



# 2018 State of the Industry Report

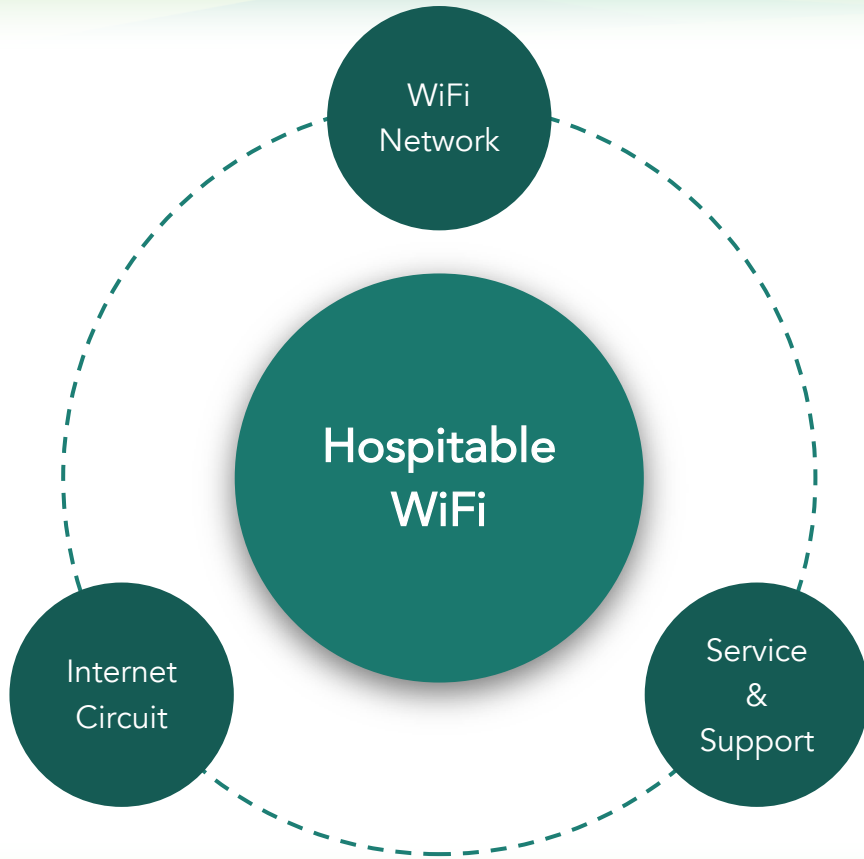
An annual assessment of campgrounds, RV parks and resorts' ability to meet consumer WiFi expectations

- Consumer Expectations Defined
- “It Takes Three”
- 2018 Findings
  - Property WiFi Ratings
  - Honest Communication
  - Circuit Capacity
  - Circuit Type
  - Network Technology and Design
  - WiFi Coverage
  - Free or Pay

For the consumer, “Wi-Fi” implicitly means... I can:

- Connect all my devices.
  - (smart phones, tablets, smart TV's, pet, cameras, gaming consoles, etc)
- To do everything I want to do reliably.
  - (Stream music, netflix, youtube, pandora, facetime, skype, slingbox, hulu)
- Anywhere in my RV/ Cabin or the Resort.
- For free
- ....Unless you, the property owner or manager, say differently

