



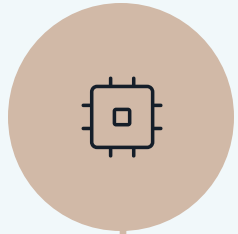
# Technology Real Estate Trends to Watch

**2026 Global Real Estate Outlook**

Global Research  
December 2025



# 2026 Technology Real Estate Trends to Watch



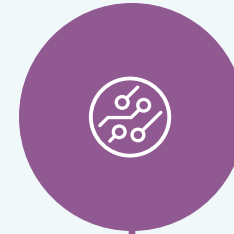
Tech gets tough:  
hardware,  
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Heightened talent  
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Beyond perks:  
Technology  
workspaces focus on  
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around the office



Racing for AI  
supremacy: The new  
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sustainability equation

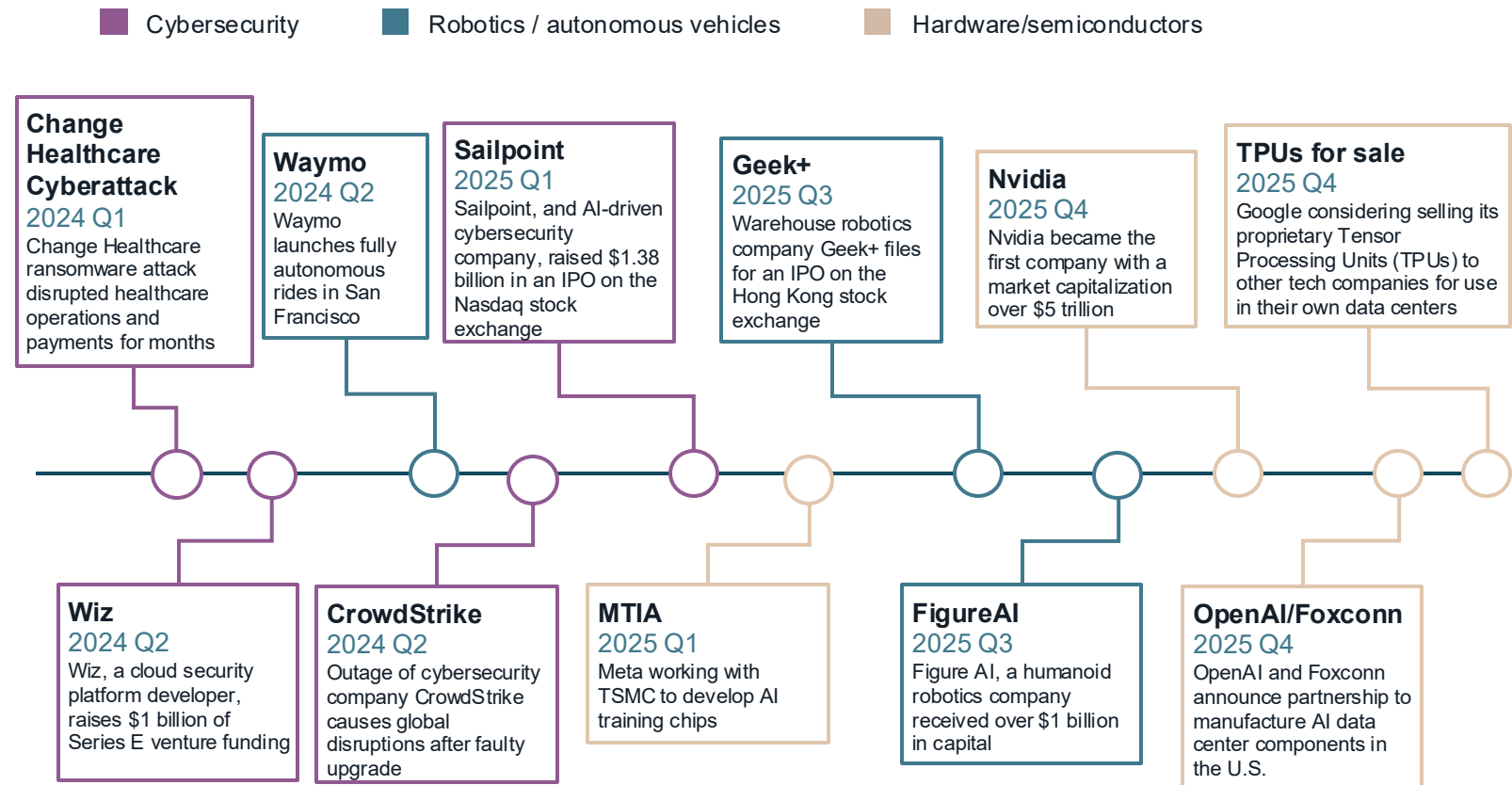


CRE leaders need  
specialized solutions  
and strategic partners  
to move the AI needle.

# Technology | Tech gets tough: hardware, semiconductors, robotics and cybersecurity will lead the industry in 2026

- Lines between software and hardware companies are blurring as traditional software, social media and cloud companies are expanding into semiconductors and hardware to deliver better user experiences and greater efficiencies. This means new workspaces within workplaces: lab and R&D spaces integrated with office to fuel collaboration between developers and engineers.
- Aging workforces, labor shortages and re-shoring of manufacturing will drive increased investment in robotics as AI-integration helps robots operate more autonomously. While humanoid robots capture headlines, more focused robotics applications will deliver greater near-term impact.
- Growth in the cybersecurity segment will accelerate due to AI's potential for both improving security and enabling more sophisticated attacks. Recent major outages exposed vulnerabilities, and leading technology companies will diversify cloud providers, improve training and focus on physical and digital security for IoT assets embedded in their facilities.
- Investors seeking to capitalize on the “tough tech” shift can provide versatile spaces with adequate power and infrastructure to allow for computational research and prototyping.

