

# Figure 5: The investor pulse: Proptechs

(5a) Investors expect moderate to significant influence of proptechs on CRE

Percentage of respondents

65%

Moderate

21%

Significant

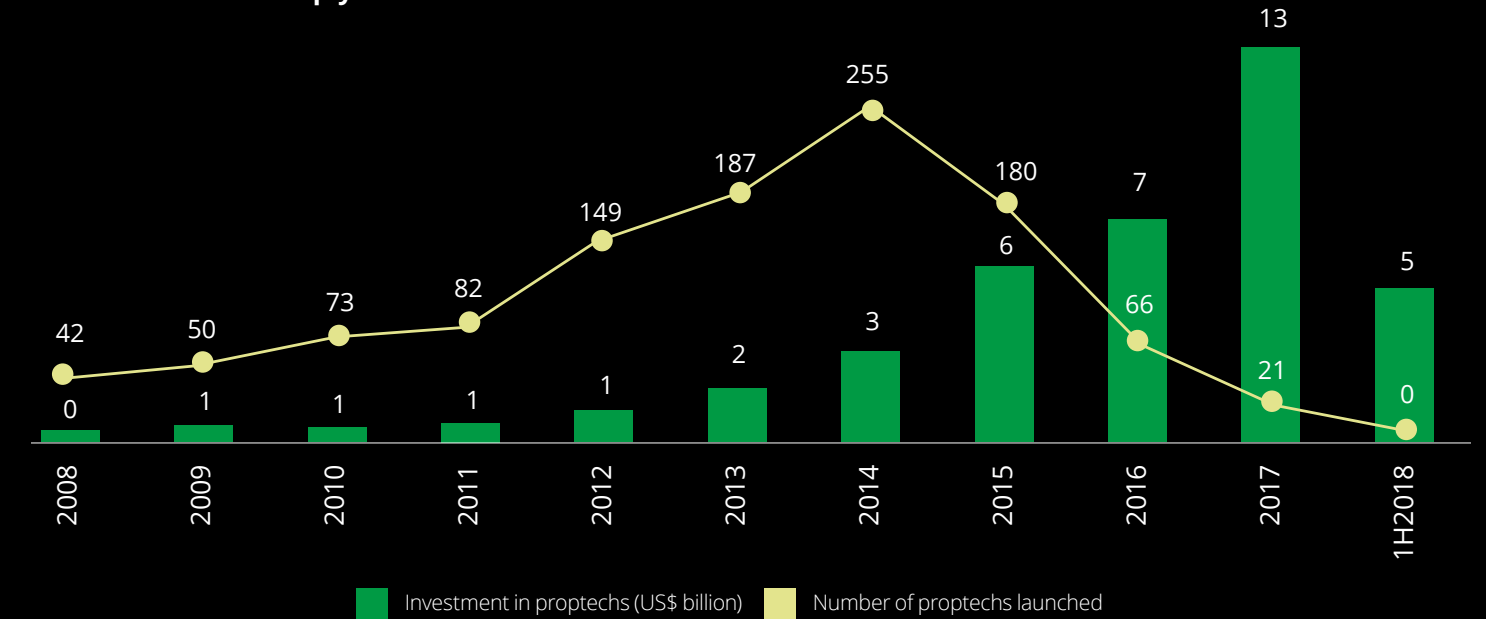
13%

No influence

Top and bottom two respondent types for moderate to significant

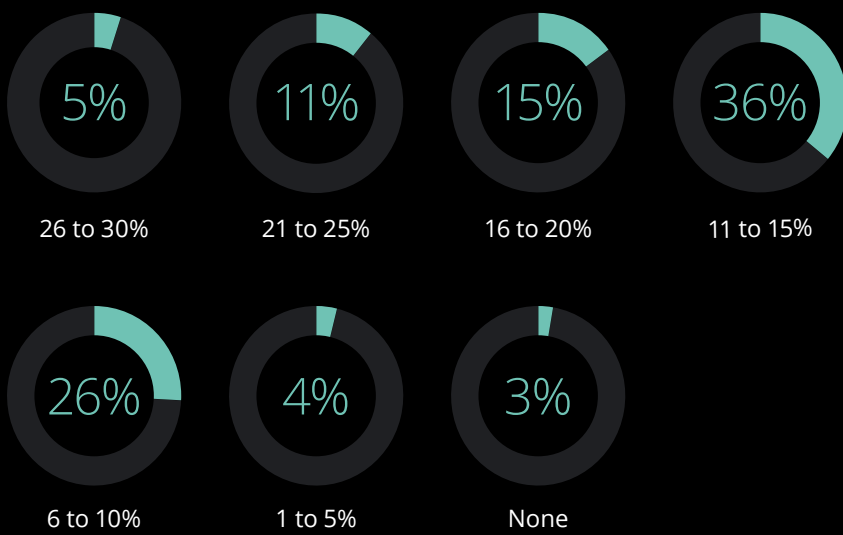
Property focus	% respondents
Hospitality, multifamily	95%
Mixed-use	90%
Retail	81%
Industrial	77%
Geographic focus	% respondents
China, Hong Kong, Japan	100%
Singapore	97%
Brazil	78%
Germany	75%
Assets under management	% respondents
US \$5.1 billion – US \$10 billion	94%
Above US \$30 billion	92%
Less than US \$500 million	78%
US \$500 million – US \$1 billion	75%
Investor category	% respondents
Hedge funds	94%
Pension funds	93%
Insurance companies (investment divisions)	77%
Banking or finance companies (asset management divisions)	76%

(5b) Globally, proptech fundraising continues to rise even as new launches decline sharply



(5c) On an average, investors plan to commit 14 percent of CRE capital to proptechs

Percentage of respondents

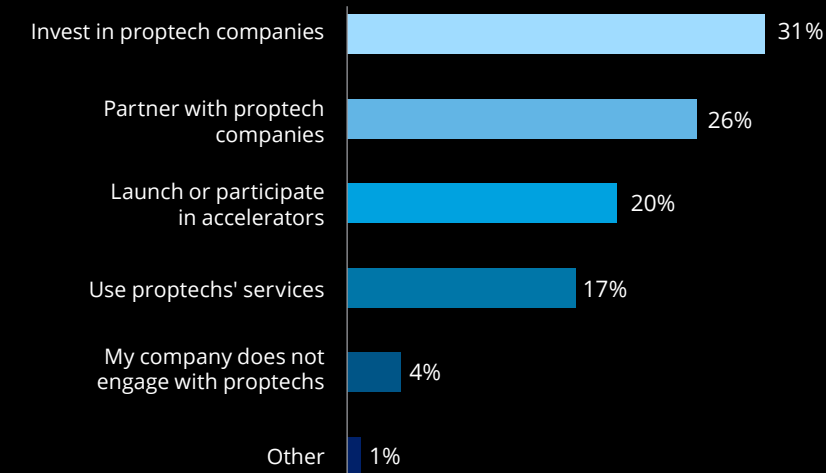


Top and bottom respondent types by % commitment

Property focus	% commitment
Nontraditional, industrial	16%
Hospitality, multifamily	13%
Geographic focus	% commitment
Canada	17%
Hong Kong, Japan	10%
Assets under management	% commitment
Less than US \$500 million	16%
Above US \$30 billion	12%
Investor category	% commitment
