
Holafly
Global eSIM &
Travel Report
2026-2027

Travel is changing fast, and so are the people who do it.

Today's global travellers value relaxation and peace of mind, and want the freedom to create their own journey as they go. Mobile internet access makes this achievable, from anywhere in the world.

With nothing more than a phone and a data connection, it's now possible to manage all aspects of a trip – from putting a first pin in the virtual map, to arriving home with memories that will last a lifetime. However, getting and staying online can still be far from straightforward.

Where, how and why we travel – both physically and digitally – is the subject of this survey.

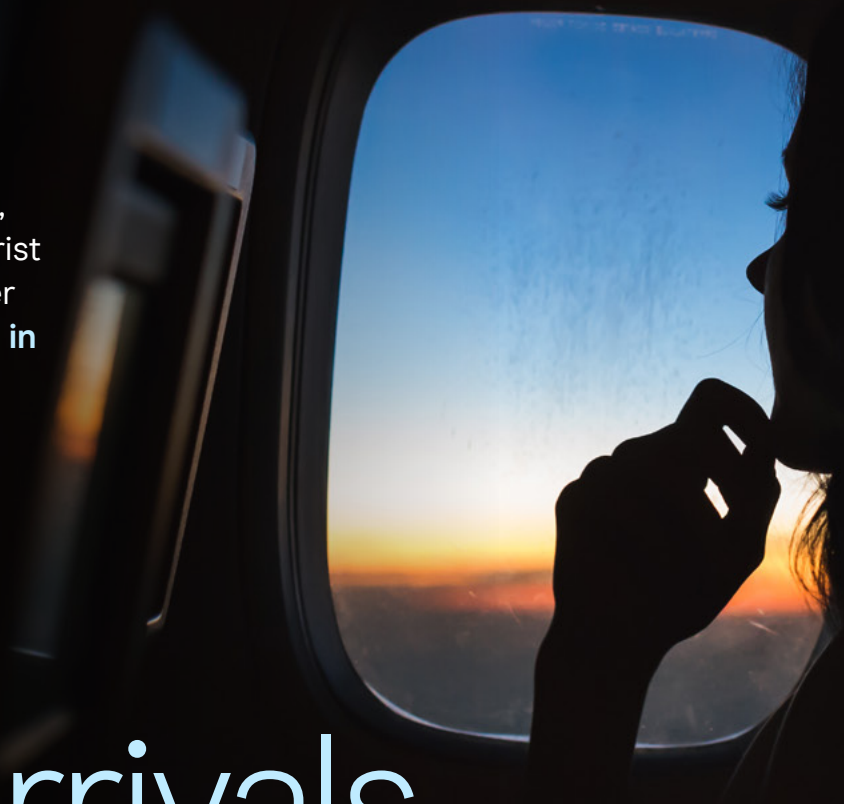
01



49%

of travellers are journeying more than they were two years ago

The story of travel in 2026 is one of confidence in the face of challenge. Geopolitical shocks, rising prices and regional conflict have undoubtedly influenced behaviour. Yet despite all this, UN Tourism found that international tourist arrivals grew by 2% over the first quarter of 2026[1]. **This report shows an increase in the number of trips being taken.**



Tourist arrivals grew ↑2%

over the first quarter of 2026[1]

As this survey also reveals, there is a great deal of positivity around global mobility – whether for leisure, business or a mixture of the two. Travel continues to become more mindful, intentional and connected, aided by digital technology that has become an integral part of the experience. **Almost all travellers now wish to remain connected while away from home.**

Sustainability has long been at the back of travellers' minds – but over the past year, good intentions have crystallised into meaningful action at an accelerated rate. **More travellers are prepared to take practical steps to make their journeys more sustainable, and more are turning to digital tools to help them achieve this.**

The way we plan and book a trip is changing. Online travel agents, aggregators and comparison sites brought power and convenience, but also added bewildering complexity and choice. Today, AI-powered services promise a more streamlined, personalised service than ever before, eliminating fuss and friction. **Adoption of these tools, and trust in them, is growing fast.**

While international roaming remains popular, there has been a marked reduction in the number of travellers who rely on Wi-Fi as their typical method of getting online while abroad. **More people now turn to an eSIM for their mobile data, and it is the most-used method for some nationalities.**

Five headline statistics define the state of travel in 2026:

98%
want to **stay online** while abroad
↑1 on 2025

69%
made **two or more** international trips
↑14 on 2025

29%
use an **eSIM** to stay connected
↑12 on 2025

53%
have made travel decisions to reduce their **environmental impact**
↑11 on 2025

44%
have frequently used **AI tools** to help plan their travels
↑13 on 2025

"Looking at 2026 and ahead to 2027, we think global mobile access will increasingly feel like a natural component of the trip, rather than a chore.



