UniScore Report

Q1 2022

TENANT EXPERIENCE

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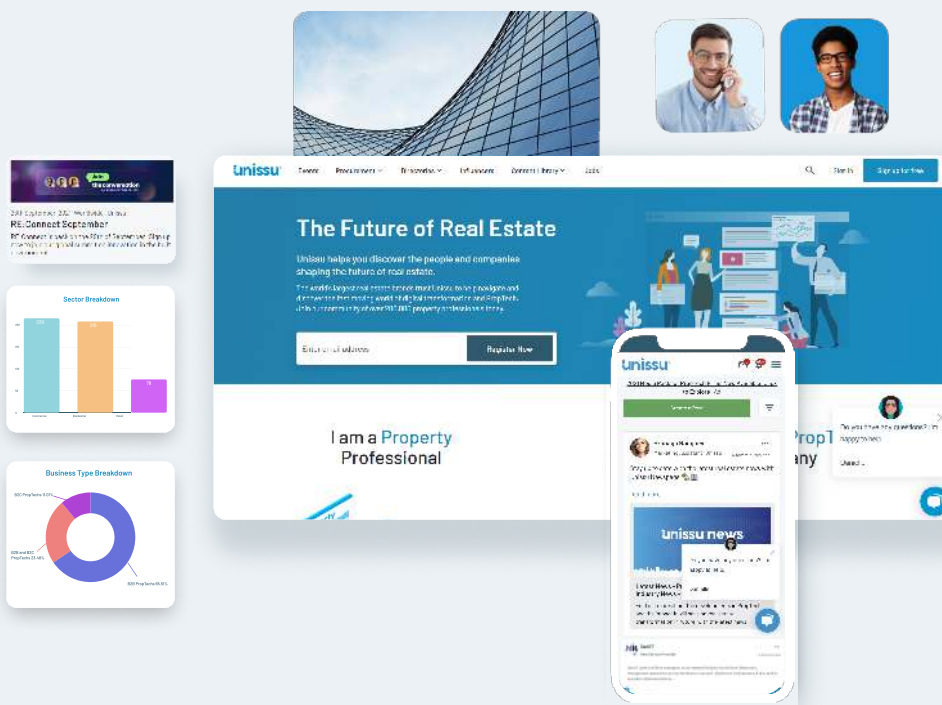
Keep an eye on the companies and people making a splash in Tenant Experience on
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And when you are ready to buy a solution, our market-leading procurement service will reach out to all of these companies - and hundreds of other tenant experience solution providers.

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Eddie Holmes
CEO, Unissu

Our Uniscore Reports apply Unissu's unique data about PropTech vendors and how our users interact with them to help you identify and select the right solutions for your business.

This edition is the first revised publication of the first UniScore report we ever produced, covering Tenant Experience.To help you understand these companies and the wider market for Tenant Experience solutions, we've added a range of new data points and insights.

You can now discover each company's Operating Markets, UniScore Position and meet the people driving Tenant Experience understanding in Real Estate.

Haltian Surge

After ranking #4 In our first UniScore Report on Tenant Experience, Haltian has continued their march, with a concerted effort to educate and help potential customers on the Unissu platform.

Their appearance in the first report also drove increased interest in their products, all of which has contributed to their climb to a dizzying 1st position.

New Entrants Mark Continued Evolution in Sector

Since the last edition of this report, the sector saw two huge acquisitions - the purchase of OfficeApp by HQ0 and the purchase of Lane by VTS.

This consolidation means space for new entries and those spots are occupied by HyperIn, VTS Rise, Bunk and Envoy.

With over 300 vendors identifying as providers of Tenant Experience solutions, the challenge of navigating the market and finding the top players is a challenging one.

As your trusted PropTech Procurement partner, Unissu will contact the companies in this report and all of the others on your behalf, when you are ready to find the perfect solution for your company.

Eddie Holmes
CEO
Unissu
eddie@unissu.com

Funding

The top 20 firms in our Tenant Experience ranking have raised almost $476m between them.

