

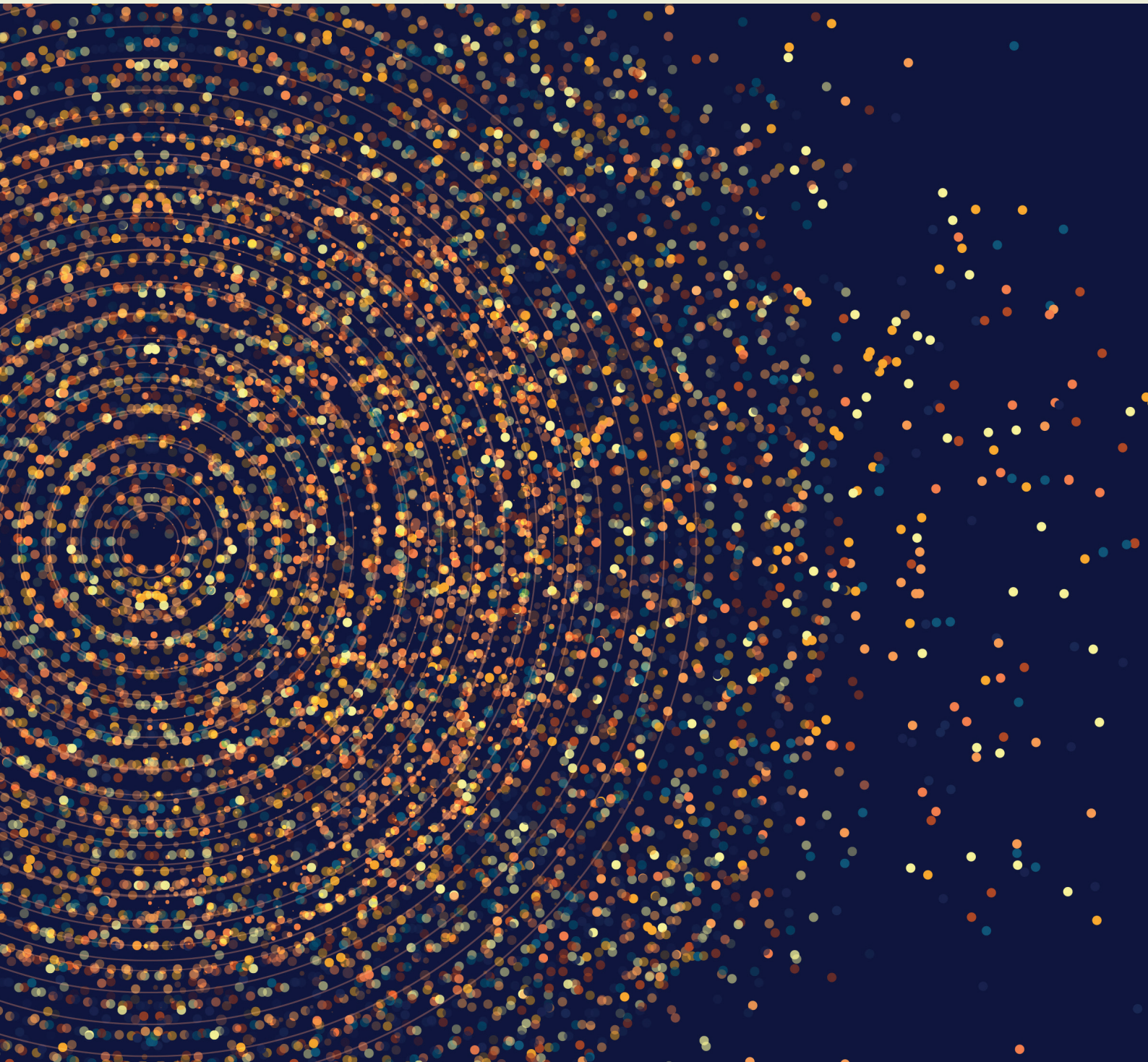
Insight Paper 1:

Reshaping Care and Real Estate

2025

Transforming Care through Technology

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The Tech for Good opportunity: reshaping care and real estate

What is Tech for Good?



HealthTech

Digital tools and platforms that improve how healthcare is delivered, accessed or managed often through apps, remote care or data-driven systems.

EXAMPLES: DIGITAL HEALTH APPS, TELEMEDICINE PLATFORMS, REMOTE MONITORING



BioTech

Innovations that use biology to develop new treatments, medicines or diagnostics often focused on personalising care or preventing disease.