A better, more reliable internet service will give travellers greater power to journey and explore freely, change plans easily, and work from anywhere with peace of mind."

Javier Cabrerizo
CEO, Holafly

Global Travel Landscape: 2026 in Review

2.1 How People Travelled in 2026
2.2 Travelling Companions: Solo, Group and Family Trips
2.3 From Where to Why: The Purpose of Travel
2.4 Top Destinations: Where the World Went in 2026
2.5 Hopes and Likes: Where People Said They Were Going

02

If 2025 represented a quiet revolution in travel, 2026 has witnessed more visible changes in the way we explore the world. It has arguably been the year when travel finally emerged from the long shadow of the pandemic. Across the globe, people have once again felt at liberty to spread their wings, follow their dreams and fulfil their ambitions.

For some, this has meant revisiting and reconnecting with familiar places. For others, it has involved long-awaited first-time visits to far-flung destinations. But above all, it can be characterised by an openness to new ways of doing things.

The survey shows that people are undertaking more international travel, and making more frequent trips. On average, they are more inclined to swap a long vacation for shorter, more intense experiences.

More people are sampling the freedom of going solo, with fewer travelling as part of a family group. While leisure remains the most popular reason to take a journey, business travel continues to bounce back. And although the list of the most popular destinations has seen little change, more than three quarters of travellers visited a new country in the last 12 months.

Aided by digital tools, people are prepared to embrace the new – marking 2026 down as the year when the connected, technologically fluent traveller came of age.

2.1 How People Travelled in 2026

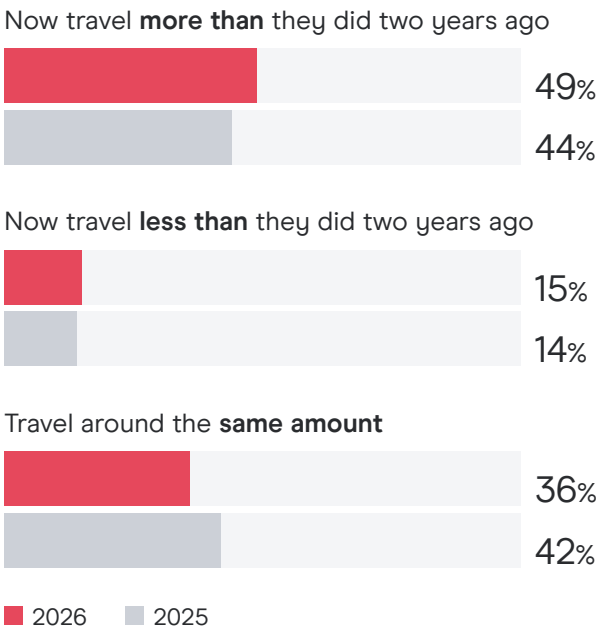
- *International travel is up, particularly among younger people*
- *On average, travellers are choosing to take shorter trips*

The headline news from 2026 is simple. People are travelling more, and more often.

Nearly half of those polled (49%) said they were travelling more than they were two years ago – a 5 percentage point jump on last year's result. This increased appetite for travel is especially strong in younger age groups, with 69% of 18-24-year-olds and 64% of 25-34s reporting an increase in travel.

There were likewise big variations across different regions. People from the Americas, Africa and South Asia have been the most prolific travellers over the past year: 67% from Brazil, 58% from Mexico, 61% from the United States and 69% from South Africa said they were now travelling more than they were two years before. All were eclipsed by India, with a score of 75%.

How people have altered their recent travel habits



It's the same story with travel frequency. In 2026, international travellers made an average of 2.6 trips abroad over the year – up from 2.2 in 2025.

Across all survey respondents, 19% are now taking four or more international trips a year, up from 12% in 2025. By contrast, the number travelling just once per year has fallen dramatically from 45% to 31%.

Once again, it's the younger travellers who are driving the increase. Those aged 25-34 are particularly likely to venture across borders, with around a quarter (24%) taking four or more international trips over the year.

The situation is mirrored in domestic travel. More than a third of all those surveyed (36%) took at least four trips within their own countries during the past year, compared with 29% in 2025. The strongest growth is among those taking four to six trips (up 4 percentage points to 22%) and seven or more trips annually (up 3 points to 14%).

