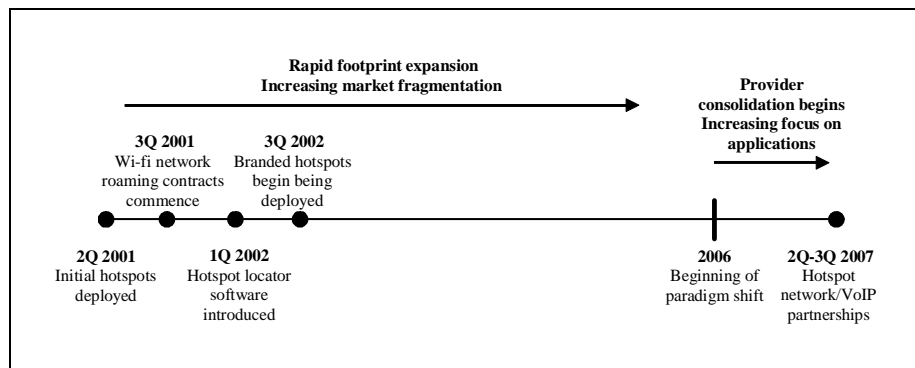


Hotspots: The Next Generation

Consumers...Handsets...VoFi

<p>Published Date: November 2007 Author: Amy Cravens Pages: 42 Available For Sale Now!</p>	<p>Phone: 480-213-4151 Email: Amy@multimediamintelligence.com Report#: MMI070402IBM</p>
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The business market for hotspot usage is well understood, but how do hotspot operators drive usage to the next level? The hotspot market is moving beyond just business travelers accessing airport and hotel hotspots on a laptop. There is an impending revolution in the hotspot market characterized by consumer usage, handheld access, and new applications, especially Voice over Wi-Fi (VoFi).



But hotspot services, as they exist today, are a barrier to such evolution. Providers must redesign hotspot offerings, everything from pricing to device interface, to cater to the consumer market. How can providers embrace consumers without discounting their existing, high margin, business offering? How can providers capitalize on the \$5 billion revenue opportunity MMI forecasts by 2011?

The hotspot market is also challenged with the potential competitive threat presented by WiMAX initiatives. What effect will WiMAX have on hotspot offerings? How will the introduction of VoFi change the competitive balance of cellular and hotspot services?

With the hotspot market on the cusp of significant transformation, many of the standards in the hotspot market are being brought into question again. This report will provide a perspective of the hotspot market, where it began and where it is now. It will examine issues of venue, pricing, and marketing strategies and provide perspective on moving hotspot services into the new generation. This report will provide detailed competitive analysis of hotspot operators, resellers, and roaming providers and discuss key success factors going forward. Finally, a detailed forecast is provided including venue forecasts by region and venue type as well as usage and revenue forecasts segmented by region, venue type, access device, user type (consumer versus business), and payment method (subscription versus pay-as-you-go).

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Hard Rock Café	O2	Vonage
Hertz	Orange	Wayport
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