# "It Takes Three"

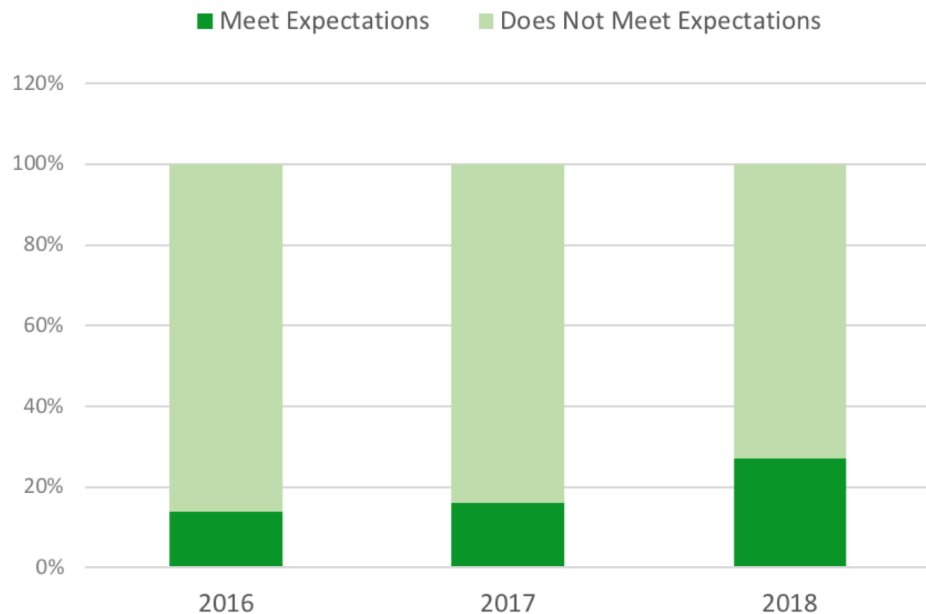


Giving your guests a great WiFi experience requires these three things:

- Internet Circuit - at least basic speeds (1Mbps/device)
- WiFi Network - full coverage for mobile devices (802.11 AC)
- Service & Support - effective circuit, network, and guest support

# One in Four Properties Meet Consumer Expectations

## Guest WiFi Experience

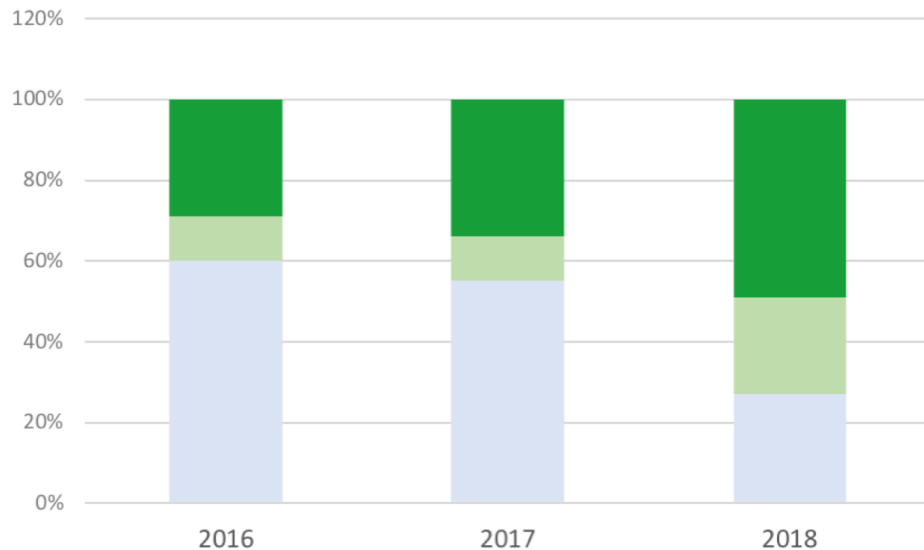


## Key Highlights:

- This year, the average WiFi service rating improved to 6.9 out of 10 from 5.7 in 2017 as properties invested in faster internet circuits, more coverage and legacy equipment upgrades.
- 27% percent of properties had a 9 or 10 rating - meaning these can meet consumer expectations, a 50% improvement over 2017.