$476m Raised

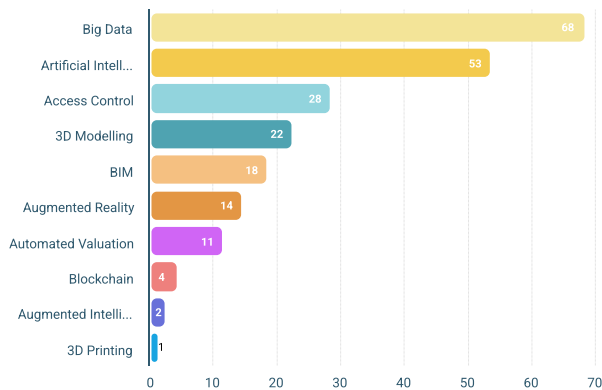This doesn't include the funds raised by Lane and OfficeApp pre-acquisition.

Methodology

We apply our unique algorithm to the proprietary insights derived from how our Unissu users engage with PropTech companies, people and topics, to produce weight adjusted rankings of matching vendors.
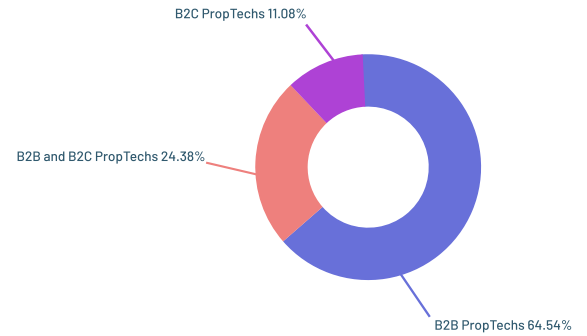
In addition to analysing how the market is interacting with itself, we also layer a range of data points about vendors including their age, funding history, team size and many others to generate a holistic understanding of each firm.

These initial rankings are then parsed by industry experts to ensure that every company we cover provides solutions suitable for the vertical covered in the report.
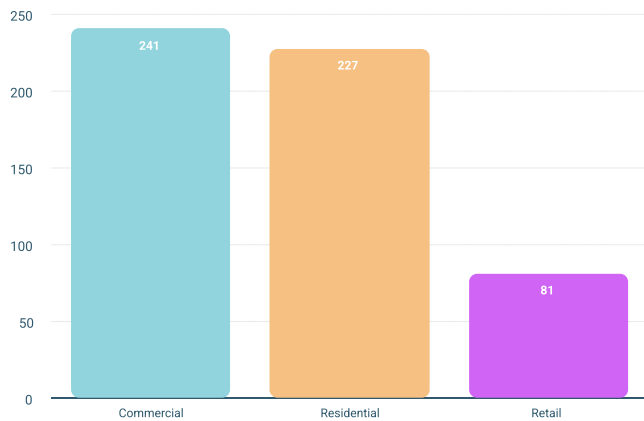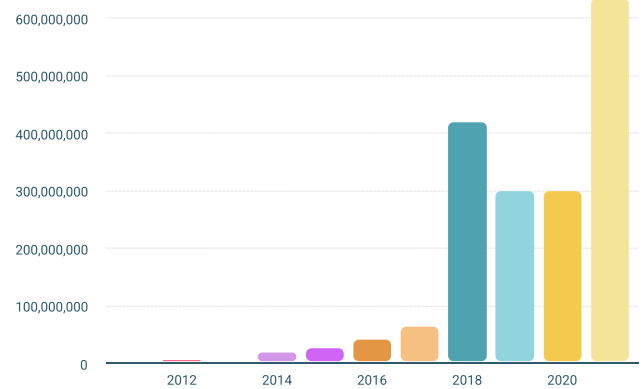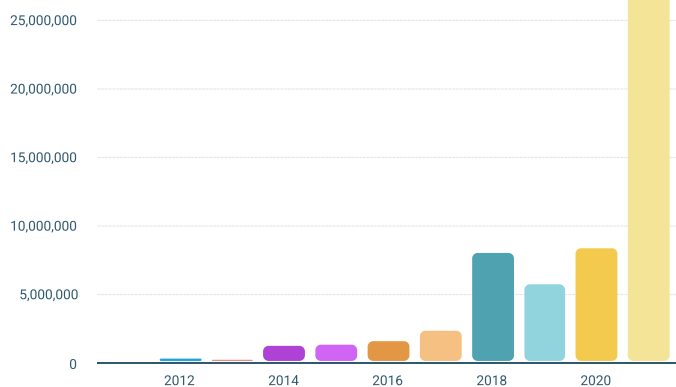
Technology Breakdown

