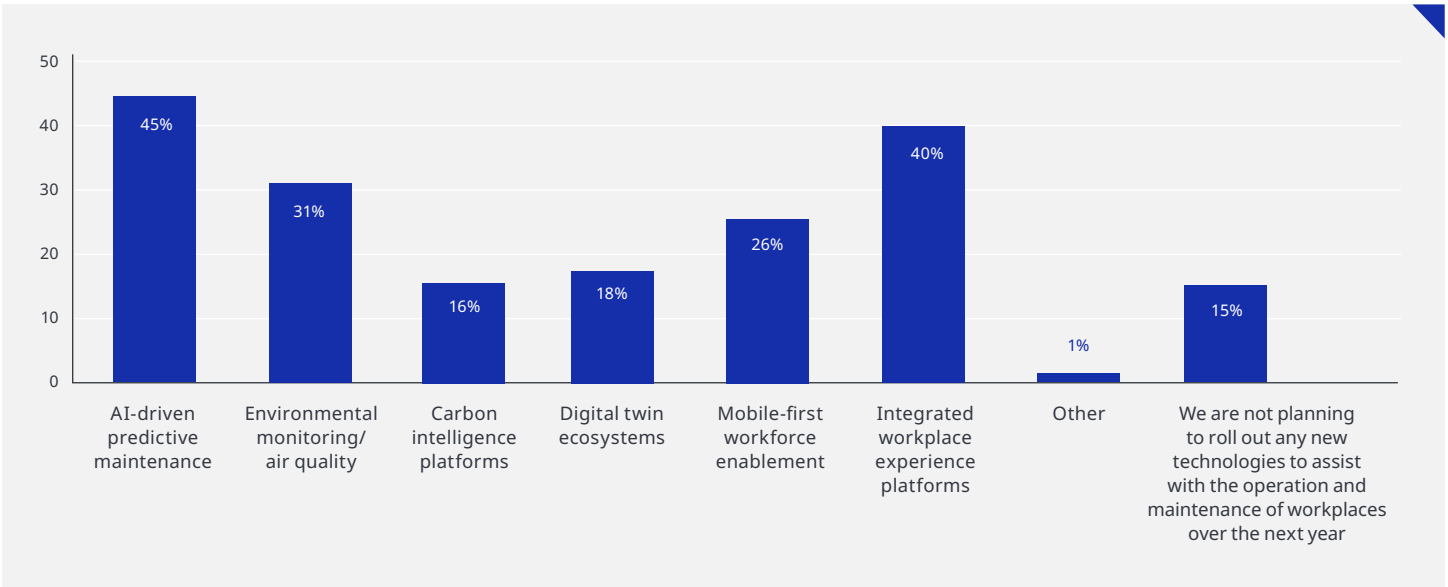


While attendance monitoring has become less of a focus for many organizations, business leaders remain concerned about their limited visibility into how workplaces are actually being used. Nearly **1 in 4** business leaders still track attendance and utilization manually or not at all, and demand for performance insight is high. When asked which aspects of the workplace they would like better visibility into, **utilization ranks second** (48%), closely following cost (56%).

Business leaders: Please indicate all solutions your organization is currently using?



Business leaders: Which of the following technologies are you planning to implement to assist with the operation and maintenance of workplaces over the next year?



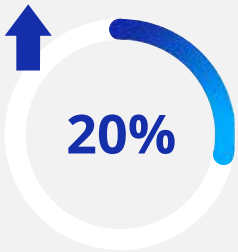
Business impact: The conversation has moved beyond RTO/office mandates toward **building and workplace performance, utilization and operational effectiveness**.

