

PropTech – Chance oder Gefahr für das FM

IFMA-Spotlight 2019



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«Alles, was digitalisierbar ist, wird digitalisiert. Alles»

Peter Glaser, Ehrenmitglied Chaos Computer Club,
Autor Technology Review (2015)

Startups revolutionieren Immobilienmarkt

Die Disruption ist 2018 definitiv im Schweizer Immobilienmarkt angekommen. PropTech-Startups bringen mit neuen Angeboten Schwung in den Markt

Proptech – Revolution in der Immobilienbranche

Anzeige. Es erstaunt, dass Real Estate bisher kaum E von Startups fand. Doch das hat sich 2016 geändert. über disruptive Trends – und Chancen.

13. November 2018

Ringier Digital Ventures investiert in Schweizer PropTech-Startup Archilyse

einer Disruption?

12. Juli 2018

PropTech: Allthings sammelt 13,7 Millionen bei Investoren ein

Dem PropTech-Unternehmen Allthings sind im Rahmen seiner Series-A-Finanzierungsrunde 13,7 Millionen CHF an Investorengeldern zugeflossen.

beiträge, Immobilien 0 Kommentare

kurz vor

Global PropTech Survey

A blue donut chart that is almost completely filled, representing 97% of the total.

97%

think that digital and technological innovation will impact their business

A blue donut chart that is nearly full, representing 90% of the total.

90%

think that the corporate real estate industry views PropTech as an opportunity/enabler

A blue donut chart that is about three-quarters full, representing 73% of the total.

73%

see digital and technological innovation as an opportunity. A further 25% see it as both an opportunity and threat

A blue donut chart that is about two-thirds full, representing 66% of the total.

66%

do not have a clear enterprise-wide digital and technological innovation vision and strategy

Quelle: KMPG 2018

Property

Technology

PropTech

Smart Building / IoT

Big Data Analytics

Deep Learning / Artificial Intelligence

Machine Learning

Blockchain

Virtual- / Augmented Reality

Robotics / Drones

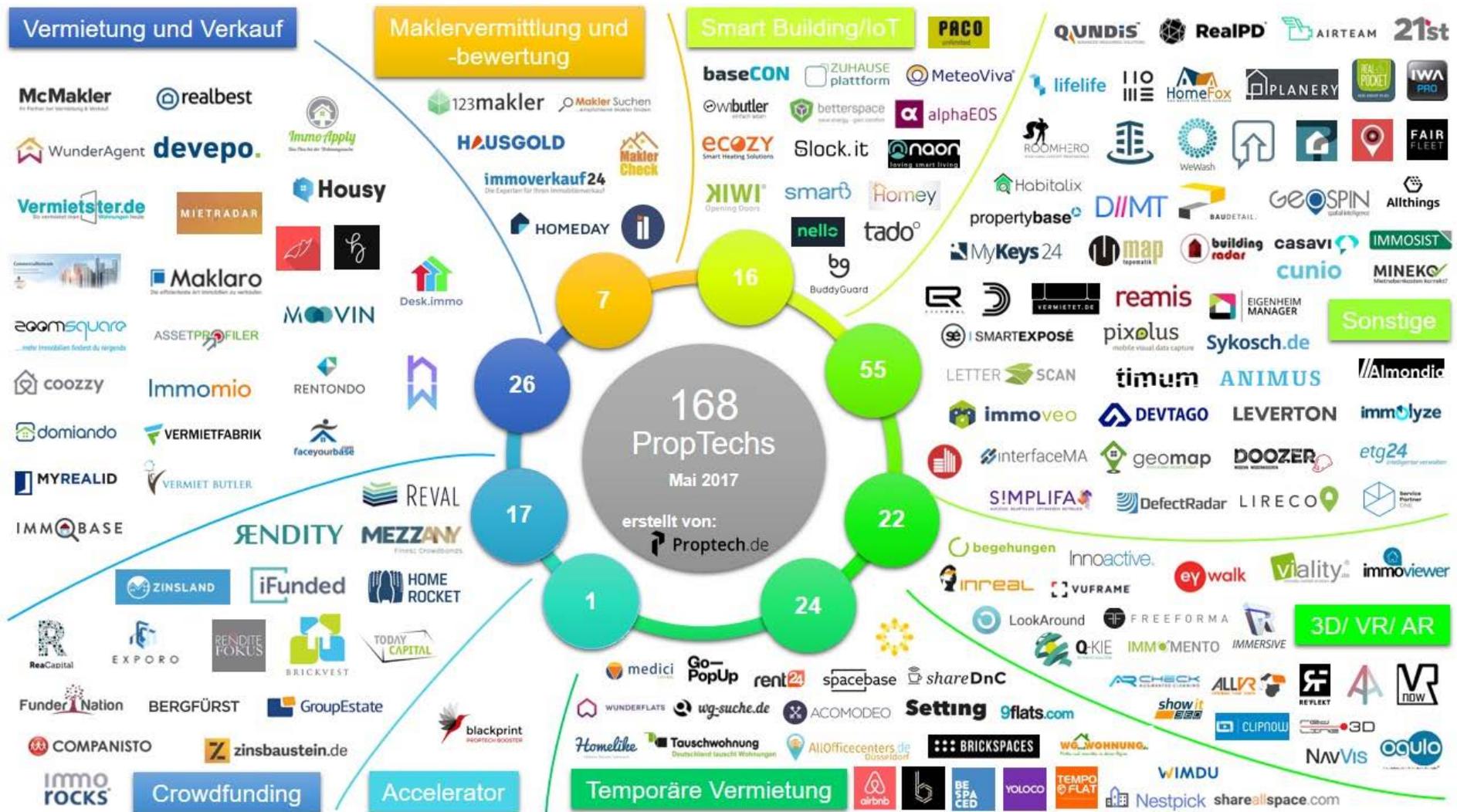
3D Printing



«PropTech is not about start-ups, it`s about the digital transformation of society focused on real estate and the environment.»