Technology	Value
Big Data	68
Artificial Intell...	53
Access Control	28
3D Modelling	22
BIM	18
Augmented Reality	14
Automated Valuation	11
Blockchain	4
Augmented Intelli...	2
3D Printing	1

Business Type Breakdown

B2C PropTechs 11.08%

B2B and B2C PropTechs 24.38%

B2B PropTechs 64.54%

Sector Breakdown

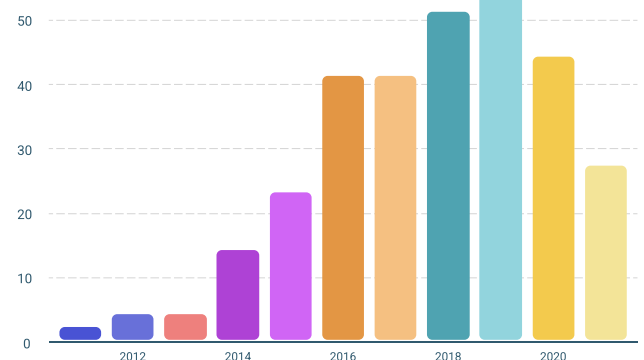| Sector	Value
Commercial	241
Residential	227
Retail	81

Total Funding ($)

Average Funding ($)

Number Of Funding Events

Understand the Tenant Experience Market in Detail with Data Explorer

£149 + VAT per annum
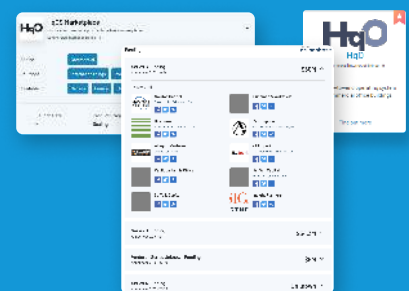
#	Company	Country	Year Founded	Amount Raised	Position Change
1	Haltian	Finland	2012	$15.2M	▲ +4
2	HqO	United States	2017	$106.9M	▼ -1
3	Allthings	Switzerland	2013	$18.71M	▼ -1
4	SmartRent	United States	2017	$101.5M	▲ +2
5	EQUIEM	Australia	2010	$8.4M	▼ -2
6	mallcomm	United Kingdom	2000	–	▲ +3
7	SPACEFLOW	United Kingdom	2016	$2.43M	▲ +3
8	mri REAL ESTATE SOFTWARE	United States	1971	$1M	▶ 0
9	proxyclick	Belgium	2009	$18.5M	▼ -2
10	spaceOS	Poland	2015	$9.1M	▲ +1
11	ThoughtWire	Canada	2009	$24.1M	▲ +1
12	hyper[in]	Finland	2008	–	New Entry
13	brivo.	United States	1999	–	▶ 0
14	VELIS REAL ESTATE TECH	Poland	2009	–	▲ +2
15	VTS | Rise	United States	2015	–	New Entry
16	LOCALE°	United Kingdom	2005	–	▼ -1
17	BUNK	United Kingdom	2016	–	New Entry
18	Envoy	United States	2013	$170.2M	New Entry
19	Dwellant Building Intelligence	United Kingdom	2008	–	▲ +1
20	SPINALCOM	France	2009	–	▼ -1

WINNER

Established
Tenant Experience
Haltian
Q1 2022

Haltian

Haltian is a global IoT solution provider and product development company from Finland.   Haltian IoT solutions include the Empathic Building digital twin solution for smart buildings & digital workplaces, and Thingsee IoT device solution, the proven IoT technology ecosystem that enables faster IoT launches for mass-scale deployments.

Also, Haltian provides world-class new product development services to help startups get from an idea to a ready product, and in addition, Haltian can customize their Thingsee IoT device ecosystem based on customer-specific needs and requirements so that companies can deploy fast, affordable, and flexible IoT solutions.

Number Of Products: 4
Company Size: 51-200
Last Funding: Venture
Operating Markets: Finland , India , Switzerland , Germany +4 More

Company Profile →

Haltian Empathic Building is a digital twin solution that focuses on improving employee well-being and happiness. It is a complete and end-to-end smart office solution that combines technology, culture, and physical space into one. It makes the everyday tasks of the end-user easier and simpler, helping them to find the right workspace, colleagues, share information, and voice their feelings.