## Internet Circuit Capacity

■ Slow ■ Basic ■ Streaming

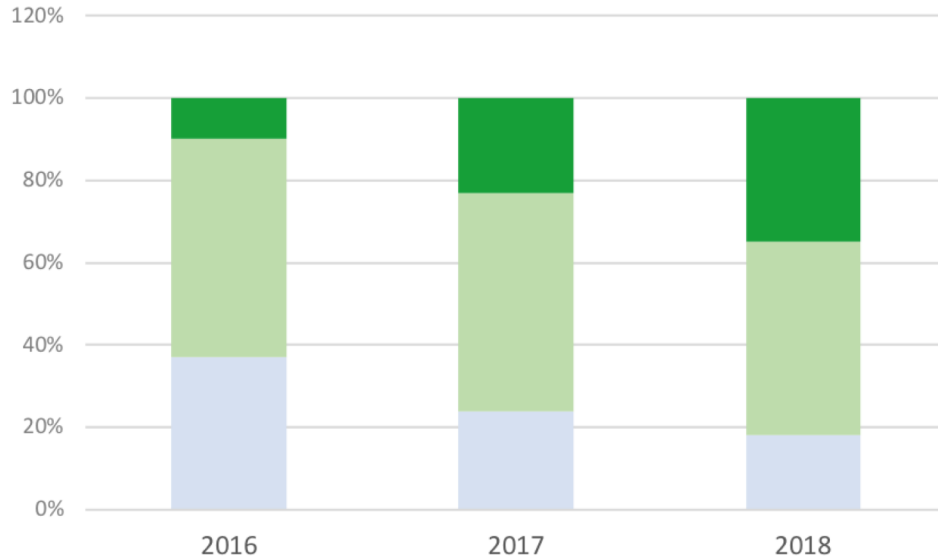


## Key Highlights:

- 26% of properties have a “slow” internet circuit for the number of sites covered - meaning their guests cannot consistently check emails, browse or enjoy social media.
- Streaming quality internet circuits for sites covered is available at 49% of properties.
- Due to an increased number of sites with multiple devices, properties need to upgrade their circuits and networks to provide adequate MB per site.
- Fiber and coax circuit upgrades were the top two circuit upgrade types.
- Fiber upgrades in particular increased by 2.5%.

## Equipment by Generation

Legacy (B, G)   Last (N)   Current (AC)

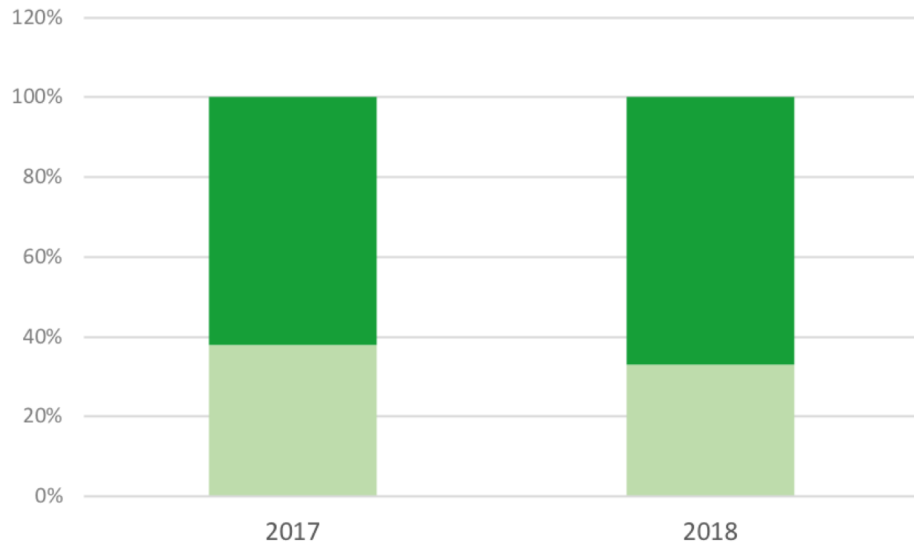


## Key Highlights:

- Multiple Devices per customer + streaming = higher network/ access point capacity.
- 82% had N- or AC-rated Wi-Fi networks (N is still an accepted industry standard for properties with less than 100 sites, though AC is the most recent).
- Increase in current generation networks from 23-35% - rise of 802.11AC technology for higher capacity and mobile quality.
- 18% of parks are using severely dated, G standard or older networks using mesh technology
- Phasing out Mesh Design – Mesh networks dropped from 24% to 18% of properties. As these designs cannot support a consistent guest experience.

## WiFi Coverage

Partial Full



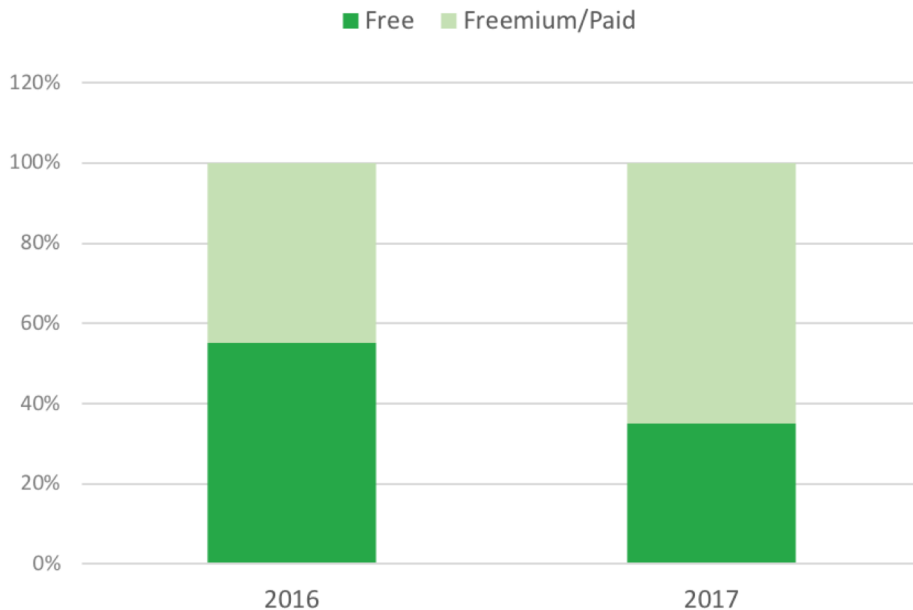
## Key Highlights:

