

STARTUPWA



STARTUP REPORT

Insights into the startup ecosystem in Western Australia, 2019



This report was produced by **Chloe Constantinides** on behalf of StartupWA and with the support of the Board of Directors.

Please note this version does not provide recommendations, but is intended as an indicative snapshot of the ecosystem.



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132/66/11 kV



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Emergency exit



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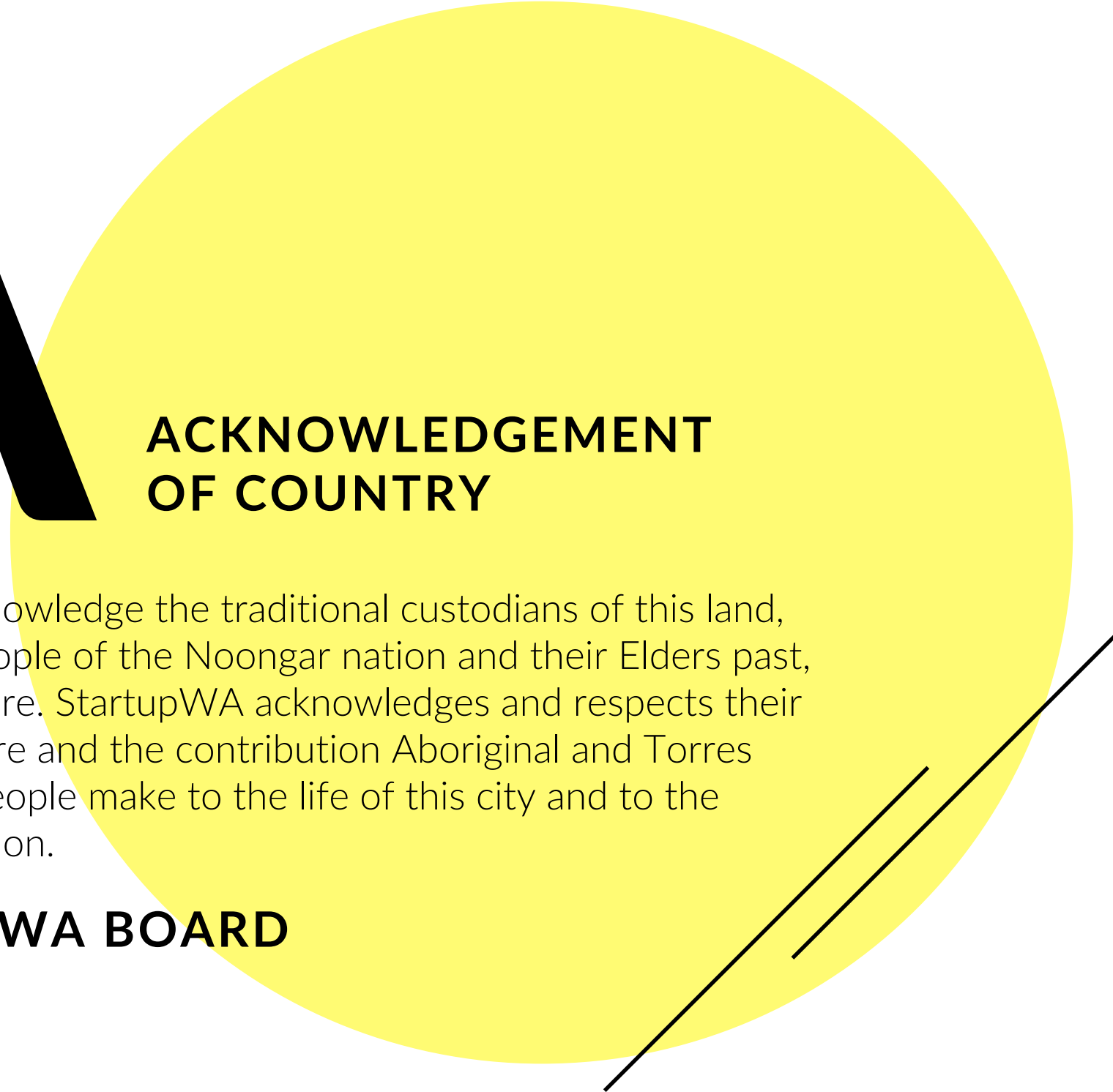
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ACKNOWLEDGEMENT OF COUNTRY

We wish to acknowledge the traditional custodians of this land, the Whadjuk people of the Noongar nation and their Elders past, present and future. StartupWA acknowledges and respects their continuing culture and the contribution Aboriginal and Torres Strait Islander people make to the life of this city and to the broader WA region.

- STARTUPWA BOARD



SPONSORS

We're extraordinarily grateful to our long-term sponsors. Thanks to the ongoing support of the City of Perth, Spacecubed and Australian Landing Pads, StartupWA continues to champion the ventures of tomorrow and accelerate the startup ecosystem in Western Australia.



City of Perth



spacecubed

**AUSTRALIAN
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THANK YOU FOR THE GENEROSITY OF OUR 2019 REPORT SPONSORS:



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Innovation academy helping
individuals and organisations to get
ready for the future of work



Podcast: Interviewing WA startups



Provides expert advice to
businesses planning or
experiencing high rates of growth



Covering WA startups



CONTRIBUTORS

We wish to extend a huge thanks to the people who contributed significant time, data and research to making this report possible, as well as those who offered their personal insights into their area/s of expertise. This included but is not limited to the following:

01 **ANDREW OUTHWAITE** WE ARE ARISING

We Are Arising provided much of the data you find in this report including breakdowns of startups by region, focus area, lists of accelerators and much more.

02 **STARTUP NEWS TEAM** STARTUP NEWS

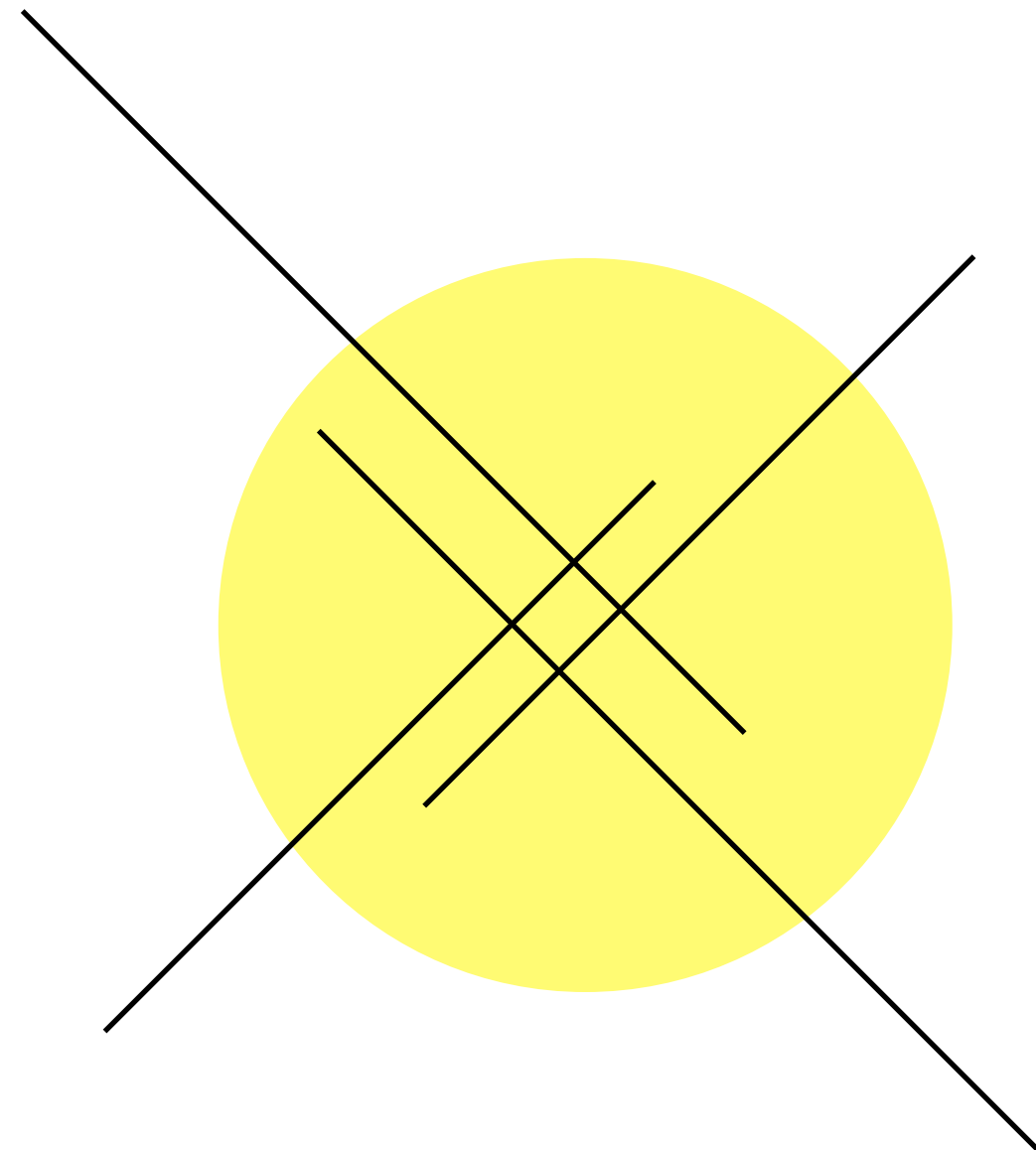
Startup News has been collating and updating data on startups and startup news stories in Western Australia since 2014. This was provided to StartupWA for use in this report.

03 **PETER VAN BRUCHEM** TECHBOARD

Techboard collects and actively tracks data on startups and young tech companies in Australia. They shared information on startups, and in particular funding data, to contribute to the wider community here.

04 **CHAD RENANDO** STARTUP STATUS

Startup Status maintains a map of those who support entrepreneurs in Australia including government, universities and corporates, and measures the impact of that support.



FOREWORD FROM STARTUPWA

On behalf of my fellow board members, partners and affiliates, StartupWA is proud to share with you the second edition of our startup ecosystem report.

The latest edition, published in 2015, was a significant milestone for WA's small but rapidly-growing startup and digital innovation ecosystem. That report provided a snapshot of the first five years of our fledgling startup community, incorporating rich data and a series of policy recommendations that were crucial to the ecosystem's ongoing sustainability, and helping to create the businesses and jobs of the future.

While only some of those recommendations have been adopted to date and WA continues to face significant challenges relative to the support and resources available in other States and overseas, that our ecosystem continues to mature and develop is testament to the incredible work of so many community-builders featured in the 2019 startup ecosystem report – all those people running co-working spaces and hosting events, organising meetups, coaching startups and continually backing entrepreneurs with a vision and the drive to make it happen.

We are particularly grateful for the ongoing support of the City of Perth, who helped lay the foundations for this community in 2012 from the launch of Spacecubed and Perth's first Startup Weekend, and have continued supporting key ecosystem initiatives such as our Ecosystem Reports, West Tech Fest and the Perth Angels.

A huge vote of thanks also to all those who contributed their time, knowledge, data and resources to help bring this report to life. Your contribution to the startup community and WA's economic progress is invaluable.

SAM BIRMINGHAM
CHAIRPERSON, STARTUPWA



SAM
BIRMINGHAM



KATE
BROOKS



CHLOE
CONSTANTINIDES



LESLIE
DELAFORCE



TOM
GOERKE



RAFAEL
KIMBERLEY-BOWEN



CAMERON
SINCLAIR

STARTUPWA

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CITY OF PERTH

As a major partner of StartupWA, the City of Perth is committed to supporting innovation and the development of knowledge-based industries.

At a time when global trends of technological disruption are predicted to affect 25% of WA's economy: this means new businesses, jobs and vibrancy for our CBD.

In the 5-year period following Spacecubed's entry to Perth's office market in 2012, the office footprint of the tech sector grew by 42.5% to become the 8th largest occupier of office space in the city by industry. Since that time, the proliferation of shared office space in Perth has grown at a rate of 22% per year. This growth is set to continue with professional job advertisements in Perth the second-highest of Australia's capitals and new shared workspace offerings set to open in the new year.

The increasing prevalence of the tech and coworking sectors points to the changed, more diverse, nature of economic activity in the years since the last boom.

The City of Perth was proud to support the first edition Startup Ecosystem Report in 2016. That document has provided influence into the ways the City develops its strategic relationships around the globe, particularly South-East Asia. The Report also influenced the City of Perth strategic priorities and investments locally, including ongoing support of events such as Startup Weekend and WestTechFest, as well as investor education and capacity building programs with Perth Angels.

We look forward to monitoring the growth and development of the local innovation ecosystem from the previous edition to this 2019 Startup Ecosystem Report and well into the future.

- Andrew Hammond, Chair Commissioner



500+ STARTUPS IN WA

An aerial photograph of a coastline with turquoise water, white sand, and dark rocks. The image is partially obscured by the large number '500+' and a yellow banner.

This is an indicative list of some of the startups based in Western Australia, that are currently active. It is not expected to be exhaustive. This does not include service providers, small businesses, or startups that are known to have closed down. Please get in touch via our website to add your startup to our next report list.