Empathic Building also provides valuable data on space utilization, air quality, employee satisfaction, and more from Haltian's own Thingsee IoT device solution but also from other 3rd party hardware and software providers.

The Team

Janne Kilpeläinen
Director
Influencer Ranking 718

Paulo Lopes
Senior Marketing Manager
Influencer Ranking 63

Anniina Kaisanlahti
Marketing Manager
Influencer Ranking 2243

2ND PLACE

HqO

Operating Markets:
USA , Canada , France & United Kingdom

Established
Tenant Experience
HQO
Q1 2022

The world's leading commercial real estate firms count on HqO to help them deliver a state-of-the-art tenant experience within their properties. Active in over 150 million square feet in 8 countries, HqO is known for its tenant experience platform comprised of an award-winning tenant app, analytics suite, and partner marketplace. Our solutions put experiences and a sense of community directly into the tenants' hands while helping property owners uncover insights and take intelligent action to differentiate their assets.

Number Of Products: 3
Company Size: 51-200
Last Funding: Series C

Company Profile →

Chase Garbarino
Chief Executive Officer
Influencer Ranking 3036

Courtney Hayes
Marketing Manager

Startups To Watch

Despite the relatively well-established nature of the Tenant Experience sector, it's important to keep an eye on those more recently established firms which are making a splash on Unissu.

Whether it's because they have found some form of innovation or user experience that is helping them gain traction, or perhaps they are selling in emerging markets, it's key to ensure you're staying abreast of these new entrants.

#	Company	Country	Year Founded	Amount Raised
1	Savvy	United Kingdom	2018	–
2	Roost	Australia	2019	–
3	E-ESTATES	Nigeria	2018	$55k
4	GREEN APPS	Canada	2018	–
5	PROPTEX	Spain	2020	–
6	tenex	United Arab Emirates	2018	–
7	oomer	–	2019	–
8	Pigello	Sweden	2019	–
9	Wicomico	Denmark	2020	–
10	propra	Canada	2021	–

UniScore Comparison

One of the data points which goes into our overall UniScore rankings are votes gathered from each company's profile page on Unissu.

These votes are gathered from our community and measure the sentiment and opinion about each firm, particularly how well adopted they are amongst customers and how innovative they are considered to be. Only companies with a certain number of votes are shown below.
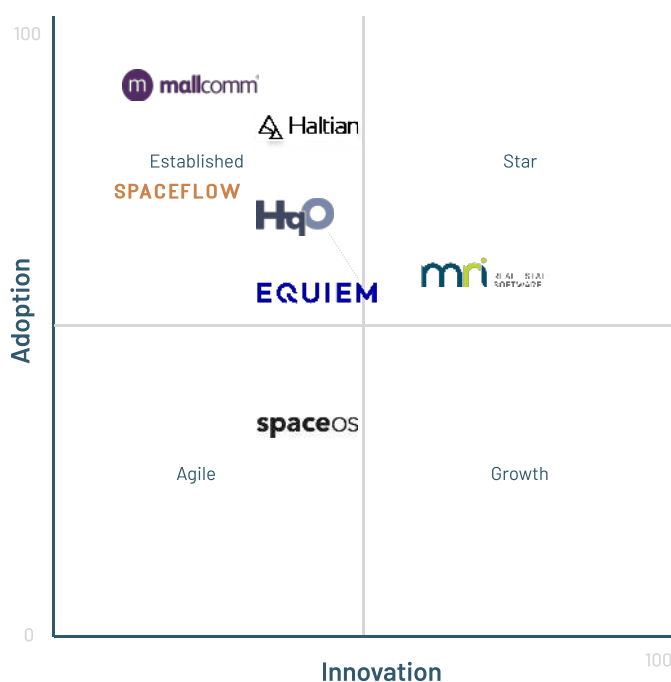
3RD PLACE
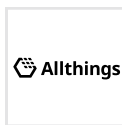
Allthings

Operating Market:
Switzerland

Allthings' tenant management platform captures 100% of interactions between tenants, property owners and service providers. Customers do this in order to increase tenant loyalty, maximize efficiency and execute their digital brand strategy. In addition, Allthings allows customers to build up and control an ecosystem of partners that generate value beyond rent for tenants and owners.