REITS or real estate operating companies	17%
Hedge funds	12%

(5d) Invest and partner are most preferred modes of engaging with proptechs

Percentage of respondents



Category	Respondent types with top preference apart from invest or partner	Mode
Investor size	AUM above US \$30 billion	Launch/participate in accelerators
Investor category	Sovereign wealth funds	Launch/participate in accelerators

(5e) Collaboration with proptechs is a key influencer of CRE investment decisions for nearly a third of investors

Top and bottom two respondent types with proptech collaboration as key influencer in CRE investment decisions

Property focus	% respondents
Mixed-use	43%
Nontraditional	40%
Hospitality	25%
Retail	21%
Geographic focus	% respondents
Japan	60%
Brazil	48%
Singapore	23%
Germany, Australia	13%
Assets under management	% respondents
US \$1.1 billion – US \$5 billion	37%
US \$10.1 billion – US \$20 billion	33%
Above US \$30 billion	24%
US \$20.1 billion – US \$30 billion	20%
Investor category	% respondents
Banking or finance companies (asset management divisions)	48%
REITS or real estate operating companies	43%
Hedge funds	22%

**Note:** The categories highlighted in the graphic tables suggest the following about the survey respondents:  
**Property focus:** Property specialization of investors; **Geographic focus:** Home country of the investor; **Assets under management:** Investor size  
 Source: Venture Scanner database and Deloitte Center for Financial Services analysis.