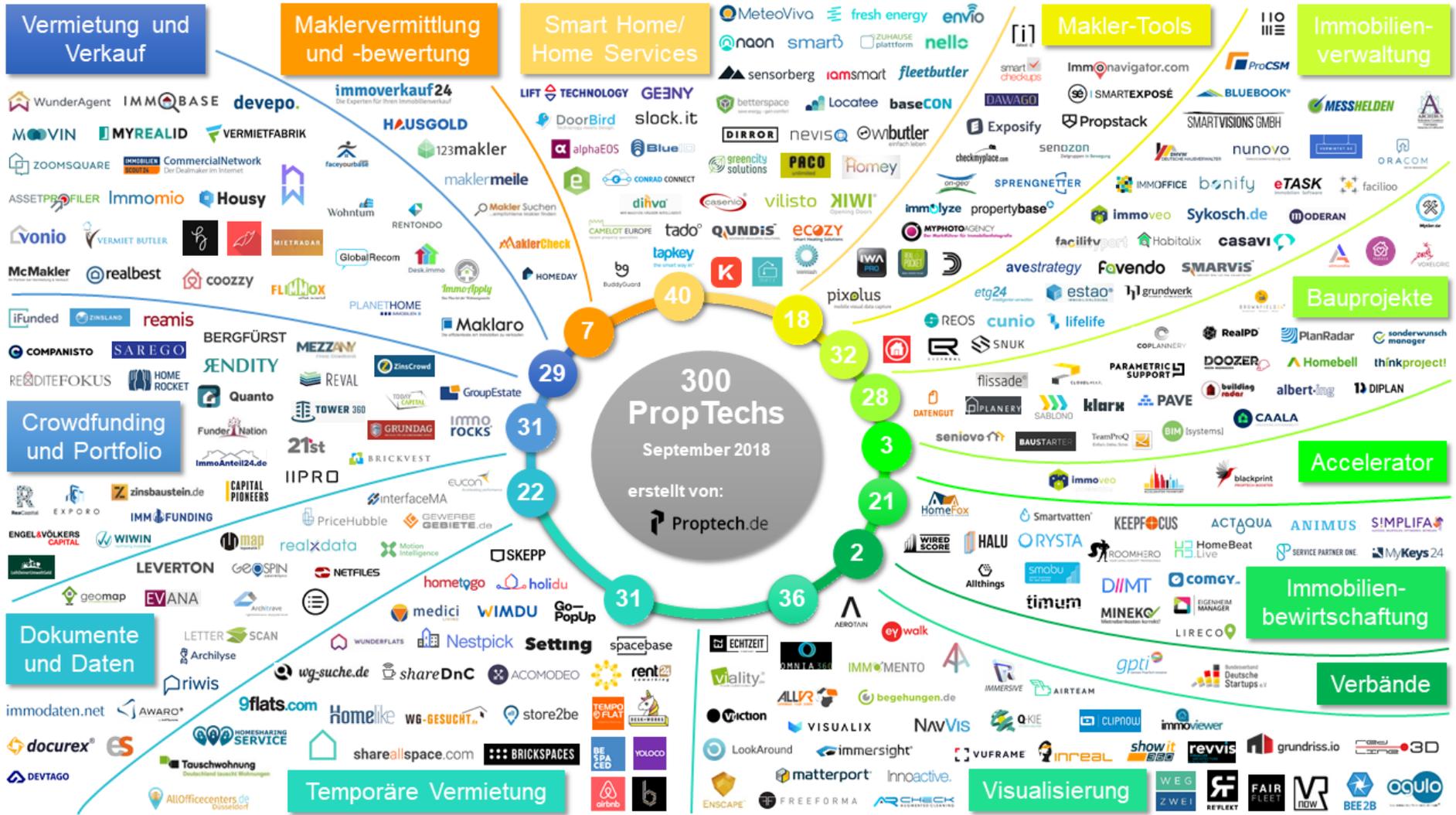
Menno Lammers, Founder of PropTechNL

PropTech Map Deutschland



Quelle: www.proptech.de

PropTech Map Deutschland



Quelle: www.proptech.de

PropTech Map Switzerland

Real Estate Portals

33



Rental

15



Sale

4



360° Tours, AR/VR Floor Plans

8



Software/CRM Database

16



Smart Building

4



Services

16



Financing/ Crowdfunding

9



Asset/Facility Management

5



PropTech Map Switzerland

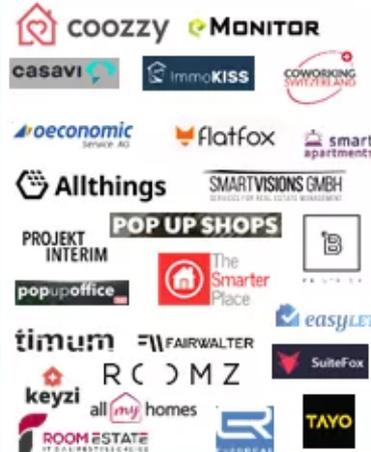
Real Estate Portals

40



Rental

25



Sale

15



360° Tours, AR/VR Floor Plans

19



Software/CRM/ Database/Dataroom

21



7



Services / Smart Building

43



15



Blockchain/ Cryptocurrency

1





The Proptech Unicorn Club

* Share of total proptech unicorn valuation (104,8 b\$)