STARTUPS

STARTUPS

180 Cakes

6Q

ABHUBS

Absolute VR

ACE Tutors

Ads on Wheels

Ads Pay All

Adveritas

AEGLE Life

Agtalent

Agtalent

AIRO

Akora

Akumen

Aleign

Alerte Digital Health

Algae Tech Solutions

Alinda Mondal

All the Dresses

AMLab

APE Mobile

Ape Shift

Appollo

Arcisect

Arility

Arisave

Art of Communication

Atamo

Atlas Trend

Atom Earth

AuPayU

Aussie Tech Industries

Australian Geotomography

Autisense

Autonomous Technology Indi

Axonium

Ayla

Bamboo

Bank Vault

Beanbag Entertainment

Being VR

Beqom

Binary Crate

Binary Crate

Binary Space

Binsense

Biotome

Bitcar

Black Sheep Engineering

BlockBoxx

Blockhead Technologies

Blue Bricks

BookPlayAR

Boozle

Boss Mama

Botanix

Bravio Tech

BrickX

Bruno Health

BSC Solar

Buildsort

Business Action Complete

Bustle

Buy a Smile

Calor Medical (formerly

Dermacool)

CampusWall

Caseflix

Cellr

ChironixCinglevue

Clear Poll

Clear Vue

Clinical Excellence Tech

Clique Arcade

Close Comfort

Club Soda

Coin Mine

Complete Home Filtration

Conjecture

Constructive Software

Cordially

Cost Eng

CourseGenius

Covocate

Crab Nabber

Credi

CropLogic

CrowdClip

Cryptocurrencies

Cultured Cities

Cup Flick

Custom Carbon

CX Academy

Cycle My City

Cykel OS

DC Two

Decipher

Deckee

DeepLime

Dex

Diffo

Digii

Digital Health Action

Digital Maas

Dismantle

Docmosis

Document Node

Draw History

Drenalina

Dressed

Droplt

Drumbeat

DryTabs

Dryverless Ads

E-Sports Mogul

Early Works

Easy Trace

Ecocentric Energy

eeBudee

Enably

Energy Vision

Enterprise Lens

eTool

Everythere

Exchange database recovery
Exodus Space Systems
Ezee Shop
Eziworx
Family Zone
Famylia
Farmsave
Fastvue
Fencemate
Fern Earth
Field Magic
FIFO Housemate
Fiink Design
Finch
FIRE Escape
Firetech
Fitter
Flaktest Gaming
Flanno
Flash Mop
Fledge Technology
Fleetsu
Flicq
Flock2Go
Flow Perth

FlowerBros
Fooduction
Four Flags Blast Tech
Frame VR
Freewheeler
Frigbot
Frogponds
Fuel Mate
Functionally
Future Green Solutions
Gaems
Game Ranger
Gastrayda
Gelavo
Genvis
GenVis
Geo Risk Systems
GeoMoby
Get Early Works
Get Flapped
Get Rig
Get Trakka
Gloria Dieu
GLX
Go Casual

GoChat
Golf Great Real Estate
Good Earth Dairy
Grafa
Greenbatch
Group Map
Grubs Up
H5 Controls
Halo Medical Devices
Hazer
Hearing Choices
Helio Global
Hi Oscar
Higher
HighVibe
Hip Flask
Hippie
Hiresquare
Hiya
Holonc
Home Addict
HP Lat
HungryMart
Hyba
Hydralert

Hydrogen Fuel Systems
Hygge
iCollege
iComics
iDataMap
Ideology
Idle
iiSkipper
Immersia VR
ImmuMat
IMR Technologies
In-situ Marine Optics
Indigenuity
Industry One Card
Ingeniation
Instatruck
Intelicare
Intuit Earth
InvenTree
Iron Matrix
Isol8
Isopogen
Jaant
JakApp
Jaksta

Jas Honey A20
JobMap
JR Tech
Judicate
Jugglr
Jungle Juniors
Juta App Builder
Kaiketsu
KeepSpace
Kimberley Birds
Kin Childcare
KinChip Systems
Kiwa Techwear
Komo
Kooda
LA One
Labrador Holdings
Laconik
LactaMap
LandedVibe
Latitude 28
LaunchMii
Laundromap
Lazcath
LendMi

Life Cykel
Lily & Fox
LinXMart
Little Green Pharma
Live Mine
Livestock Systems
Long Pipes
Loopa
Loyalty App
LTCM
Luxabrows
Magellan Power
Magneto
Maker Kids
Maldi ID
Maplzy
MapTaskr
Markr
Matcher
Matter
May Day Spares
MedVR
MelDx
Memory Box Collective
Meshnet

MET Energy
Metabolic Symphony
Mi Vista
Milleable
MilleniumX
Mine GeoTech
Mineler
Mini-U
Miracle Tek
Mirreco
Mondo
Money School
Moneycatcha
MooFarm
Mote Net
Mud & Musk
Mureus
My Care My Choice
My Fiziq
My Grate
My Lead Pod
myKicks
Myn (Zora Tech)
NanoDent
Nauti-Craft

Newton Labs
Nfty.ai
Ninja Dojo
Noisy Guts
Norwood Systems
Notis
NXT Global
Oceanwise
Offpeak Games
OncoRes Medical
OneAtom 12
OneVR
Open DNA
Openn Negotiation
OpenXMR
Opulenza
Opus Systems
Order Point
Origo Farm
Ortrack
Oscar Rideshare
Oula la
Ovass
OviDrive
OzEating

PainChek (formerly ePAT)
Paradigm Adventure
Parent Power
Pentanet
People Diagnostics
People Science
Perch
Pet Rescue
Pickstar
Picture Wealth
Pin Payments
Plaak
Plan-et
Point Share Plus
Polished Cutlery
Politify
Porze
PosturePuck
Power Research Networks
Purposeful
Practon VR
Pro 9 Global
Pro Scout
Pro Tippa
ProGolfMe

Project Pay
Property My Way
QPLEX
QuadIQ
Quipmo
QuizJam
Quokkit
Rag Tagd
Ralleo
Rate It App
RealEzy
Redback Energy
Regen Technologies
Release Energy
Re Energi
Revel
Revise Online
REX Ortho Screw
REXY
Risk Talk
Roborigger
Robot Buddy
Safescape
Salutem Analytics
Sapien

Sapien Cyber
Scalabl
Screening Labs
Sealz
Seeable
Segnut
Selvax
Sharequity
SheSellsIt
SkillSocial
Skyfy
Smart Vision AI
Smartbeat
Smooth Retirement
Soar
Social Folio
Solo Accounts
Soter Analytics
Sound Delve
Sourcetoad
Spacedraft
SpacetoCo
Spark Chart
Spectur
Speqs

SpiroPak
Splend
Springtech
Sprout
Squaddle
Staflr
Startup News
StayOnHire
Steadyrack
Stirling Labs
Stocct
Stock Photo
Storekat
Straight Track
Strapsi
Stratus Imaging
Street Oracle
Stuck
Surgical Realities
Sustainable Platform
Sustainable Villages
Swan Systems
Switch Glass
Table Locate
Tam Book

Tamad Technology
Tan Ninety
Tangibal Energy
Tap into Safety
Tape Ark
TeamBizBase
Teamline
Telemed Health
Terra 15
The Art of Comms
The CloudMiner
The Difference
The Executive Circle
The Gatherist
The H Factor
The Jummi Factory
The Pack Australia
The Quick Flik
The Underground Collective
The Volte
TheBroth
Ticket Booth
Tidy Club
Tik Force
Tiller Rides

Today We Learned
TOKN
Topitza
Touchgram
Track'em
TrackMySubs
Trade Platform
Tradie Point
Tradr
Translator HQ
Tranwall
Trendwise
Triplify
Tuggl
UBhunt
Udio
Udrew
Unleashed VR
UnoCart
Uproute
Urbi
Urbotanica
Urfree Continnence
Vanguard Robotics
Veri.Vote

VetDB
Village Energy
Virgil
Virtual Guest
VirtualCSI
Vital Trace
Vortals
Voyant AR
VROC
VSBL
WA HomeStay
WA Pure Honey
Wager Games
Webble
Wellteq
Whitz
Wholesale Exchange
Wide Open Agriculture
Wipo
Wrapd
WUNA Group
Xsights
Your Change
Zelda Therapeutics

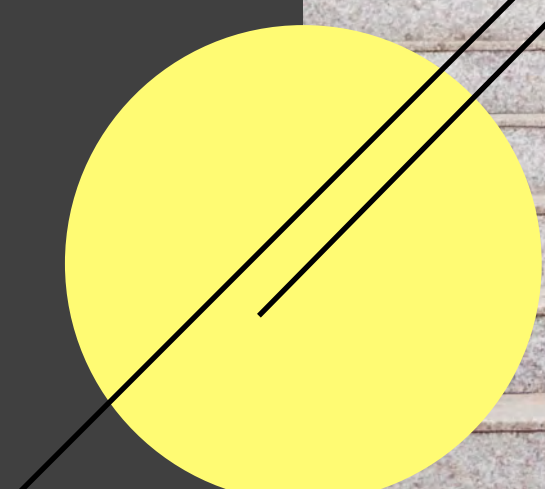
ESTABLISHED STARTUPS

Agworld
AppBot
AusCann
Australian Tenders
Bunsters
ClickSend
Cycliq
Dinner Twist
Fastbrick Robotics
Family Zone
FBR
HealthEngine
iCetana
iiNet
Minnovare
MiPlan
Moodle
NearMap
Nuheara
Power Ledger
Rhinohide
ScanCam
Seabreeze
SEQTA
Simply Wall Street

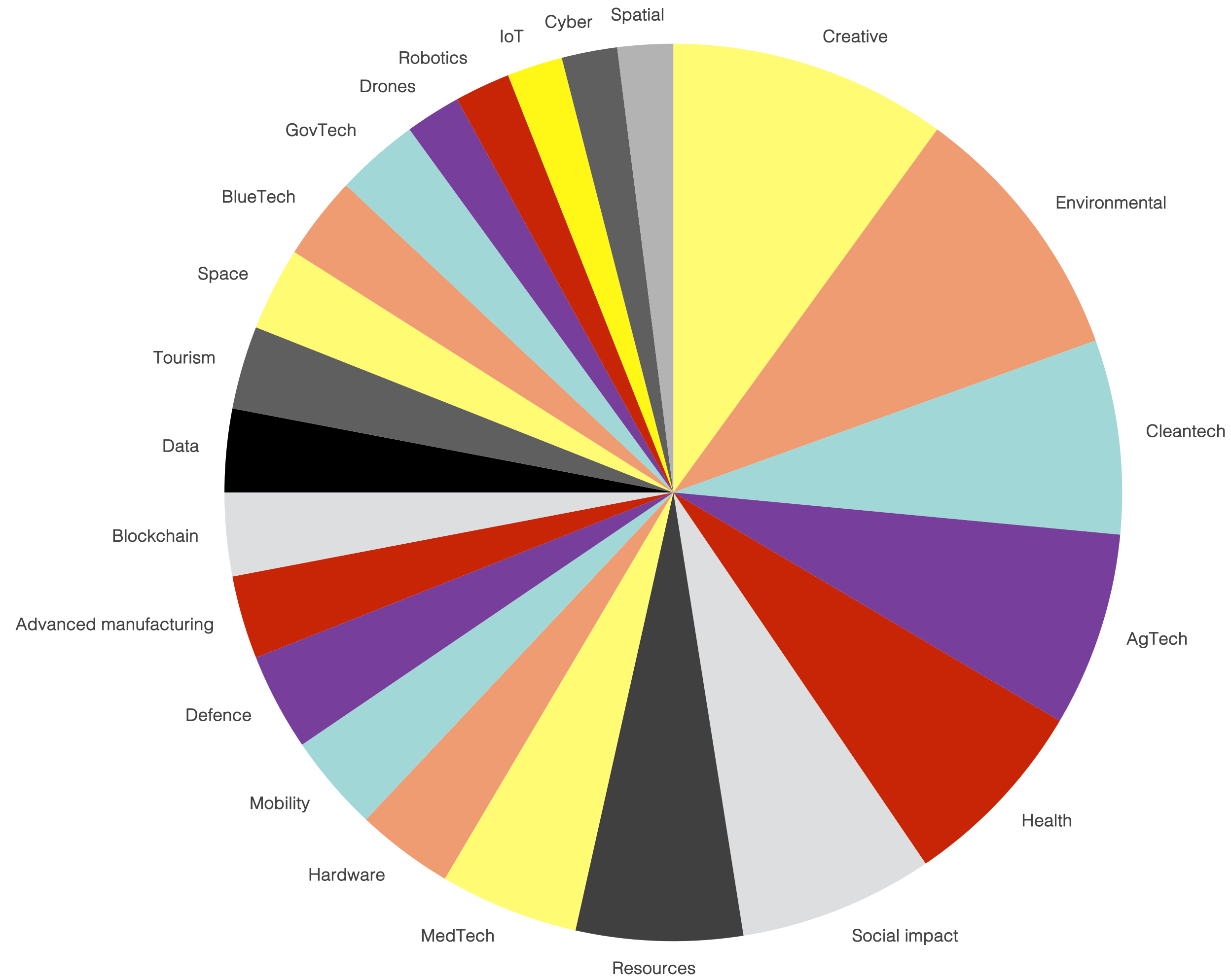
Solv
Student Edge
Spookfish
Ticketbooth
VGW
VROMO
Workmetrics

NOTABLE STARTUPS THAT HAVE MOVED INTERSTATE OR OVERSEAS

BibliU
Brainchip
Canva
Finch
Humm
Kanopy



Startups by focus area





TWENTY YEARS

IN THE PERTH STARTUP SCENE

Back in 1999 when I set up my own tech startup, there were no co-working spaces, no tech accelerators, no broadband, no social media and no smartphones in Perth. We were called 'dotcoms' and dial up internet was how you connected to the world wide web. Web pages took about 30 seconds to load. Meanwhile, various people were running around worried about the Y2K bug. Together with those Y2K concerns, most of those dotcom businesses were blown away within a few months.

By the mid-2000s, a small band of internet business survivors started meeting on an ad hoc basis, calling themselves 'eGroup'. They still meet to this day. Spacecubed opened up the first modern co-working space in 2012, and within a few months the first Startup Weekend was held. A year later saw Curtin Accelerate, RAC SeedSpark, AMCOM (and later VOCUS) Upstart, the first accelerator programs of their kind, which invested into startups and provided mentoring.

Around this time the mining construction boom started to fade. Over the next five years, a net 8,000 mining and oil and gas jobs would disappear in Perth, with tech jobs being one of the largest growth areas (along with lawyers, interestingly).

