



US Public WLAN Business Users By State and Metro Area



***Total United States for 2001 - 2005
51 States (including D.C.) and 274 Metro Areas for 2002 & 2005
Top 30 Metro Areas by Users and by Penetration Rates***

*Including User Forecasts for:
Total Public WLAN (Business)
Mobile Corporate Segment
Occasional User Segment*

Contact Information

Terry Young
Vice President & Principal Analyst
terry.young@telecompetition.com
+1 925 543 5724

Eileen Healy
President & CEO
eileen.healy@telecompetition.com
+1 925 543 5702

Christine Godinez
Research Associate
christine.godinez@telecompetition.com
+1 925 543 5726

TABLE OF CONTENTS

1	INTRODUCTION AND FORECAST THEMES	1
1.1	WIRELESS LAN DEVICES	1
1.2	WIRELESS LAN AND PUBLIC WIRELESS LAN	1
1.3	PUBLIC WIRELESS LAN HOT SPOTS	1
1.4	PUBLIC WLAN SEGMENTS - DESCRIPTION	2
	<i>Table 1.1. Public WLAN - user segment description</i>	2
	<i>Figure 1.2 US Public WLAN addressable market: 2002</i>	3
2	US SUMMARY FORECASTS	4
	<i>Table 2.1 Summary of US subscribers and penetration rates- Public WLAN</i>	4
	<i>Figure 2.2 US Public WLAN users by segment: 2000 – 2005</i>	4
3	US STATE P-WLAN USERS: 2002 AND 2005	5
	<i>Table 3.1. Public WLAN users by segment and by state: 2002 and 2005</i>	5
4	US METRO AREA USERS: 2002 & 2005	7
	<i>Table 4.1. Public WLAN users by metro area: 2002 and 2005</i>	7
	<i>Table 4.3. Top 30 metro areas sorted by highest mobile corporate users in 2005</i>	18
	<i>Table 4.3. Top 30 metro areas sorted by highest occasional users in 2005</i>	19
5	METHODOLOGY	20
5.1	TELECOMPETITION, INC. AND ATIVA RESEARCH TOOLS®	20
6	ABOUT TELECOMPETITION, INC.	21
7	AREAS FORECAST IN THIS REPORT	22
7.1	LIST OF STATES	22
	Alabama	22
	Alaska	22
	Arizona	22
	Arkansas	22
	California	22
	Colorado	22
	Connecticut	22
	Delaware	22
	District of Columbia	22
	Florida	22
	Georgia	22
	Hawaii	22
	Idaho	22
	Illinois	22
	Indiana	22
	Iowa	22
	Kansas	22
	Kentucky	22
	Louisiana	22
	Maine	22
	Maryland	22
	Massachusetts	22
	Michigan	22
	Minnesota	22
	Mississippi	22
	Missouri	22
	Montana	22
	Nebraska	22
	Nevada	22

<i>New Hampshire</i>	22
<i>New Jersey</i>	22
<i>New Mexico</i>	22
<i>New York</i>	22
<i>North Carolina</i>	22
<i>North Dakota</i>	22
<i>Ohio</i>	22
<i>Oklahoma</i>	22
<i>Oregon</i>	22
<i>Pennsylvania</i>	22
<i>Rhode Island</i>	22
<i>South Carolina</i>	22
<i>South Dakota</i>	22
<i>Tennessee</i>	22
<i>Texas</i>	22
<i>Utah</i>	22
<i>Vermont</i>	22
<i>Virginia</i>	22
<i>Washington</i>	22
<i>West Virginia</i>	22
<i>Wisconsin</i>	22
<i>Wyoming</i>	22
7.2 LIST OF METRO AREA	23
<i>All Rural U.S. Counties</i>	23
<i>Abilene, TX</i>	23
<i>Albany, GA</i>	23
<i>Albany-Schenectady-Troy, NY</i>	23
<i>Albuquerque, NM</i>	23
<i>Alexandria, LA</i>	23
<i>Allentown-Bethlehem-Easton, PA</i>	23
<i>Altoona, PA</i>	23
<i>Amarillo, TX</i>	23
<i>Anchorage, AK</i>	23
<i>Anniston, AL</i>	23
<i>Appleton-Oshkosh-Neenah, WI</i>	23
<i>Asheville, NC</i>	23
<i>Athens, GA</i>	23
<i>Atlanta, GA</i>	23
<i>Augusta-Aiken, GA-SC</i>	23
<i>Austin-San Marcos, TX</i>	23
<i>Bakersfield, CA</i>	23
<i>Bangor, ME</i>	23
<i>Barnstable-Yarmouth, MA</i>	23
<i>Baton Rouge, LA</i>	23
<i>Beaumont-Port Arthur, TX</i>	23
<i>Bellingham, WA</i>	23
<i>Benton Harbor, MI</i>	23
<i>Billings, MT</i>	23
<i>Biloxi-Gulfport-Pascagoula, MS</i>	23
<i>Binghamton, NY</i>	23
<i>Birmingham, AL</i>	23
<i>Bismarck, ND</i>	23
<i>Bloomington, IN</i>	23
<i>Bloomington-Normal, IL</i>	23
<i>Boise City, ID</i>	23
<i>Boston-Worcester-Lawrence, MA-NH-ME-CT</i>	23
<i>Brownsville-Harlingen-San Benito, TX</i>	23
<i>Bryan-College Station, TX</i>	23
<i>Buffalo-Niagara Falls, NY</i>	23
<i>Burlington, VT</i>	23
<i>Canton-Massillon, OH</i>	23

