

# The True Cost Retail

Cellnex UK highlights how poor digital infrastructure thwarts retailers bid to stay competitive in a fast-moving market.

The Indoor Coverage Experts



# CONTENTS

- ➔ Foreword from Gianluca Landolina, CEO of Cellnex UK
- ➔ Executive summary
- ➔ Introduction: The true cost of the connectivity disconnect in retail
- ➔ What shoppers really want – a connected experience
- ➔ The connectivity gap
- ➔ Supermarkets in the spotlight
- ➔ Seamless signal for smarter retail
- ➔ The Cellnex UK solution: Powering retail that works
- ➔ Reconnecting to move forward
- ➔ Delving into the findings
- ➔ Appendix



# FOREWORD

## Gianluca Landolina – CEO of Cellnex UK

Retail is driven by people but powered by connection. From stockroom to storefront, loyalty apps to social media, digital connectivity underpins every moment of the customer journey. Yet, when that connectivity falls short, the consequences are deeply impactful.

At Cellnex UK, we commissioned **The True Cost** to uncover how digital connectivity is shaping the day-to-day retail landscape. Drawing on new consumer research, we set out to understand how poor mobile signal, patchy Wi-Fi and digital dead zones are quietly disrupting the retail experience. What we found paints a clear

picture: when connectivity fails, so does confidence. Shoppers lose patience, staff lose time and brands lose trust. As retailers double down on digital technology – from mobile payments to AI-powered services – the risk of weak infrastructure only grows. Add to this rising concerns around retail cybersecurity, with a growing reluctance to use guest Wi-Fi following a number of cyber-attacks, it's clear that the repercussions are no longer confined to the operational, but also the reputational.

If we want a high street that's future ready, we need to strengthen the networks that hold it together.

# EXECUTIVE SUMMARY

Retailers are evolving to meet modern expectations and embrace technologies that enhance the in-store experience. From AI-powered tools to smart infrastructure, digital innovations are transforming how shoppers engage with both high street and supermarket environments.

To explore how connectivity is influencing this shift, **The True Cost** surveyed 2,000 UK consumers to understand how tech frustrations are affecting the in-store shopping experience.

Shoppers are ready for innovation, but infrastructure is falling behind. While 38% say dynamic pricing would motivate them to visit physical stores, and 22% are drawn to live comparison features, issues with guest Wi-Fi and digital dead zones are creating barriers. Nearly a third (31%) say they can't trust or rely on in-store Wi-Fi and more than a quarter (27%) report difficulty making phone calls while shopping.

The demand is there – retail tech just needs to catch up.

Our research also shows that innovation can't come at the expense of a reliable, seamless shopping experience. In fact, over half of consumers believe retailers are prioritising technology over customer satisfaction. But without the right infrastructure – like consistent mobile connectivity – these technologies fail to deliver, frustrating shoppers and undermining the very experience they're meant to improve.

When the digital foundations behind in-store technology fall short, it influences where people shop, how long they stay, and whether they return. To truly unlock the full value of digital investments, retailers must go beyond surface level innovation and commit to building resilient and secure infrastructure. Only then can technology serve its true purpose: enriching the customer experience, fostering loyalty and driving long-term growth.



Gianluca Landolina  
CEO, Cellnex UK



# INTRODUCTION: CONNECTIVITY DISCONNECTS IN RETAIL

Global spending on retail technology, according to PWC, is forecast to grow 10% each year between 2024 and 2028 <sup>1</sup> . But despite this significant investment in digital transformation, many retailers are still grappling with the everyday reality of poor connectivity. From high street stores to large supermarket chains, the promise of seamless, tech-enabled experiences is often undermined by weak mobile signal, outdated infrastructure and unreliable Wi-Fi that requires a clunky sign-in process.

As retail environments become more reliant on connected systems, even minor disruptions can have a compounding effect. In this report, we explore the gap between digital ambition and reality, drawing on Cellnex UK's new consumer research to highlight where connectivity is falling short, how it's shaping shopper behaviour and what's at stake if these issues aren't addressed.

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<sup>1</sup> PWC UK, Retail Outlook 2025







# WHAT SHOPPERS REALLY WANT – A CONNECTED EXPERIENCE

Today's shoppers are more digitally fluent than ever. They walk into stores expecting the same seamless experience they get online: instant access to information, personalised offers and fast, hassle-free payments.

At the heart of this experience is connectivity. It's the invisible layer powering everything, from comparing prices and redeeming loyalty rewards, to messaging a friend for a second opinion. For many, shopping is as much a social activity as it is a practical one, with 45% of consumers saying staying connected with friends and family is an essential part of the experience.

