

Industry Report

Wi-Fi Hotspots: Global Outlook

Table of Contents

2017



PARKS
ASSOCIATES

By Harry Wang, Senior Director of Research, and Kristen Hanich, Researcher

<p>Synopsis</p> <p>This report examines the entrance into the mobile services market of Wi-Fi-first providers such as cable companies, MVNOs, and Internet companies like Google. It provides consumer Wi-Fi usage data to measure the potential impact of this disruption. It reviews new Wi-Fi standards and analyzes the growing use of Wi-Fi technologies in mobile operators' HetNet network strategy. The report also provides a worldwide forecast of Wi-Fi adoption on major consumer electronic devices and revenues from Wi-Fi hotspot services and Wi-Fi-first mobile services.</p>	<p style="text-align: center;">Connecting to the Internet at Home</p> <p style="text-align: center;">Method of Connecting to the Internet at Home U.S. Broadband Households</p> <table border="1"> <caption>Method of Connecting to the Internet at Home (Estimated Data)</caption> <thead> <tr> <th>Method</th> <th>% Using Selected Method at Home</th> </tr> </thead> <tbody> <tr> <td>Cable High-Speed Internet</td> <td>~65%</td> </tr> <tr> <td>DSL or Fiber Optic</td> <td>~35%</td> </tr> <tr> <td>3G/4G Hotspot</td> <td>~15%</td> </tr> <tr> <td>Exclusively use 3G/4G Hotspot</td> <td>~5%</td> </tr> </tbody> </table> <p style="text-align: right;">© Parks Associates</p>	Method	% Using Selected Method at Home	Cable High-Speed Internet	~65%	DSL or Fiber Optic	~35%	3G/4G Hotspot	~15%	Exclusively use 3G/4G Hotspot	~5%
Method	% Using Selected Method at Home										
Cable High-Speed Internet	~65%										
DSL or Fiber Optic	~35%										
3G/4G Hotspot	~15%										
Exclusively use 3G/4G Hotspot	~5%										
<p>Publish Date: 2Q 17</p>	<p>“The public Wi-Fi hotspot service market is very fragmented. Millions of business owners make the decision to make their Wi-Fi network public as well as charging fees to access it. Telecom operators, cable MSOs, and independent Wi-Fi network operators such as Boingo Wireless, manage anywhere from thousands to millions of Wi-Fi hotspots,” said Harry Wang, Senior Director of Research, Parks Associates.</p>										

<p>Contents</p>	<ul style="list-style-type: none"> 1.0 Report Summary <ul style="list-style-type: none"> 1.1 Purpose of Report 1.2 Scope of Report 1.3 Research Approach/Sources 2.0 Consumer Wi-Fi Usage and Hotspot Service Market Analysis <ul style="list-style-type: none"> 2.1 Consumer Wi-Fi Usage Trend 2.2 Analysis of Public Wi-Fi Hotspot Market 2.3 Wi-Fi-first Mobile Services and Impact on Mobile Carriers 2.4 Wi-Fi Network-enabled Value Added Services 3.0 Wi-Fi for 5G: Global Outlook <ul style="list-style-type: none"> 3.1 Carrier Small Cell and HetNet Strategy 3.2 Unlicensed Spectrum Use and Wi-Fi for IoT Applications
------------------------	--

TABLE OF CONTENTS

	<ul style="list-style-type: none"> 3.2.1 Wi-Fi for IoT 3.2.2 Competing Standards <p>4.0 Market Forecasts</p> <ul style="list-style-type: none"> 4.1 Drivers & Barriers: Global Wi-Fi Adoption and Service Deployment 4.2 Forecast Methodology and Assumptions 4.3 Forecast of Global Wi-Fi Hotspot Service Revenues 2017-2021 <p>5.0 Implications and Recommendations</p> <p>6.0 Appendix</p> <ul style="list-style-type: none"> 6.1 Glossary 6.2 Index 6.3 Image Sources
--	--

Figures	
	<ul style="list-style-type: none"> Companies Researched or Interviewed for Report Mobile Data Consumed by Network (2015-2016) Use of Home Networking Technologies Method of Connecting to the Internet at Home Wi-Fi-First Mobile Service Providers Enterprise Wi-Fi Contract and Related Revenue Opportunities Unlicensed Spectrum Use by Mobile Operators Smart Home Device Ownership Wi-Fi Technologies for IoT: LP-WiFi and 802.11ah/HaLow Overview of Cellular IoT Standards SIGFOX: Technical Details and Deployment Momentums LoRa Alliance: Technical Details and Deployment Momentums Ingenu: Technical Details and Deployment Momentums Global Public Wi-Fi Service Revenue estimates: 2016 Global Public Wi-Fi Hotspot Data Consumption: 2016-2021 Global Public Wi-Fi Hotspot Service Revenues by Category: 2016-2021 Global Public Wi-Fi Hotspot Service Revenues by Region: 2016-2021 Direct-to-consumer Wi-Fi Hotspot Service Revenue by Region: 2016-2021 B2B Wholesale Wi-Fi Hotspot Service Revenue by Region: 2016-2021 B2B Advertising and Sponsorship Wi-Fi Hotspot Service Revenue by Region: 2016-2021

List of Companies	
	<ul style="list-style-type: none"> <li style="width: 50%;">AT&T <li style="width: 50%;">LoRa Alliance <li style="width: 50%;">Boingo Wireless <li style="width: 50%;">Nokia <li style="width: 50%;">Cablevision <li style="width: 50%;">Qualcomm <li style="width: 50%;">Charter <li style="width: 50%;">Republic Wireless <li style="width: 50%;">Cisco <li style="width: 50%;">Samsung <li style="width: 50%;">Comcast <li style="width: 50%;">SIGFOX <li style="width: 50%;">Ericsson <li style="width: 50%;">Sprint <li style="width: 50%;">Extreme Networks <li style="width: 50%;">Starry <li style="width: 50%;">FreedomPop <li style="width: 50%;">Telefonica <li style="width: 50%;">GoGo Air <li style="width: 50%;">T-Mobile <li style="width: 50%;">Google <li style="width: 50%;">Verizon <li style="width: 50%;">Ingenu <li style="width: 50%;">ViaSat

TABLE OF CONTENTS

	iPass
Attributes	
<p>Parks Associates 15950 N. Dallas Pkwy Suite 575 Dallas TX 75248</p> <p>800.727.5711 toll free 972.490.1113 phone 972.490.1133 fax</p> <p>parksassociates.com sales@ parksassociates.com</p>	<p>Authored by Harry Wang and Kristen Hanich Executive Editor: Jennifer Kent Published by Parks Associates</p> <p>© April 2017 Parks Associates Dallas, Texas 75248</p> <p>All rights reserved. No part of this book may be reproduced, in any form or by any means, without permission in writing from the publisher.</p> <p>Printed in the United States of America.</p> <p>Disclaimer Parks Associates has made every reasonable effort to ensure that all information in this report is correct. We assume no responsibility for any inadvertent errors.</p>