Casper, WY	23
Cedar Rapids, IA	23
Champaign-Urbana, IL	23
Charleston, WV	23
Charleston-North Charleston, SC	23
Charlotte-Gastonia-Rock Hill, NC-SC	23
Charlottesville, VA	23
Chattanooga, TN-GA	23
Cheyenne, WY	23
Chicago-Gary-Kenosha, IL-IN-WI	23
Chico-Paradise, CA	23
Cincinnati-Hamilton, OH-KY-IN	23
Clarksville-Hopkinsville, TN-KY	23
Cleveland-Akron, OH	23
Colorado Springs, CO	23
Columbia, MO	23
Columbia, SC	23
Columbus, GA-AL	23
Columbus, OH	23
Corpus Christi, TX	23
Cumberland, MD-WV	23
Dallas-Fort Worth, TX	23
Danville, VA	23
Davenport-Moline-Rock Island, IA-IL	23
Daytona Beach, FL	23
Dayton-Springfield, OH	23
Decatur, AL	23
Decatur, IL	23
Denver-Boulder-Greeley, CO	23
Des Moines, IA	23
Detroit-Ann Arbor-Flint, MI	23
Dothan, AL	23
Dover, DE	23
Dubuque, IA	23
Duluth-Superior, MN-WI	23
Eau Claire, WI	23
El Paso, TX	23
Elkhart-Goshen, IN	23
Elmira, NY	23
Enid, OK	23
Erie, PA	23
Eugene-Springfield, OR	23
Evansville-Henderson, IN-KY	23
Fargo-Moorhead, ND-MN	24
Fayetteville, NC	24
Fayetteville-Springdale-Rogers, AR	24
Flagstaff, AZ-UT	24
Florence, AL	24
Florence, SC	24
Fort Collins-Loveland, CO	24
Fort Myers-Cape Coral, FL	24
Fort Pierce-Port St. Lucie, FL	24
Fort Smith, AR-OK	24
Fort Walton Beach, FL	24
Fort Wayne, IN	24
Fresno, CA	24
Gadsden, AL	24
Gainesville, FL	24
Glens Falls, NY	24
Goldsboro, NC	24
Grand Forks, ND-MN	24

Grand Junction, CO.....	24
Grand Rapids-Muskegon-Holland, MI.....	24
Great Falls, MT.....	24
Green Bay, WI.....	24
Greensboro-Winston Salem-High Point, NC.....	24
Greenville, NC.....	24
Greenville-Spartanburg-Anderson, SC.....	24
Harrisburg-Lebanon-Carlisle, PA.....	24
Hartford, CT.....	24
Hattiesburg, MS.....	24
Hickory-Morganton-Lenoir, NC.....	24
Honolulu, HI.....	24
Houma, LA.....	24
Houston-Galveston-Brazoria, TX.....	24
Huntington-Ashland, WV-KY-OH.....	24
Huntsville, AL.....	24
Indianapolis, IN.....	24
Iowa City, IA.....	24
Jackson, MI.....	24
Jackson, MS.....	24
Jackson, TN.....	24
Jacksonville, FL.....	24
Jacksonville, NC.....	24
Jamestown, NY.....	24
Janesville-Beloit, WI.....	24
Johnson City-Kingsport-Bris., TN-VA.....	24
Johnstown, PA.....	24
Jonesboro, AR.....	24
Joplin, MO.....	24
Kalamazoo-Battle Creek, MI.....	24
Kansas City, MO-KS.....	24
Killeen-Temple, TX.....	24
Knoxville, TN.....	24
Kokomo, IN.....	24
La Crosse, WI-MN.....	24
Lafayette, IN.....	24
Lafayette, LA.....	24
Lake Charles, LA.....	24
Lakeland-Winter Haven, FL.....	24
Lancaster, PA.....	24
Lansing-East Lansing, MI.....	24
Laredo, TX.....	24
Las Cruces, NM.....	24
Las Vegas, NV-AZ.....	24
Lawrence, KS.....	24
Lawton, OK.....	24
Lewiston-Auburn, ME.....	24
Lexington, KY.....	24
Lima, OH.....	24
Lincoln, NE.....	24
Little Rock-North Little Rock, AR.....	24
Longview-Marshall, TX.....	24
Los Angeles-Riverside-Orange County, CA.....	24
Louisville, KY-IN.....	24
Lubbock, TX.....	24
Lynchburg, VA.....	24
Macon, GA.....	24
Madison, WI.....	24
Mansfield, OH.....	24
Mcallen-Edinburg-Mission, TX.....	24
Medford-Ashland, OR.....	24