Key finding #5

Energy performance is a leadership-level priority, led by facility managers

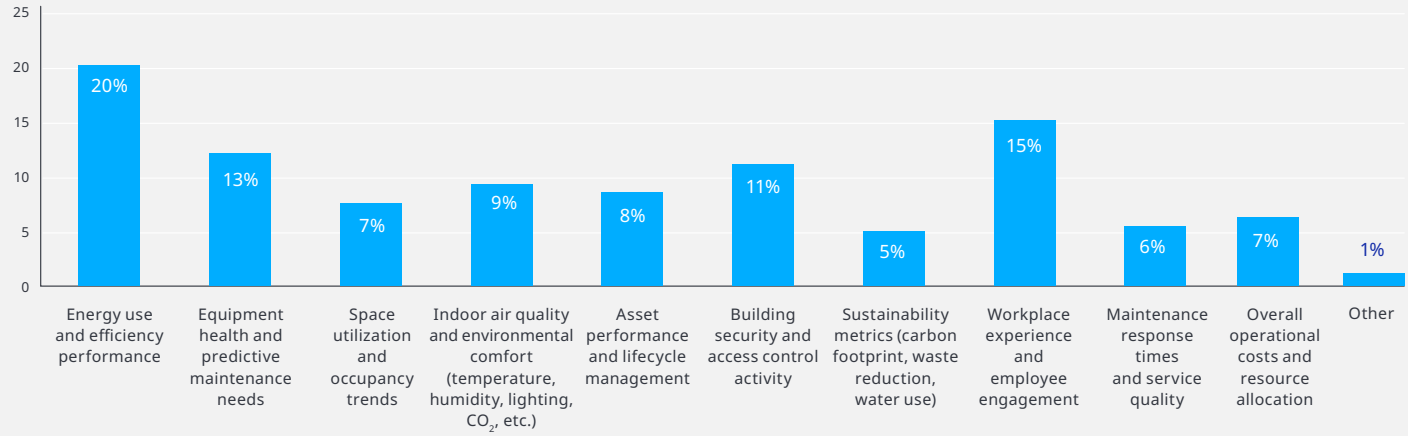
FMs and business leaders have traditionally approached energy performance from different vantage points but rising energy costs and growing performance pressures reinforce that energy intelligence is a leadership-level concern. Facilities teams tend to see energy performance as both an operational and financial metric. They connect inefficiency to energy waste, equipment strain and early warning signs of failure – all of which have cost implications.

When asked what aspect of their facilities they would most like to have more data and insights about, 20% of FMs say energy use and efficiency performance – by far the top response. This emphasis on energy performance is also reflected in how FMs approach technology adoption:



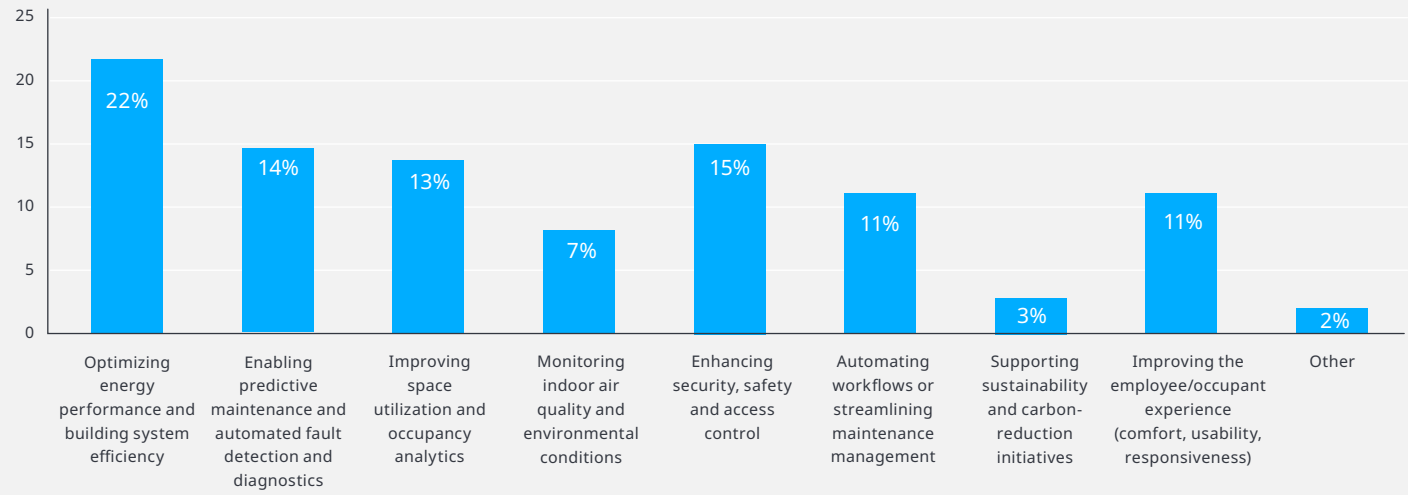
20% of FM respondents cite **rising energy costs** as the number one challenge impacting their ability to manage facilities.

Facility managers: What aspects of your facilities would you most like to have more data and insights about?