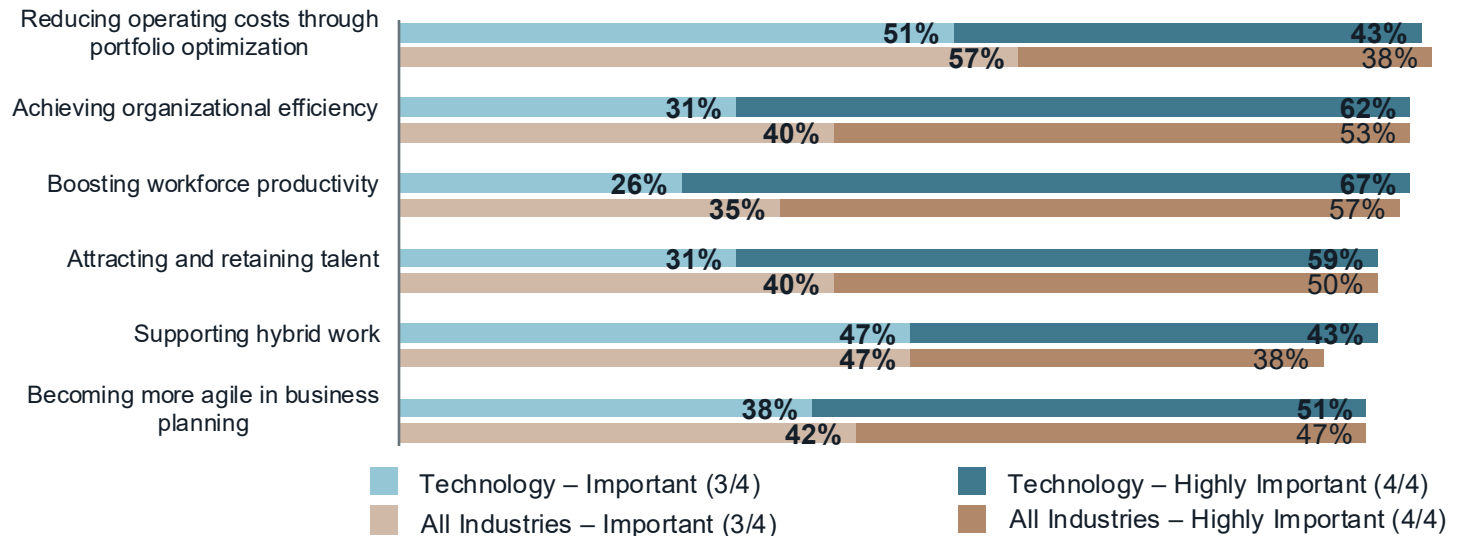
## Technology developments 2024-2025



# Technology | Heightened talent uncertainty will challenge CRE organizations to constantly evolve portfolio strategy

- Talent strategy is at a crossroads. AI-enabled efficiencies, demand for rare AI skills, immigration policy changes, a shift away from remote work and a continued focus on margins are creating headcount uncertainty for HR. Many CRE leaders report difficulty in getting a solid headcount forecast from HR, making it difficult to plan for future space needs.
- Uncertainty requires portfolio optimization to become an always-on function. To adapt, CRE organizations will need to upgrade their data analytics capabilities and integrate their processes with business and HR strategy. Portfolio success will hinge on cost-reduction, utilization optimization and efficiency, but also incorporate human experience and productivity.
- As talent strategy converges with requirements for in-office presence, technology organizations will focus on adding experienced headcount in key markets for AI and advanced manufacturing. Instead of relying on international relocations, they will expand capabilities centers, and rather than focusing on low-cost markets for software development they will focus on skilled engineers to build architecture for new AI applications. This will result in a retrenchment to core markets and reductions in the remote workforce through attrition.

## How important are the following objectives to your c-suite business strategy for the next 3 years?



Source: JLL Global Technology Survey 2025