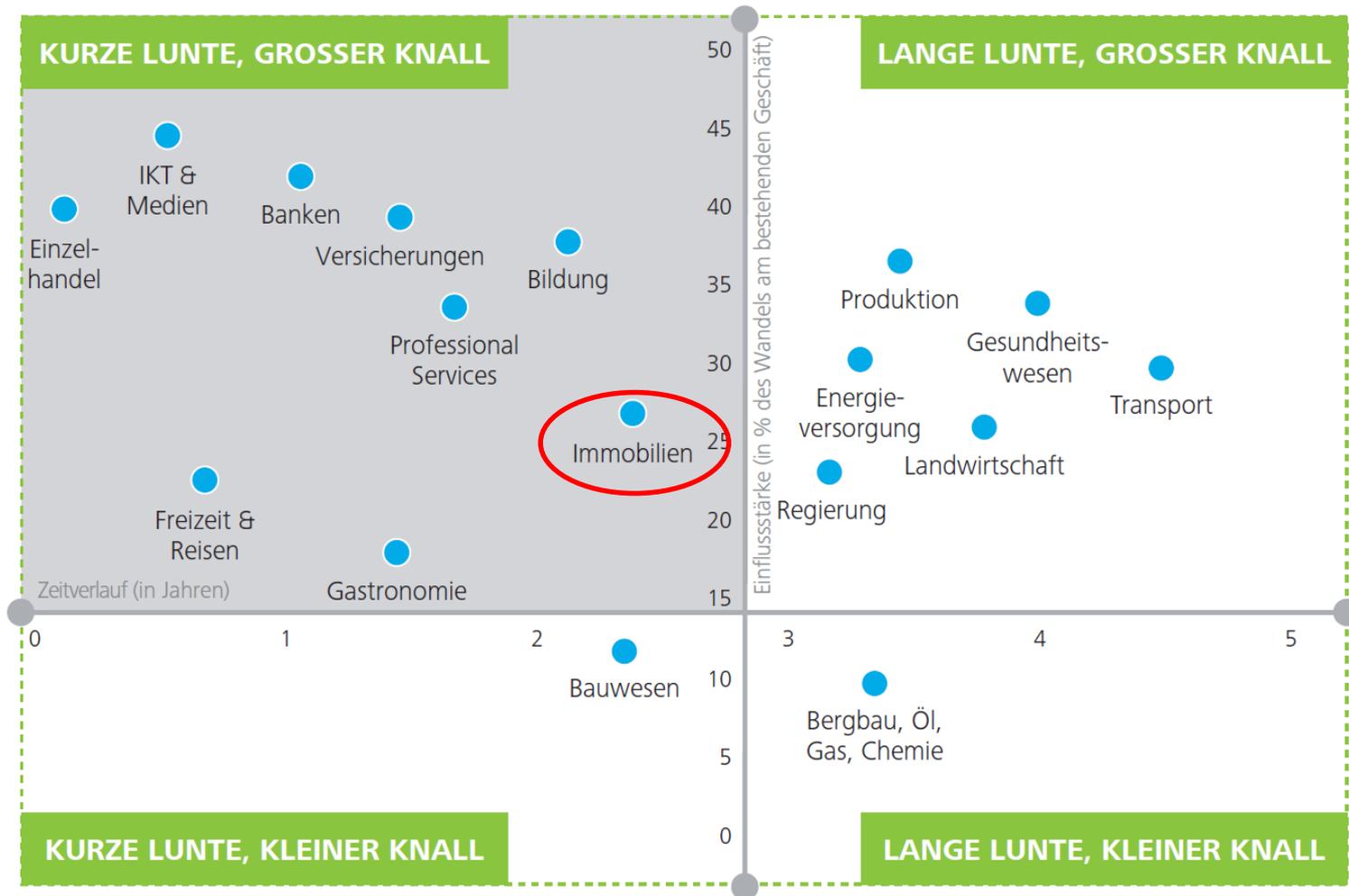


LEGEND
● Marketplace
● Other

COMPANY (US)	VALUE (b\$)	CATEGORY
WeWork	35,0	Facilities
Airbnb	29,3	eCommerce/Marketplace
American Home 4 Rent	5,8	eCommerce/Marketplace
Compass	2,2	Real Estate
Nextdoor	1,5	Social
C3 IoT	1,4	IoT
Ten-X	1,2	eCommerce/Marketplace
Katerra	1,0	Construction Tech
Procore Technologies	1,0	Construction Tech
OpenDoor Labs	1,0	Real Estate

COMPANY (CHINA)	VALUE (b\$)	CATEGORY
Homelink Lianjia	5,8	eCommerce/Marketplace
Jia.com	3,0	Home decoration and furni...
Ziroom	3,0	eCommerce/Marketplace
e-shang Redwood	2,8	Real Estate
Tubatu	2,0	eCommerce/Marketplace
Ucommune	1,7	Facilities
Tujia	1,5	eCommerce/Marketplace
URWork	1,3	Facilities
lwjw	1,3	eCommerce/Marketplace
Mofang Congyu	1,0	Facilities
Fangdd	1,0	eCommerce/Marketplace
XiaoZhu	1,0	eCommerce/Marketplace

Disruption Map nach Industrien



*Basierend auf Analysen von Heads! und Deloitte Digital

Quelle: Heads! Executive Consultancy und Deloitte Digital 2015

Neue Konkurrenten?



