U.S. Indoor Small Cells Forecast, 2019 - 2024: *The COVID-19 Slowdown*

Market Study
Third Quarter, 2020

U.S. Indoor Small Cells Forecast, 2019-2024: *The COVID-19 Slowdown*

A Market Study

Published Third Quarter, 2020
Version 1.0
Report Number: 3Q2020-01

*iG*R
12400 W. Hwy 71
Suite 350 PMB 341
Austin TX 78738

Table of Contents

Quoting information from an *iG*illottResearch publication: external — any *iG*illottResearch information that is to be used in press releases, sales presentations, marketing materials, advertising, or promotional materials requires prior written approval from *iG*illottResearch. *iG*illottResearch 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 *iG*illottResearch. The use of large portions or the reproduction of any *iG*illottResearch document in its entirety does require prior written approval and may have some financial implications.
Copyright © 2020 *iG*illottResearch, Inc. Reproduction is forbidden unless authorized.
FOR INFORMATION PLEASE CONTACT IAIN GILLOTT (512) 263-5682.

Quoting information from an *iG*illottResearch publication: external — any *iG*illottResearch information that is to be used in press releases, sales presentations, marketing materials, advertising, or promotional materials requires prior written approval from *iG*illottResearch. *iG*illottResearch 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 *iG*illottResearch. The use of large portions or the reproduction of any *iG*illottResearch document in its entirety does require prior written approval and may have some financial implications.
Copyright © 2020 *iG*illottResearch, Inc. Reproduction is forbidden unless authorized.
FOR INFORMATION PLEASE CONTACT IAIN GILLOTT (512) 263-5682.

Quoting information from an *iG*illottResearch publication: external — any *iG*illottResearch information that is to be used in press releases, sales presentations, marketing materials, advertising, or promotional materials requires prior written approval from *iG*illottResearch. *iG*illottResearch 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 *iG*illottResearch. The use of large portions or the reproduction of any *iG*illottResearch document in its entirety does require prior written approval and may have some financial implications.
Copyright © 2020 *iG*illottResearch, Inc. Reproduction is forbidden unless authorized.
FOR INFORMATION PLEASE CONTACT IAIN GILLOTT (512) 263-5682.

Quoting information from an *iG*illottResearch publication: external — any *iG*illottResearch information that is to be used in press releases, sales presentations, marketing materials, advertising, or promotional materials requires prior written approval from *iG*illottResearch. *iG*illottResearch 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 *iG*illottResearch. The use of large portions or the reproduction of any *iG*illottResearch document in its entirety does require prior written approval and may have some financial implications.
Copyright © 2020 *iG*illottResearch, Inc. Reproduction is forbidden unless authorized.
FOR INFORMATION PLEASE CONTACT IAIN GILLOTT (512) 263-5682.

Abstract

Because of the near-total shutdown of the U.S. economy due to COVID-19, *iG*R has reduced its forecast for the number indoor small cells to be installed in the U.S. throughout the forecast period (2019-2024). *iG*R will again update this forecast in late 2020 when, ideally, more is known about the virus, its impact, and the U.S./global economy has begun recovering.

This market study provides a five-year forecast for indoor small cells in the U.S. Small cells run the gamut from Distributed Antenna Systems (DAS), DAS Lite, Centralized-/Cloud-RAN, enterprise small cells, femtocells (residential small cells) and cellular signal boosters.

*iG*R classifies any system as "indoor" or "in-building" when the majority of its nodes (sites where the antennas are placed) are inside a building. *iG*R puts stadiums in the "indoor" category, along with hotels and airports to name a few.

In this market study, *iG*R provides a forecast for the:

- Total addressable market (TAM) for indoor small cells in commercial and residential buildings.
- Actual installed small cell nodes.

Key questions addressed in this market study include:

- What effect has COVID-19 had on the indoor small cell market? What effect will it have?
- What does indoor mean?
- What are indoor small cells?
- Where do small cells fit in the network?
- What are some of the perceived benefits and issues related to indoor small cells?
- What are the key drivers for using indoor small cells?
- What is the impact of edge computing and proptech on indoor small cell deployments?
- What are some of the perceived negatives and issues related to indoor small cells?
- What are the key barriers to indoor small cell adoption?

Quoting information from an *iG*illottResearch publication: external — any *iG*illottResearch information that is to be used in press releases, sales presentations, marketing materials, advertising, or promotional materials requires prior written approval from *iG*illottResearch. *iG*illottResearch 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 *iG*illottResearch. The use of large portions or the reproduction of any *iG*illottResearch document in its entirety does require prior written approval and may have some financial implications.
Copyright © 2020 *iG*illottResearch, Inc. Reproduction is forbidden unless authorized.
FOR INFORMATION PLEASE CONTACT IAIN GILLOTT (512) 263-5682.

- How large is the total addressable market for indoor small cells?
- How many indoor small cells are expected to be deployed both residentially and commercially?
- What percentage of deployed indoor small cells will use sub-6 GHz, mmWave and CBRS spectrum bands?

Who should read this report?

- Mobile operators
- Infrastructure OEMs
- Small cell product and solution vendors
- Backhaul service providers and equipment OEMs
- Financial analysts and investors.

Quoting information from an *iG*illottResearch publication: external — any *iG*illottResearch information that is to be used in press releases, sales presentations, marketing materials, advertising, or promotional materials requires prior written approval from *iG*illottResearch. *iG*illottResearch 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 *iG*illottResearch. The use of large portions or the reproduction of any *iG*illottResearch document in its entirety does require prior written approval and may have some financial implications.
Copyright © 2020 *iG*illottResearch, Inc. Reproduction is forbidden unless authorized.
FOR INFORMATION PLEASE CONTACT IAIN GILLOTT (512) 263-5682.