EXAMPLES: GENETIC TESTING, BIOLOGICS, PERSONALISED MEDICINE



MedTech

Medical devices and technologies used by professionals to diagnose, monitor or treat patients in clinical settings.

EXAMPLES: IMAGING DEVICES, SURGICAL ROBOTICS, DIAGNOSTICS



AgeTech

Technology designed to meet the needs of older adults - supporting safety, independence and wellbeing as people age.

EXAMPLES: SMART SENSORS, FALLS DETECTION, DIGITAL COMPANIONSHIP FOR OLDER ADULTS



EdTech

Tools that support education and training. Used in both special education settings and for upskilling clinicians.

EXAMPLES: ACCESSIBLE LEARNING TOOLS FOR SPECIAL EDUCATION AND CLINICIAN TRAINING



Assistive Tech

Products that help people with disabilities or impairments carry out everyday tasks more independently.

EXAMPLES: SPEECH-TO-TEXT, SCREEN READERS, MOBILITY AIDS

Technology is reshaping how care is delivered, accessed and experienced - across hospitals, GP surgeries, care homes and special educational needs (SEN schools) alike. It's helping spot issues earlier, reduce pressure on staff and support more independent lives.

For example, smart sensors alert carers to changes in routine. Digital platforms connect fragmented services. Assistive tools give children new ways to learn, communicate and participate. These tools are already making a meaningful difference in how care is delivered.

This Tech for Good series explores the technologies driving this change - delivering positive social impact alongside operational efficiency. Across five papers, we'll explore:

1. What Tech for Good really means
2. The HealthTech revolution
3. Breakthroughs in BioTech and MedTech
4. AgeTech, EdTech and Assistive Tech in action
5. A Global Opportunities Index spotlighting the best-positioned countries for tech-ready care real estate

WHY IT MATTERS?

Healthcare systems around the world are under pressure. Demand is rising - driven by ageing populations and chronic conditions - but capacity is not. Many systems are already stretched, with growing wait times, staff shortages, and limited access to timely care.

In response, the World Health Organization launched its Global Strategy on Digital Health (2020–2025). The strategy calls for technologies that support prevention, diagnosis, care coordination and long-term health management - all underpinned by secure, ethical use of patient data.

As a result, we expect to see significant growth in healthcare technology across innovation, investment and global adoption. The market is projected to reach \$1.5 trillion by 2030,

reflecting a compound annual growth rate of 16.8% from 2024.

WHY HEALTHCARE REAL ESTATE NEEDS TO PAY ATTENTION

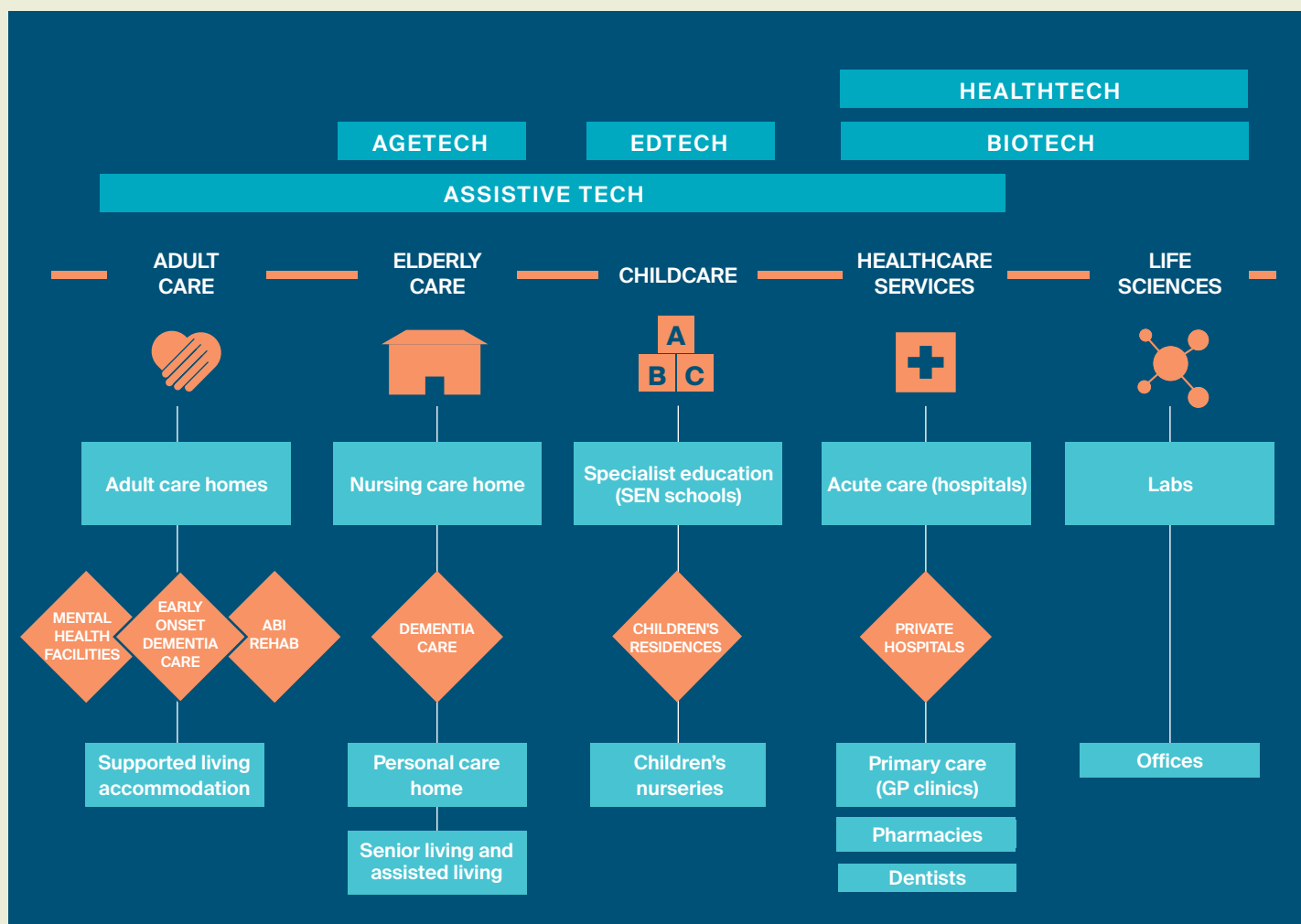
Healthcare real estate sits outside traditional asset classes. Its value is directly tied to the day-to-day performance of the businesses that occupy it - making it, by nature, an operational sector.

