

# **U.S. Retail: Cellular In-Building Wireless Spending, 2020-2025**

Market Study  
Second Quarter 2021





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# U.S. Retail: Cellular In-Building Wireless Spending, 2020-2025

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## Market Study

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*iGR*

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## Abstract

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There are many thousands of retail/mercantile buildings in the U.S., including both malls and standalone buildings. There is no question that the retail sector has been severely impacted by the COVID-19 pandemic; instead, the question is how bad is it?

In-building wireless (IBW) systems can be deployed in retail buildings to handle internal business, employee, third-party vendors and patron voice/data traffic, and even though some retail buildings are good candidates for IBW, the pandemic has changed the likelihood for the deployment of IBW in these buildings.

This market study provides a revised forecast of the cellular in-building wireless (IBW) market for mall and non-mall (standalone) retail buildings. *iGR* found that due to the pandemic, the IBW market for 2020 and beyond is significantly different than it was previously, and pre-2020 trends are largely irrelevant now. The 2021 revised forecast was modeled with:

- New data and assumptions regarding the (ongoing) COVID-19 pandemic
- Newly available data (November 2020) from the Commercial Buildings Energy Consumption Survey (CBECS)
- Information gathered from conversations with multiple solution providers in the IBW market.

Included in the market study is a five-year forecast for both network build spending and operational spending for the deployment of cellular IBW in U.S. retail buildings in the sub 6 GHz, CBRS, and mmWave bands.

Key questions addressed in this study:

- What are mercantile/retail buildings? What applications and services are enabled in a smart/connected mercantile buildings?
- How has COVID-19 impacted the IBW market for retail buildings?
- How much will be spent to build and operate sub 6 GHz, CBRS and mmWave IBW systems in U.S. mall and non-mall retail buildings from 2020 to 2025?
- What technologies are required for a smart retail building?



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- What are 5G, CBRS, and MmWave, some of the technologies and spectrums that will support cellular IBW?

This market study is recommended for:

- Mobile operators, particularly those servicing the U.S. market
- Mobile backhaul providers, including telcos and cable MSOs
- Wired and wireless backhaul vendors and solution providers
- Mobile OEMs, particularly those servicing the U.S. market
- Wired and wireless infrastructure vendors, particularly those servicing the U.S. market
- Financial and investment analysts.



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