International travellers made

2.6 trips

abroad over the year, on average



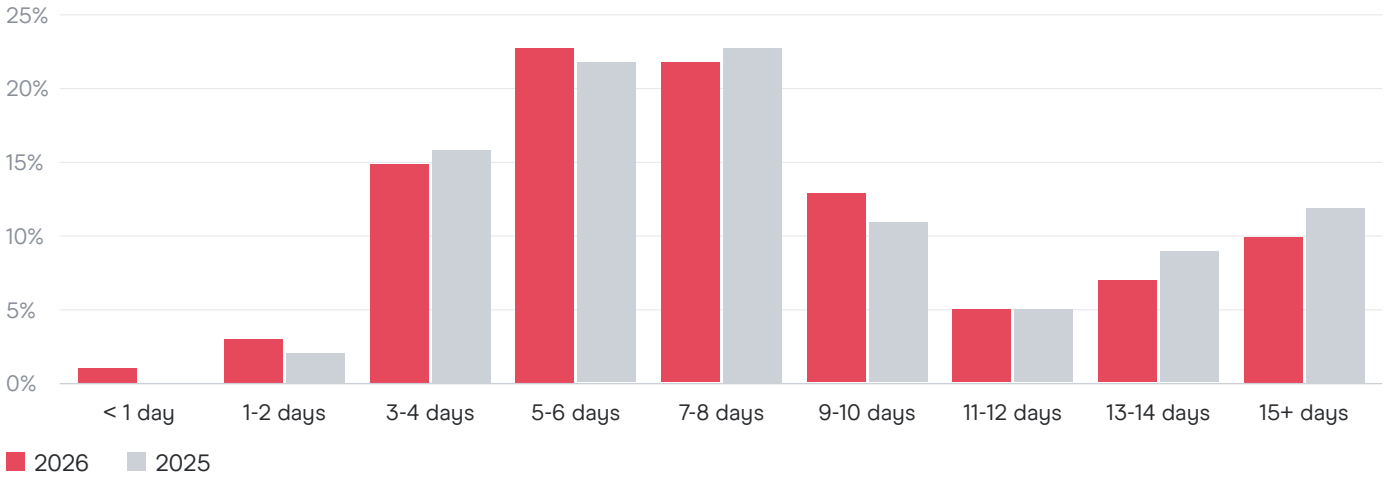
On the whole, travellers are treating themselves to shorter, more intense experiences. The average length of a trip is 7.9 days, down from 8.2 in 2025.

The typical trip lasts most or all of a week. The most frequent length is 5-6 days (23%), followed by 7-8 days (22%) – though short breaks and long weekends still have their supporters, with 15% of people typically going away for 3-4 days (down from 16% in 2025).

Compared with 2025, there has been a small shift away from 13-14 day holidays (7%, down from 9%) towards trips lasting 9-10 days (13%, from 11%). And across the board, fewer people are opting for a lengthy "holiday of a lifetime", or an extended spell as a digital nomad overseas. Trips of 15 days or more are down to 10%, from 12% in 2025.

Here, it's older travellers who are bucking the trend. Among the Boomer generation (born between 1946 and 1964), 15% stay an average of 15 days or more at a destination. Travellers from Australia and New Zealand are also far more accustomed to taking trips that last more than two weeks – a finding that's unsurprising, given the geographical remoteness of these countries.

Average stay in a destination



2.2 Travelling Companions: Solo, Group and Family Trips

- *Solo travel is rising across all age groups*
- *Fewer people are going on trips with family members*



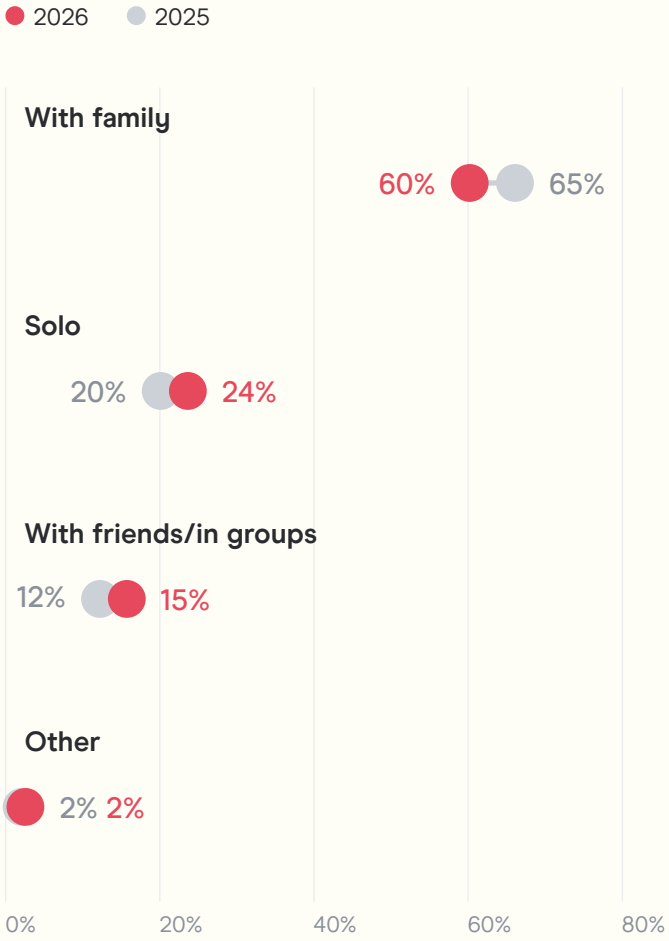
Travel is changing. The survey data reveals a thirst for independent exploration – aided by the ability to stay online while abroad. It's the next chapter in the rise of the "solo connected traveller".