With diverging priorities of reducing cost and supporting productivity, technology CRE leaders are split on portfolio size forecasts:

**36%** of technology CRE leaders believe the footprint they occupy will decrease in the next 3 years vs. 29% overall

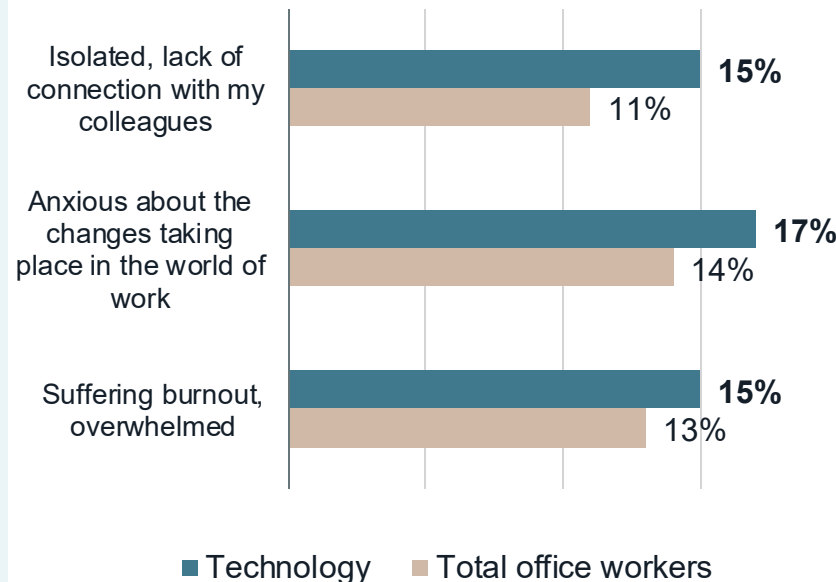
**39%** of technology CRE leaders believe the footprint they occupy will increase in the next 3 years vs. 33% overall

Source: JLL Pulse Survey 2025

# Technology | Beyond perks: Technology workspaces focus on experience in and around the office

- While quality has always been a focus for technology offices, in 2026, offices need to provide consistent high-quality services for longer hours (as AI teams have adopted a 9-9-6 schedule) for a workforce comprised of fewer entry-level workers and more specialized employees. Rather than recreational perks, employees want quick, healthy food service and support for a healthy lifestyle.
- Multiple locations in talent-rich metro areas will minimize commute for high-value talent. Vibrancy of the broader neighborhood ecosystem and amenities will complement in-space services.
- Technology and meeting spaces will be upgraded to support global connectivity, maximize productivity and improve speed from concept to product. Office spaces will be converted to labs and other infrastructure to support innovations in AI, quantum, and other emerging technologies.
- Burnout and anxiety is higher among technology employees than in other industries. To support employee wellbeing, companies can make strategic upgrades to outdoor spaces, acoustics and ergonomics to improve productivity, satisfaction and encourage increased in-office presence.

