

Retail Sector

PropTech and the Digital Evolution of Real Estate

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Innovation in Retail Real Estate

The retail sector is undergoing a significant transformation, moving from traditional brick-and-mortar to dynamic, data-enabled ecosystems. This innovation rethinks property operations, tenant interactions, and decision-making at every level.



Transforming Retail Workflows

- **AI-Powered Lease Abstraction**

Accelerates negotiations and streamlines lease management.

- **Smart Onboarding Platforms**

Enhance tenant experience and simplify integration.

- **Real-Time Traffic & Sales Tools**

Provides insights into tenant performance and consumer behavior.

- **Predictive Maintenance**

IoT-based monitoring for efficient asset operation and energy optimization.



Driving ROI Through Technology

- **Enhanced Revenue**

Shortens leasing cycles and reduces vacancy downtime.

- **Reduced Operating Costs**

Predictive maintenance and smart work order routing lower OpEx.

- **Strengthened Tenant Performance**

Foot traffic analytics and sales correlation models improve tenant mixes.

- **Improved Decision Making**

Real-time intelligence dashboards for asset managers.



Over-addressed Subjects in Retail Sector

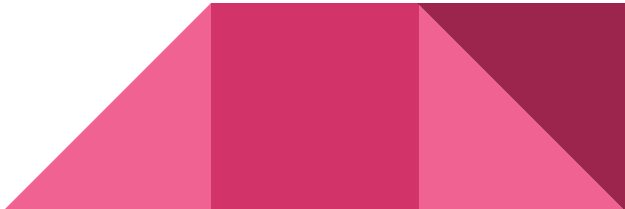
Market data platforms (acquisitions)

- abundance of data vendors crowding the space
- CoStar, Reonomy

Tenant / leasing side

- Overpopulation of tenant engagement apps
- VTS, HqO, Equiem

Property Management

- Work order platforms, maintenance platforms
 - UpKeep, Angus, Facilio
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Under-addressed Subsects in Retail Sector

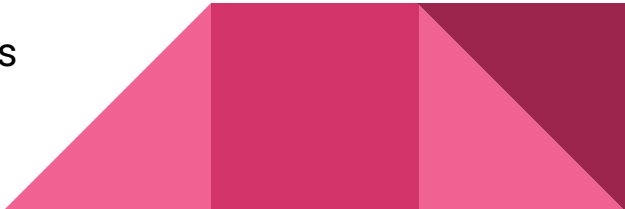
Acquisitions / Capital Markets

- Real-time sales performance data sharing
- Lack of rapid transparency between landlords

Tenant Experience

- Area lacks depth in predictive tenant turnover models
- Could benefit from a strong model that combines both sales and foot traffic

Property Management

- Inventory based energy management products
 - I.e., refrigeration optimization for grocery retail
 - Demand based lighting for a broader subset of retail properties
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Leading Retail Space Investors

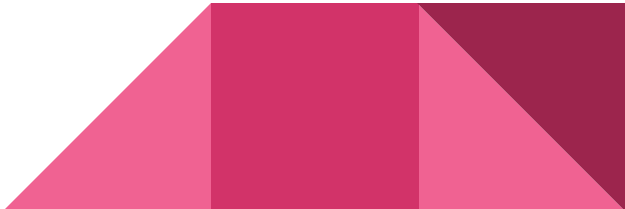
SoftBank Vision Fund

- Focus on retail enablement tools and AI mapping
- One of largest tech-focused investment funds globally
- Poised for exponential growth in AI sector - potential for major implications in retail space

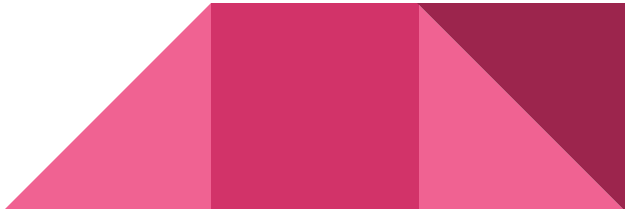
Brookfield Technology Partners

- Focus on retail activation and tenant engagement

Energy Impact Partners (EIP)

- Focus in operations and IoT
 - Leading investor in smart building systems
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Leading Prop Tech Innovation in Retail

- Retail prop tech platforms are transforming physical stores into measurable and optimizable assets.
 - Placer.ai provides industry standard location intelligence and foot traffic analytics that support site selection, trade area definition, and performance benchmarking.
 - RetailNext and MRI Springboard bring ecommerce style analytics into the store through people counting, occupancy monitoring, and shopper journey mapping that link traffic patterns with sales and staffing decisions.
 - Trax deploys computer vision and AI at the shelf level to monitor on shelf availability, merchandising execution, and promotional accuracy.
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Platforms Reducing Risk for Store Deployment and Operations

- A second category of prop tech focuses on reducing cost and complexity for brands opening physical stores.
- Leap offers turnkey store deployment, integrated operations, and first party data across a network of locations, lowering capital requirements for emerging brands.
- These platforms help landlords attract well curated digitally native tenants and support more efficient and data driven store operations.
- Broader ecosystems such as VTS, HqO, and Equiem remain relevant for portfolio and tenant experience management but are less specific to the operational needs of brick and mortar retail.



Most Innovative Retail Real Estate Owners

- Simon Property Group leads with its Simon Innovation Group and proprietary Retail Intelligence platform that integrates traffic and shopper behavior data across its national portfolio.
 - Simon collaborates with partners including Leap and Shopify to support online first brands entering physical retail.
- Brookfield Properties uses traffic analytics, demographic insights, and AI driven tenant experience platforms to enhance leasing decisions and customer engagement.
- Unibail Rodamco Westfield advances innovation through Westfield Rise, an in house media and experiential division that converts malls into immersive engagement and advertising environments.



Emerging Trends in Data Transparency

- Oxford Properties is piloting real time sales transparency tools that connect directly to retailer POS systems to capture anonymized sales data.
- These tools allow landlords to link traffic, sales, merchandising decisions, and rent structures with greater precision.
- Owners like Simon, Brookfield, Unibail Rodamco Westfield, and Oxford are setting the standard for innovation by investing in predictive data infrastructure and modern tenant support models.
- Collectively, these strategies demonstrate how retail real estate is evolving beyond traditional rent toward diversified revenue and data driven asset optimization.





Thank You