

Assessing the State of the Wi-Fi Market venue deployment performance

Executive Summary

This report summarizes results and implications of CCG Group primary data analysis of Wi-Fi venue deployments in a large number of public access points, or 'hotspots', in the U.S. and Europe. We carefully coordinate our analysis with our benefit segmentation of the enterprise mobility market. (See CCG Group Enterprise Mobility Report Series "Market Decision Guide", August 2004 and "Segments in the Enterprise Mobility Market: How to Choose Which Segments to Target", October 2004).

During the period January to June 2004, we conducted assessment surveys at 86 venues with Wi-Fi public access in 27 U.S. cities and at 33 public Wi-Fi venues in 13 European cities. We designed these venue surveys to assess performance of the service in conducting a standard set of information retrieval and transmission actions, and also to evaluate how conducive the venue was to support alternative demands associated with enterprise mobility.

No matter how we looked at it, we found the industry performance to be dismaying. We have catalogued eight serious deficiencies in the deployment of Wi-Fi service as it may be delivered to the enterprise market. The deficiencies range from a confusion of pricing and value to insufficient indoctrination of venue personnel in the basic service that customers demand. Fortunately, these eight deficiencies can be corrected; but doing so would require deliberate effort that so far even the market leaders do not exhibit.

CCG Group dedicates this report to the proposition that the industry serving enterprise mobility can elevate its practice of commercializing technologies to a level that the impressive technology advance warrants. There should be no doubt in anyone's mind that the industry has not yet achieved this condition. If on reading this you are doubtful, just ask a customer.

Who needs to read this report

To make decisions wisely executives must convince themselves that they have the necessary information. The truly basic question for market decision-making purposes is the show stopper: what is the market for enterprise mobility? Or to put this in terms connected to the decision-making: how should the executive decision-maker *think* about the market for enterprise mobility?

We have written this report especially for marketing, sales, and product development managers at vendors of Wi-Fi services. It is also relevant for investment analysts who follow the wireless communications domain and for managers at retailers and other venue operations who manage Wi-Fi deployments.

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Contents

Table of Figures	2
Executive Summary	3
Wi-Fi Venue Deployment Assessments	4
The Enterprise Mobility Benefit Segments	5
Findings	8
Finding 1: pricing of Wi-Fi does not reflect value	8
Finding 2: Wi-Fi service is poorly defined for prospective users	9
Finding 3: technical performance is not a differentiator	10
Finding 4: the rationale for offering Wi-Fi is not clear to venue operators	11
Finding 5: venue staff support inadequately the Wi-Fi service	12
Finding 6: there is more than one business case for Wi-Fi	13
Finding 7: venues are conducive to only a few benefit segments	14
Finding 8: most potential users are not being served	14
Concluding observations	15
Appendix: Should Wi-Fi be free?	16
Appendix: About CCG Group LLC	17

Table of figures

Figure 1 Venue assessment cities	4
Figure 2 Venue types	5
Figure 3 Sub-markets of enterprise mobility	6
Figure 4 Benefit segments in the general, diffuse enterprise sub-market	6
Figure 5 Benefit segments in the extended office sub-market	7
Figure 6 Benefit segments in the specialized processes sub-market	7

About CCG Group LLC

CCG Group was founded in 2003 by Melissa Cantrelle, Dr. Mary Ellen Cremer, and Dr. David Gautschi. The group includes over 35 affiliate members from industry and academe in the United States and Europe.

Known for exceptionally rigorous analyses of markets of emergent technologies and trenchant interpretations of management imperatives, we pursue our mission passionately:

**To improve radically how enterprise technology
is marketed, selected, and used.**

CCG Group blends primary and secondary data collection and analysis to inform perspectives on emerging markets. Through use of an expansive expert affiliate network, CCG Group primary data response rates have exceeded 90%, a level previously unheard of in the market research industry.

CCG Group clients include carriers, equipment manufacturers, software providers, adopting enterprises, executive education programs, and systems integrators.

The CCG Group Enterprise Mobility Report Series

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