## Burnout, anxiety and isolation is more prevalent in the technology industry



Technology workers are satisfied with office's support of productivity, but gains can be made to improve wellness

### Most satisfied

- Ability to find a desk
- Light: access to natural light and quality
- Ability to sit close to my team

### Least satisfied

- Sustainable design
- Acoustics & noise levels
- Access to the outside

**53%** of technology employees say they enjoy working from their office "a lot" vs. 39% in all industries

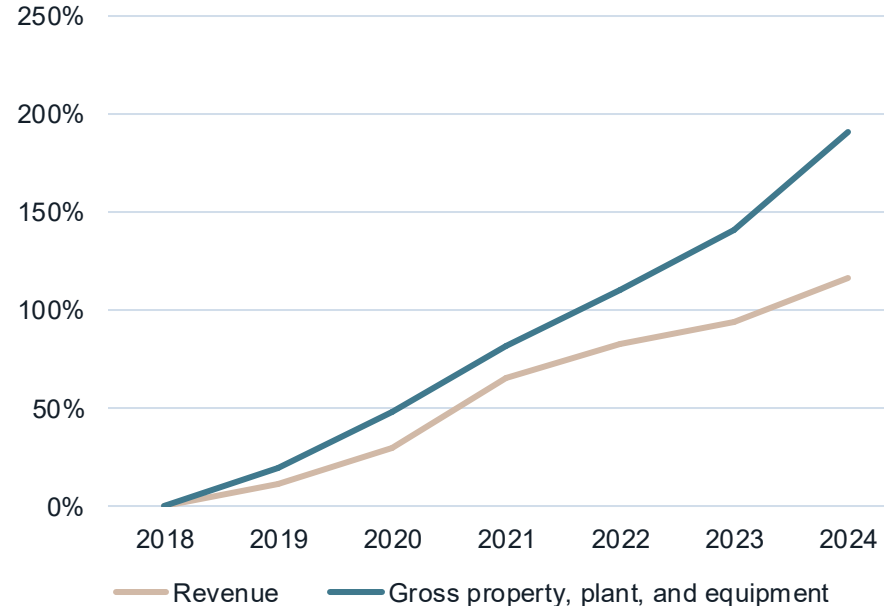
Source: Workforce Preferences Barometer 2025

# Technology | Racing for AI supremacy: The new power, capital and sustainability equation

- Speed of innovation is paramount: Technology leaders are doubling down in the fast-moving AI race, determined to win or risk getting left behind. Savings from increased operational efficiency are being rerouted to innovating with AI. Cost reduction is driving facilities and operations decisions.
- Power availability and cost are key in site selection, especially for manufacturing but also for lab uses in office buildings. Given delivery timelines from utility companies, more cloud and manufacturing companies are exploring self-generation but lack the in-house expertise in energy construction and deployment. Aging facilities are receiving increased focus through proactive maintenance instead of reactionary repairs.
- Capital planning will focus on obtaining resources to support AI ambitions. Occupiers will look to creative strategies such as sale-leasebacks, conversions or leasing underutilized space to turn underperforming assets into cash.
- The technology industry's sustainability commitments are in tension with AI ambitions. While companies expect long-term efficiency gains to offset environmental cost, rapid AI development is resource-intensive. Accurate energy use data and advanced technology to achieve efficiency will be essential.

## Big Tech companies are investing in facilities at a pace faster than their revenue growth as the AI race heats up

### Percent change since 2018



Source: JLL Research, S&P Capital IQ, Companies included: Alphabet, Amazon, Apple, Meta, Microsoft, NVIDIA

# 57%

of power for data centers globally in 2035 will be gas and coal

Source: BloombergNEF

# 81%

of technology CRE leaders said they have a public sustainability commitment vs. 72% overall.