- **68%** of FMs with a workplace management or smart building solution already in place say they use these tools to improve energy efficiency and sustainability
- **68%** of FMs planning to implement a solution in the next year say improving energy efficiency and sustainability is a primary goal
- **64%** of FMs with AI already in place use it to optimize energy performance and building system efficiency and **60%** of those planning to deploy AI in the next year cite the same objective
- When asked where AI has the greatest long-term potential to improve facilities operations, optimizing energy performance and system efficiency emerges as the top response among FMs (**22%**)

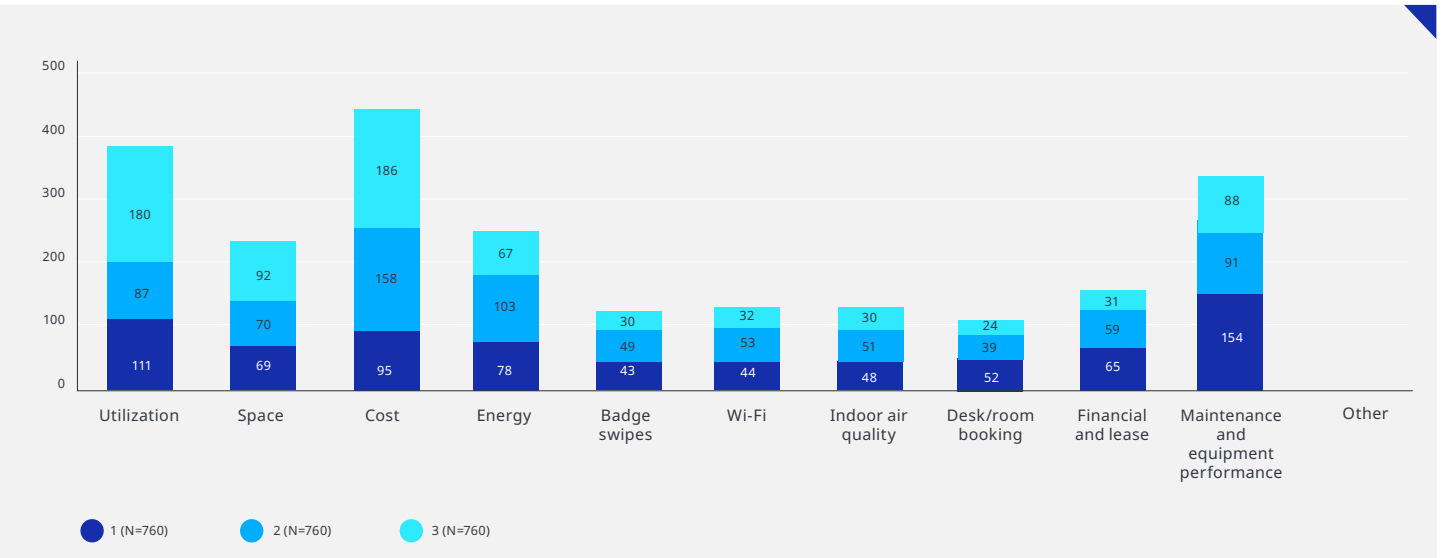
Facility managers: In which area do you believe AI has the greatest long-term potential to improve the operation, utilization and maintenance of your organization's facilities?



As organizations seek to control costs and reallocate resources toward business growth, business leaders are increasingly recognizing the importance of gaining more visibility into, and control over, energy performance:

- **44%** of business leaders say they are already using AI to optimize energy performance
- **45%** of business leaders planning to expand AI in the next year cite energy optimization as a priority

Business leaders: What are the top three aspects of your workplace that you would most like better visibility into?



Business impact: The right tools, insights, visibility and reporting capabilities help demonstrate how energy optimization can support growth – and enable FMs and business leaders to leverage those insights for quick wins.