In 2019, the startup ecosystem is bustling. Mentors, programs, support and advice are plentiful. Deals are being done. Real businesses and good jobs are being created. Among other things, Perth has a golden opportunity to become a regional tech city. It's come a long way since 1999.

- Charlie Gunningham



COWORKING SPACES

Coworking continues to grow in Perth and across WA. In the seven years since Spacecubed started operations, flexible workspaces has grown from 500 sqm. to an estimated 23,000 sqm (estimated by Dec 2019). This has been driven by converging global trends which will only increase the relevance and opportunity for companies to utilise coworking and shared spaces.

The mix of people being able to work anywhere, millennials making up 75% of the workforce by 2025, and large corporates and Government shifting to more flexible working arrangements for staff are all drivers for rapid uptake of coworking and growth of the shared space sector as a whole.

In Perth, we have seen year on year growth of coworking with a range of different spaces emerging to service startups, small and medium businesses, corporates and Government. There are increased opportunities to work in spaces across the metro area and regionally all being driven by these large global shifts in how people work.

Over the next five years, we expect a continuation of industry-specific spaces like CORE Innovation Hub along with spaces to support specific technologies such as 3D printing like SOLDER.

This growth in competition and the different types of spaces will be a boost for better connecting entrepreneurs with ideas and startups with corporates and potential customers.

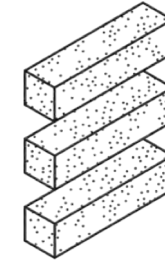
- Brodie McCulloch



Some of the coworking spaces across WA:

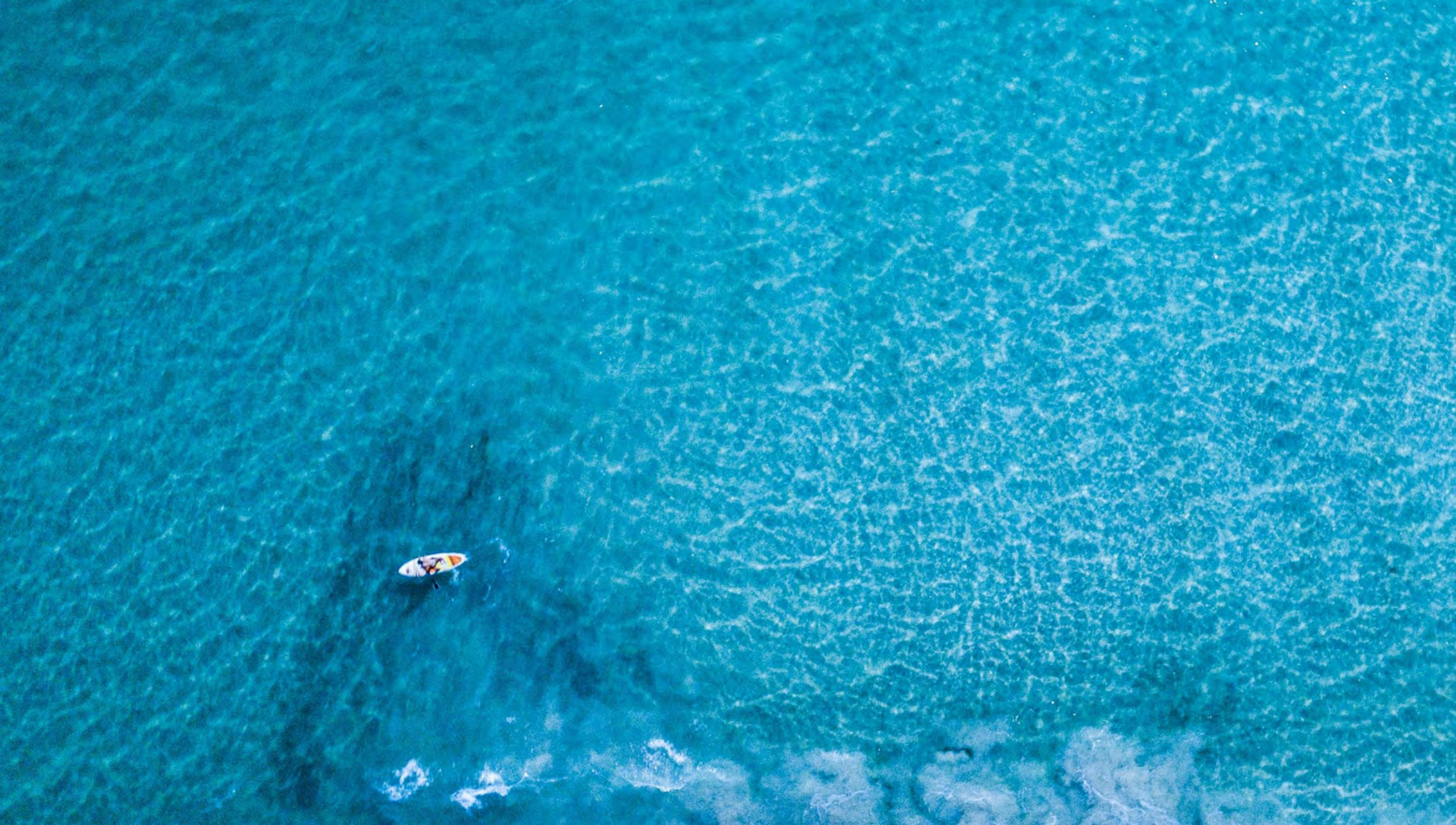


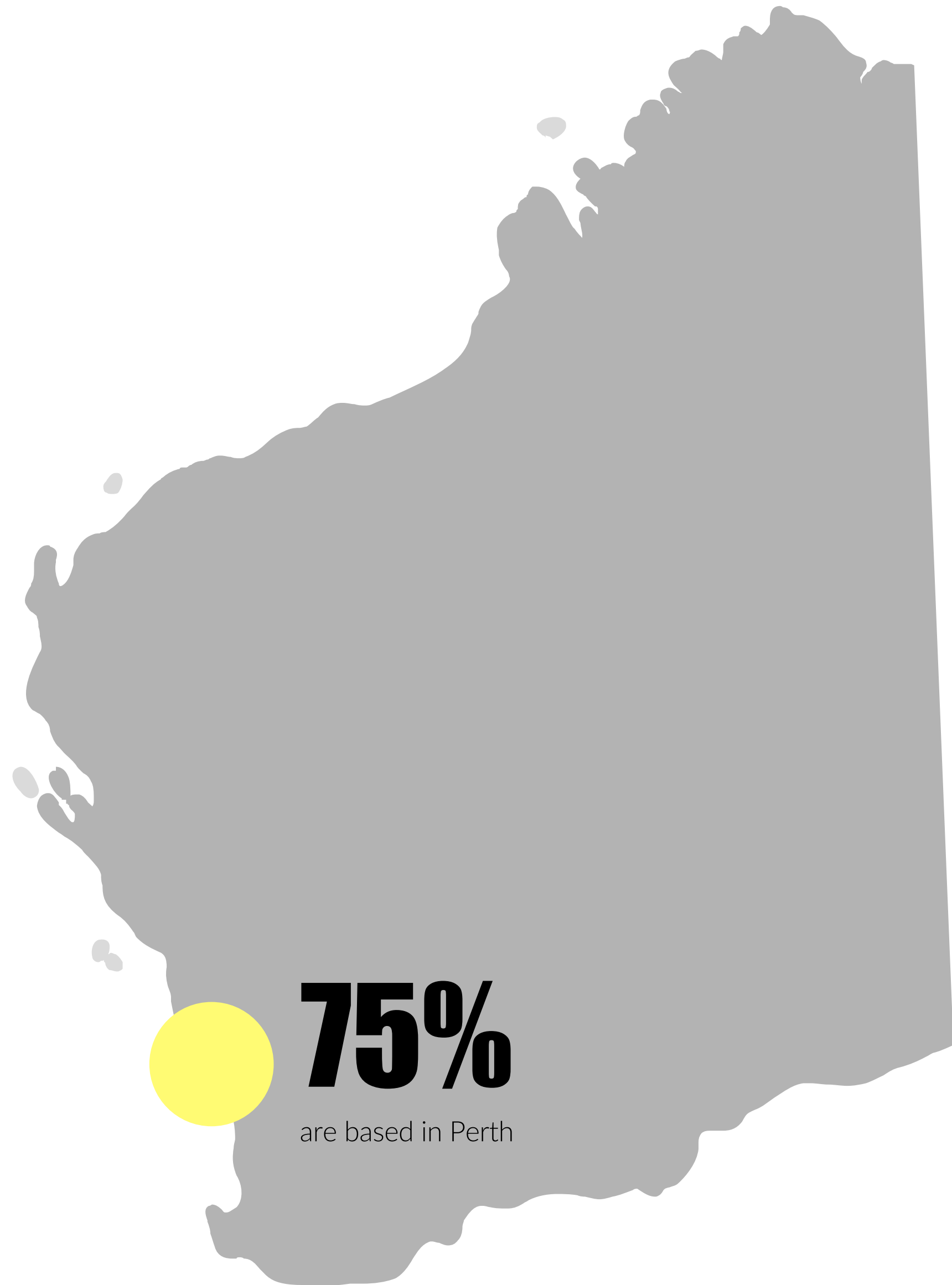
Coworking spaces continued:



Makerspaces:







75%

are based in Perth

SMALL BUSINESS

*Not all small businesses are startups

224,270

Small businesses in WA

\$48bn

Small businesses contribute to the WA economy

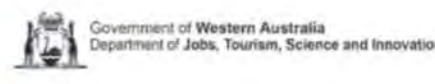
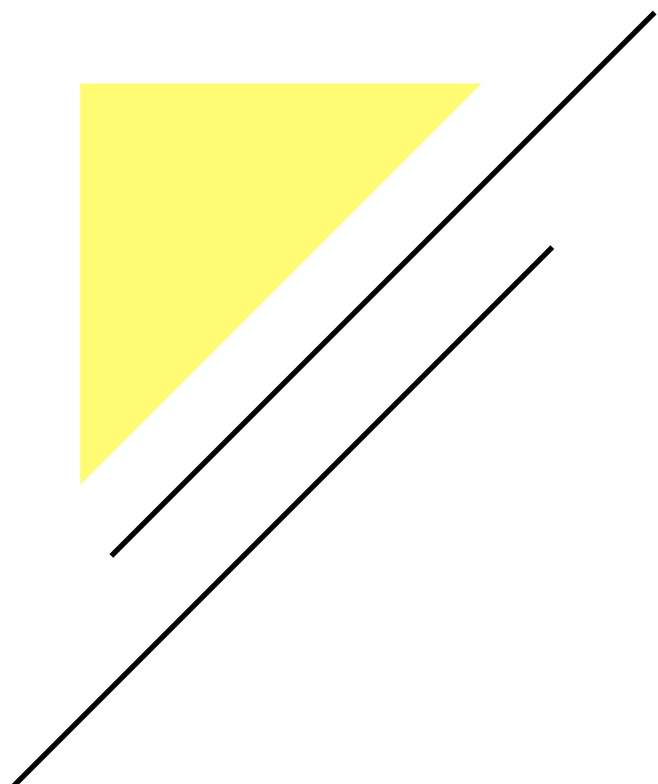
37%

Employ people

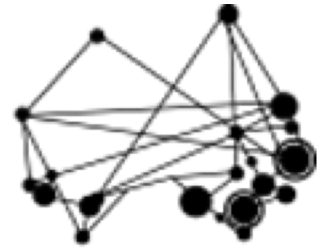
491,993

People are employed by small businesses (41% of WA's private sector workforce)

INNOVATION HUBS



WA Cyber Innovation Hub



MTPConnect
MedTech and Pharma Growth Centre



**WA DATA SCIENCE
INNOVATION HUB**



Innovation
Central Perth

A collaboration led by cisco



SPUR



Unearthed

**Claisebrook
Design
Community**



PROJECT 412
The Future of Mobility

**KALGOORLIE-BOULDER
MINING INNOVATION HUB**

**North Midlands
Project**

130+ STARTUP 'HUBS'

Only a handful of startup 'hubs' - programs, networks, spaces or supporters - existed in WA ten years ago. There are now more than one hundred and thirty. StartupWA 2015-16 report showed twelve incubators and twelve coworking spaces (1). There are now twenty six programs, sixteen recurring major annual events, and fifty two coworking spaces.

Those numbers in WA are comparable to those for Victoria (2) and Queensland (3) whose State's governments have historically invested an order of magnitude more into support for startups. Encouragingly, our analysis showed that in 2018-19 State and Federal government co-investment in WA hubs was ten times any previous year in the last decade.

This investment has gone into hubs longer-term sustainability, new audiences, and new services to address gaps and needs. More expert support is now more accessible to diverse people and in more diverse sectors: females, students, regional entrepreneurs, and for health, eco-tourism, VR and social ventures.

The WA startup community should be proud of the growth in hubs and support, and satisfied that starting and scaling an idea from Perth is easier than ever. And, just like a startup getting some traction is just the beginning for the WA ecosystem. So, what next? The 'valley of death', 'hockey-stick growth'?

Startup Genome's 'ecosystem lifecycle' model suggests greater activation, resource attraction and globalisation are needed. This means more startups and scale-ups, more \$100m exits, stronger sector specialisation, and more globally connected entrepreneurs and hubs (4). Anecdotally and organically this is starting to happen: we have local hubs that are internationally influential in their sectors, a few more successful exits and re-investments, and stronger connections with international experts including returning ex-patriots.

The competition for talent and capital is fierce, so the next phase will likely require smart strategies and deliberate investment. So, three recommendations: increase your support for local startups and hubs, be a great global ambassador, and support advocacy and data collection efforts that are necessary to direct further government and private investment.

