

**U.S. Hospitality
Buildings: *Cellular
In-Building
Wireless Spending,
2020-2025***

Market Study
Second Quarter 2021





U.S. Hospitality Buildings: *Cellular In-Building Wireless Spending, 2020-2025*

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iGR

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Abstract

There are many thousands of hospitality buildings in the U.S., including lodging (hotels), casinos and convention/exhibit halls. It is not a question of *if* the hospitality sector was severely impacted by the COVID-19 pandemic; instead, the questions are how bad was it and what is expected moving forward?

In-building wireless (IBW) systems are primarily deployed in hospitality buildings to improve customers' experience on the mobile network while in the building and moving through the facility.

This market study provides a revised forecast of the cellular in-building wireless (IBW) market for three types of hospitality buildings: lodging, casinos and convention/exhibit halls. *iGR* found that due to the pandemic, the IBW market for 2020 and beyond is significantly different than it was previously. The 2021 revised forecast was modeled with:

- New data and assumptions regarding the (ongoing) COVID-19 pandemic
- Newly available data (November 2020) from the Commercial Buildings Energy Consumption Survey (CBECS)
- Information gathered from conversations with multiple solution providers in the IBW market.

Included in the market study is a five-year forecast for both network build spending and operational spending for the deployment of cellular IBW in U.S. hospitality buildings in the sub 6 GHz, CBRS, and mmWave bands.

Key questions addressed in this study:

- What are hospitality buildings? What applications and services are enabled in a smart/connected hospitality building?
- How has COVID-19 impacted the IBW market for three types of hospitality buildings – hotels, casinos and convention/exhibit halls?
- How much will be spent to build and operate sub 6 GHz, CBRS and mmWave IBW systems in U.S. hotels, casinos and convention/exhibit halls from 2020 to 2025?
- What technologies are required for a smart hospitality building?



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- What are 5G, CBRS, and MmWave, some of the technologies and spectrums that will support cellular IBW?

This market study is recommended for:

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



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