Number Of Products:	1
Company Size:	51-200
Last Funding:	Series A

Company Profile →

Marc Beermann
Co-Founder

Influencer Ranking 718

4TH PLACE

SmartRent

Operating Market:
USA

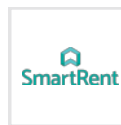SmartRent is bringing smart home automation to property managers and renters. Whether you develop, own or manage multifamily communities, our platform enables you to control all of the smart devices in your properties.   Property managers can monitor all vacant unit activity and remotely control door locks, thermostats, cameras, lights and hundreds of other smart devices.

Number Of Products:	2
Company Size:	51-200
Last Funding:	Post-IPO Equity

Company Profile →

Muir Baxter
Sales Director

Influencer Ranking 3038

5TH PLACE

EQUIEM

Operating Markets:
Australia , Philippines , Ireland , USA +3 More

unissu
Established
Tenant Experience
Equiem

Equiem is the intelligent platform that brings your building to life.   We believe that everyone wants to be part of a community. With our help property owners and managers around the world are transforming workspaces into places people truly want to be part of.   As the leading customer experience platform for real estate, we exist to help landlords unlock new value in their assets.

Number Of Products:	2
Company Size:	201-500
Last Funding:	Corporate Round

Company Profile →

Gab McMillan
CEO

Influencer Ranking 475

6TH PLACE

mallcomm

Operating Markets:
UK , Canada , USA , Spain +6 More

unissu
Established
Tenant Experience
Mallcomm

Mallcomm is a multi-award-winning 360-degree integrator for managing and engaging real estate communities: tenants, operations, suppliers, shoppers and other stakeholders. Mallcomm transforms the users' experience of the space, creates loyalty by connecting people to places whilst delivering efficient operations, significant budget savings and valuable insights.

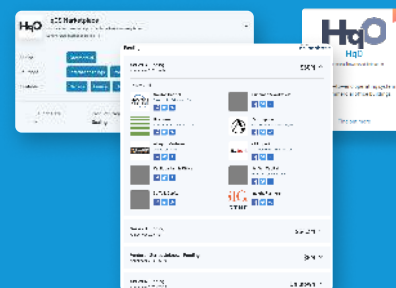|	
Number Of Products:	1
Company Size:	11-50
Last Funding:	Series A

Company Profile →

Michelle Buxton
Founder

Influencer Ranking 428

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✉ info@unissu.com

7TH PLACE

SPACEFLOW

Operating Markets:
UK , Australia, Denmark , Czech Republic +13 More

Established Tenant Experience Spaceflow

Spaceflow creates digital experiences to enable better life in buildings. Integrating data, technology, and people, the company helps both commercial and residential landlords and building operators go through digital transformation to finally connect buildings with their occupiers.

Number Of Products: 1
Company Size: 11-50
Last Funding: Seed

Company Profile →

Lukas Balik
Co-Founder

Influencer Ranking 748

8TH PLACE

mri

Operating Markets:
USA , Ireland , Singapore , UAE +6 More

Star Tenant Experience MRI

Founded in 1971, MRI Software is a leading provider of innovative real estate software applications and hosted solutions. MRIs comprehensive and flexible technology platform coupled with an open and connected ecosystem meets the unique needs of real estate businesses from property-level management and accounting to investment modeling.

Number Of Products: 14
Company Size: 1,001-5,000
Last Funding: Debt Financing

Company Profile →

Trevor Youens
UK Director

Influencer Ranking 594

9TH PLACE

proxyclick

Operating Market:
Begium

Proxyclick is trusted by top companies like L'Oreal, Airbnb, and Audi to create a visitor management experience that matches their enterprise needs.Proxyclick allows you to manage visitors globally, while retaining the flexibility to act locally. We're pleased to be the premier dedicated visitor management system on the market, covering over 30 languages.

Number Of Products: 1
Company Size: 51-200
Last Funding: Series B

Company Profile →

Christina Tubb
Regional Manager

Influencer Ranking 718

10TH PLACE

spaceOS

Operating Market:
Poland

Agile Tenant Experience Spaceos

spaceOS is a cloud based SaaS platform for real estate that enables a premium TenantExperience with a best in class UX &UI while offering access to data and enabling commerce. The tenant-facing mobile and web app of spaceOS combine features like community, booking, support, payments, food & beverage orders and a variety of services, compiled into one holistic but simple SaaS product.