And expectations are high. Half of shoppers now demand fast, reliable mobile data in-store. They're not just browsing but they're using digital tools to shop smarter. Live price comparisons appeal to 38%, while 22% are drawn to AI-powered dynamic pricing that adapts in real time to their preferences.

This appetite for innovation is especially strong among younger consumers. Over a third (35%) of 25–34-year-olds say they'd be more likely to visit a store with AI shopping assistants. Today's shoppers want a retail experience that's connected, intelligent and as dynamic as their digital lives.



# THE CONNECTIVITY GAP

## In-store connectivity issues continue to frustrate shoppers

Despite the growing adoption of digital tools, many shoppers still face persistent in-store connectivity issues that disrupt their experience.

These aren't isolated glitches - they're recurring pain points that erode trust and deter customers from shopping in-store.

The problem is even more pronounced among younger shoppers. Nearly a third of all consumers (31%) say they can't rely on in-store Wi-Fi and this figure jumps to 42% among Gen Z (ages 16–24). For a generation that expects always-on connectivity, this lack of reliability can be a dealbreaker especially when connecting to public Wi-Fi often requires a lengthy login process. It's rarely as simple as unlocking your phone; users are frequently asked to share personal information, all of which adds friction, takes time and raises privacy concerns.

### Our research reveals that:

**33%** of shoppers have experienced loyalty apps failing to load

**27%** have struggled to make phone calls in-store

**22%** have had mobile payments fail at the till due to dropped connections mid-transaction







# SUPERMARKETS IN THE SPOTLIGHT

## Shoppers want more than just groceries

Supermarkets are a critical testing ground for connected retail. With high footfall and frequent visits, they push digital infrastructure to its limits. Shoppers expect more than stocked shelves. They want fast, frictionless checkouts, real-time personalised offers and seamless app integration – all powered by strong connectivity.

## Beyond the basket: connectivity as a social enabler

Our research reveals that 41% of shoppers would visit physical stores more often if the in-store experience was enhanced. But it isn't just about speed and convenience, for 30% of supermarket shoppers, staying connected to friends and family while shopping is also part of the experience.

## Trust on the line: cyber threats and the new shopper mindset

Yet, as digital touchpoints multiply, so do the risks. The Spring 2025 cyberattacks on major retailers have shaken consumer confidence. In several cases, hackers gained access to customer data, including names, addresses and contact details by exploiting vulnerabilities in store networks. Now, 23% of shoppers, and 25% of those aged over 45, say they're less likely to connect to in-store Wi-Fi, paving the way for a mobile coverage driven future.

In this environment, connectivity is no longer just a technical backbone. Whether customers are entering payment details, accessing loyalty accounts, or simply browsing online while in-store, they need to feel safe. Supermarkets may be the frontline, but the implications ripple across the entire retail landscape and it's clear the future of connected retail depends on networks that are not only fast but trusted.



# SEAMLESS SIGNAL FOR SMARTER RETAIL

At Cellnex UK, we deliver robust in-building mobile coverage that meets the evolving needs of today's retail spaces. Our advanced 4G and 5G multi-operator systems are designed to eliminate signal blackspots across entire estates from bustling shop floors to hidden back offices.

By integrating scalable infrastructure like our Distributed Antenna Systems (DAS) and signal enhancement technologies, we ensure consistent, high-performance connectivity without disrupting daily operations. This empowers retailers to unlock mobile-driven experiences, streamline operations and stay ready for future innovations.

## Key Benefits:

- ➔ **Better customer journeys:** Shoppers stay connected from entry to checkout, enabling seamless payments, app engagement and digital browsing.
- ➔ **Keeping in touch:** Customers can keep the conversation going with friends and family while shopping, making each visit more personal.
- ➔ **Smarter store operations:** Teams benefit from uninterrupted access to inventory systems, communication tools and digital workflows.
- ➔ **Empowered staff:** Reliable signal helps staff stay connected and responsive, improving coordination and morale.
- ➔ **Ready for what's next:** Built to support future innovations, from smart shelving to immersive retail tech, on a solid, mobile-first foundation.



Cellnex UK delivers **comprehensive connectivity solutions** backed by full lifecycle support – from strategic design and seamless installation to continuous optimisation and upkeep. Our hands-on approach ensures retailers stay focused on elevating customer experiences and operating **smart, resilient stores** built for the future.



