

U.S. Hospitality Buildings: Wireless and Cellular Nodes Forecast, 2019- 2024

Market Study
Second Quarter 2020





U.S. Hospitality Buildings: Wireless and Cellular Nodes Forecast, 2019-2024

Market Study

Published Second Quarter 2020

Version 2.0

Report Number: 02Q2020-02

iGR

12400 W. Hwy 71

Suite 350 PMB 341

Austin TX 78738

Table of Contents

Abstract	1
Executive Summary	3
Table A: Cellular/Wireless Nodes Deployed in U.S. Hospitality Buildings, 2019-2024	4
Figure A: Cellular/Wireless Nodes Deployed in U.S. Hospitality Buildings, 2019-2024.....	4
What This Means.....	4
Methodology.....	6
Hospitality Buildings.....	7
What is required for a Smart Hospitality Building?.....	8
Why make hospitality buildings smart?	10
5G New Radio.....	10
URLLC	11
Massive IoT	12
5G Services and Use Cases	12
5G and Smart Hospitality Buildings	13
CBRS and Hospitality Buildings	13
Forecast and Methodology.....	15
COVID-19 Impact	15
Building-specific assumptions	15
Table 1: Commercial Buildings in the U.S.	16
Lodging.....	17
Public Assembly / Hospitality Buildings	18
Casinos	18
Convention/Exhibit Halls	18
Technology-specific assumptions.....	19
Casinos.....	21
Sub 6 GHz Bands.....	21
Table 2: Sub 6 GHz Nodes in Casinos, Actuals and TAM, 2019-2024	21
Figure 1: Sub 6 GHz Nodes in Casinos, Actuals and TAM, 2019-2024	21
CBRS.....	22
Table 3: CBRS Nodes in Casinos, Actuals and TAM, 2019-2024	22
Figure 2: CBRS Nodes in Casinos, Actuals and TAM, 2019-2024	22
mmWave.....	22
Table 4: mmWave Nodes in Casinos, Actuals and TAM, 2019-2024	23
Figure 3: mmWave Nodes in Casinos, Actuals and TAM, 2019-2024	23
Wi-Fi.....	23
Table 5: Wi-Fi Nodes in Casinos, Actuals and TAM, 2019-2024	24



Quoting information from an iGillottResearch publication: external — any iGillottResearch information that is to be used in press releases, sales presentations, marketing materials, advertising, or promotional materials requires prior written approval from iGillottResearch. iGillottResearch reserves the right to deny approval of external usage for any reason. Internal-quoting individual sentences and paragraphs for use in your company's internal communications activities does not require permission from iGillottResearch. The use of large portions or the reproduction of any iGillottResearch document in its entirety does require prior written approval and may have some financial implications.

Figure 4: Wi-Fi Nodes in Casinos, Actuals and TAM, 2019-2024	24
Convention/Exhibit Halls	25
Sub 6 GHz Bands	25
Table 6: Sub 6 GHz Nodes in Convention/Exhibit Halls, Actuals and TAM, 2019-2024	25
Figure 5: Sub 6 GHz Nodes in Convention/Exhibit Halls, Actuals and TAM, 2019-2024	26
CBRS	26
Table 7: CBRS Nodes in Convention/Exhibit Halls, Actuals and TAM, 2019-2024	26
Figure 6: CBRS Nodes in Convention/Exhibit Halls, Actuals and TAM, 2019-2024	27
mmWave	27
Table 8: mmWave Nodes in Convention/Exhibit Halls, Actuals and TAM, 2019-2024	27
Figure 7: mmWave Nodes in Convention/Exhibit Halls, Actuals and TAM, 2019-2024	28
Wi-Fi	28
Table 9: Wi-Fi Nodes in Convention/Exhibit Halls, Actuals and TAM, 2019-2024	28
Figure 8: Wi-Fi Nodes in Convention/Exhibit Halls, Actuals and TAM, 2019-2024	29
Lodging Buildings	30
Sub 6 GHz Bands	30
Table 10: Sub 6 GHz Nodes in Lodging Buildings, Actuals and TAM, 2019-2024	30
Figure 9: Sub 6 GHz Nodes in Lodging Buildings, Actuals and TAM, 2019-2024	31
CBRS	31
Table 11: CBRS Nodes in Lodging Buildings, Actuals and TAM, 2019-2024	31
Figure 10: CBRS Nodes in Lodging Buildings, Actuals and TAM, 2019-2024	32
mmWave	32
Table 12: mmWave Nodes in Lodging Buildings, Actuals and TAM, 2019-2024	32
Figure 11: mmWave Nodes in Lodging Buildings, Actuals and TAM, 2019-2024	33
Wi-Fi	33
Table 13: Wi-Fi Nodes in Lodging Buildings, Actuals and TAM, 2019-2024	33
Figure 12: Wi-Fi Nodes in Lodging Buildings, Actuals and TAM, 2019-2024	34
Summary	35
Table 14: Cellular/Wireless Nodes Deployed in U.S. Hospitality Buildings, 2019-2024	35
Figure 13: Cellular/Wireless Nodes Deployed in U.S. Hospitality Buildings, 2019-2024	36
Definitions	37
Definitions Table	37
About iGR	59
Disclaimer	59