- **Andrew Outhwaite**, Director, We Are Rising & Former Chair, StartupWA

(1) Startup Ecosystem Report 2015-16, StartupWA

(2) 2018 Startup Ecosystem Mapping report, LaunchVic

(3) Business Queensland, Co-working spaces in Queensland

(4) Startup Genome Ecosystem Lifecycle Model

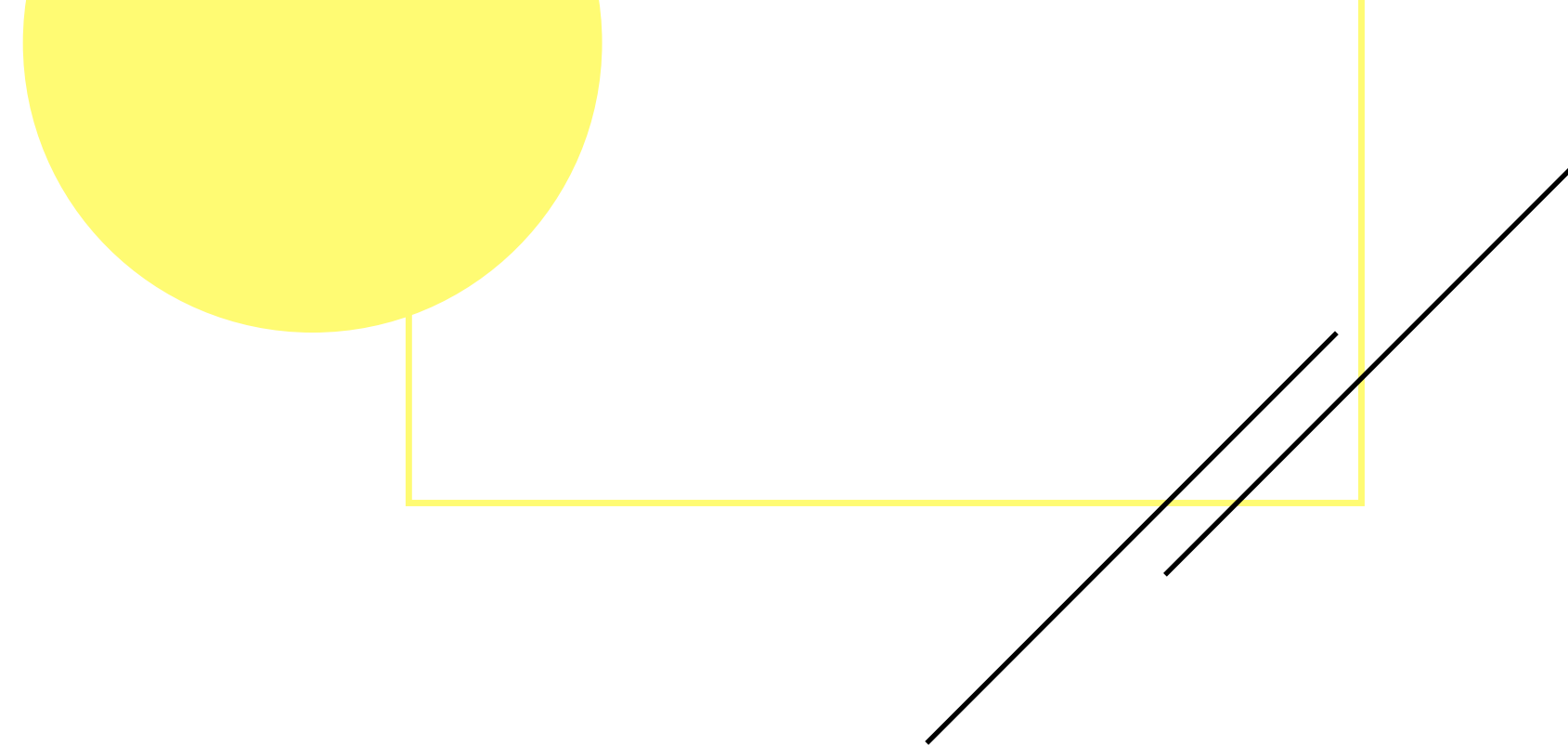


STARTUP FUNDING

We're used to lamenting the scarcity of venture capital in WA, but we sometimes forget Perth has a not-insignificant VC track record. Stone Ridge Ventures operated a number of funds with decent exits like Scanalyse, and Yuuwa Capital's \$40m fund is now a decade in and focussed on managing existing investments (like iCetana). There haven't been any funds of this size launched in a while, though other boutique funds are coming onto the scene with big ambitions, like 808 Ventures (not exclusively focussed on WA but based in Perth), Lateral Capital Ventures (NCX, Spectur) and RAC's recently launched corporate venture fund Better Labs.

By virtue of their smaller size, these funds tend to target the seed stage, and so there remains a funding gap at the later stages which continues to be filled largely by the ASX. The stock market remains a disproportionately high (compared to other states) source of funds for WA's startups, with companies like Fastbrick Robotics, Brainchip and AusCann raising over \$100m over the last couple of years between them.





Angel investment plays a vital role in supporting earlier stage businesses, though total funds deployed are small in terms of total venture dollars. As of earlier this year WA now has two angel groups, with Southwest Angels joining Perth Angels, or three if you include Innovation Bay. A positive sign is that Perth Angels invested more in the past year than Melbourne Angels or Sydney Angels, despite being a younger group with a smaller membership operating in a less sophisticated environment. The reality is, there have still not been any exits by angel groups in WA, and the larger angel cheques tend to be written outside of the formal angel groups and are often less visible.

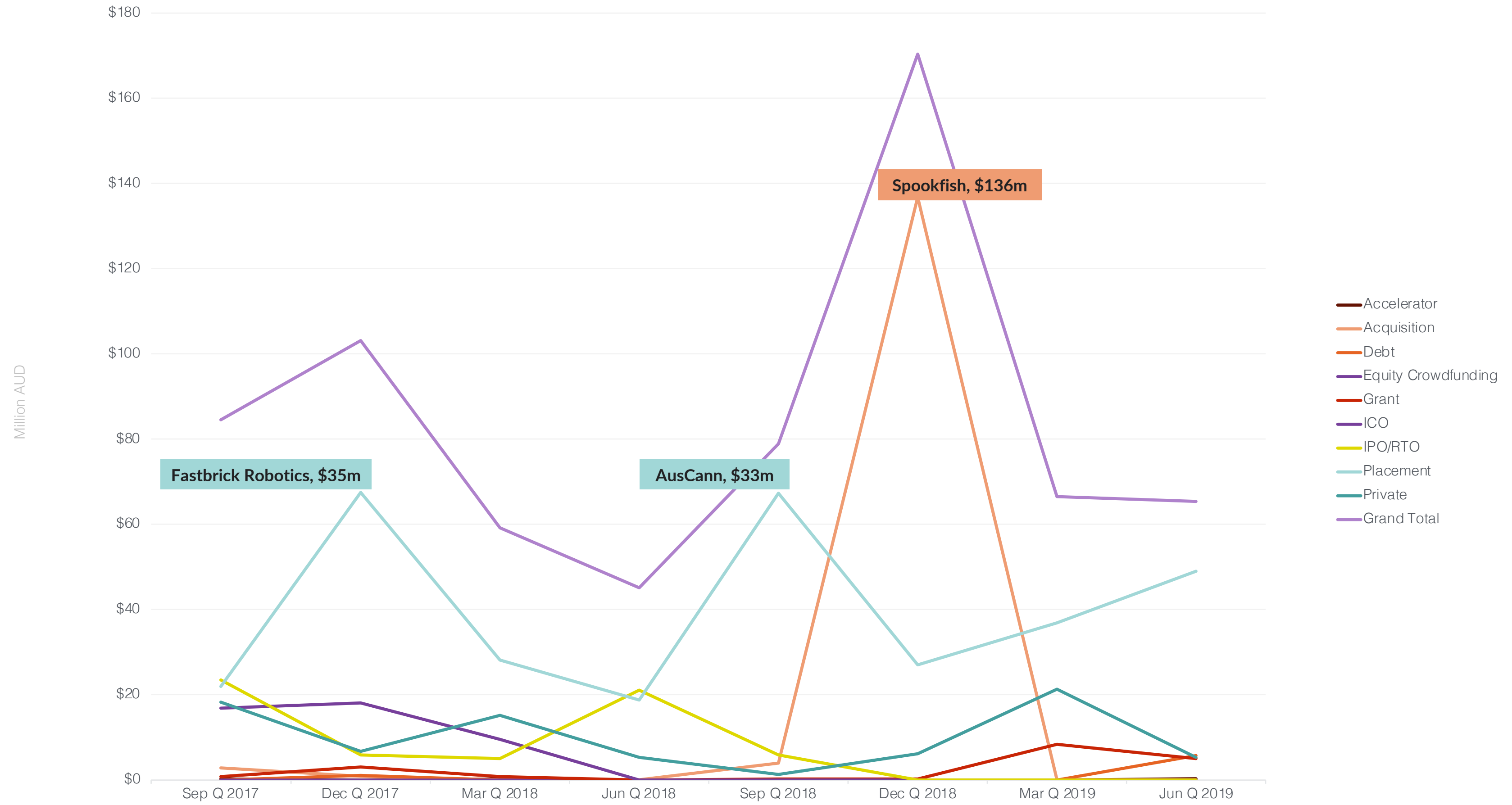
While a lot of WA wealth remains fixated on resources and property, a number of family offices play an active role in funding early stage ventures, like Larsen Ventures (HealthEngine, Humm), the Vukelic Group and the JJ Leach Group. The number of seed accelerator programs has multiplied over recent years, in particular the Plus Eight program supporting a number of ventures with funding, education and networks. Other programs like Founder Institute and Vocus Upstart are not currently active.

In recent months startups have taken to crowd-sourced funding big-time, with multiple startups being funded. West Winds Gin was first off the mark with close to a million dollars raised, followed by Credi (\$250k), and Rhinohide, Urbotanica and Tiller Rides all running concurrent campaigns at the moment.

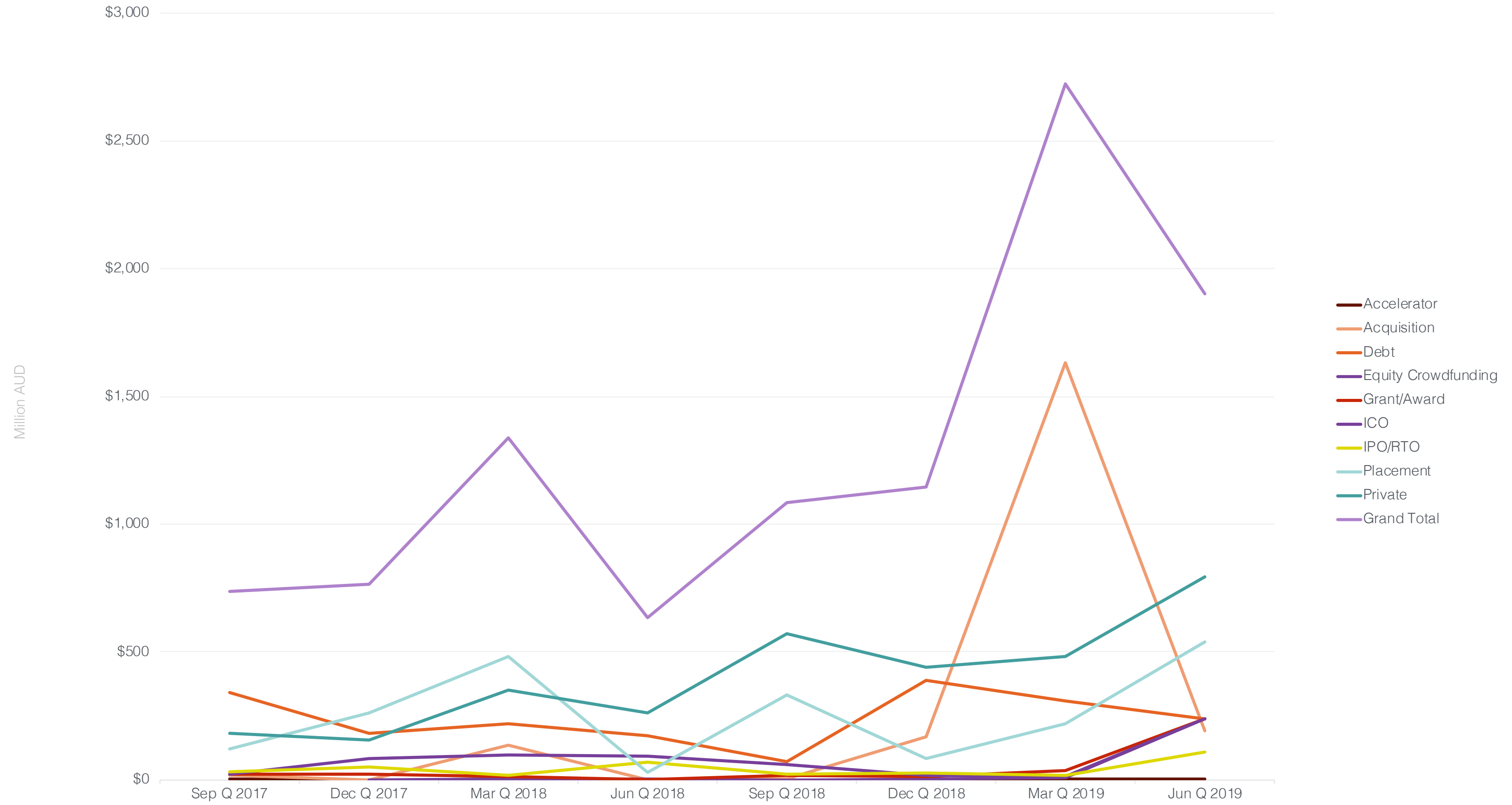
The biggest funder of earlier stage ventures likely remains the R&D tax incentive. Federal funding is also available through Accelerating Commercialisation grants and EMDG. The Medical Research Commercialisation Fund (managed by Brandon Capital) has supported a number of WA life science companies, with OncoRes Medical a notable example. Over the past four years, the Accelerating Commercialisation program has provided \$12m in funding to 23 businesses in WA with pre-revenue projects. State funding of the startup ecosystem remains disproportionately small compared to other states, with WA only receiving around 1% of the national total state funding.