- 80+% of connected devices are phones and tablets with weaker internal WiFi antennas -
- Phones and tablets need more access points to deliver guaranteed connection -65dBm.
- 66% of properties had “full coverage” an increase of 5%.
- Indoor coverage:
  - 38% of properties with full coverage also have indoor coverage to all community buildings.
  - Solving Inside-the-Cabin-Experience for both vacation rentals and MH seasonals with dedicated connections and merchandise is an OEM and Property trend.



# Consumers will pay for Premium Service

## Free vs Paid WiFi

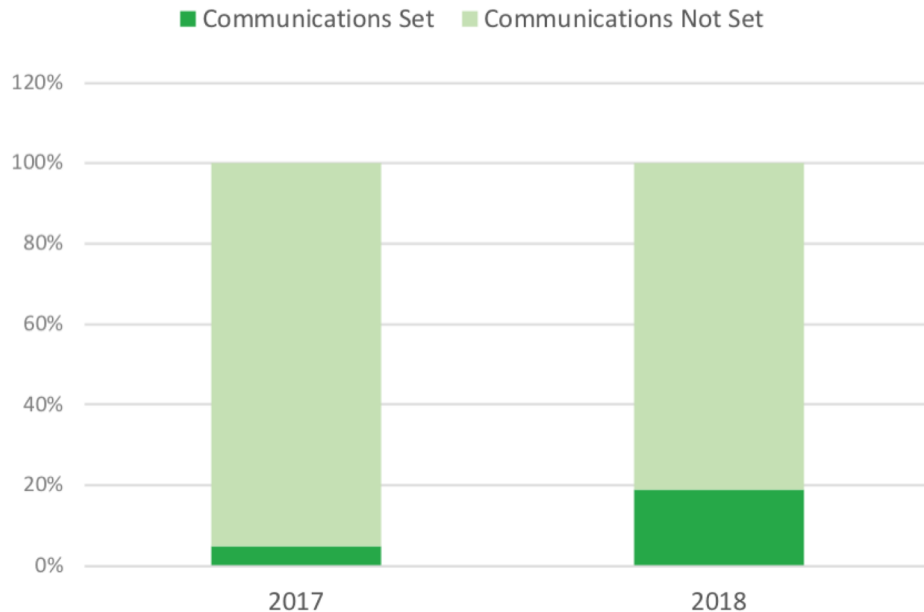


## Key Highlights:

- 35% offer free unlimited Internet.
- 65% offer a free period, basic plan or managed speeds and a Pay Plan - "Freemium."
- Most customers with a 9-10 rating are charging for a premium plan.
- Certain properties - mainly management groups - aim to offer free, excellent WiFi at all properties

# Honest Communication Gap

## Honest Communications



## Key Highlights:

- 73% of properties do not meet consumer expectations => only 19% of properties say something more than "Wi-Fi" or "Free Wi-Fi"
- Big gap improvement, up from 5% in 2017.
- Some sample expectations:
  - "Wi-Fi in Select Areas"
  - "Parkwide WiFi at every site"
  - "Free Parkwide WiFi"
  - "Basic Connection for browsing"
  - "Premium Wi-Fi Available"
  - Weblink with more details

1. The industry is improving WiFi services to meet guest expectations with 27% of properties rating 9 or 10.
2. Rating improvement is driven by investment in better internet circuits and network upgrades.
3. Honest Communication is improving, closing the expectation gap, but 81% of properties did not set WiFi expectations on their website.

# Thank You For Watching

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A background network diagram consisting of numerous nodes (small circles) connected by thin lines, forming a complex web. The nodes and lines are in shades of green and grey, set against a light green gradient background with wavy patterns at the top and bottom.

  
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