

**U.S. Residential  
Femtocell Market  
Forecast, 2013-2018:  
*Impact of VoLTE and  
VoWiFi***

Market Study  
Fourth Quarter, 2014





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# **U.S. Residential Femtocell Market Forecast, 2013 - 2018: *Impact of VoLTE and VoWiFi***

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A Market Study

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## Abstract

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Mobile network quality is of critical importance to the wireless and mobile industry. Consumers often judge the worth of a service, application or mobile phone based on their overall network experience. The quality and coverage of cellular voice remains a key issue for consumers especially given the ongoing trend toward landline replacement.

Residential femtocells are one way mobile operators can improve the quality of their subscribers' cellular voice service – primarily from the standpoint of creating or improving coverage inside a home. Most residential femtocells deployed in the U.S. today were rolled out to improve coverage for high-value customers. Moving forward, *iGR* believes that this will be the primary use case for residential femtocells, as well. Some operators have started offering VoWiFi as an alternative way to improve voice service in the home.

This report provides a total addressable market and installed base forecast for residential femtocells in the U.S., together with SWOT analyses for VoLTE femtocells and VoWiFi in the home.

Key questions addressed:

- What is a femtocell?
- How does a femtocell work?
- What are the use cases for femtocells?
- What is the outlook for LTE and VoLTE femtocells in the home?
- How do consumers rate their voice and mobile data experience?
- How do consumers use mobile devices and WiFi in their home?
- How could VoWiFi impact the demand for and use of femtocells in the home?
- What is the total addressable market for residential femtocells in the U.S.?
- How many femtocells are installed in U.S. households?
- What are the anticipated use cases for femtocells in U.S. households?
- How can femtocells be used to offload macro cellular network traffic?
- What are the forecasts for femtocell installation in the U.S.?

Who should read this report?

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- Mobile operators
- Femtocell and small cell infrastructure vendors
- VoWiFi solution vendors
- Mobile network infrastructure OEMs
- Mobile network software and services providers
- Financial analysts and investors.

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