- **Rafael Kimberley-Bowen**, Director, StartupWA

8 quarters to end of June 2019, [WA](#)



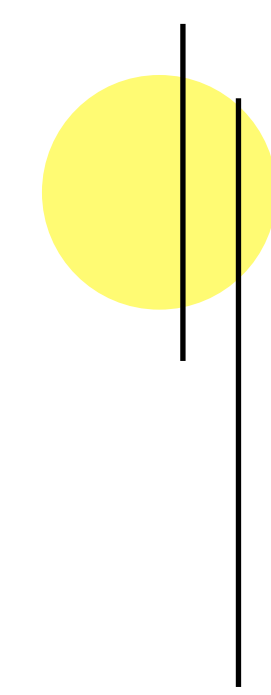
8 quarters to end of June 2019, Australia





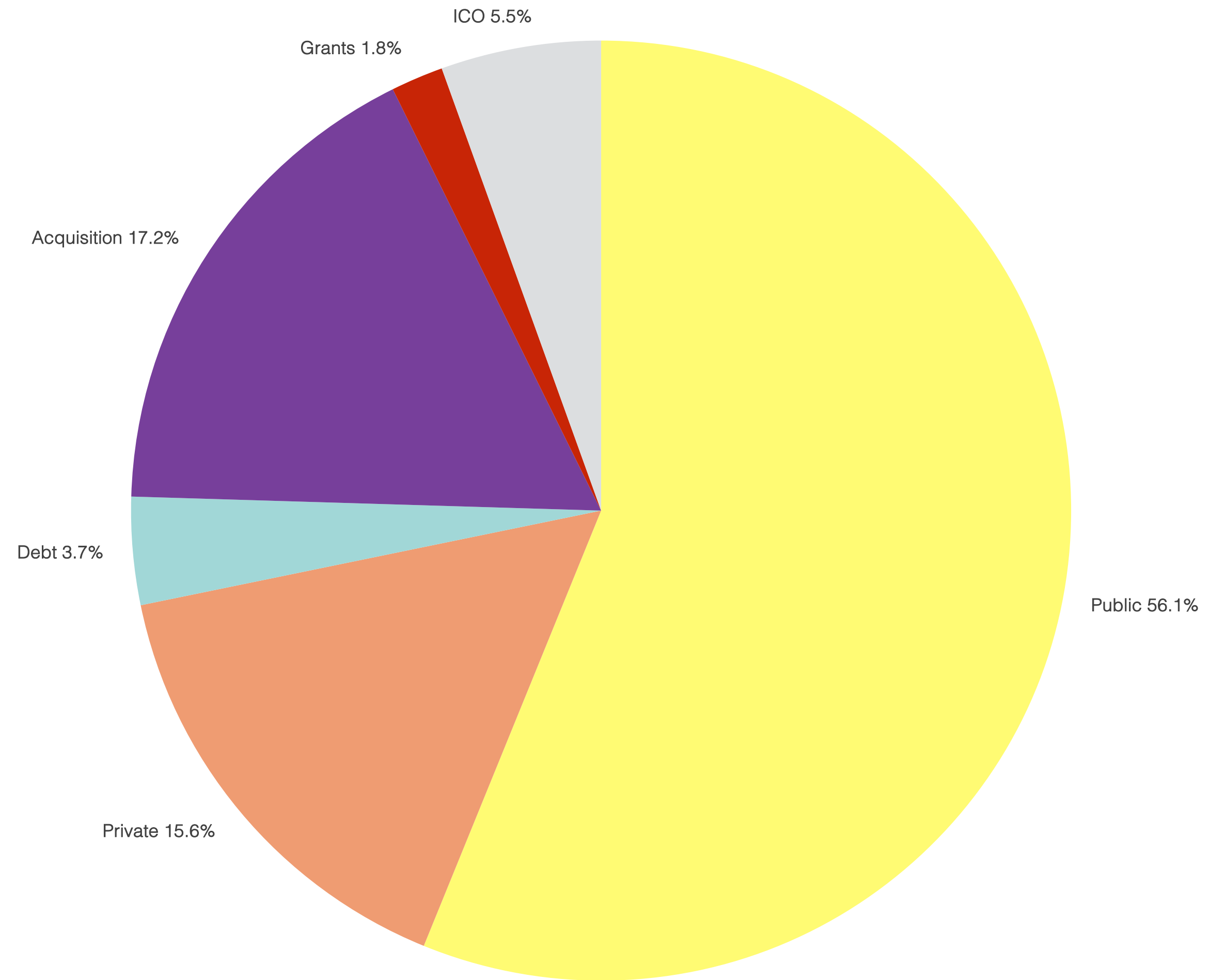
1495

INVESTORS



According to Angel List, there are 1461 investors interested in Western Australia, with 34 of them residing here.

10 quarters to end of March 2019, by funding type, WA



While startup funding in WA is still in its infancy, we continue to see movement in the right direction of both funding sources and completed deals. Investment groups such as Perth Angels, Larsen Ventures and Spacecubed (via the Plus Eight programme), have continued to make progress and this has been supplemented with new entrants such as the BetterLabs Venture Fund backed by the RAC, 808 Ventures and the recent announcement of the \$15m Fogarty Foundation fund.

There is no shortage of capital in Perth, so the ongoing need to educate investors remains and this will naturally accelerate as we see growth and exits from the tech companies that are receiving funding.

As an investor I've seen hundreds of deals in the last twelve months and there are some amazing ideas - but the key to making an investment decision still revolves around the founder relationship (character, competency and chemistry), as well as believing in the problem, solution and market fit, all demonstrated through genuine traction.

- Derek Gerrard, Purpose Ventures

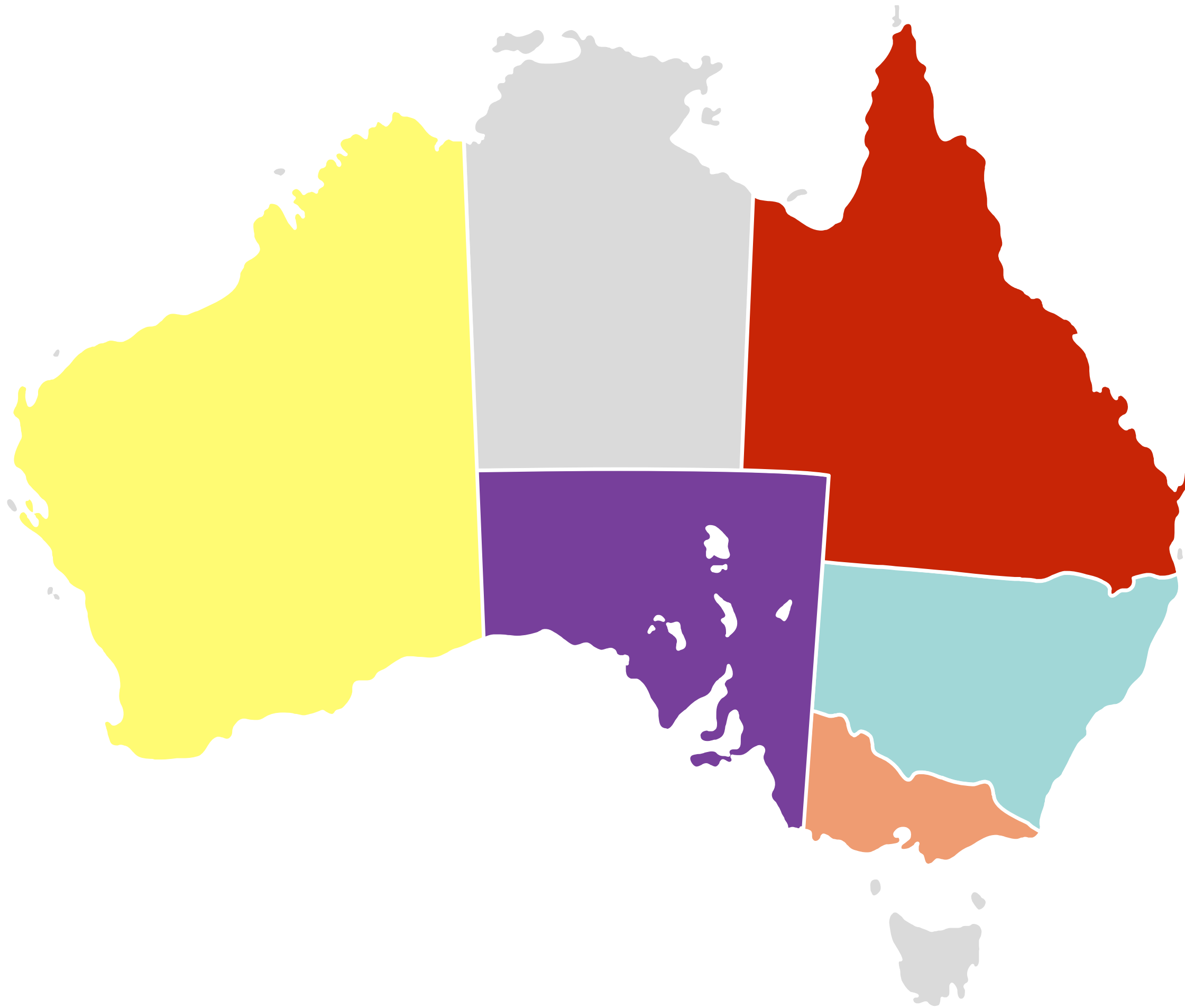




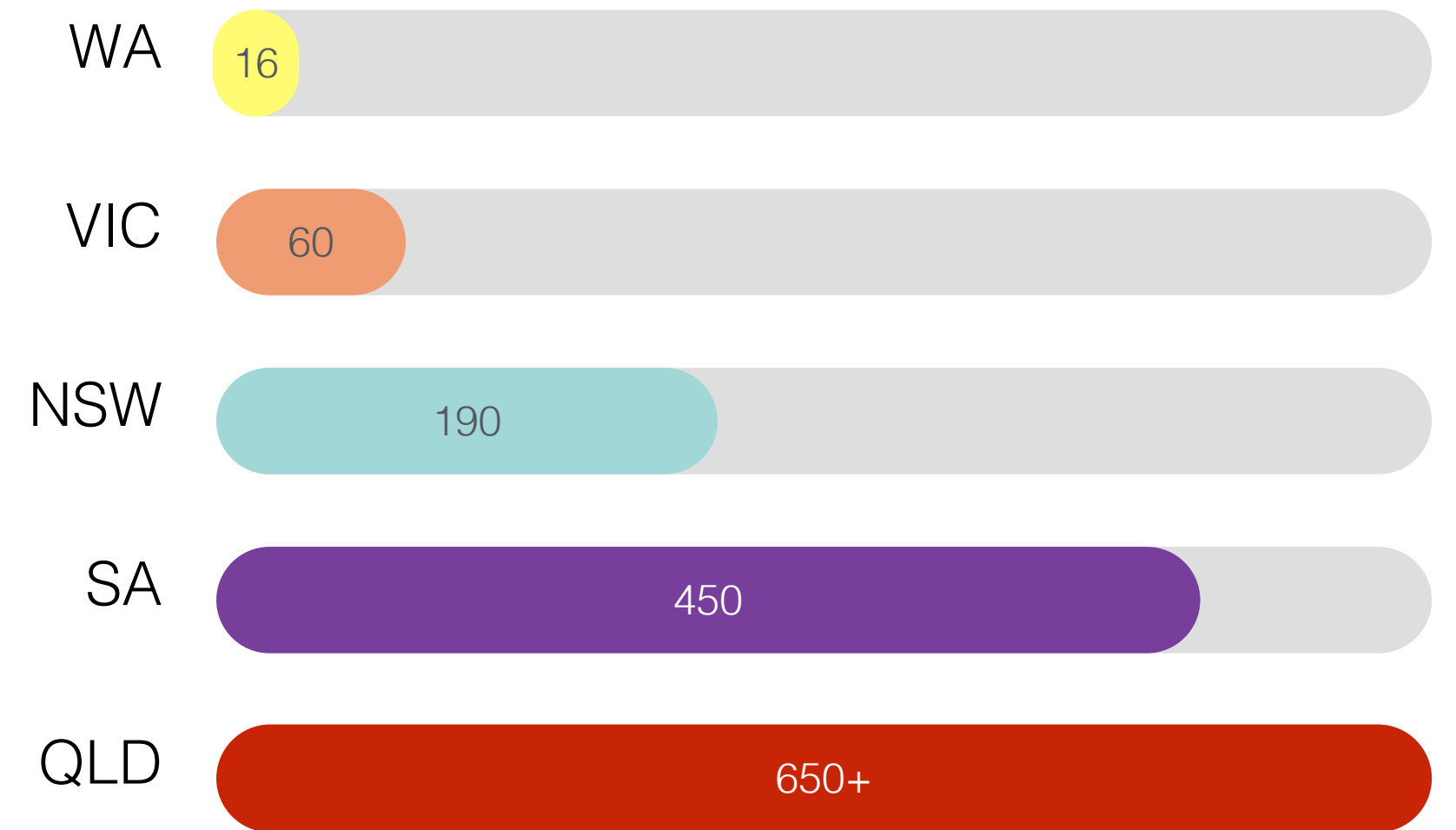
SIGNIFICANT FUNDING EVENTS

BETWEEN 2017 - 2019

1. Spookfish, \$136m – acquired by US company, Eagleview
2. Fastbrick Robotics, \$52m – raised \$35m in 2017 through share placement, and an additional \$17m in 2019
3. AusCann, \$35.3m – raised \$33.4m via a share placement, and earlier \$1.9m through a share purchase plan
4. Power Ledger, \$34m – raised \$17m in pre-sale of tokens, raised another \$17m in its ICO
5. HealthEngine, \$26.7m – in series C funding led by Sequoia Capital
6. Respirion Pharmaceuticals, \$23m – raised \$20m AUD through private investors and received a \$3m USD grant
7. Botanix, \$23m – raised \$15m and later \$8m in 2018 via a share placement
8. Brainchip, \$21.5m – raised via a share placement
9. Nuheara, \$20m – raised \$9m in 2017, \$5m, and again \$6m in 2018 via a share placement
10. Data Exchange Network, \$16m – raised in an IPO
11. Speqs, \$10m – raised through private investors



STATE GOVERNMENT FUNDING OF THE STARTUP ECOSYSTEM (\$M)



Community driven events have always been a strength of the Western Australian startup ecosystem. From meetup groups to hackathons, they are important in serving as an entry point for many local entrepreneurs on their startup journey.

