2016 Real Estate Annual Report

Description: Real estate classifieds have long become big business, overshadowing other verticals in many markets across the globe. The insatiable appetite for property in urban hubs and emerging markets — driven by new developments, improved access to mortgages and rising average incomes — is driving more users to online platforms in search of a profitable housing transaction.

In the rapidly shifting property landscape, we are witnessing three major trends involving both horizontal players pushing into real estate and vertical players carving out their market share.

The first is expansion, expansion and further expansion. In a race for global and regional growth, multinational classified specialists such as Australia's REA Group, UAE-based Propertyfinder Group and One Africa Media are investing into new territories through acquisitions or greenfield projects. The opening up of new markets, such as Cuba and Iran, is fuelling this further yet.

In turn, existing smaller players are trying to survive this capital-intensive gold rush, such as U.S. rentals specialist Zumper protecting its interests against a possible acquisition attempt by market major Zillow.

Some markets of course provide less room for growth than others. Virtual monopolies held by Rightmove in the U.K. and Sahibinden in Turkey, for example, ensure rivals see a small share of the property pie. This situation is driving another global trend — agent revolts.

As dominant players continue to hike up their listing fees, real estate agents are forming protest movements and even their own verticals in a bid to combat what they see as aggressive market control. This is certainly a challenging prospect in a business where existing consumer preference dictates success.

The final trend, and perhaps the most influential, is the impact of new technology on a sector that has already been transformed by the internet. As proptech tools emerge — such as 3D floor plans, VR showrooms, drone flyovers and geolocation analysis — question marks remain on whether the major platforms can evolve quickly enough or is it more likely that major tech companies will leapfrog existing players and rollout classifieds with the next generation of marketing tools.

You will find further insights inside, including coverage of the top three real estate players in more than 30 countries, analysis of around 50 exciting start-ups, and much more. We hope you find it informative and enjoyable.

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