Melbourne-Titusville-Palm Bay, FL.....	24
Memphis, TN-AR-MS.....	24
Merced, CA.....	24
Miami-Fort Lauderdale, FL.....	24
Milwaukee-Racine, WI.....	24
Minneapolis-St. Paul, MN-WI.....	25
Mobile, AL.....	25
Modesto, CA.....	25
Monroe, LA.....	25
Montgomery, AL.....	25
Muncie, IN.....	25
Myrtle Beach, SC.....	25
Naples, FL.....	25
Nashville, TN.....	25
New London-Norwich, CT.....	25
New Orleans, LA.....	25
Norfolk-Virginia Beach-Newprt News, VA-NH.....	25
NY-N. NJ-Long Island, NY-NJ-CT-PA.....	25
Ocala, FL.....	25
Odessa-Midland, TX.....	25
Oklahoma City, OK.....	25
Omaha, NE-IA.....	25
Orlando, FL.....	25
Owensboro, KY.....	25
Panama City, FL.....	25
Parkersburg-Marietta, WV-OH.....	25
Pensacola, FL.....	25
Peoria-Pekin, IL.....	25
Philadelphia-Wil-Atl Cty, PA-NJ-DE-MD.....	25
Phoenix-Mesa, AZ.....	25
Pine Bluff, AR.....	25
Pittsburgh, PA.....	25
Pittsfield, MA.....	25
Pocatello, ID.....	25
Portland, ME.....	25
Portland-Salem, OR-WA.....	25
Providence-Warwick-Pawtucket, RI.....	25
Provo-Orem, UT.....	25
Pueblo, CO.....	25
Punta Gorda, FL.....	25
Raleigh-Durham-Chapel Hill, NC.....	25
Rapid City, SD.....	25
Reading, PA.....	25
Redding, CA.....	25
Reno, NV.....	25
Richland-Kennewick-Pasco, WA.....	25
Richmond-Petersburg, VA.....	25
Roanoke, VA.....	25
Rochester, MN.....	25
Rochester, NY.....	25
Rockford, IL.....	25
Rocky Mount, NC.....	25
Sacramento-Yolo, CA.....	25
Saginaw-Bay City-Midland, MI.....	25
Salinas, CA.....	25
Salt Lake City-Ogden, UT.....	25
San Angelo, TX.....	25
San Antonio, TX.....	25
San Diego, CA.....	25
San Francisco-Oakland-San Jose, CA.....	25
San Luis Obispo-Antascadro-Paso Robles, CA.....	25