# THE CELLNEX UK SOLUTION: POWERING RETAIL THAT WORKS

Our Business Development Manager, **Daniel O'Sullivan** shares how Cellnex UK's in-building connectivity solutions can enhance mobile connectivity in-store to protect revenue, boost footfall and future-proof retail spaces.



**Daniel  
O'Sullivan**  
Business  
Development  
Manager

"Retailers know that customer expectations don't stop at the door and neither should connectivity. Whether it's enabling digital engagement, supporting staff operations or simply ensuring customers can stay connected, strong and highly secure in-building mobile connectivity is now a critical part of the retail experience.

"At Cellnex UK, we deliver tailored mobile connectivity solutions designed specifically for retail environments. Our systems ensure consistent, high-quality coverage across every corner, from shop floors to back offices. For shoppers, that means staying seamlessly connected from the moment they step through the doors, right through to checkout and beyond – ensuring uninterrupted service at every stage of the journey.

"We work hand-in-hand with all major UK mobile network operators, which means we can streamline the process for retailers and ensure seamless integration across 4G and 5G networks. The result: reliable, scalable coverage that helps retailers stay competitive and connected.

"Connectivity isn't just part of retail infrastructure; it's part of the brand experience. When customers walk through the doors, they expect to stay connected without interruption. That's why investing in robust, scalable connectivity solutions isn't just a technical decision – it's a strategic one. With the right solution in place, retailers can unlock new opportunities, stay ahead in a competitive market and keep customers engaged, wherever they are in their shopping experience."





# RECONNECTING TO MOVE FORWARD

Poor connectivity is costing retailers more than they realise, but it doesn't have to be this way.

The findings of **The True Cost** report point to a widespread and persistent issue. Connectivity gaps are no longer just a technical concern, they're limiting the effectiveness of digital tools, weakening the customer experience and delaying progress across the sector.

But this presents an opportunity to refocus. By addressing a core weakness, retailers can build environments that are more reliable, responsive and commercially resilient.

This report sets out a data-led case for change. Strengthening the digital foundation of retail isn't just about improving infrastructure; it's about enabling better experiences for the people who use it.



# DELVING INTO THE FINDINGS

Cellnex UK's research explores how connectivity challenges and emerging technologies are shaping consumer expectations in retail environments. The key findings from the report are:

## Connectivity challenges

- ➔ 31% say they can't rely on or trust in-store Wi-Fi, rising to 42% among 16-24 -year- olds.
- ➔ 27% have been unable to reach friends or family in-store because of weak signal.
- ➔ 27% have struggled to make phone calls in-store.
- ➔ 22% have had mobile payments fail at the till due to dropped connections mid-transaction.
- ➔ 33% of shoppers have experienced loyalty apps failing to load.
- ➔ 23% of shoppers - 25% of those aged over 45 - are less likely to connect to in-store Wi-Fi as a result of the recent cyberattacks.

## Expectations around staying connected

- ➔ 45% of consumers expect to stay connected with friends and family while shopping.
- ➔ 50% of consumers expect fast and reliable mobile data while shopping in-store.
- ➔ Almost one fifth (17%) of consumers choose stores or shopping centres specifically because they can stay connected.

## Technology vs. customer experience

- ➔ 50% believe retailers are prioritising technology over customer satisfaction.
- ➔ 41% of shoppers would visit physical stores more often if the in-store experience was enhanced.
- ➔ 30% say improved connectivity would motivate them to visit a physical supermarket.

## Technology that motivates shoppers

- ➔ Live comparison price tools (38%) and AI-driven dynamic pricing (22%), are the top technological advancements motivating shoppers in-store.
- ➔ 35% of 25-34-year-olds say they'd be more likely to visit a physical store if it featured AI-powered shopping assistants.



# Methodology

About the research: All figures, unless otherwise stated, are from independent research business Censuswide. The total sample comprised 2,000 national respondents. Fieldwork was carried out in June 2025.

## Contact Us

To find out more and book a meeting with our in-building connectivity experts, get in touch at:

[In-BuildingSolutions@cellnextelecom.co.uk](mailto:In-BuildingSolutions@cellnextelecom.co.uk)

## Additional resources



Additional resources Cellnex UK resource centre, collateral and case studies:  
[www.cellnex.com/gb-en/das-lp](http://www.cellnex.com/gb-en/das-lp)

**The Indoor Coverage Experts**



[cellnex.co.uk](http://cellnex.co.uk)

Cellnex plays a key role within the telecoms sector enabling connectivity throughout Europe. In the UK, as the country's leading independent telecoms site partner, Cellnex provides critical national infrastructure & services to telecoms operators, emergency services organisations and many other enterprises.

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