

Navigating the indoor connectivity shift: unlocking growth through value-added solutions

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The evolving landscape of indoor connectivity

In today's increasingly digital world, seamless and reliable indoor wireless connectivity has become a critical requirement. Large venues, multi-dwelling units, office spaces, and other indoor environments demand robust wireless solutions, especially as the adoption of smart building technologies, IoT, and advanced analytics solutions increases.

These advancements have transformed the indoor connectivity market, with customers seeking more specialised services adapted to their specific infrastructure designs and end-users.

Meanwhile, operators continue standardising their service offers, battling to differentiate themselves through price and service while reducing their connectivity service's standalone value.

Vertical specialisation, a response to commoditisation

The high demand for more flexible and specialised connectivity offers has driven the development of new players that compete with traditional connectivity providers: connectivity specialists.

Specialists go beyond the installation of access points, offering a better customer support, tailored solutions. Increasingly, they also offer value-added services that enhance user experiences and integrate with smart technologies.

These new players are leveraging their in-depth knowledge of different industries to address their unique needs through solutions that adapt to venue structures and connectivity requirements.

To address these needs, specialists have designed connectivity services that enhance the end-user experience for each vertical, including pay-as-you-go models, revenue-sharing frameworks, white-label options, and specialised customer services focused on each end-user characteristics.

Beyond basic connectivity, specialists also provide value-added services, such as IoT integration, data recollection and analytics, cyber security, and digital signage solutions, all tailored to specific customer requirements.

For instance, retailers may benefit from customer engagement features and data analytics tools. Hospitality providers may prioritise secure and stable connectivity for communication between the front desk and the guest rooms and distribution of entertainment to guests. Later living and care homes might benefit from IoT integration for health monitoring. Military clients may favour services that ensure critical communications are kept secure while allowing connectivity for recreational use.

With this extended and specialised offer, specialists are gaining traction from traditional connectivity providers. This suggests the market is moving from a price-based differentiation towards a more specialised demand, providing specialists with room to keep growing.

Vertical specialisation as a successful growth strategy



WorldVue Connect

WorldVue Connect Inc. is a privately held provider of video, advanced connectivity, and professional services, primarily serving the **hospitality industry** including luxury apartments and condos, student housing, and senior living.

WorldVue has become a key player in the North American hospitality market, holding an estimated 20-25% share of the hospitality Wi-Fi market in the US.

The company has established partnerships with major hotel chains, tailoring its offerings to meet the specific needs of this segment. It now serves over 7,000 properties and 900,000 rooms in renowned hotels and resorts, including the Marriot, Four Seasons, Accor, Sonesta, Hyatt and Wyndham, among others.



Boingo

Boingo Wireless is a US leading neutral host of wireless network solutions with nearly 20 years of experience. The company specializes in **large venues** and has built industry-leading Wi-Fi networks for major venues such as the World Trade Center, Hollywood Bowl, and John F. Kennedy International Airport.

To achieve this, Boingo has been an active acquirer of various airport neutral-host wireless systems that provided Wi-Fi infrastructure implementation and management for airports in North America such as Concourse Communication Group, Acquired Opti-Fi Networks or Advanced Wireless Group.



Wifinity

Wifinity is a UK-based managed Wi-Fi provider that has established a strong presence in the **military sector**, primarily serving government and military facilities.

Despite starting as a connectivity provider for military accommodations, Wifinity has expanded into new customer verticals both organically and inorganically. In fact, it also serves holiday parks, build-to-rent and purpose-built student accommodations, multitenant buildings, offices and corporate verticals.

Additionally, Wifinity has added new services to its portfolio, including data analytics, IoT integration, DDoS, VMware and cloud services.

Unlocking the future of indoor connectivity

Leading specialists in the US and the UK have embraced vertical specialisation, consolidating their presence through acquisitions of other providers to gain expertise and scale.

As the market consolidates and acquisitions increase, operators are seeing cross-selling and upselling opportunities. They are leveraging specialized knowledge in one vertical to expand into adjacent sectors and applying innovative solutions developed for one industry to meet the needs of another.

For instance, lessons learned in retail analytics might be adapted to enhance customer experiences in entertainment venues or large-scale public events.

At Fide Partners, we understand the complexities and opportunities within the in-building wireless sector.

Whether you're an investor seeking high-potential acquisitions or an operator striving to target the right verticals with tailored solutions, our team is here to guide you.

With our expertise, we can support your strategy and decision-making to help you navigate this dynamic market.

Connect with us, and let's explore how we can work together to unlock growth and achieve your goals in the evolving landscape of in-building connectivity



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