
ULI Innovation: Imperative or Incidental?

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REACH

ACCELERATING REAL ESTATE



World's largest trade organisation:
1.4 million real estate members



Venture arm

REACH alumni success



FINANCIAL REVIEW

Technology

Mergers & acquisitions

Print article

Former ASX company Updater hits \$1b valuation

Yolanda Redrup Reporter



Dec 19, 2019 — 4.10pm

Save

Share

Former ASX-listed home relocation company Updater has raised \$139 million to fund the acquisition of US home subscriptions commerce platform Bridgevine, understood to value the company at more than \$1 billion.

HouseCanary Closes \$65M Series C Funding

USA

Published on February 6, 2020



HouseCanary, Inc., a San Francisco, CA-based home valuation fintech company, closed a \$65m growth funding.

The round, which brings total funding to \$130m, was led by Morpheus Ventures, Alpha Edison, and PSP Growth.

The company intends to use the funds to continue to build the most accurate valuations in the housing market, continue to build its team to accelerate development and broad market adoption of HouseCanary, and invest in technology.

Founded in 2013 and led by CEO Jeremy Sicklick, HouseCanary is a valuation-focused real estate brokerage used by financial institutions, investors, lenders, mortgage investors, appraisal management companies, and consumers for valuations, forecasts, and transaction-support tools and accelerate acquisition, underwriting, portfolio management, and more.

Portfolio Exits

DocuSign stock soars after IPO as cloud fever continues

Published: Apr 27, 2018 5:36 p.m. ET



E-signature company worth more than \$6 billion after 37% in first day of trading



Waiting for csi.gstatic.com...

Swedish lock giant Assa Abloy acquires smart lock maker August Home



Brian Heater, Ingrid Lunden / 9:26 pm AEST • October 19, 2017



REACH

ACCELERATING REAL ESTATE

AUSTRALIA CLASS OF 2020

uxtrata


UbiPark

igloohome

sorted

PAM

 really

Current Affairs



On-going US-China trade war



South China Sea



COVID-19 virus



Belt & Road initiatives

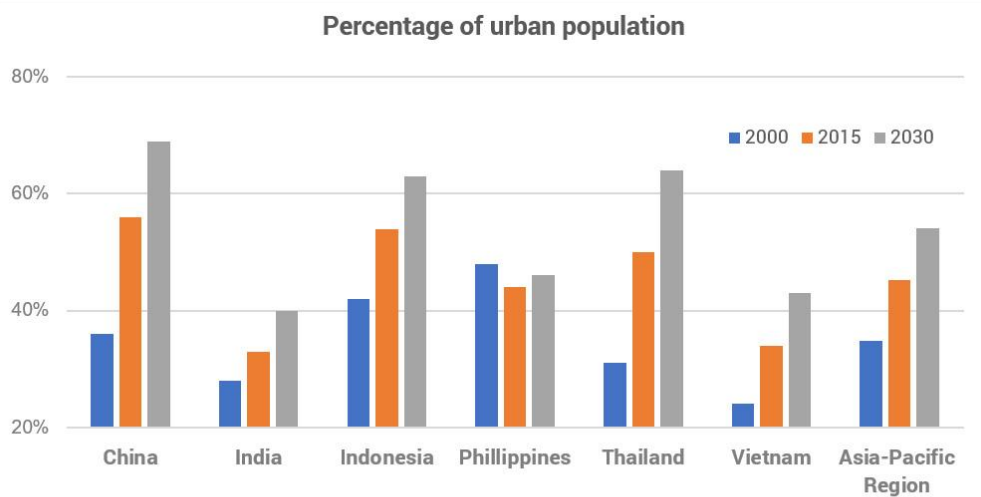


Australian bushfires



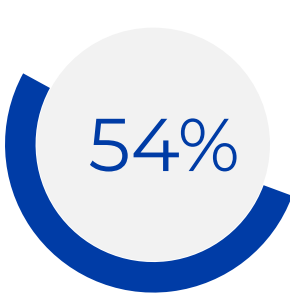
Hong Kong uncertainty

The largest mass migration of people in history at 1B



Note: Asia-Pacific Region: is calculated based on the listed countries in the chart

