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

Market Study
Second Quarter 2021

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Abstract

There are thousands of airports, bus and railway stations/terminals in the U.S., and many of these have already deployed distributed antenna systems (DAS) and Wi-Fi systems to handle travelers' voice/data traffic.

Additional in-building wireless (IBW) systems will be deployed to improve the overall experience of travelers and improve the efficiency of operations at the facilities.

This market study provides a revised forecast of the cellular in-building wireless (IBW) market for two types of transportation buildings: airports and bus & railway stations/terminals. *iG*R 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. transportation buildings in the sub 6 GHz, CBRS, and mmWave bands.

Key questions addressed in this study:

- What is a smart transportation building? What applications and services are enabled in a smart or connected transportation building?
- How has COVID-19 impacted the IBW market for the two types of transportation buildings – airports and bus & railway stations/terminals?
- How much will be spent to build and operate sub 6 GHz, CBRS and mmWave IBW systems in U.S. airports and bus & railway stations/terminals from 2020 to 2025?
- What technologies are required for a smart transportation building?

- 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.