Number Of Products: 1
Company Size: 11-50
Last Funding: Venture

Company Profile →

Maciej Markowski
Co-Founder

Influencer Ranking 737

Tenant Experience Influencers

Knowing which companies to watch is just one part of the journey to understanding a market like Tenant Experience.

We also want to make sure you know which people working in the market are making a splash on Unissu in the past 12 months.

Whether it is by sharing their knowledge in written or video content, building extensive networks or simply keeping our community updated with regular comments and posts, the individuals below have built themselves a position of influence on the Tenant Experience market.

To find out more about how you can improve your own influence on Unissu and appear in these rankings, please read this article.

#		Company	Connections	Contributions	Rank
1	**Frederik Joustra** — Area Sales Manager	SPACEFLOW	7.1k	105	2nd
2	**Cyril Banos** — Advisor	Panga	3.9k	101	5th
3	**Srinath Kandala** — Founder	propvr	3.1k	35	9th
4	**Priya V** — B2B Sales Manager	facilio	483	0	32nd
5	**Ikenna Nweke** — Director	Office App by H₂O	512	6	39th
6	**Sunder Jagannathan** — Co-Founder	propvr	374	8	40th
7	**Marcus Moufarrige** — CEO	ility	352	6	41st
8	**Hannah Lloyd-Jones** — Marketing Manager	DISTRICT	309	3	45th
9	**Mazen El Jamal** — B2B Sales Manager	AIRTHINGS	284	15	51st
10	**Paulo Lopes** — Senior Marketing Manager	Haltian	208	3	63rd

11TH PLACE

Operating Market:
Canada

ThoughtWire partners with stakeholders focused on the built environment and those who work, live, and play in the spaces we serve. Whether a HighIQ Health System, a Corporate Office, a portfolio of mixed-use buildings, or even a smart district or city, ThoughtWire is your partner in making next generation experiences, use cases, and KPIs a realty.
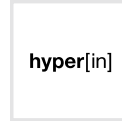
Number Of Products: **4**
Company Size: **51-200**
Last Funding: **Debt Financing**

Company Profile →

Mike Monteith
Chief Executive Officer

12TH PLACE

Operating Markets:
Norway , Denmark , Sweden , USA +5 More

hyper[in] brings a game-changing solution for people who MANAGE shopping malls. We provide all the tools for multi-channel communication, collaboration and integration between you and your tenants. You can MONETIZE spaces to outside advertisers and marketers. You have always up-to-date information that you can use to CONNECT to consumers and understand them.

Number Of Products: **1**
Company Size: **51-200**
Last Funding: **N/A**

Company Profile →

Markus Porvari
Chief Executive Officer

Influencer Ranking 485

13TH PLACE

Operating Markets:
USA , Romania , Australia , Austria +10 More

Brivo is the global leader in mobile, cloud-based access control for commercial real estate, multifamily residential, and large distributed enterprises. Our comprehensive product ecosystem and open API provide businesses with powerful digital tools to increase security automation, elevate employee and tenant experience.

Number Of Products: **6**
Company Size: **51-200**
Last Funding: **N/A**

Company Profile →

Steve Van Till
Founder & CEO

Influencer Ranking 1429

14TH PLACE

Operating Market:
Poland

Velis Real Estate Tech creates technology for buildings that transforms the way you operate in them. We do this by automating the management of commercial and industrial properties. All under one umbrella brand called Singu, combining both our own designed software and hardware.

Number Of Products: **3**
Company Size: **11-50**
Last Funding: **N/A**

Company Profile →

Adam Penkala
Co-Founder

Influencer Ranking 1679

PropTech Procurement

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events.unissu.com

15TH PLACE

Operating Markets:
USA , Singapore , UK , Canada +4 More

We believe people should be delighted by where they live and work. With seamless access, a captivating user experience, robust operations tools, and advanced capabilities, your VTS Rise native platform replaces all other property technology solutions - improving staff efficiency, elevating occupant experience, and increasing NOI.

Number Of Products: 1
Company Size: 51-200
Last Funding: N/A

Company Profile →

Prasan Kale
Chief Executive Office

16TH PLACE

Operating Market:
United Kingdom

With the Locale App & Desktop, you can run your building more efficiently, engage with your community more effectively, and deliver experiences that set you apart from the competition. Est. in 2005, Locale has grown and developed in line with our clients and their customers' needs. We are unique in offering a holistic approach that enables centralised, knowledge-driven decision-making paramount to modern building management.