This year, Morning Startup surpassed 4,300 members, driving collaboration and learning through fortnightly meetups and sundowner events. More targeted meetups also serve ever growing communities, including Machine Learning Group and Fintech Perth with over 1,500 members each.

Local hackathons such as Startup Weekend, Govhack and Ministry of Data also provide pillars of the startup ecosystem, with Startup Weekend having run its 13th instalment in 2019 and Govhack spreading its impact to regional innovation communities.

The WA innovation community continues to embrace and experiment with new community event formats, including welcoming F*ck Up Nights to Perth, with over 500 registrations over 4 sell out events this year and the growing popularity and esteem of the Pitch at the Palace event series.

The year will culminate in a celebration of local innovation and entrepreneurship at West Tech Fest, bringing together some of Western Australia's best startup talent.

- Nate Sturcke, Skills of the Modern Age (SoMA)



COMMUNITY EVENTS



WESTTECHFEST

The WestTechFest was born out of a desire to stimulate activity in the tech sector in WA by providing a focal point to attract national and international investors and entrepreneurs to share their experience and networks with talented local developers and startup founders.

Initiated by Curtin University and co-founders Bill Tai, Larry Lopez, Paula Taylor and Rohan McDougall almost a decade ago, what began as the WAPP competition evolved into the OzAPP Awards and is now a week-long annual festival which fosters dialogue and collaboration between entrepreneurs, innovators, researchers, investors and industry.

Prominent startups and scale-ups such as Power Ledger and Canva went on to raise significant funding (and in Canva's case, reach "unicorn" status) thanks to connections made through WestTechFest.

Leveraging some of WA's natural strengths, including our spectacular coastline and world class kite-surfing conditions, WestTechFest has consistently attracted

high-profile VCs, entrepreneurs and tech industry visionaries from leading global ecosystems such as Silicon Valley and Israel as well as delegations from Australia's East Coast and South-East Asia.

We have hosted regional spin-off tours, showcasing WA from the Abrolhos Islands to Margaret River region; as well as emerging technology and industry specific events such as WA's first major blockchain summit. This year, we are excited to expand the event to feature social impact technology and ignite investment for global challenges, aligned to the United Nations' Sustainable Development Goals.

Across this journey and through collaborations with many other groups in the startup ecosystem, WestTechFest has hosted thousands of guests at countless events all with that same shared objective, to celebrate innovation, investment and entrepreneurship.

- **Paula Taylor**, Co-Founder, WestTechFest

Some of the recurring events in WA:



PROGRAMS (STRUCTURED)

Accelerating Australia
<https://www.acceleratingaustralia.com>

AgriStart Regional Connect
<http://www.agristart.com.au>

Alpha Incubation Group
<http://www.alphaincubation.com.au>

Basecamp
<https://pollinators.org.au/learning/pollinatorsbasecamp/>

Biodesign Australia
<https://www.acceleratingaustralia.com>

Bloom Launchpad
<https://www.launchpad.run>

CERI
<https://www.ceri.org.au/>

CORE Innovation Hub
<http://www.corehub.com.au>

CSIRO On Prime - Perth
<http://www.oninnovation.com.au/en/Programs/ON-Prime>

Curtin Accelerate
<https://research.curtin.edu.au/industry-partners/accelerate/>

Curtin Ignition
<https://businesslaw.curtin.edu.au/industry/executive-education/ignition/>

fSpace Business Development Program
<https://fspace.me>

Impact Spark - Gascoyne
<https://www.impactseed.org/impactspark/>

Impact Spark - West Kimberley
<https://www.impactseed.org/impactspark/>

IQ Academy
<http://www.innovation.uwa.edu.au/iq-academy>

Just Start IT
<https://juststartit.edu.au>

Perth BioDesign
<https://www.sparkcolab.com>

Plus Eight Accelerator
<https://pluseight.spacecubed.com/>

Plus Eight Academy
<https://pluseight.spacecubed.com/>

Rise
<https://riseaccelerator.gateway.kpmg.com.au>

She Codes (formerly Perth Web Girls)
<https://www.shecodes.com.au>

Skills of the Modern Age
<https://skillsofthemodernage.com.au>

Springboard
<https://sbeaustralia.org>

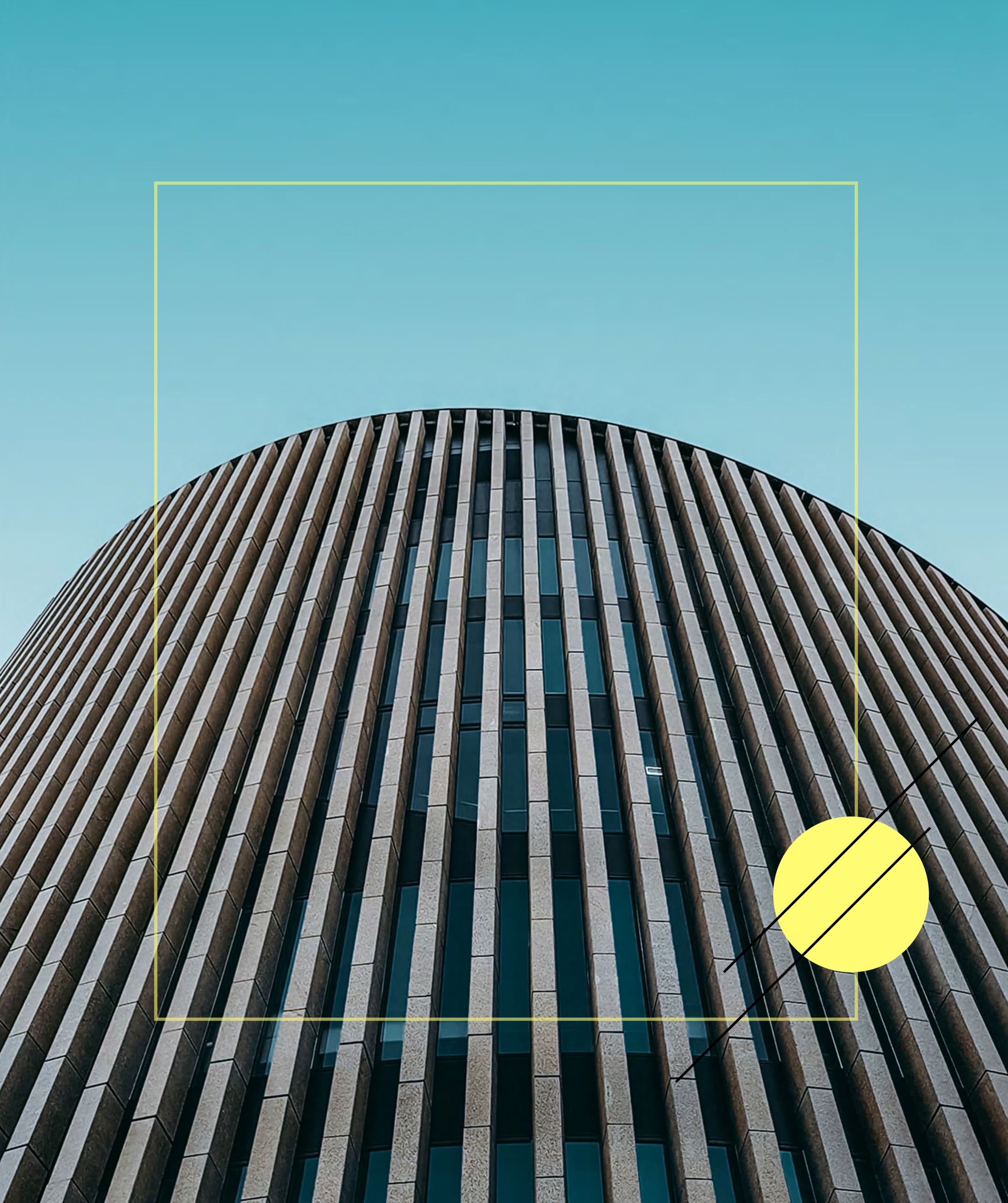
Spur
<https://spur.wa.gov.au>

TechTrails
<https://www.witwa.org.au/techtrails>

The WA Digital Health Accelerator Program
<https://www.perthbiodesign.com.au/digitalhealth>

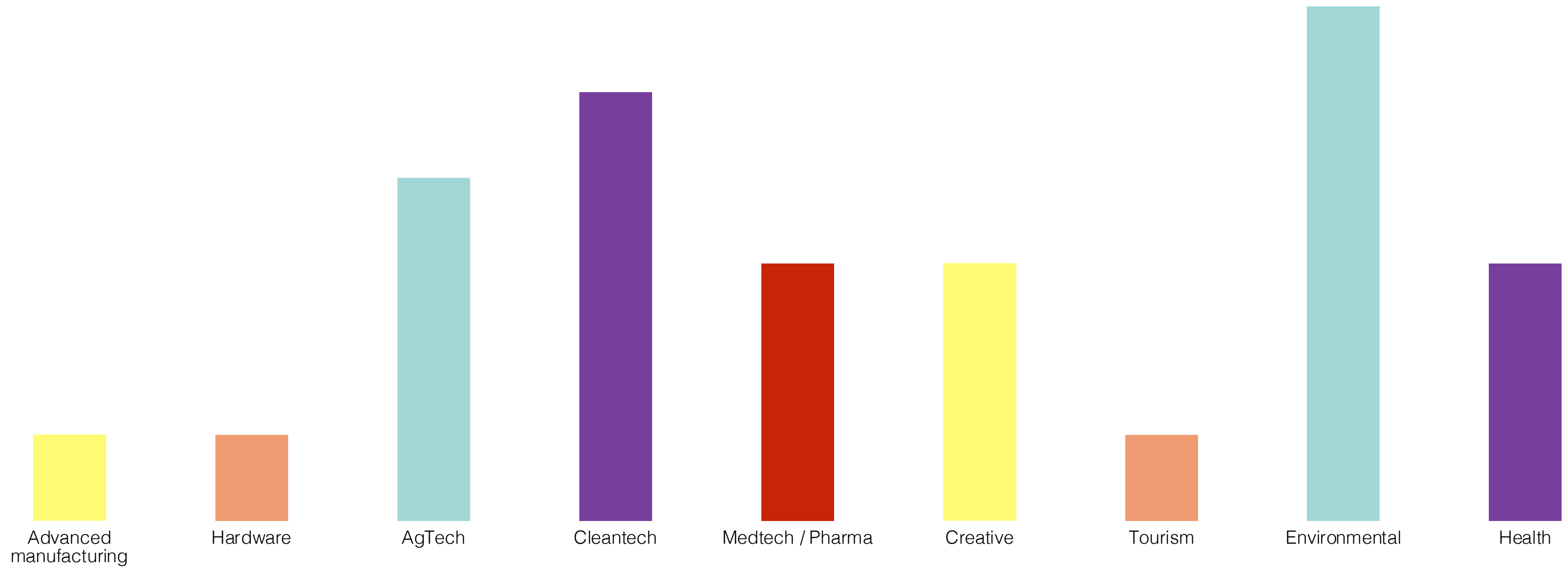
Unearthed
<http://www.unearthed.solutions>

Women in Technology WA
<https://www.witwa.org.au>

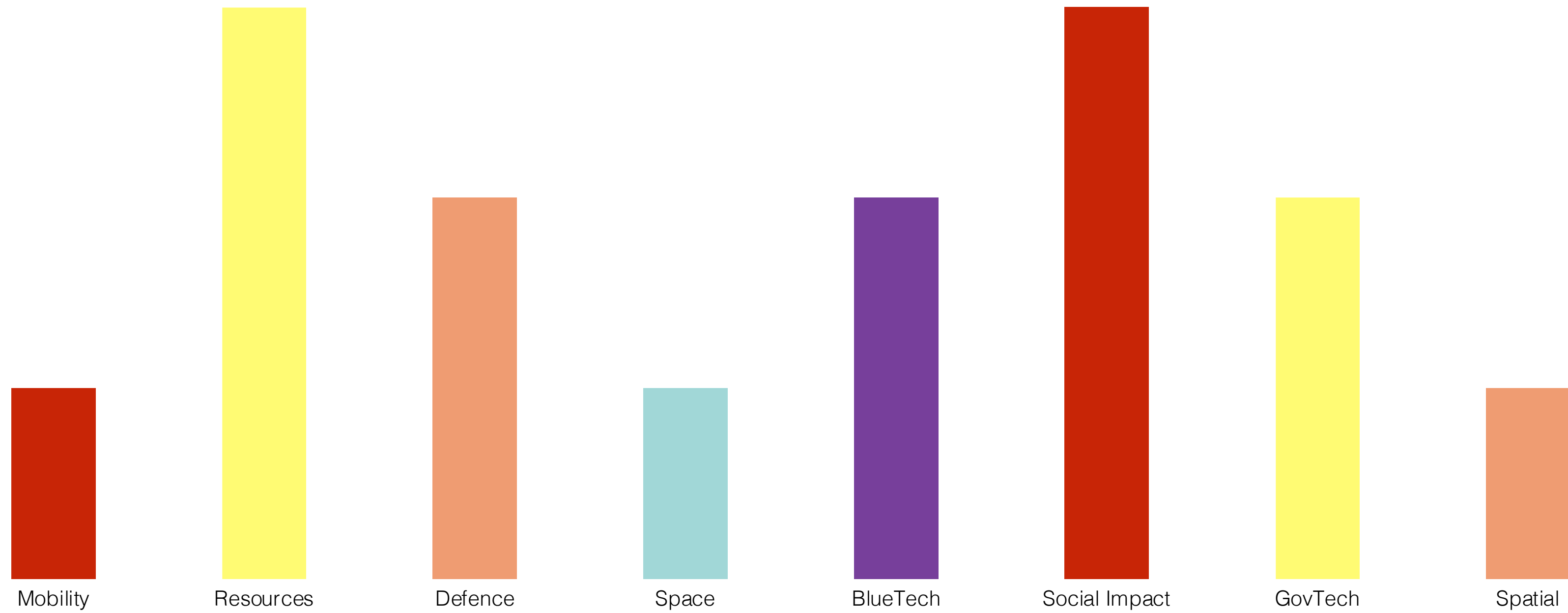


There is a big focus around education - particularly in tech, entrepreneurship and emerging skills of the future. For She Codes Australia (formally Perth Web Girls) we are seeing unprecedented demand at the moment, with workshops selling out in a matter of hours, with waiting list in the hundreds from women who want to learn. We are hearing from a lot of women, and the broader community, that technology education is hard to come by and that they are keen to develop skills to stay relevant in a rapidly changing market. We are also seeing a huge demand for companies in upskilling their teams, and from state and federal government in funding projects for the skills revolution. If we can teach the right skills, at a big enough scale it represents a huge opportunity for Western Australia in diversifying our economy.

