



Contact *iGR*

Amanda Louie

(512) 554-1701

amandal@iGR-inc.com

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Home WiFi bandwidth use on Cable Networks forecast to more than double in the next four years

New iGR study shows significant increase in U.S. Household Bandwidth Usage and WiFi Use on Cable Networks driven mainly by demand for video

AUSTIN, Texas, December 5th, 2011 – Cable Networks have provided video and broadband Internet connections to the majority of U.S. homes for more than a decade. At the same time, WiFi devices have proliferated in the U.S. household, with 80 percent of homes using WiFi to provide data connections to smartphones, tablets, laptops, televisions and gaming consoles. For the cable MSOs, WiFi has become a critical part of their ability to deliver broadband data services to consumers and WiFi has complemented investments in mobile broadband assets and services.

iGR's new research study, *U.S. Home Broadband & WiFi Usage Forecast, 2011-2015*, quantifies the bandwidth used in the typical U.S. home and the bandwidth used on WiFi devices. *iGR* forecasts that for the heaviest users of WiFi in the home (those in the 'extreme' category), total bandwidth used is expected to increase from more than 390 GB per month in 2011 to nearly 440 GB per month in 2015. *iGR* forecasts that WiFi will increase from 55 percent of the total bandwidth used in 2011 to more than 75 percent in 2015. Importantly for the cable providers, this high level of data consumption is driven principally by demand for video, both streamed and downloaded.

iGR believes that in-home WiFi usage is important for cable MSOs (such as Comcast, Cox Communications, Time Warner Cable, Charter Communications, Cablevision, Bright House Networks, Suddenlink Communications, Mediacom Communications, Insight Communications and CableOne) to understand for several reasons:

- WiFi provides a high quality data connection in the home so users are accustomed to very low latency and high connection speeds.
- WiFi is wireless and users, as this report concludes, are increasingly accustomed to bandwidth-intensive activities on laptops, smartphones and, increasingly, tablets.

- In-home usage is a precursor to outside-the-home usage. For example, consumers who watch a TV episode on a tablet in the home will expect to do the same sitting in the park or at the airport.
- This presents opportunities for the cable MSOs to offer mobile 4G broadband services as a compliment to in-home WiFi solutions and extend the consumer experience outside of the home. *iGR* believes this will present an important opportunity for the cable companies to increase their market differentiation and value to their customer base.

“Why should the major cable providers care about how much WiFi is used in the home? Because today’s consumers are expecting a world in which they always have high-speed data access to anything they want and the cable MSOs have been the principal providers of home video and broadband data services for more than a decade,” says Matt Vartabedian, *iGR*’s vice president of the wireless and mobile research service, who was responsible for the new study. “Internet and data access is inextricably woven into the personal, social and business fabric of today’s life. And WiFi is setting expectations by which consumers will judge the performance of 4G, HSPA+ and LTE networks, devices and services.”

iGR’s new report also finds that:

- Older consumers are the least likely to use WiFi
- Middle-aged consumers are more likely to use WiFi in airports, hotels. These are likely to be business travelers.
- Smartphone ownership tends to drive more WiFi usage – conversely, consumers who do not have smartphones are least likely to use WiFi.
- Consumers with smartphones are more likely to use WiFi in various locations. Everything that applies to smartphone users also applies to WiFi use: for example, they tend to be in their 20s, 30s or 40s; they tend to be employed or, in some cases, in school; they tend to have reported annual household incomes that are above the U.S. median.
- Tablet users, by default, are the most likely to use WiFi in any given location. As discussed in other *iGR* research studies, tablet users are almost always smartphone users.

iGR’s new report, *U.S. Home Broadband & WiFi Usage Forecast, 2011-2015*, provides details on *iGR*’s recent survey findings on WiFi devices, applications and services used in the U.S. home, *iGR*’s forecast for fixed bandwidth consumed in the U.S. household, including splits by connection speed and bandwidth consumed per month, and *iGR*’s forecast for WiFi use in the home through 2015.

For details on how to obtain the new report, please contact Amanda Louie, *iGR*’s Director of Strategic Development, at (512) 544-1701 or by email at amandal@iGR-inc.com.

About *iGR*

iGR is a market strategy consultancy focused on the wireless and mobile communications industry. Founded by Iain Gillott, one of the wireless industry’s leading analysts, in late 2000 as *iGillottResearch*, *iGR* is now entering its twelfth year of operation. *iGR* continuously researches emerging and existent technologies, technology industries, and consumer markets. We use our

detailed research to offer a range of services to help companies improve their position in the marketplace, clearly define their future direction, and ultimately improve their bottom line.

iGR researches a range of wireless and mobile products and technologies, including: smartphones; tablets; mobile applications; bandwidth demand and use; small cell architectures; DAS; LTE; WiMAX; VoLTE; IMS; NFC; GSM/GPRS/UMTS/HSPA; CDMA 1x/EV-DO; iDEN; SIP; macro-, pico- and femtocells; mobile backhaul; WiFi and WiFi offload; and SIM and UICC. *iGR* is a member of the Rural Cellular Association.

A more complete profile of the company can be found at www.iGR-inc.com.