Number Of Products: 3
Company Size: 11-50
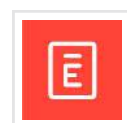Last Funding: N/A

Company Profile →

Guy Windsor Lewis
Founder

Influencer Ranking 1108

17TH PLACE

Operating Market:
United Kingdom

Bunk allows you to run every aspect of your property business online. Turbocharge your operations by empowering your entire team with the most advanced property technology in the world. Companies that use our tech improve rent collection rates, yield and the capacity of their property managers - all whilst providing a world-class tenant experience.

Number Of Products: 1
Company Size: 11-50
Last Funding: Non-Equity

Company Profile →

Tom Woollard
Co-Founder

Influencer Ranking 553

18TH PLACE

Operating Market:
USA

Envoy is transforming modern workplaces with products that make office life easier and work more meaningful. Envoy's workplace platform has redefined how offices welcome visitors, keep employees safe, book desks and conference rooms, and manage deliveries in over 14,000 locations around the globe while building products for a new era of workplace experience.

Number Of Products: 1
Company Size: 51-200
Last Funding: Series B

Company Profile →

Larry Gadea
CEO and Founder

19TH PLACE

Operating Market:
United Kingdom

Dwellant provides cloud-based software and apps for commercial and residential buildings, property management, and leasehold block management. If you're a property manager, our building management software gives you a clear dashboard for managing your work. It automates work management, supply chain management and invoice processing (Purchase to Pay).

Number Of Products: 5
Company Size: 11-50
Last Funding: N/A

Company Profile →

Dorothy Newman
Director

Influencer Ranking 1679

20TH PLACE

Operating Market:
France

Spinalcom's mission is to make buildings smart in much the same way that iOS made phones smart - by providing an OS that will serve as an enablement platform for a world of new applications: applications that grow the asset value of buildings, provide new revenue streams, enhance tenant experience and lower hard costs like energy, O&M and space.

Number Of Products: 9
Company Size: 11-50
Last Funding: Seed

Company Profile →

Sebastien Coulon
Co-Founder

Influencer Ranking 364

FAQ

Q How are the rankings calculated?

A Our UniScore rankings are based on the behaviour we can observe inside the Unissu marketplace.

We utilise a range of datasets to do so. In addition to information about the vendors such as their age and funding, we also analyse how the vendors interact with the marketplace and how the marketplace interacts with the vendors.

Is a vendor appearing in search results more often than others? Do users spend more time looking at a vendor's profile? Are the vendors' team engaging in thought leadership?

All of this and more influences where a vendor ranks in a UniScore report.

Q Are the rankings a recommendation?

A No, our UniScore reports are not a recommendation. Every buyer will have specific requirements around use cases or feature sets unique to them. Our reports are here to support initial discovery and analysis of the vendors that should be considered in the early stages of this process.

We recommend that buyers employ suitably qualified experts or speak to our partner when it comes to choosing the best solution for their particular needs.

Q What areas of PropTech do UniScore reports cover?

A Uniscore reports cover the entire global PropTech industry. We publish a range of regular reports covering some common areas but our analysis is available for any sub sector in any location. Ask us for more information on your specific requirements.

Q Is inclusion or position in the rankings paid for by PropTech companies?

A No, the rankings are not paid for by PropTech companies. The rankings are determined by how PropTech vendors utilise our platform and how others interact with the vendors. Almost all of these interactions take place with no commercial involvement by Unissu.

PropTech companies may purchase services from Unissu that can influence certain data points. For example, search positioning (like Google Adwords) can ensure that they appear in more search queries. However, many data points (like procurement hit rate) cannot be influenced by Unissu.

Vendors may pay to place advertising in our UniScore reports but this does not count towards their ranking.

Q I don't see the area I'm interested in. Can you still help?

A Yes absolutely! PropTech is such a wide field that we can't possibly hope to publish reports covering them all. However, we can produce bespoke reports for any subsector, technology or geography quickly and efficiently, at a flat cost of £2,500 + VAT

Q How else can Unissu help me find the right solution?

A UniScore reports are here to help you move beyond a simple understanding of any particulr market and into a deeper dive, exploring the companies, their features and benefits that you may like to adopt in your business.

When you're ready to buy, it's essential to conduct a full market scan.

Uniscore – Tenant Experience

Q1 2022

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