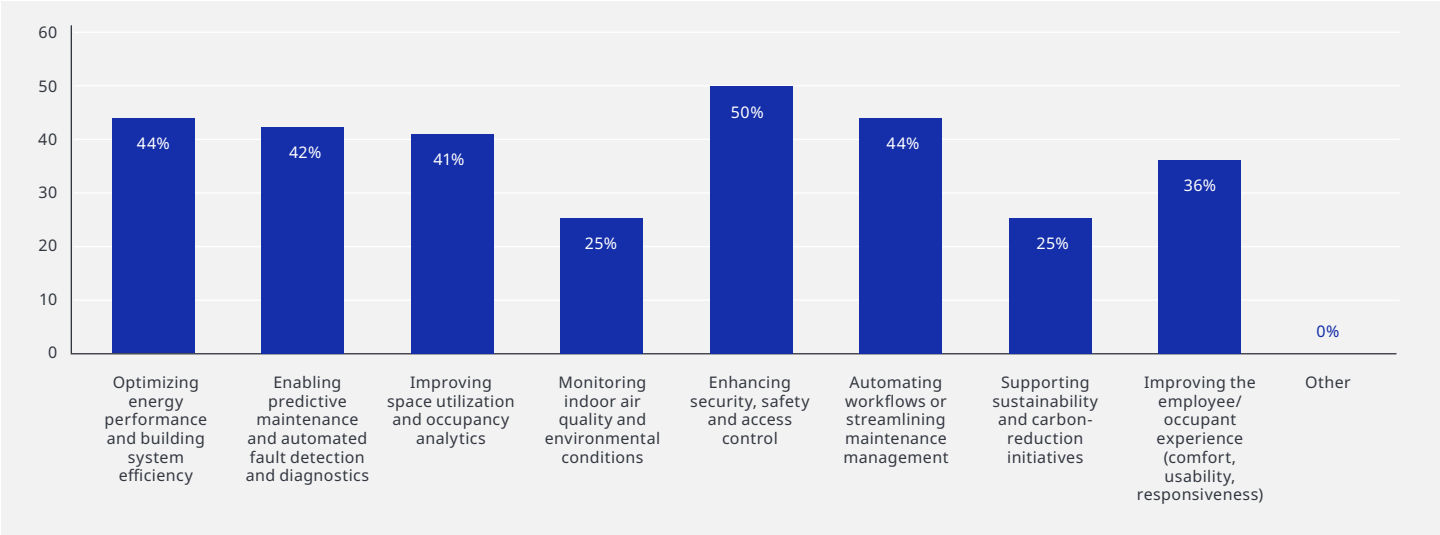
Key finding #6

Physical security is a primary AI use case, while cyber risk limits how fast it scales

AI is often associated with analytics, efficiency and automation. However, our survey results show that **risk mitigation and operational resilience are currently the primary drivers** of AI adoption for facility performance and optimization. As facilities have become more connected and OT and IT have converged, facilities teams are increasingly responsible for managing cyber risk, physical security and system reliability. In this environment, many organizations are adopting AI less as a productivity enhancer and more as a critical tool for protecting people, assets and operations.

- **50%** of business leader respondents report using AI to enhance **security, safety and access control**
- Among business leaders planning to expand AI use in the next year, **security remains one of the top focus areas**
- Security also ranks among the **top areas for AI's long-term value**, alongside workflow automation and predictive maintenance

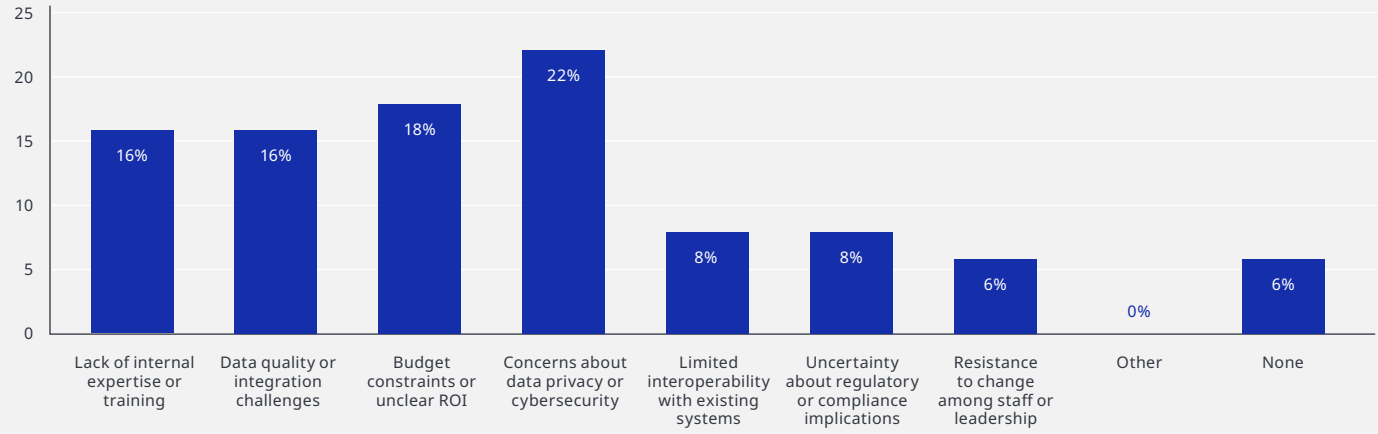
Business leaders: How is your organization using AI to improve the operation, utilization and maintenance of your organization's workplaces?