Source: Population Division, United Nations, Churchouse Publishing stansberrychurchouse.com



%WORLD POPULATION LIVE IN URBAN AREAS (2014)

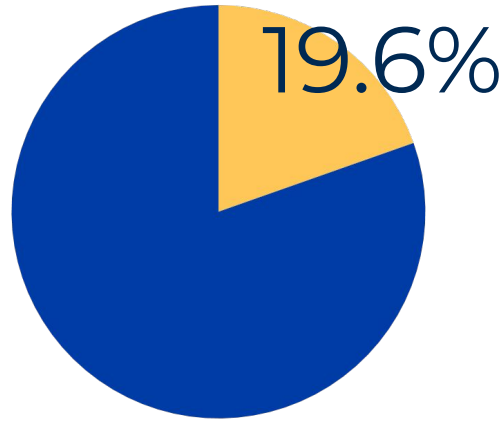


EXPECTED %APAC POPULATION LIVE IN URBAN AREAS (2050)

Source: KPMG + RealTech Ventures - White Paper (2018)

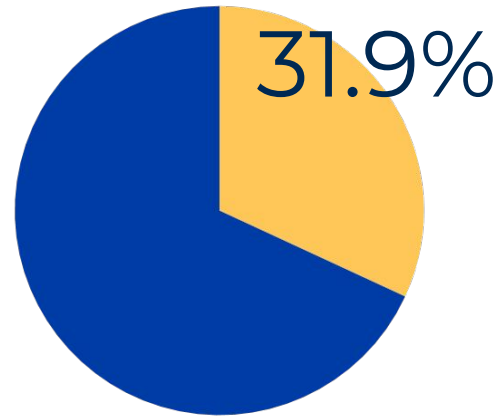
Real Estate in APAC

Points scored



2019

Points scored



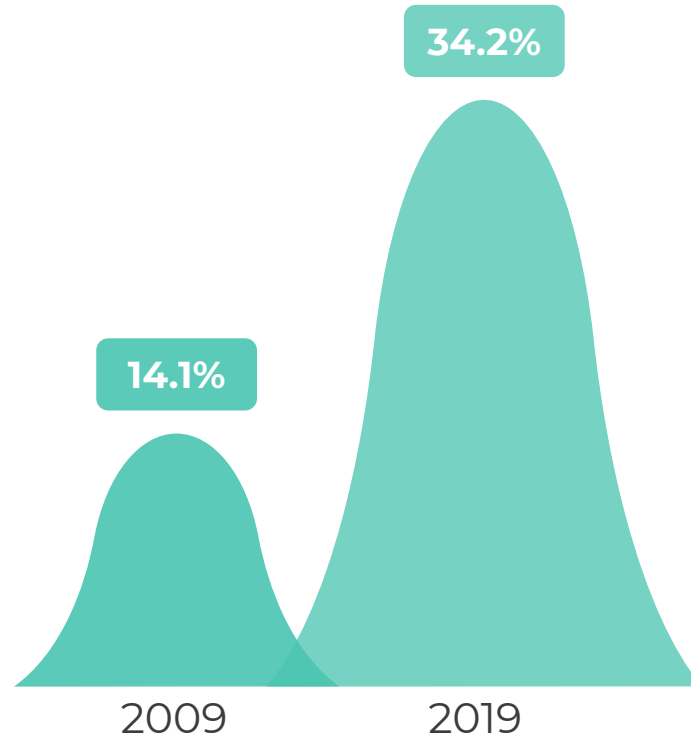
2020 projected

INSTITUTIONAL INVESTMENT DEPLOYMENT

- rest of the world
- APAC

Source: JLL + APAC Real Estate (2020)

APAC's Cross-Border Deals 2019



- A 10-year high
- Cross-border deals 2019: ~US\$54B -> 5x 2009

Source: JLL + Business Times (2020)

