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**TOP TRENDS IN
REAL ESTATE TECH**

00

33%

of homebuyers wish their agent had leveraged technology to better streamline the process

78%

of renters would prefer to pay rent online, but only 30% of the industry accepts online payments

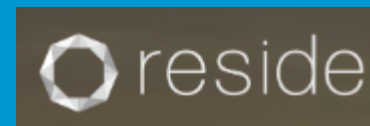
51%

of buyers have found their home online (30% of buyers have found their home via a real estate agent)

The Full-Stack Brokerage

01

“Digitally native” real estate brokerages are emerging with vertically integrated models designed to serve all of their customers’ transaction-related needs. We are seeing the bundling of real estate services around the broker (offering title, escrow, mortgage, and other services) with the rise of Homie, Reside, and Door, among others.



02

Workflow Automation

Workflow automation software is making all parties (brokers, agents, and lenders) more efficient by streamlining processes and eliminating repetitive, manual tasks. Various tools have surfaced across the real estate landscape, notably in title insurance, real estate appraisal, and mortgage origination.

Title Insurance Tools



Valuation / Appraisal Tools



Mortgage Application Tools



03

The Flexible Space

Work spaces and living spaces are increasingly flexible and on-demand. Gone are the days of fixed, inflexible, multi-year leases!

Residential Examples

bungalow whyhotel

LYRIC SONDER

common ZEUS

Commercial Examples

wework

KNOTEL INDUSTRIOUS

BULLETIN NeueHouse

Alternative Financing Models for Residential Real Estate

New financing models make home buying and selling more efficient, affordable, and convenient.

04

Real Estate Agent
Complements

Ribbon

Full-service Real
Estate Brokerages

FLYHOMES

knock

Direct Buyers
(‘iBuyers’)

Opendoor

Offerpad

Zillow

Perch

Democratization of Real Estate Investing

05

Traditionally, real estate development has been funded by large institutional capital providers. Emerging investment marketplaces broaden access to real estate as an asset class, often starting with accredited investors as a new capital source for real estate projects.



Digitization of the Building

06

Buildings are coming online. Several startups are collecting, consolidating, and interpreting building data. Building data is valuable for myriad use cases, including investment decisions, environmental initiatives, and day-to-day management.



Affordable Housing Solutions

07

Startups with a variety of business models are tackling the housing affordability crisis. Solutions include co-living arrangements, thoughtful space configuration in new developments, and alternative financing mechanisms for home buying.



Commercial Real Estate Marketplaces

08

Through the MLS, residential real estate has long been a transparent market. More recently, commercial real estate has become discoverable online through marketplaces that aim to reduce friction in the office rental process.



Digital Tools for Non-Institutional Landlords

09

Until recently, “mom and pop” landlords had few tools at their disposal to manage their tenants. Several startups are looking to change that, empowering landlords with software and digital tools that make it easier to collect rent, communicate with tenants, find new tenants, and more.

The logo for rentigo features the word "rentigo" in a blue, lowercase sans-serif font. A red outline of a house roof is positioned above the letter "i".The logo for MYND PROPERTY MANAGEMENT consists of a green icon of two houses above the letters "MYND" in a bold, black, uppercase sans-serif font. Below "MYND" are the words "PROPERTY MANAGEMENT" in a smaller, black, uppercase sans-serif font.The logo for Cozy features an orange square icon containing a white flame and two white logs. To the right of the icon, the word "Cozy" is written in a bold, orange, lowercase sans-serif font.The logo for avail features a dark blue square icon with a white stylized "A" symbol. To the right of the icon, the word "avail" is written in a dark blue, lowercase sans-serif font.

Loan Securitization on the Blockchain

10

A handful of noteworthy new entrants aspire to securitize real estate loans using blockchain technology. These companies are helping to power the next big wave in capital markets: tokenized securities.



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THANK YOU!