Source: JLL Work Dynamics Pulse Survey 2025

# 67%

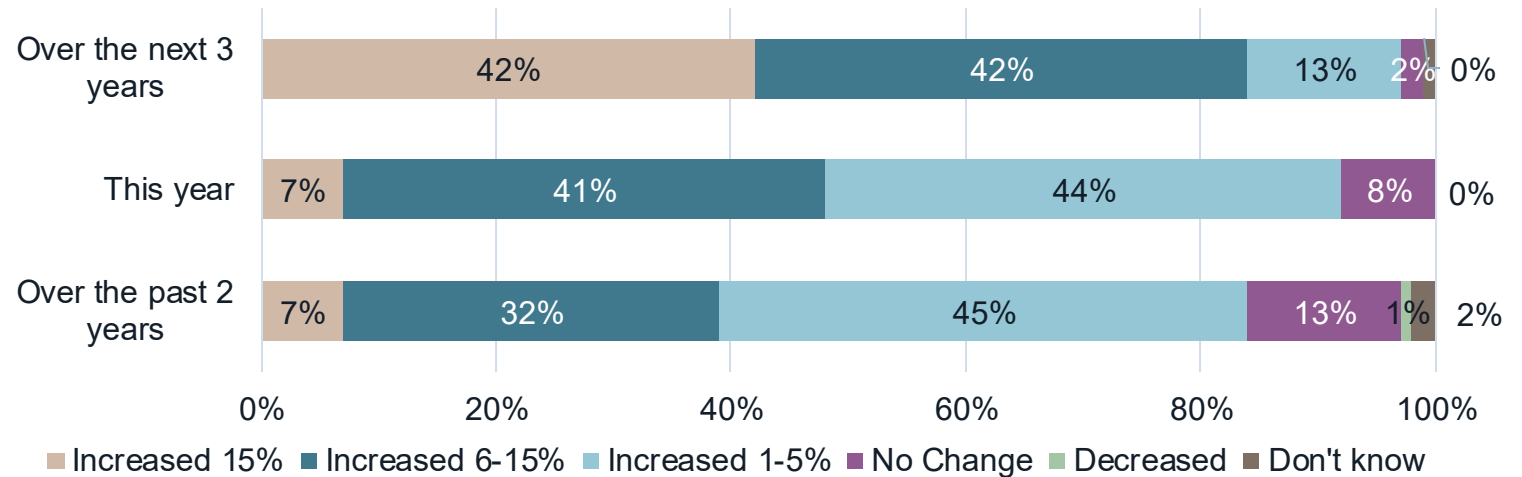
of technology CRE leaders stated energy performance was their biggest driver for sustainability vs. 62% overall.

Source: JLL Work Dynamics Pulse Survey 2025

# Technology | CRE leaders need specialized solutions and strategic partners to move the AI needle

- Technology CRE leaders face mounting pressure from the C-suite to demonstrate measurable returns and procurement processes are growing more complex as a result. CRE leaders recognize the opportunity for real estate technology to increase productivity and are increasing budgets in response. However, over 50% cite longer approval cycles, budget constraints and stringent ROI requirements as key barriers to procurement decisions even as technology CRE teams are ahead of other industries.
- While AI is a key focus for organizations, strategic gaps persist in implementation. Over half of technology CRE leaders say that AI pilots for the real estate function are not a priority, and 40% do not have a clearly-defined strategy on AI, yet 55% of respondents say AI is improving team productivity.
- CRE leaders are prioritizing spend for strategic advisory for technology and AI. CRE leaders need outside experts to move AI applications from marginal efficiency gains to core business outcomes such as improving data workflows, energy management and other key CRE functions. As in the wider industry, CRE technology will see 2026 will be the year of the forward development engineer as organizations create custom solutions to improve efficiency.

**Q: How has your CRE technology budget changed, and how will it change over the next 3 years?**



**64%**

of technology company CRE leaders say that spending to upgrade digital infrastructure to prepare for AI integration is a budget priority vs. 57% overall

**72%**

of technology company CRE leaders say spending on strategic advisory on tech or AI is priority spending of strategic importance vs. 63% overall

Source: JLL Technology Survey 2025

# Thank you

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