Quoting information from an iGillottResearch publication: external — any iGillottResearch information that is to be used in press releases, sales presentations, marketing materials, advertising, or promotional materials requires prior written approval from iGillottResearch. iGillottResearch reserves the right to deny approval of external usage for any reason. Internal-quoting individual sentences and paragraphs for use in your company's internal communications activities does not require permission from iGillottResearch. The use of large portions or the reproduction of any iGillottResearch document in its entirety does require prior written approval and may have some financial implications.

Copyright © 2020 iGillottResearch, Inc. Reproduction is forbidden unless authorized.
FOR INFORMATION PLEASE CONTACT IAIN GILLOTT (512) 263-5682

Abstract

There are many thousands of hospitality buildings in the U.S. These buildings include the following sub-types: lodging (hotels, etc.), casinos and convention/exhibit halls. Not all of these hospitality buildings are candidates for in-building wireless (IBW) systems, but many are – and many already have distributed antenna systems (DAS) and Wi-Fi systems deployed to handle guests' voice/data traffic.

This market study provides a five-year forecast for the number of Sub 6 GHz, CBRS, mmWave and Wi-Fi nodes expected to be deployed in the U.S. Five-year total addressable market forecasts for these technologies are also provided.

This version 2.0 of the market study provides an updated forecast based on the expected impact of the global virus COVID-19, as iGR understands it today.

Key questions addressed in this study:

- What is a smart hospitality building? What applications and services are enabled in a hospitality building?
- What technologies are required for a smart hospitality building?
- What is 5G NR?
- How does 5G NR impact hospitality buildings?
- What is CBRS?
- How does CBRS impact hospitality buildings?
- What is the total addressable market for Sub 6 GHz, CBRS, mmWave and Wi-Fi nodes in U.S. hospitality buildings?
- How many Sub 6 GHz, CBRS, mmWave and Wi-Fi nodes are expected to be deployed in U.S. hospitality buildings between 2019 and 2024?

This market study is recommended for:

- Mobile operators, particularly those servicing the U.S. market
- Mobile backhaul providers, including telcos and cable MSOs



Quoting information from an iGillottResearch publication: external — any iGillottResearch information that is to be used in press releases, sales presentations, marketing materials, advertising, or promotional materials requires prior written approval from iGillottResearch. iGillottResearch reserves the right to deny approval of external usage for any reason. Internal-quoting individual sentences and paragraphs for use in your company's internal communications activities does not require permission from iGillottResearch. The use of large portions or the reproduction of any iGillottResearch document in its entirety does require prior written approval and may have some financial implications.

Copyright © 2020 iGillottResearch, Inc. Reproduction is forbidden unless authorized.
FOR INFORMATION PLEASE CONTACT IAIN GILLOTT (512) 263-5682

- 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.



Quoting information from an *iGillottResearch* publication: external — any *iGillottResearch* information that is to be used in press releases, sales presentations, marketing materials, advertising, or promotional materials requires prior written approval from *iGillottResearch*. *iGillottResearch* reserves the right to deny approval of external usage for any reason. Internal-quoting individual sentences and paragraphs for use in your company's internal communications activities does not require permission from *iGillottResearch*. The use of large portions or the reproduction of any *iGillottResearch* document in its entirety does require prior written approval and may have some financial implications.

Copyright © 2020 *iGillottResearch*, Inc. Reproduction is forbidden unless authorized.
FOR INFORMATION PLEASE CONTACT IAIN GILLOTT (512) 263-5682