- Kate Kirwin, Founder & Program Manager, She Codes Australia



VOLUME OF PROGRAMS & EVENTS BY FOCUS AREA



UNIVERSITIES

Universities play an important role in the tech sector through provision of research services, new technology that can form the basis of products and capability building for participants. As an example, Curtin has developed a pipeline of support for early stage tech entrepreneurs that enable them to commercially assess their idea through Curtin Ignition, validate it with customers through Curtin Accelerate, access funding for prototyping, pilot trialing and proof of concept through Curtin Kickstart and then connect with global entrepreneurs and investors at West Tech Fest. The pipeline has already produced successful outcomes including Scanalyse, HiSeis, iCetana and Painchek and we hope to see many more.

- Rohan McDougall, Director, Commercialisation, Curtin University





YOUNG ENTREPRENEURS IN WESTERN AUSTRALIA


Year on year we're seeing more students interested in the Launchpad program, a 12-week university accredited entrepreneurship program run out of Bloom. This year we had to triple the size of the program to accommodate the demand. It seems more young people are starting to question how will they position themselves in the future of work and more are turning to entrepreneurship as a way to create their own employment.

It appears that this entrepreneurial mindset is degree agnostic. Applicants in the current Launchpad cohort are from Science, Engineering, Commerce, Law and Arts degrees equally. Whereas a couple of years ago it was mainly Commerce and Engineering. It's also interesting to see most Science students coming from deep science majors like genetics, neuroscience and biotechnology.

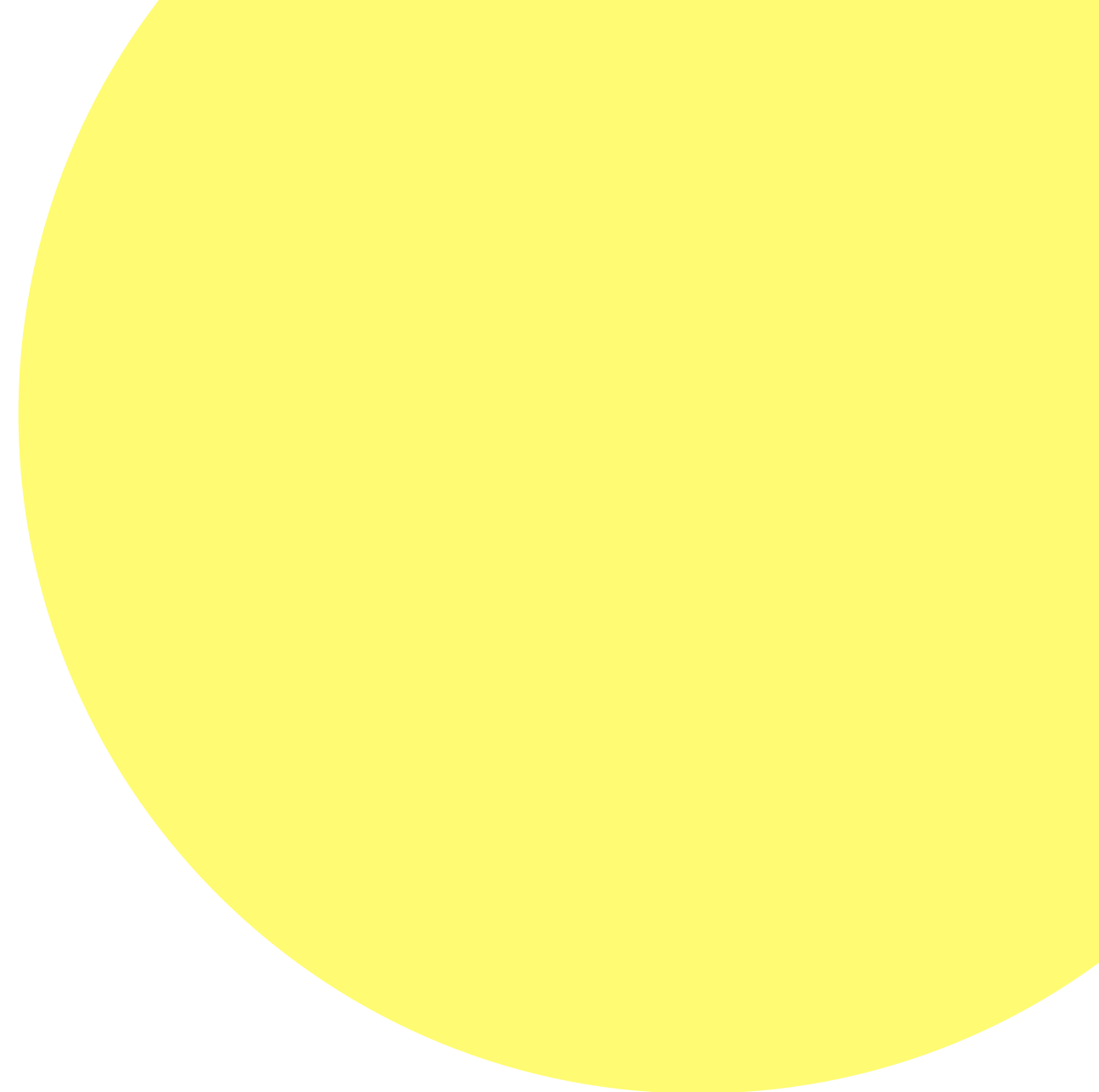
This year we saw more females get involved than in previous years which is great. The current Launchpad cohort has 48% female and 51% male participants.

We've seen a change in the types of businesses the students are pursuing. This year there was an increase in agriculture businesses, education - specifically numerical and financial literacy and even more systemic problems like single-use plastic waste and fake news & misinformation. Its clear students are passionate about creating an impact and making a positive change in the world. We're seeing a lot of purpose-driven businesses using a social enterprise model where the business model aims to generate revenue, instead of the traditional not-for-profit model that was more common in previous years.

- Jasmin Ward, Bloom



INDIGENOUS ENTREPRENEURSHIP

- Of the 660 Indigenous kids that finished school last year, 10 were enrolled into software engineering or other technology related subjects
 - How we do business will change, 44% of jobs will be automated in the next 10 years
 - Tech and STEM has the power to be an equalising effect on opportunity for Aboriginal people
 - 60% of the Aboriginal population under 35 years and are digitally connected
 - Most Indigenous startups have a social focus
 - Aboriginal people need to transition from a consumer of technology to a creator
 - Under the Raise the Bar initiative from the Business Council of Australia, 20 of their largest members will spend over \$3 billion with Indigenous suppliers over the next 5 years.
- 



The Indigenous startup ecosystem is an exciting growing, evolving and emerging sector that is being driven primarily from a grassroots level.

There's been significant growth in this young sector with plenty of activity across the country. Closer to home in WA we have a number of startups operating in diverse industries including Sense of Direction, Virtual Kamay, Flanno and Dreamblocks.

The challenge for Western Australia is how to create the environment that incentivises local Indigenous startups to stay in WA. Particularly given the significant investment in accelerator programs and tech meetup groups in the eastern states for Indigenous tech and aspiring entrepreneurs such as those by the Victoria Government and Ngamai developed by a Koorie Entrepreneur.

To support this sector, a number of StartupWA board members and WA's own Skills of Modern Age are supporting a flagship event, backed by the Minderoo Foundation for Indigenous entrepreneurs. Dream Summit is an Indigenous leadership summit to support Indigenous startups and founders to grow and scale their business.

Recognising the strength, value and opportunity of this rapidly growing startup sector, StartupWA has formed the Aboriginal Startup Working Group looking to map the WA's Indigenous ecosystem. This work aims to support the sector by facilitating corporates, government and startups to work together and how we can support and grow this exciting sector and Indigenous startups. This exercise ties in with the recent Raise the Bar initiative seeing an investment of \$3 billion into this sector.

- **Leslie Delaforce**, Director, StartupWA

REGIONAL



Innovation in the regions is gaining traction and showing signs of growth across most of Western Australia. There are differences in innovation maturity from region to region, largely due to the individual differences in regions around working collaboratively and being able to gain support for projects. A lot of the work that has been funded over the past 12 months has been years in the making, from hard working, passionate stakeholders who understand the impact innovation and new ways of thinking can have in regional WA.

Meshpoints has been facilitating capacity building activities and focusing on connecting these champions across their geographical landscape, allowing for a transfer of ideas and taking on lessons learned without the resource drain usually associated with "starting up" in isolation. Linking these champions together across the regions, as well as back into the Perth Ecosystem has benefitted with regional iterations of She Codes, Plus Eight and Hackathons all making their mark in the South West, Mid West, and Pilbara over the past year.

There has been significant focus on investment pathways and opportunities in Peel and the South West with the development of SW Angels and investment activities.

<https://www.meshpoints.com/>

Peel are also exploring the opportunity of significant infrastructure investment and innovation around food processing, with a diverse range of stakeholders.

The Pilbara continues its growth in innovation by connecting the hubs across the region with WEB Business Hub Launchpad project due to kick off in early 2020.

Mid West is seeing continued growth after a successful Eco-Tourism Incubator, and the appointment of a CEO at Pollinators Inc.

The Great Southern are kicking goals with the launch of Fathom Co. to strategically drive innovation across the region through RNIF funding to Creative Albany.

Inland we are seeing some great traction with Wheatbelt Business Network attracting funding and support for their business growth programs. Across the regions, Agristart are making a significant impact in the Great Southern, South West and Wheatbelt with their Connect program, and Impact Seed are developing enterprise in the Gascoyne and Kimberley regions.

With significant capacity building happening across WA already, regions will be well placed to understand and leverage future opportunities by working together to realise strategic goals around innovation and growth. The future outlook is positive, with a groundswell of interest from stakeholders wanting to work together and pool resources in order to realise this positive impact. Across WA, regions are growing in maturity, willing to learn, and open to support in order to take their ecosystems to the next level.