[Pro-Programm](#) [Produkte](#) [Blog](#)

[Anmelden](#)

[Registrieren](#)

Das vernetzte Zuhause vernetzt sich nicht von selbst.

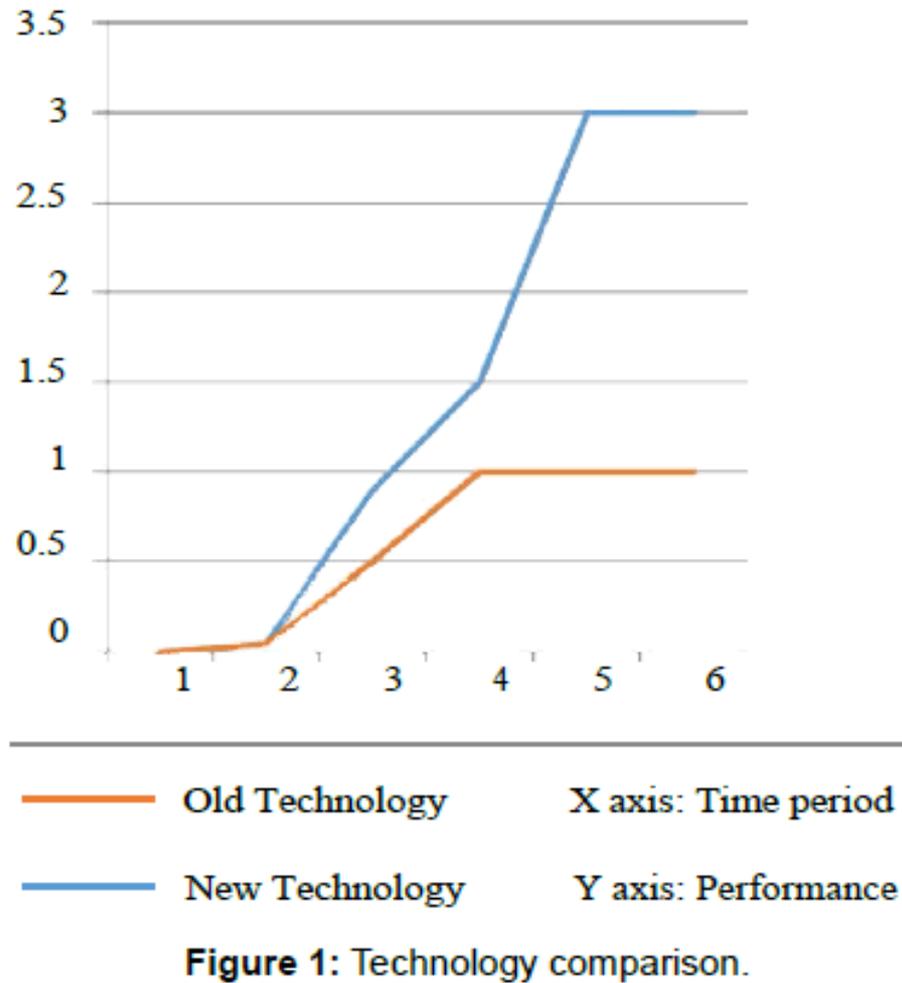
Werde Nest Pro, damit du Produkte wie die Nest Hello-Videotürklingel und den Nest Protect Rauch- und Kohlenmonoxidmelder verkaufen und installieren kannst. Du erhältst professionelle Preisvorschläge und Vorteile, exklusive Schulungen und Marketing-Tools, VIP-Support sowie Kundenempfehlungen, die deinem Unternehmen zu mehr Erfolg verhelfen.



Vorteile für Pros



«Sailing Ship Effect»

