

# Commercial property & post-pandemic recovery

## OWNER REQUIREMENTS

May 2022



Wireless  
Infrastructure  
Group





# Post-pandemic trends - Offices

## WHY HIGH-QUALITY SERVICE DELIVERY IS SO IMPORTANT

- Office vacancy rates increased significantly in 2020: 91% in San Francisco, 45% in Edinburgh, 32% in London and 27% in Berlin<sup>1</sup>
- Two-thirds of large/medium sized firms planned to re-configure their office space away from desks and private offices toward more team spaces and conference rooms – 30% office space reduction on average<sup>1</sup>
- 20-25% of workers in advanced economies could work remotely 3+ days a week on a long-term basis<sup>1</sup>
- Average amount of time employees spend in video meetings each week has reached 11.7 hours<sup>2</sup>
- In 2022, 25 percent of respondents state that their biggest struggle when working remotely was not being able to unplug<sup>3</sup>
- Reduced space, more hot-desking - greater demand for improved office connectivity and mobility

<sup>1</sup> Source: McKinsey, The future of work after COVID-19

<sup>2</sup> Source: Gartner, Workforce consumer survey

<sup>3</sup> Source: Statista, Struggles with working remotely

# Canary Wharf Group

## NEW SERVICE MODELS, FLEXIBLE WORKSPACES



- Offices are adapting to meet demand for a new age of flexible workforces
- Canary Wharf MadeFor Office has been designed for collaboration, hybrid working and sustainability
- Attracting and retaining business demands the highest standards of connectivity

*“We now offer our customers any type of solution to meet their needs – from taking a few desks in our L39 community to managed services via the MadeFor platform to a bespoke sustainable build to suit..”*

Shobi Khan, CEO,  
Canary Wharf Group – 21/2/22

# Large scale offices and commercial campuses

EVOLVING BUSINESS AND SERVICE MODELS FOR BOTH TENANTS AND OWNERS



King's Cross campus



Canary Wharf campus



MediaCityUK campus



ARM HQ Cambridge



The Leadenhall Building



Linklaters HQ



## Post-pandemic trends - Shopping Malls

### CONTINUING HEADWINDS CHALLENGE RETAIL RECOVERY

- Footfall in shopping malls declined by 37.5% in January 2022 - below the 3-month average decline of 36.5%<sup>1</sup>
- 56 percent of consumers said they intended to continue to major on online grocery shopping post-pandemic<sup>2</sup>
- Retail sales slow to recover: sales volumes in retail stores fell by 7.9% in March, down from a fall of 6.9% in February 2022<sup>3</sup>.
- Post-pandemic recovery impeded by the fallout from energy price rises and Ukraine

<sup>1</sup> Source: British Retail Consortium, February 2022

<sup>2</sup> Source: McKinsey, Adapting to the next normal in retail

<sup>3</sup> Source: ONS, Retail Sales, March 2022

# Footfall is a key driver

## AN OUTSTANDING SHOPPING EXPERIENCE IS THE ENABLER



### Mobiles used extensively by shoppers

73% of shoppers prefer to use their mobile device in store rather than ask a shop assistant for help<sup>1</sup>

69% use their smartphone to review in store purchases<sup>2</sup>



### Retailers rely on high quality mobile coverage

Retailers depend on indoor mobile services to support retail transactions, targeted advertising & loyalty schemes.

Contactless payments now account for 51% of all UK transactions<sup>3</sup>



### Improving the utility of retail space

92% stated leased commercial space was more attractive if there was good quality connectivity<sup>4</sup>



### Key differentiator in a competitive retail market

49% of retailers said mobile was their top customer engagement priority<sup>5</sup>

25% of visitors will leave a centre due to a poor mobile signal<sup>6</sup>

<sup>1</sup> Curalate, The Mobile Shopping Mall Experience, 2017

<sup>2</sup> RetailMeNot, Retail Shopping Study, 2019

<sup>3</sup> UK Payments Markets Report, June 2020

<sup>4</sup> Signal Boosters InBuilding connectivity report, 2018

<sup>5</sup> BRP, Special Report - In Store Mobility, 2019

<sup>6</sup> Global Wireless solutions, Nationwide test of shopping centre coverage, 2019

# UK leaders in retail

## OWNERS INNOVATING IN DIFFERENT WAYS



Westfield



Canary Wharf Retail



Trafford Centre



Bluewater



Lakeside



Meadowhall



## Post-pandemic trends - Stadiums

### FANS ARE BACK, DEMAND HAS ESCALATED

- Fans and visitors are returning to stadiums after two years of increased streaming and online activity
- Stadium owners and operators adapting to the pandemic placing greater emphasis on digital transformation for mobile ticketing, push information and crowd control
- Operational security and associated communications prioritised

# Fan engagement and in-stadium experience are key drivers

## MOBILE CONNECTIVITY INTEGRAL TO THE VISITOR EXPERIENCE



### Connecting fans

97% of fans bring a mobile device to a game<sup>1</sup>

Connectivity seen as the number one enabler for creating new in-stadium revenue streams<sup>2</sup>



### Fan engagement

Over 80% of fans seek a more immersive and content rich experience during live events<sup>1</sup>

Mobile connectivity is the key delivery mechanism to maximise the fan experience<sup>1</sup>



### Driving F&B revenues

Connected stadiums benefit from increased F&B revenues – express pick ups, reduced queue time and faster POS<sup>1</sup>

In-seat / in-game ordering r – a key driver for improving the F&B experience<sup>3</sup>



### Sponsorship & advertising

Facilitating sponsors and advertisers – delivering targeted and timely marketing – e.g. F&B / merchandise offers before and after matches<sup>1</sup>

<sup>1</sup> Keeping sports fans engaged 2020, Deloitte

<sup>2</sup> The Stadium as a Platform 2019, Deloitte

<sup>3</sup> The Stadium of the Future 2019, Oracle

# UK leaders in sport

## GROWING DIVERSITY OF SERVICE DEMAND



Anfield Stadium  
UK's first neutral-host 4G stadium DAS



BT Murrayfield  
First 4G DAS with dynamic capacity allocation



Lord's Cricket Ground  
UK's first neutral-host cricket ground DAS



Ibrox Stadium  
Forecast activation 2023

# Landlords, venue operators, owners of real estate

## STILL LOOKING FOR THE SAME THINGS POST PANDEMIC

Trusted advisor

Market leading  
commercials

Turnkey service  
with full lifecycle  
management

Long term  
partnership

“Putting our fans first, improving their match day experience and helping them to enjoy their time at Anfield is integral to our strategy. Using expertise from WIG we’re tackling this challenge with high quality 4G services throughout the stadium to provide a much better match day experience.”

Andrew Robinson  
Head of Technology & Transformation  
Liverpool Football Club

“ We were looking for a partner capable of designing, deploying and managing a single wireless solution to complement our existing communications network. The experts at WIG rose to the challenge and were able to meet our unique requirements by delivering one of the UK’s largest and most advanced wireless communication solutions. We’re now supporting the mobile demands of MediaCityUK, as well as having an appropriate network upgrade path to support emerging wireless technologies over time.”

Paul Clennell, CTO,  
dock10, MediaCityUK

“ WIG was our first choice when it came to launching superfast 4G technology at intu Trafford Centre. We needed a partner who could help bring the world of online and offline retail together. WIG ticked this box by providing a single solution and comprehensive mobile coverage on a multi-carrier, multi-technology basis across our shopping centre. Our customers can now stay more connected while visiting intu Trafford Centre.”

Gordon McKinnon,  
Regional Centre Director,  
Intu Properties plc



Thank you