- **Katie van den Brand**, Meshpoints



GROWTH IN
OPPORTUNITIES

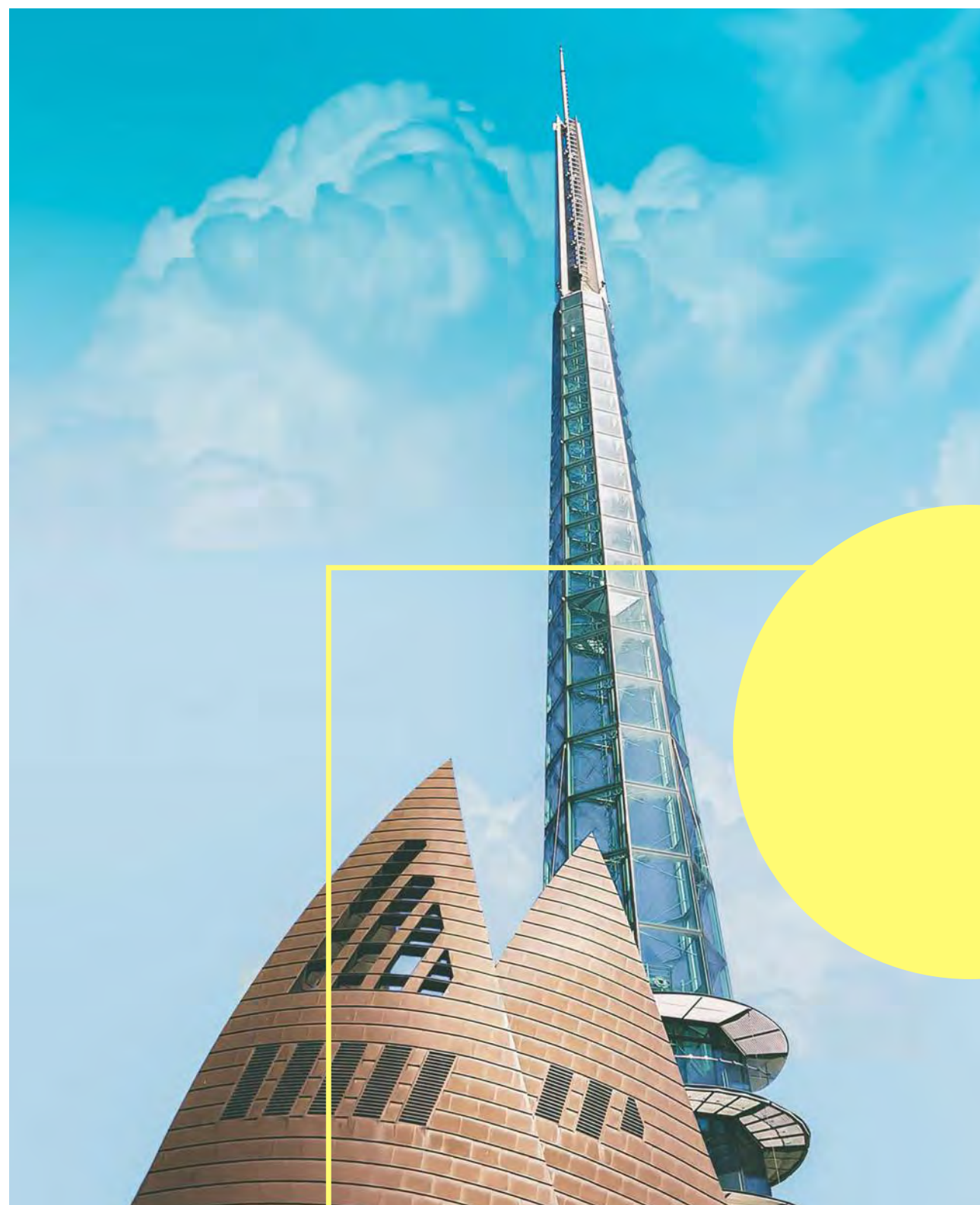
AGRICULTURE

Opportunities for regional innovators continue to grow in parts of WA as more support mechanisms are put in place for businesses to start and scale without having to move to Perth. AgriStart runs programs throughout the Wheatbelt, South West, Great Southern and the Kimberley. We work with entrepreneurs at the early idea validation stage, start-ups looking to scale and through to established businesses looking for growth opportunities. Helping regional businesses to access investment and export opportunities will be critical to ensuring industry growth.



The South West region in particular seems to have quite an advanced innovation ecosystem, with Maker & Co and Meshpoints in Bunbury, Creative Corner in Margaret River and AgriStart's CONNECT Hub in Busselton. The South West Angels investor group has also recently formed and is looking to provide investment opportunities for start-ups across the South West region. The area attracts a lot of 'lifestyle entrepreneurs', who have usually moved to the area for lifestyle reasons and find professional roles difficult to come by. Support and collaboration with local, state and federal government bodies in the region will help to grow the culture of innovation.

- [Natasha Ayers](#), Managing Director, AgriStart



MEDTECH

The health industry in WA accounts for nearly 171,000 jobs in Western Australia, more than any other sector of the State's economy. Health contributes around 6 per cent of the total economic value across all industry sectors, third behind mining and construction. (ABS 5220)

There are number of government and university initiatives in WA to support the translation and commercialisation of the State's world-class health and medical research. These include: Western Australian Health Translation Network (WAHTN); SPARK Co-Lab; Accelerating Australia (WA activities); the BioZone initiative and the newly created MTPConnect WA Life Sciences Innovation Hub. The medtech, biotech, digital health and pharmaceutical startups operate in a global market and there are additional opportunities in WA for rural and remote applications, precision health and clinical trials.

Globally, digitalisation, big data and industry 4.0 technologies are creating significant innovation opportunities for startups and WA is well positioned to take advantage of this.

- Kate Brooks, MTPConnect



WOMEN IN TECHNOLOGY WA

EDUCATING, ENABLING, EMPOWERING

The gender distribution of Australians with STEM qualifications is highly skewed, with less than 25% of women represented in the rapidly evolving tech sector. The challenge remains to shift preconceptions, address systemic challenges and enable women and young girls to see a place and clear path for themselves in the future of work landscape.

As the leading voice for women in tech in Western Australia, WITWA remains firmly focused on encouraging greater diversity and supporting women and young people in technology, science and innovation. Our initiatives focus on role modelling "the possible" to women about to enter or already present in the workforce, as well as empowering the next generation of young girls through our Techtrails Future Skills + STEM Program. The scope of female talent in Australia is inspiring. A testament to this is the 300+ women featured on the Women in Technology WA Role Models page alone. The challenge remains to amplify this talent pool and make true diversity in the tech sector the new normal.

#ifyoucanseeheryoucanbeher

- Pia Turcinov, Chair, Women in Technology Western Australia



MINING
RESOURCES
OIL/GAS
ENERGY
DEFENCE
SPACE

CORE is Australia's first coworking, collaboration and innovation hub spanning the mining, oil/gas, energy, resources, defence and space industries, opened in 2016. It is our mission at CORE to deliver proximity to skills, solutions and opportunity along the supply chain, and a culture of entrepreneurship, open innovation, trust, collaboration and commercialisation of digital technologies into the sector, which we will be able to fast track thanks to CORE's Incubator Support Program.

This involves over 100 activities and initiatives which includes the following:

- **CORE Start Awards**, which provides two startups per quarter access to CORE's coworking facilities, industry facilitation and support, plus industry and business development experts and mentors.
- **CORE Start Global** providing six high growth CORE member startups with short-term stays in global resources and energy hubs in across the globe
- **CORE Startup Growth**, a new knowledge-building Masterclass series with three high-quality seminars a year on targeted startup growth, business development and commercialisation needs
- **CORE Resources Founders Pre-Accelerator**, a dedicated program for prospective female founders of resources and energy technology startups

- Aaron Schier, General Manager, CORE Innovation Hub

SOCIAL IMPACT

Social innovation, social enterprise and impact investment are analogous to tech innovation, high growth startups and VC across the rest of the startup ecosystem; with the key difference being the emphasis of social impact and impact measurement metrics beyond financial growth. Over 150 WA social ventures have registered as part of the 2019 Mapping Project, and Impact Seed has supported many of them over the past 5 years. With the right support, these businesses have the capacity to address some of WA's most intractable social and environmental challenges through investable impact-driven business models ranging from employment-based social enterprises which can support people suffering disadvantage including long term unemployment and disability, to regenerative agriculture projects in partnership with Aboriginal corporations, which have the capacity to transform WA's \$8B ag sector, and our food system into the State's largest carbon drawdown project. The foundations laid since 2015 are now knitting into a comprehensive demand-and-supply side pipeline build, through the ImpactSpark program, WA's only social enterprise incubator program launched in 2017, a newly launched \$20M WA Impact Investment Fund and government policy advocacy work which has culminated in the launch of the cross-sector [www.iiwa.org.au] Impact Investment WA Alliance by the Hon. Ben Wyatt MLA, Treasurer, and Hon. Simone McGurk, Minister for Communities in early September 2019.

- Sven Stenvers, Founding Director, Impact Seed

CORPORATE INNOVATION PROGRAMS

Corporate innovation is about shifting mindset and encouraging people to solve their business challenges in different ways.

Some of the well known primary drivers for corporate innovation include: collaboration and external partnerships, lean prototyping with early customer validation; and embracing digitalisation. These drivers enable the corporate to accelerate the commercialisation of their products and leverage the latest technologies and skillsets. The close proximity of Western Australia's largest corporates with the State's leading researchers and bright new startups provides the ideal ecosystem within which corporate innovation can thrive. Corporates are looking to collaborate more and more with startups to solve their business challenges. This is an exciting time for startups in WA.

- Tom Goerke, Director, StartupWA

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CITY of PERTH

STARTUP STORIES

THE MOST READ STORIES ON STARTUP NEWS IN 2018/2019

Since early 2014, **Startup News** has been telling stories of local startups. Over the past year, they have also been interviewing startup founders and investors with their '**Startup West**' podcast.

Reflecting the kind of news that is coming out of the sector, and what people are most interested in reading, here's the Top 10 stories of the last 18 months

1. **HUMM move to Silicon Valley** – graduate of Plus Eight Accelerator program, Iain and the team moved to California in mid-2018 and have since released their neuroscience band that aids concentration
2. **Idle Australia's first year** – current member of the Plus Eight cohort, Dylan's marketplace for construction equipment experienced all the typical startup ups and downs
3. **Feedmee rebrands to Unocart** – Tyler and Brenda's app for food lovers pivoted into home delivery and then customer insights
4. **State Government Innovation Vouchers**- once a year opportunity for local startups to grab \$20,000 to help them develop their business
5. **First startups move into Tank Stream Labs**- the Sydney-based co-working space moved into the EY building in Perth, and welcomed its first inhabitants
6. **RAC launches BetterLabs Venture fund** – RAC WA put up \$3M and are looking to invest in ten local startups; two deals have already been announced
7. **Bunsters Sauces expand into the US** – Renae's hot sauces are the number 1 hot sauce on Amazon in the US; they later attracted investment from Perth Angels
8. **Buildsort to build blockchain marketplace** – Chris's blockchain building solution launched with a partnership deal
9. **Incite Award winners announced** – the main ICT and tech awards of the year, in which local startups heavily featured, alongside corporates
10. **Laconik wins \$383K Accelerating Commercialisation grant** – local agtech startup secured a federal government grant to commercialise its precision Nitrogen fertiliser technology

MEDIA, SOCIAL, MEETUPS

PODCASTS

StartupWest Podcast
The Weird Growth Podcast

NEWS

Business News WA
StartupNews

FACEBOOK GROUPS

Startup Grind Perth
Crypto Chatter Aus
UWA Ethical Hacking

COMMUNITY SLACK CHANNELS

Perth Design
Startups Perth

RECURRING MEETUP GROUPS

3D Printing Enthusiasts
Advanced Analytics, Beautifully Engineered
Agile Perth
Agtech Perth – Agricultural Technology and Innovation
Amazon Web Services User Group
Ambitious Leaders Network Perth

Ambitious Professionals and Entrepreneurs Perth
Analytics at Speed
Android Developers
Angular Perth
Ansible Perth
Bitcoin Perth
Business Analysis Community
Canning vale Women in Business
Circular Economy Perth (WA)
Clickfunnels
Crowd Funding Institute of Australia (CFIA)
Crypto Currencies & Blockchain Technology
Cryptocurrency Investing
Cyber Risk in Perth
DevOps Perth
Digital Transformation Perth
Digital Marketing Tips and Tricks
DIY Robocars
Drupal WA
Elastic Perth User Group
Electronics Hobbyists and Engineers Perth
EngITT Meetup

Enterprise Design & Leadership
Entrepreneurs in Perth Australia
Entrepreneurs Making an Impact
Experience Design Perth
FinTech Perth
Flutter Perth
Freo Founders
Front End Web Developers Perth (Fenders)
GEN Australia
GDG Perth – Google Developer Group
Grow Your Business Online
Hacking HR – Perth Chapter
Hyperledger Perth
Honeybee Products
Impactful Female Entrepreneurs of Perth
Indi Hackers Perth
Indie Swans
Influentiall
Information Technology Professionals Assn.
Insuretech Perth
I Love My Business (Most of the Time)

Joomla User Group WA
Joondalup Women in Business
Junior Developers Perth
KNIME Users Western Australia
Lean Startup
Liberating Structures User Group
Magneto WA
Make Money Online
Making Money with Bitcoin
Morning Startup – Perth
.NET Perth
Nintex User Group
Oracle Perth
OWASP Perth - AppSec
Perth 3D World Meetup
Perth Agile Meetup
Perth Amazon Alexa Developers
Perth Appreneurs MasterMind Group
Perth Aritifical Intelligence Meetup with IBM Watson
Perth ASX Investor Insights
Perth Automation Dojo
Perth Azure User Group
Perth Big Data, Data Science, Data Ops & Analytics
Perth Chatbots – Chat marketing

Perth Cloud Migrations
Perth Code Dojo
Perth Computational Design Group
Perth Craft CMS Meetup Group
Perth Creative Designers
Perth Customer Success and Product
Led Growth
Perth Customer Success and Product
Led Growth
Perth Design Thinking
Perth Django and Python Developers
Perth Entrepreneurs for Artificial
Intelligence
Perth Ethereum Meetup
Perth Exploration and Mining
Investment
Perth Functional Programmers
Perth HashiCorp User Group
Perth iOS Developers
Perth Internet of Things Community
Perth Java & JVM Community
Perth Lean Change Management
Meetup
Perth Legal Hackers
Perth Linux User Group (PLUG)

Perth Machine Learning Group
Perth Marketing
Perth Microsoft Data and Analytics
User Group
Perth Mobile .NET Developers
Perth MuleSoft Meetup
Perth Open Source Hackers
Perth PHP Developers
Perth Rapid Startups
Perth Salesforce Developer Group
Perth Serverless
Perth Sitecore Meetup Group
Perth Scrum Master and Agile
Coaching Guild
Perth Small Business Networking
Group
Perth Startup Founder 101
Perth STEM Fields Meetup Group
Perth Technology Startups Co-
Founders Meetup
Perth Unreal Engine Meetup
Perth VMUG - Sponsored by Veeam
Perth VR Meetup
Perth Web Accessibility & Inclusive
Design

Perth Web Design Meetup
Products of Perth
ProductTank Perth
PropTech Perth
Pyladies Perth
React Native Perth
Ruby on Rails Oceania
SecTalks Perth
Service Design Perth
Shopify Meetups Perth, hosted by
The Cut
Silicon Beach Perth
SkillGym
Space Hub Perth
StartBUILD – PropTech (PER)
Strong Women Network
Systems Change Community
The Perth Artifactory
The Perth Data Science Meetup
Trend Chats @ AtlasTrend
UWA Innovation Quarter
WA Changemakers
Women in Blockchain
Wordpress Perth



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THANK YOU

From Sam, Raf, Kate, Cam, Tom, Chloe & Les.