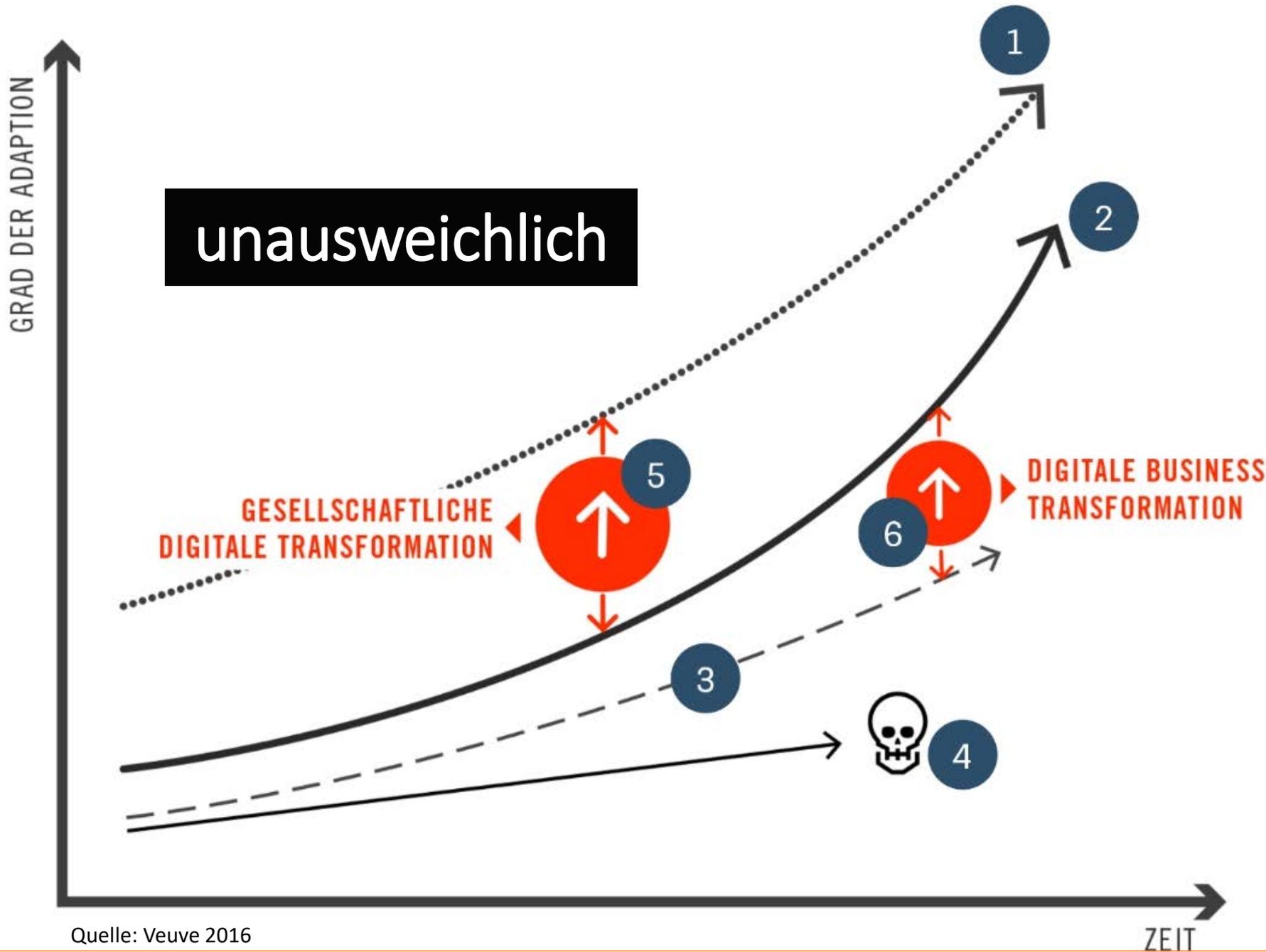


Quelle: Quelle: Nainwal 2018

A man in a dark suit stands with his back to the camera, looking down a long, glowing blue tunnel. The walls and floor of the tunnel are composed of rows of white binary code (0s and 1s) that recede into the distance, creating a strong sense of perspective. The lighting is bright and ethereal, emanating from the end of the tunnel.