Top 5 Prospective Markets 2020

INVESTMENT

- Singapore **1**
- Tokyo (Japan) **2**
- Ho Chi Minh (Vietnam) **3**
- Sydney (Australia) **4**
- Melbourne (Australia) **5**

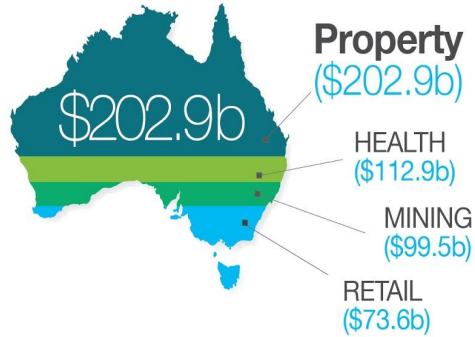
DEVELOPMENT

- Ho Chi Minh (Vietnam)
- Singapore
- Sydney (Australia)
- Tokyo (Japan)
- Melbourne (Australia)

Source: pwc (2020)

Real Estate in Australia

Property is Australia's **biggest industry**



The property industry is Australia's **biggest employer**

1.4 million

WORK IN PROPERTY



182k

218k

819k

INFO MEDIA
& TELECOM

MINING
INDUSTRY

MANUFACTURING



Property touches the lives of all Australians



Property **secures your future**

14.8 million Australians

HAVE A FINANCIAL STAKE IN PROPERTY
THROUGH THEIR SUPER FUNDS



Source: The Real Estate
Conversation (2018)

Flow-on contribution

Marketing, legal, manufacturing, finance

Additional \$254B

Grand total of **\$456.9B** or **29.2%** of Australian GDP

Source: Property Council of Australia (2020)

#1 energy efficiency for 8 consecutive yrs

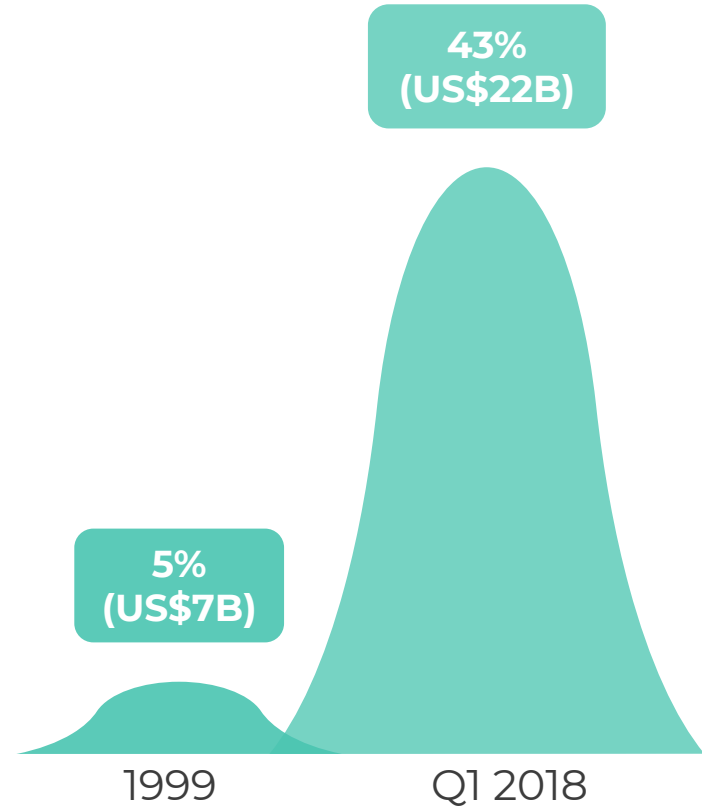
REGIONAL GRESB SCORE AND COVERAGE



Source: The Global Real Estate Sustainability Benchmark (2018)

APAC's Global Venture Capital Deal Value 2018

- Q1 2018: APAC surpassed North American market in both number of deals and aggregate value
- Southeast Asia: VC deals grew 4x from 126 in 2012 to 524 in 2017 (Bain & Company)

