Wi-Fi Hotspots: Global Outlook

TABLE OF CONTENTS

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

Synopsis

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.

Publish Date: 2Q 17

“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.

Contents

1.0 Report Summary
   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
   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
   3.1 Carrier Small Cell and HetNet Strategy
   3.2 Unlicensed Spectrum Use and Wi-Fi for IoT Applications
# Wi-Fi Hotspots: Global Outlook

## TABLE OF CONTENTS

<table>
<thead>
<tr>
<th>3.2.1</th>
<th>Wi-Fi for IoT</th>
</tr>
</thead>
<tbody>
<tr>
<td>3.2.2</td>
<td>Competing Standards</td>
</tr>
</tbody>
</table>

## 4.0 Market Forecasts

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

## 5.0 Implications and Recommendations

## 6.0 Appendix

6.1 Glossary
6.2 Index
6.3 Image Sources

### Figures

- 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

<table>
<thead>
<tr>
<th>AT&amp;T</th>
<th>LoRa Alliance</th>
</tr>
</thead>
<tbody>
<tr>
<td>Boingo Wireless</td>
<td>Nokia</td>
</tr>
<tr>
<td>Cablevision</td>
<td>Qualcomm</td>
</tr>
<tr>
<td>Charter</td>
<td>Republic Wireless</td>
</tr>
<tr>
<td>Cisco</td>
<td>Samsung</td>
</tr>
<tr>
<td>Comcast</td>
<td>SIGFOX</td>
</tr>
<tr>
<td>Ericsson</td>
<td>Sprint</td>
</tr>
<tr>
<td>Extreme Networks</td>
<td>Starry</td>
</tr>
<tr>
<td>FreedomPop</td>
<td>Telefonica</td>
</tr>
<tr>
<td>GoGo Air</td>
<td>T-Mobile</td>
</tr>
<tr>
<td>Google</td>
<td>Verizon</td>
</tr>
<tr>
<td>Ingenu</td>
<td>ViaSat</td>
</tr>
<tr>
<td>Attributes</td>
<td>Wi-Fi Hotspots: Global Outlook</td>
</tr>
<tr>
<td>------------</td>
<td>--------------------------------</td>
</tr>
</tbody>
</table>

Parks Associates  
15950 N. Dallas Pkwy  
Suite 575  
Dallas TX 75248  
800.727.5711 toll free  
972.490.1113 phone  
972.490.1133 fax  
parksassociates.com  
sales@parksassociates.com  

Authored by Harry Wang and Kristen Hanich  
Executive Editor: Jennifer Kent  
Published by Parks Associates  

© April 2017 Parks Associates  
Dallas, Texas 75248  

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.  

Printed in the United States of America.  

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.