Digitale Transformation

Quelle: Krcmar 2018

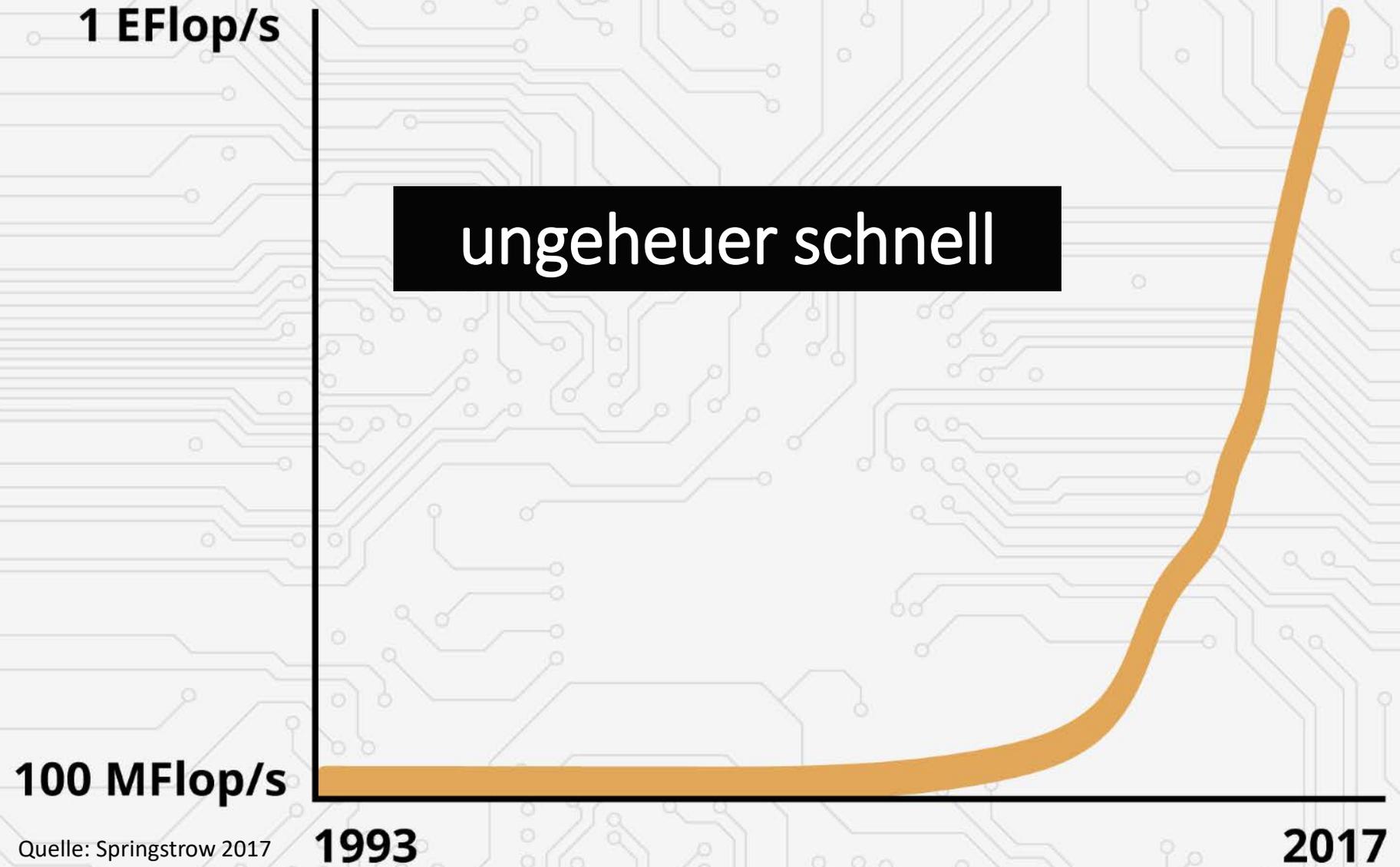


Quelle: Veuve 2016



unumkehrbar

Geschwindigkeit von Supercomputern



Quelle: Springstrow 2017

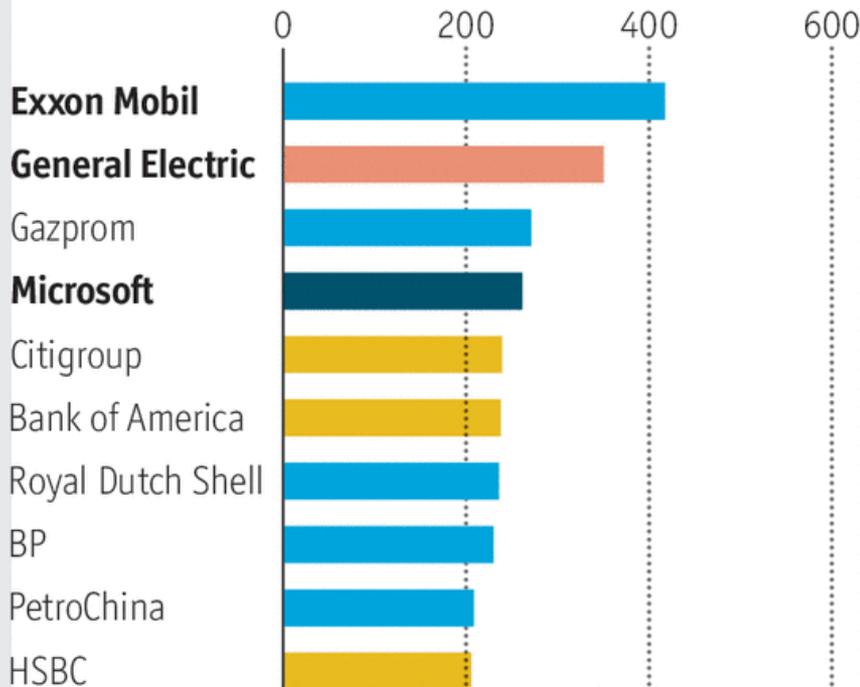
mit Unsicherheit behaftet

A virtually new world

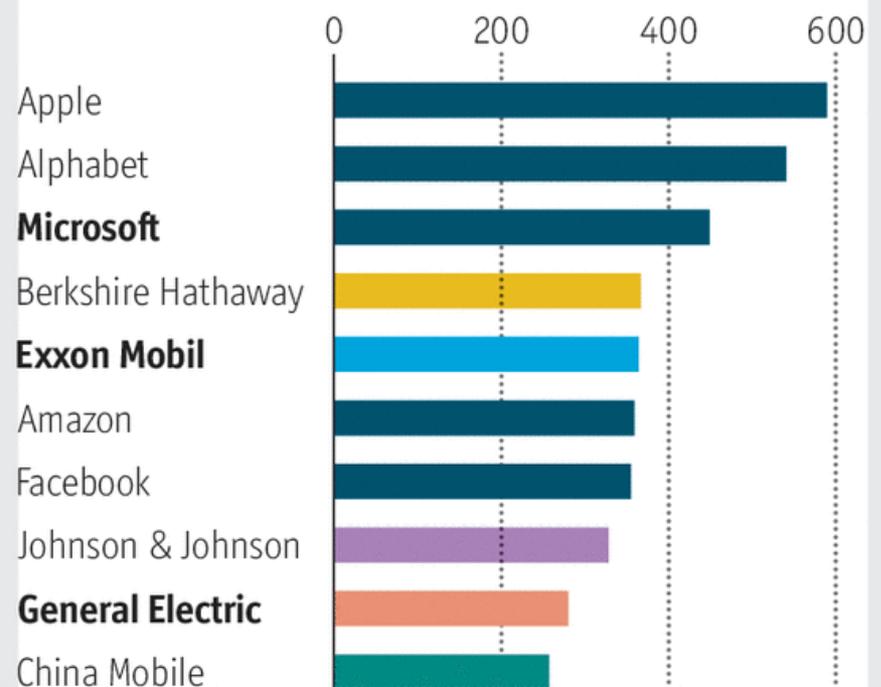
World, largest listed companies by market capitalisation, \$bn

Sector: ■ Energy ■ Financials ■ Health care ■ Industrials ■ IT ■ Telecoms

End 2006



2016*



Source: Bloomberg

*At August 24th 2016

Erfolgreiche Digitalisierung

- Digitalisierungsstrategie
- Commitment Geschäftsleitung
- Weniger Konzepte, mehr Probieren
- Erfolg bestätigt, Misserfolg bringt einem weiter (Ever tried. Ever failed. No matter. Try again. Fail again. Fail better.)
- Digitalisierung ist kein IT-Projekt
- Change Management (Veränderungen schüren auch Ängste)
- «Systemgrenze öffnen» (neue Business-Modelle in neuen Eco-Systemen)



«The customer`s perception is
your reality.»