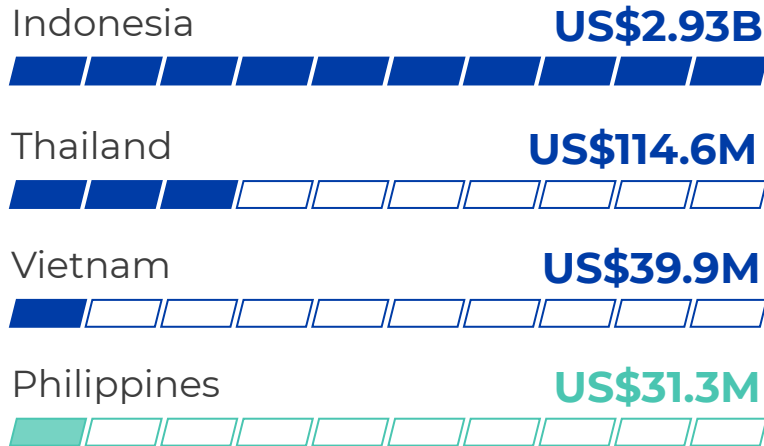


Source: Hogan Lovells (2018)

Case Study - Philippines



STARTUP INVESTMENT DEALS IN 2018

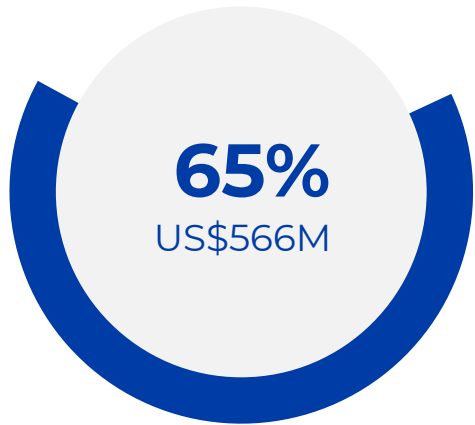


OPPORTUNITIES

- Young workforce and 2nd largest population in ASEAN
- English proficiency
- Internet-savvy market - individuals spend an average of 10 hours a day on their screens

Source: SCMP (2019)

APAC's Share In Global Proptech Investments 2017



- \$3B wave expected to drive proptech innovation in Asia
- 2013 to 2017, US\$4.8B was raised by 179 proptech startups in APAC

Source: Tech Collective (2019)

Real Estate Tech in APAC



Beijing, China
Valuation: US\$1.2-1.8B
Total raised: US\$519M



KL, Malaysia
Acquired by REA Group for \$414M



Singapore
Valuation: US\$576-864M
Total raised: US\$349M



Melbourne, Australia
Acquired by Oracle for \$1.6B



Gurgaon, India
Valuation: US\$2.8-4.2B
Total raised: US\$2.4B

Source: Crunchbase + Dealroom (2020)

Real Estate Tech in Australia

Total number of Australian PropTech Companies in 2019

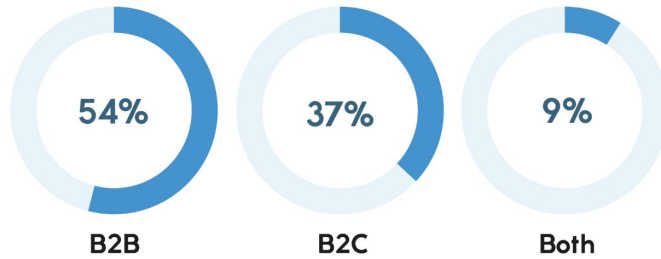


- 428% increase in proptech startups since 2013
- Total funding in AU: US\$339M (2019)
- Average deal amount: US\$10.1M (2018)