<i>Santa Barbara-St. Maria-Lompoc, CA</i>	25
<i>Santa Fe, NM</i>	25
<i>Sarasota-Bradenton, FL</i>	25
<i>Savannah, GA</i>	25
<i>Scranton-Wilkes-Barre-Hazleton, PA</i>	25
<i>Seattle-Tacoma-Bremerton, WA</i>	25
<i>Sharon, PA</i>	25
<i>Sheboygan, WI</i>	25
<i>Sherman-Denison, TX</i>	25
<i>Shreveport-Bossier City, LA</i>	25
<i>Sioux City, IA-NE</i>	25
<i>Sioux Falls, SD</i>	25
<i>South Bend, IN</i>	25
<i>Spokane, WA</i>	25
<i>Springfield, IL</i>	25
<i>Springfield, MA</i>	25
<i>Springfield, MO</i>	25
<i>St. Cloud, MN</i>	25
<i>St. Joseph, MO</i>	25
<i>St. Louis, MO-IL</i>	25
<i>State College, PA</i>	25
<i>Steubenville-Weirton, OH-WV</i>	25
<i>Stockton-Lodi, CA</i>	25
<i>Sumter, SC</i>	25
<i>Syracuse, NY</i>	25
<i>Tallahassee, FL</i>	26
<i>Tampa-St. Petersburg-Clearwater, FL</i>	26
<i>Terre Haute, IN</i>	26
<i>Texarkana, TX-AR</i>	26
<i>Toledo, OH</i>	26
<i>Topeka, KS</i>	26
<i>Tucson, AZ</i>	26
<i>Tulsa, OK</i>	26
<i>Tuscaloosa, AL</i>	26
<i>Tyler, TX</i>	26
<i>Utica-Rome, NY</i>	26
<i>Victoria, TX</i>	26
<i>Visalia-Tulare-Porterville, CA</i>	26
<i>W. Palm Bch-Boca Raton, FL</i>	26
<i>Waco, TX</i>	26
<i>Washington-Baltimore, DC-MD-VA-WV</i>	26
<i>Waterloo-Cedar Falls, IA</i>	26
<i>Wausau, WI</i>	26
<i>Wheeling, WV-OH</i>	26
<i>Wichita Falls, TX</i>	26
<i>Wichita, KS</i>	26
<i>Williamsport, PA</i>	26
<i>Wilmington, NC</i>	26
<i>Yakima, WA</i>	26
<i>York, PA</i>	26
<i>Youngstown-Warren, OH</i>	26
<i>Yuba City, CA</i>	26
<i>Yuma, AZ</i>	26

1 Executive Summary

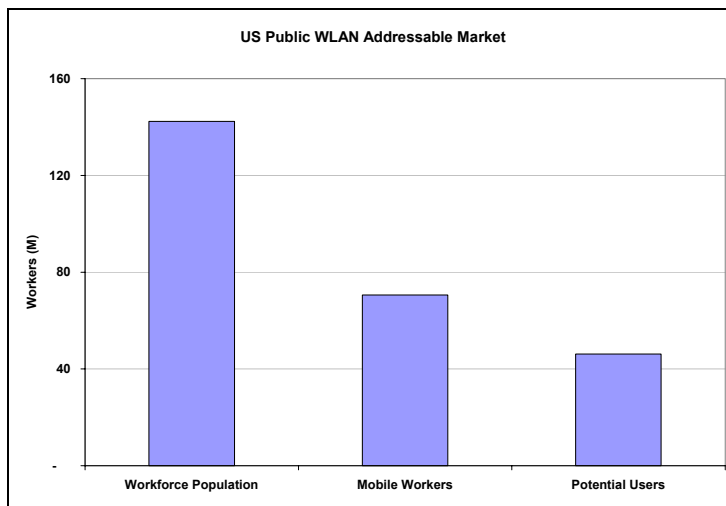
Global public and industry interest in Wireless LANs (WLANs) has exploded in the past year. Recent surveys of corporations in the US have shown that most companies are either evaluating the use of wireless LAN technology or have already installed the technology in offices and factories as replacements for wired LANs or to provide employees with un-tethered access to the corporate network. Public institutions such as universities and hospitals are also deploying WLANs for similar purposes. Public WLAN service providers have launched fee-based WLAN services in public venues such as coffee shops, hotels, and airports. In the private sector, WLANs are being installed by consumers to create in-home networks, and in public spaces by community groups to provide free Internet access to citizens. The list of major (and start-up) telecommunications hardware and software manufacturers, as well as service providers, supporting WLAN grows almost daily.

While a great deal of established demand exists for *private* WLANs, this report focuses on the growing demand for public WLAN, typically available on a per-use basis, by subscription, or “free” while patronizing a public establishment. This report segments the public wireless LAN market by two major categories: the high value mobile corporate user and the occasional / recreational user.

A distinction is made between a private wireless LAN (WLAN) and a public WLAN. Individual businesses typically install WLAN technology an extension to, or as an alternative for, a wired Ethernet LAN within a building or campus, for the employees of that location. A public WLANs is deployed by a service provider in high-traffic areas called “hot spots” to allow high-speed Internet access to the general public – individuals who are “on the go” or don’t otherwise have high speed Internet access. This report only forecasts users of public wireless LANs.

Figure 1.2 shows Telecompetition estimate of the potential market for public WLAN for business users.

Figure 1.2 US Public WLAN addressable market: 2002.



Source: Telecompetition Inc., June 2002.