- **22%** of business leader respondents cite **data privacy and cybersecurity** as the biggest obstacle to AI expansion
- This outweighs concerns about **budget constraints, lack of expertise and resistance to change**

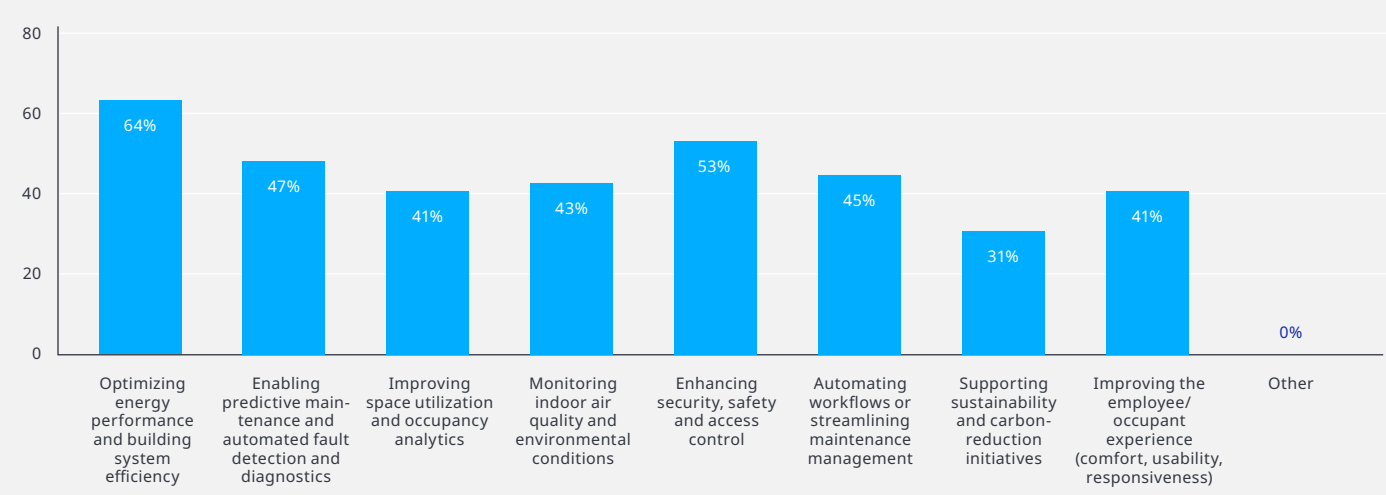
Even as AI adoption grows, business leaders remain cautious about expanding its use. When asked what is holding their organization back from scaling AI, **data privacy and cybersecurity concerns emerge as the top barrier**.

Business leaders: What is the biggest barrier your organization faces in expanding the use of AI for facility operations, maintenance and optimization?



- **53% of FMs** report using AI for security-related applications, reinforcing its importance across operational roles

Facilities managers: How is your organization using AI to improve facility operations?



Business impact: This underscores the importance of security and governance considerations - such as zero-trust architecture and privacy-by-design - as organizations look to expand AI use in building operations.

Methodology

In collaboration with independent market research firm PureSpectrum, Johnson Controls OpenBlue conducted an online survey of 760 U.S. business leaders in facilities, finance, HR, IT and real estate, as well as 260 facility managers.
All respondents work for organizations that have more than 200 employees. The survey was conducted between December 4 and 19, 2025. The overall margin of error for the findings is less than 5% at a 95% confidence level.

About Johnson Controls

Johnson Controls, a global technology leader in energy efficiency, decarbonization, thermal management and mission-critical performance, helps customers use energy more productively, reduce carbon emissions, and operate with the precision and resilience required in rapidly expanding industries such as data centers, healthcare, pharmaceuticals, advanced manufacturing, and higher education.

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