Kate Zabriskie, President at Business Training Works, Inc.

Kooperation statt Disruption

- Zusammenarbeit – Neues ausprobieren (disruptive Innovationen kommen nahezu immer von extern)
- Nicht auf die Perfektion warten
- Verständnis für digitale Geschäftsmodelle schaffen
- Gegenseitiges lernen und entwickeln
- Technologie ist ein Mittel zum Zweck

WHAT MAKES THE COOPERATION INTERESTING

RE portfolios



78,6%

Knowledge



57,3%

Business development



57,3%

Access to regional market



43,7%

Funding



42,7%

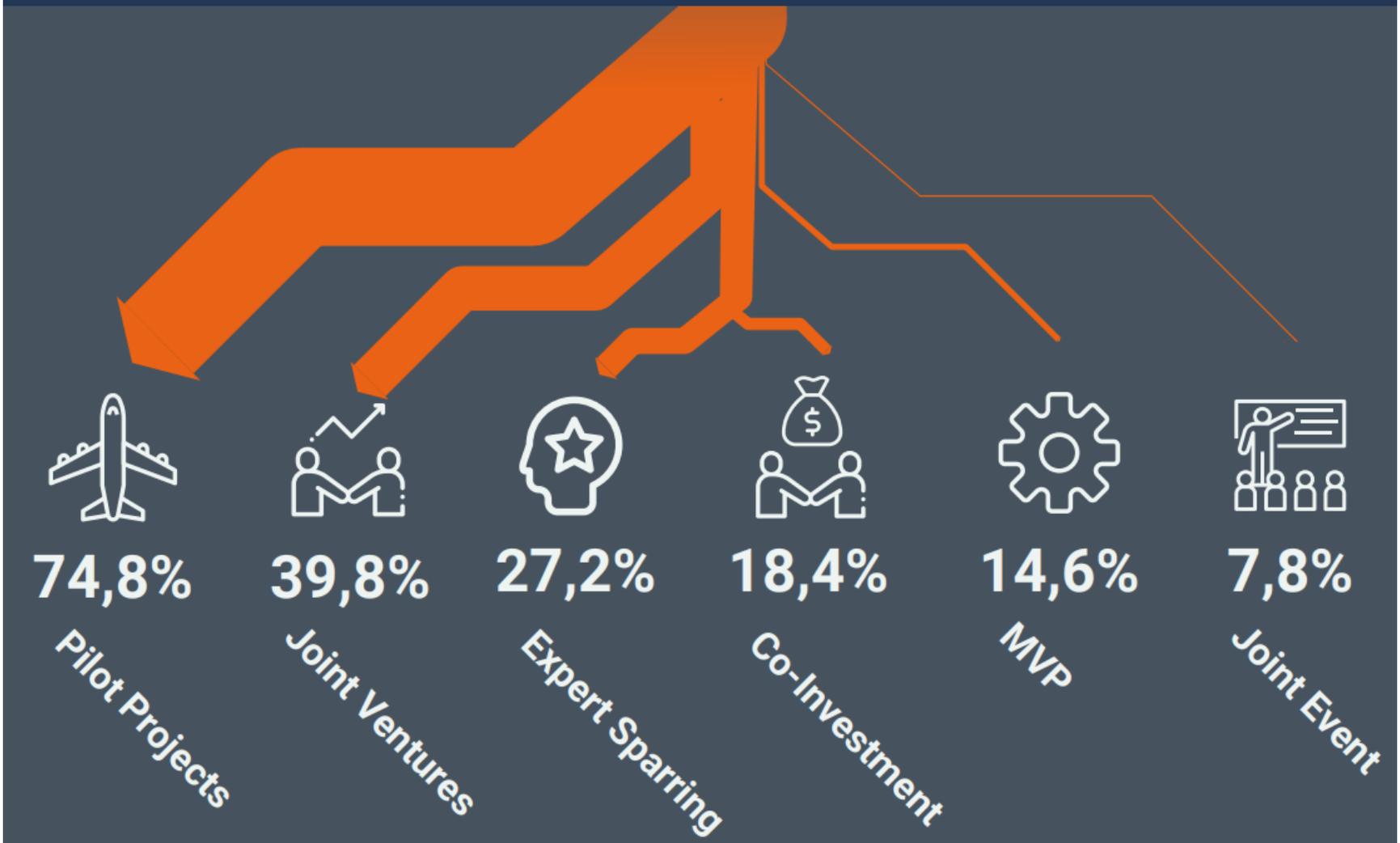
Big Data



31,1%

Quelle: GTEC Operation GmbH und Union Investment Real Estate GmbH 2018

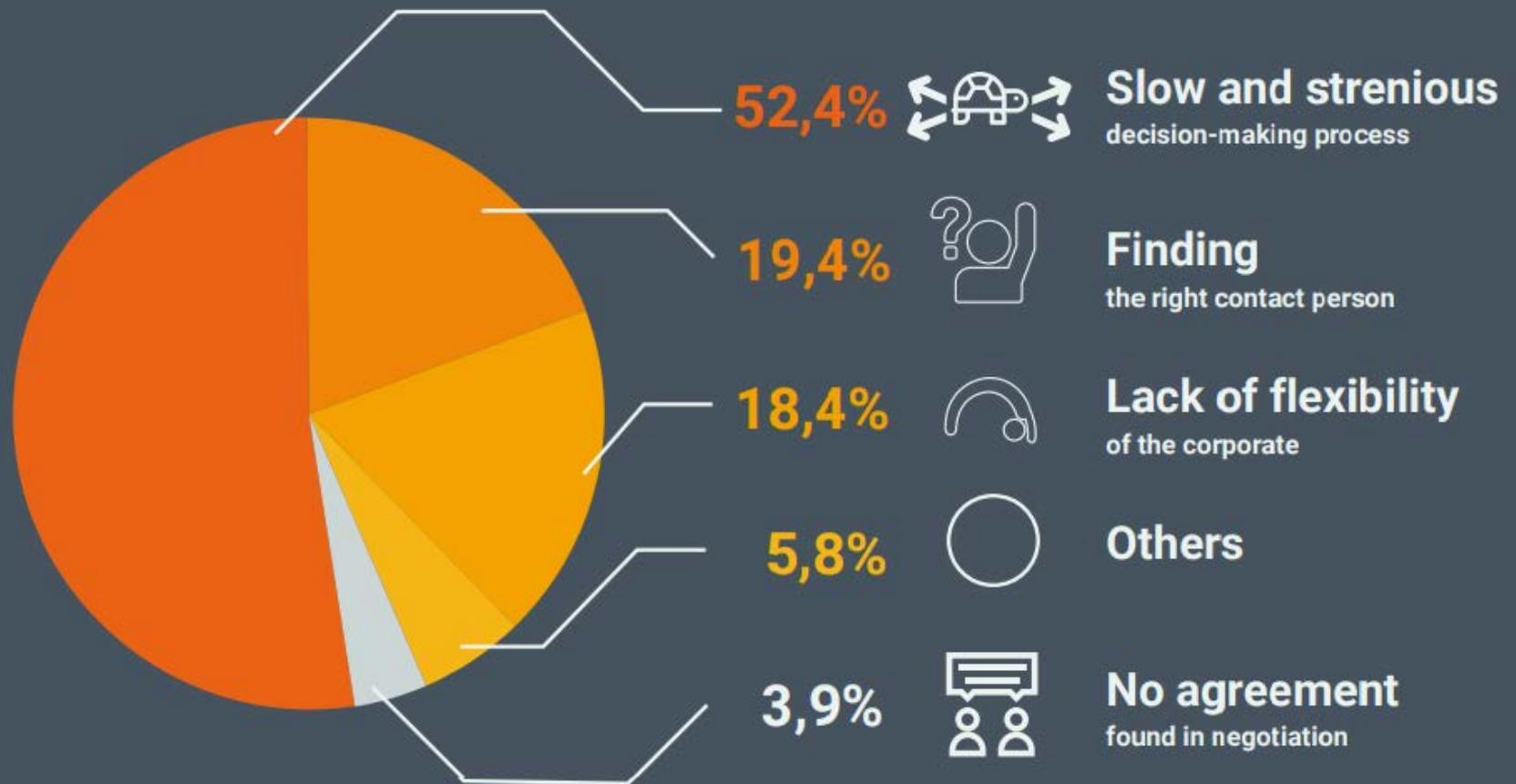