So why should investors consider technology more actively in their real estate strategies? Because that's where the capital is going and where value is being created.

According to S&P Global, the nine largest healthcare tech PE and VC fund closes in 2024 raised approximately \$44 billion across the US, Saudi Arabia and the Netherlands, with major backers including Bain and

Aramco Ventures. Total healthcare tech investment hit \$15.6 billion - the strongest in two years - with Q1 2025 already 22% ahead year-on-year, reaching \$2.9 billion. On the real estate side, around \$31.5 billion of care and medical property transacted globally in 2024. As investment builds across both sectors, the priorities of real estate professionals and private capital are starting to align - with long-term value increasingly tied to operational efficiency, scalability and future-readiness.

“We expect to see significant growth in healthcare technology across innovation, investment and global adoption.”



The above graphic showcases the crossover between the respective Tech for Good categories and assets that fall into health, social care and life sciences. This is where the opportunity lies – at the intersection of healthcare, real estate and technology. Investors are looking for efficient, high-performing businesses. Technology offers a route to that efficiency by automating tasks, improving workflows and unlocking greater operational output. That performance, in turn, supports stronger rental income for landlords and better exit

multiples for investors in operating platforms. As care models evolve, tech is becoming a strategic lever for long-term value creation.

We've reached a point where technology is shaping not only how care is delivered, but also how healthcare real estate is designed, valued and used. Like ESG before it, tech is moving up the agenda - influencing everything from space requirements for telehealth to growing demand for advanced lab facilities. Rising M&A activity and investor interest in platform deals reflect this

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shift. What’s emerging is a market hungry for scalable, future-ready assets- and Tech for Good is helping define what those assets need to be.

Key takeaways



1.

Technology is reshaping care delivery. From hospitals to SEN schools, tech is enhancing efficiency, early intervention, and support for stretched staff.



2.

Tech for Good spans multiple sectors, such as HealthTech, BioTech, MedTech, AgeTech, EdTech and Assistive Tech, all of which, are driving smarter, more personalised care.



3.

Investment in healthcare tech is surging. \$15.6bn was invested in 2024, with private equity and VC activity rising across the US, Europe and the Middle East.



4.

Real estate must adapt to digital care. Telehealth, AI and lab innovation are changing how healthcare spaces are designed, valued and used.



5.

Tech is becoming a key factor for both operators and property investors focused on scalable, future-proof assets.

Recent research



Healthcare Capital Markets 2025



Quantifying Technology In Real Estate Spring 2025



Healthcare Development Opportunities Report 2025

We like questions. If you've got one about our research, or would like some property advice, we would love to hear from you.



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