

## Real estate's AI reality check: 90% of companies piloting, only 5% achieved all AI goals

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Artificial intelligence (AI) in commercial real estate is entering a new phase, moving beyond early explorations and toward targeted, high-impact use cases that aim to redefine value. [JLL's 2025 Global Real Estate Technology Survey](#), of 1,500+ senior CRE investor and occupier decision-makers across 16 markets and various industries, reveals while maturity remains low, organisations are prioritising AI in their real estate technology budgets and piloting projects that go well beyond individual productivity use cases.

Currently, [88% of investors, owners and landlords](#) have started piloting AI, with most pursuing an average of five use cases simultaneously and [92% of occupiers](#) are also running corporate real estate AI pilots. This shift signals a strategic pivot from efficiency to growth and business impact.

Despite economic headwinds, more than half of investors have achieved considerable technology budget growth over the past two years. Strategic advisory on technology or AI is investors' number one commercial real estate (CRE) tech budget priority for the next two years and 87% report their real estate technology budgets have increased because of AI. Their top five real estate technology budget items for both investors and occupiers are strategic advisory on tech/AI, followed by upgrading both cyber and data security measures and infrastructure for AI integration, all of which have been chosen for their potential to deliver competitive advantage rather than quick, operational wins.

"We're seeing a definite shift as our clients are reimagining the possibilities of AI and focusing more on generating long-term value over quick, operational wins," said Yao Morin, Chief Technology Officer, JLL. "A strong data platform is critical for growth and the companies that prioritised building out their data platforms to gear up for more sophisticated AI applications will continue to pick up steam and lead the competition."

## Rapid adoption but varied success rates

Over the last two years, the speed of AI adoption in real estate has been unprecedented. In July 2023, fewer than 5% of companies started AI pilots, a stark contrast compared with now.

While some companies have proactively embraced the technology, a considerable portion of CRE occupier teams have ended up implementing AI not by choice, but by C-suite mandate as they view AI adoption as a competitive necessity. Despite the significant percentage of CRE occupiers piloting AI, only 5% report having achieved all their program goals; 47% have achieved two to three goals. Though implementation is widespread, most initiatives remain experimental with limited scaling.

## Why some companies are winning with AI

While adoption is widespread, maturity remains low. Between occupiers and investors, JLL Research identified 56 AI use cases across every aspect of the CRE value chain, from which both groups are pursuing an average of five pilot projects simultaneously. Historically, it was suggested that organisations should start with simple, low-risk applications; however, the survey data reveals a different approach emerging in CRE. Despite facing limited resources and uncertain outcomes, teams are prioritising high-impact areas and rebalancing their AI priorities to directly address their most pressing business challenges.

The real challenge, and the reason why maturity remains low, lies in the readiness of an organisation including whether they have quality data, infrastructure and the change-management processes needed to integrate AI into core workflows. The most successful investors take a systematic approach to AI by developing tailored technology roadmaps, investing in quality data and infrastructure and embedding AI into core workflow, all widening the gap between leaders and laggards.

## The window to act is closing

The opportunity to secure competitive advantage through AI is not indefinite. The CRE landscape will look different within the next three years and certainly by 2030.

The cost of inaction isn't just slower growth; it's potential loss of market relevance as the industry rewards tech-forward leaders. Yet more than 60% of investors remain unprepared strategically, organisationally and technically. In tandem, occupiers that wait idly for technologies to mature in hopes of a "second mover advantage" risk competitive obsolescence as they miss the chance to experiment and understand how AI can deliver value for their unique operations. Companies with successful tech programs are widening the competitive gap through systematic approaches to road mapping, resource allocation and change management.

"Successful AI implementation begins with a clear, strategic vision that aligns technological capabilities to business objectives," said Sharad Rastogi, CEO, Work Dynamics Technology Group, JLL. "Execution of AI demands the right blend of internal expertise and external partnerships to upskill talent, embed governance structures and build ongoing capabilities."

The message is clear: act smart and act now. Companies that invest in foundational capabilities today will



lead as AI reshapes the industry.