TYPE OF COOPERATION THAT ARE MOST IMPORTANT



Quelle: GTEC Operation GmbH und Union Investment Real Estate GmbH 2018

PROBLEMS

INITIATING COOPERATIONS WITH ESTABLISHED COMPANIES



Quelle: GTEC Operation GmbH und Union Investment Real Estate GmbH 2018





REAL ESTATE INNOVATION FORUM

TECH ALLEY

DIGITAL FINANCE

ARTIFICIAL INTELLIGENCE

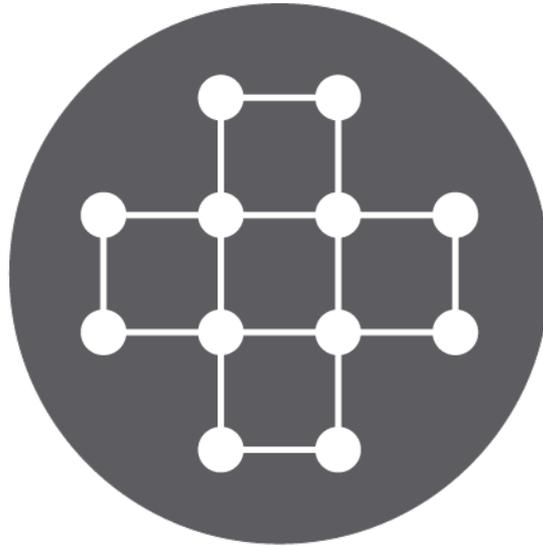
INTERNET OF THINGS

08.4

FAIR

expo real

08



SwissPropTech

Innovation in Real Estate

www.swissproptech.ch

SwissPropTech Day 22.05.19



<https://swissproptech.ch/review-swissproptechday2018>



«The best way to predict the future is
to create it»

Peter Drucker