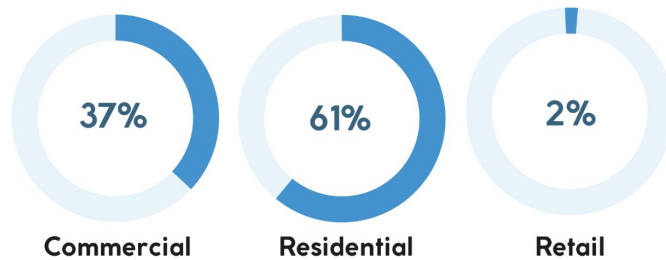
Source: Unissu (2020)

Real Estate Tech in Australia

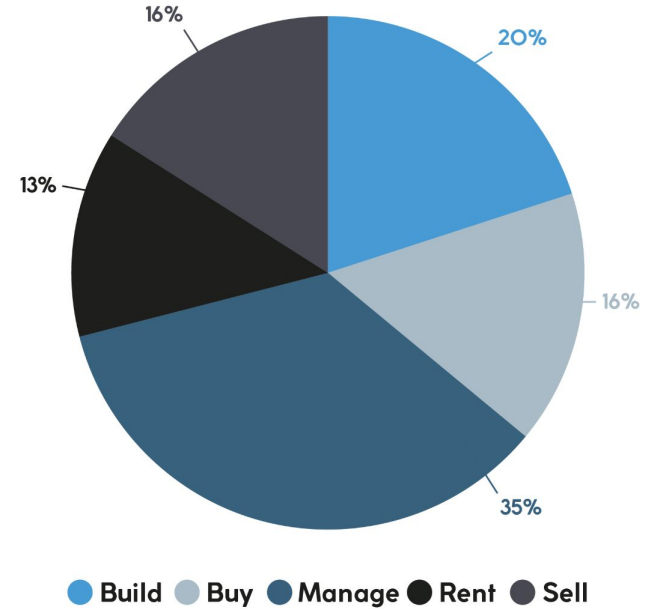
PropTech business type breakdown in Australia



PropTech sector breakdown in Australia

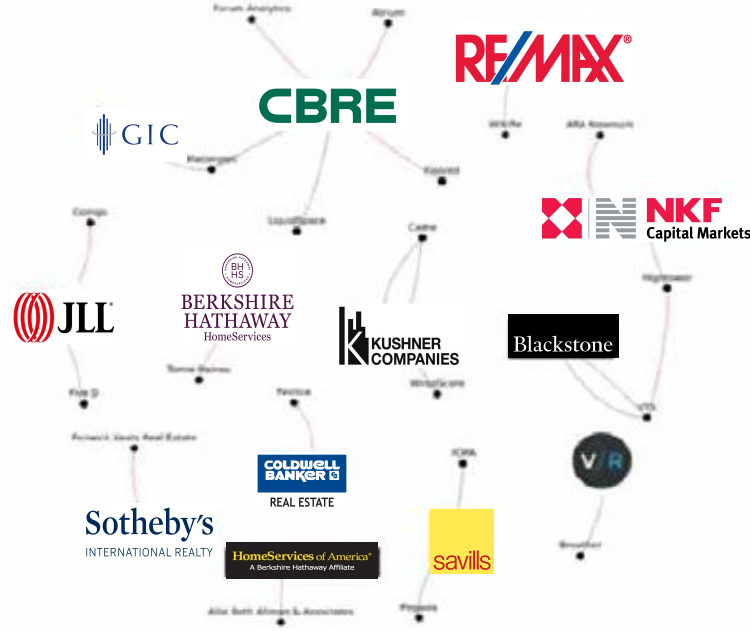


PropTech lifecycle breakdown in Australia



Source: Unissu (2020)

Proptech investments by real estate operators



Source: KPMG + RealTech Ventures - White Paper (2018)

igloohome

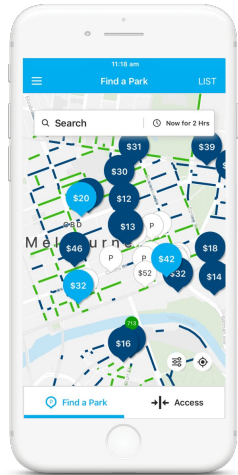
Your smart access partner for real estate needs



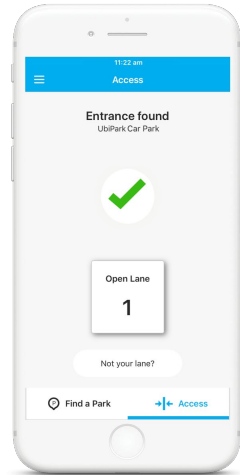
- Contactless showings
- No need for keys
- Efficient leasing & rental processes

UbiPark

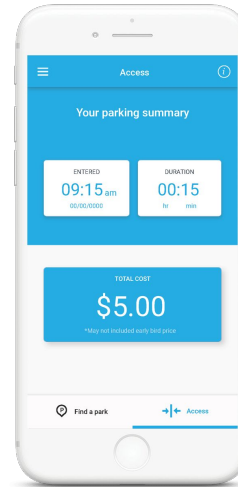
A zero contact parking solution for property owners. The safest & most hygienic way to park for your tenants & guests in a COVID-19 world.



Search & navigate



Open the barrier

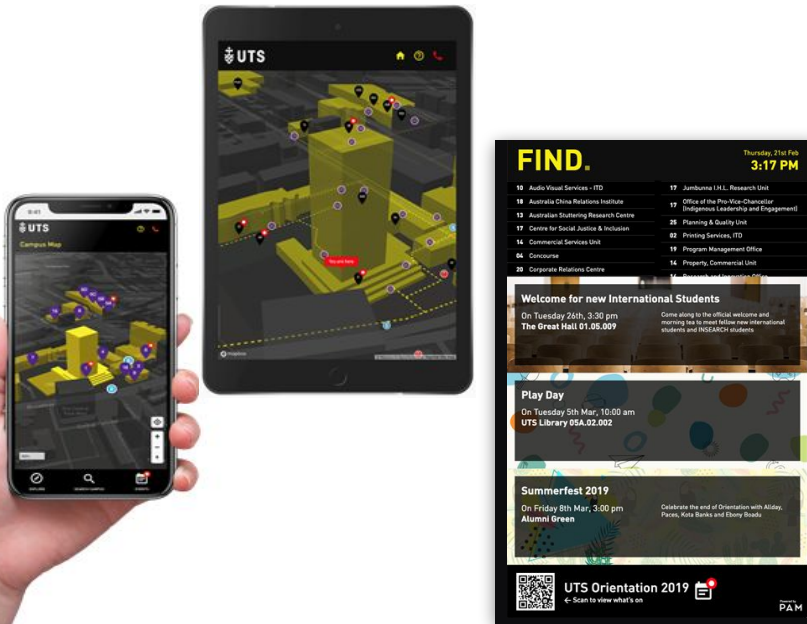


Pay

- 100% touch-free, the complete windows up solution
- Enter, exit & pay without leaving your vehicle
- Better utilise car spaces, increase revenue from parking
- Reduced traffic congestion & CO2 emissions, time spent normally searching for a park

PAM

A software platform to provide smarter navigation for iconic precincts



- Almost 'contactless' digital journey for visitors
- Dynamic & contextual digital information to ensure safety and visitor satisfaction
- Efficient way to manage physical and digital signage across the precinct for operators
- Direct visitors to products and services they want while increasing revenue

nar-reach.com/apply-reach-australia

Applications will reopen October 2020

If you would like to be notified about the application process or news and events from the REACH Australia team - please sign up to be included in our mailing list.

First name

Last name



Email*

Submit



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nar-reach.com/2020-reach-australia-insight-panel Closes July 10th

Welcome to the REACH Australia Insight Panel!

Panelists, we need your feedback.

This is your opportunity to find out more about the 2020 REACH Australia class and guide these companies to better serve you and any challenges you are facing.



Click on a
company



View an
informational
video



Provide your
feedback



Redeem an
exclusive
special offer

Thank-you!

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