If 2025 was a time when families came together to share the experience of going abroad, 2026 has offered a chance for individuals to spread their wings. Last year, almost two thirds of travellers (65%) typically travelled with their family. That figure dropped to 60% in this year's survey.

Behind the headline figure, though, is a very clear generational story. Only 45% of Generation Z (born after 1996) take most trips with their relatives. That shoots up to 63% for Millennials and Generation X (born 1965-1996), and hits 67% for Boomers (born 1946-1964).

There's also a geographical tale to tell. Travellers from Latin America and the United Kingdom go against the trend, with 75% from Brazil, 65% from Mexico, and 68% from the UK accompanied on most trips by family members.

How people travelled in 2026





Nearly 1 in 4 travel alone

Solo travel is rapidly increasing, with a 4 point increase on last year. Across all those surveyed, 24% say they typically go alone.

It's a trend that cuts across all age brackets. The 18-24 age group (25%) are about as likely to travel alone as those in the 65+ group (24%). This represents a big change from last year, when younger people were far more enthusiastic solo travellers than their older counterparts.

There remains a big gender divide. This year, 27% of men and 19% of women typically travel alone, not far off the 2025 figures (24% and 17%). Survey respondents from North America, South Asia and Africa are the most likely to take trips without companions, while Europeans are more liable to travel in company.

There was a slight rise, too, in those saying they took most of their trips with friends or in groups. This is very much a young person's mode of travel, preferred by 28% of 18-24s and 20% of the 25-34 group, but only 9% of those aged 55 and over.

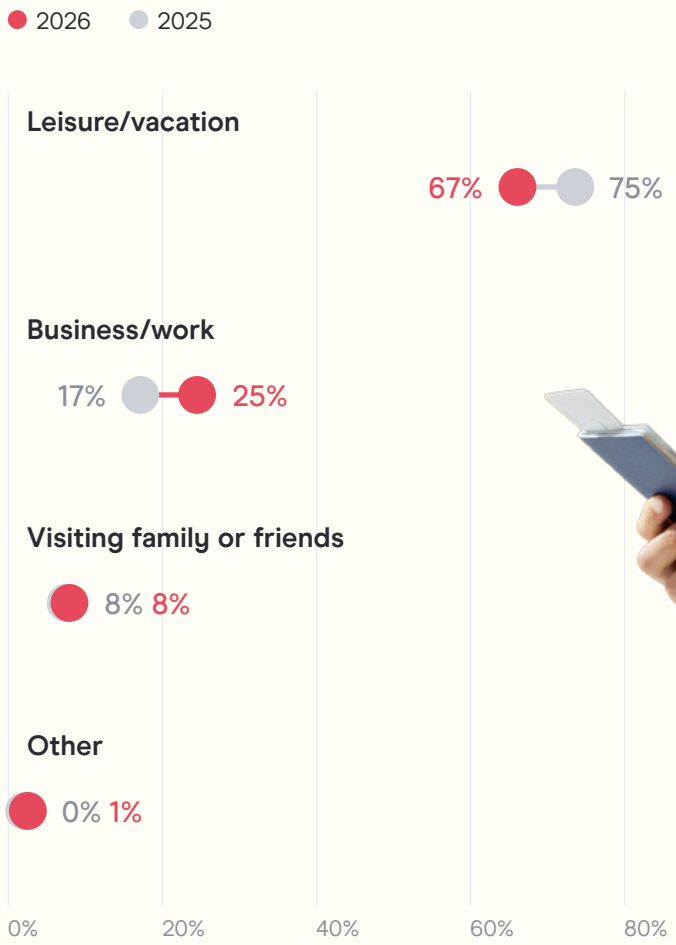
2.3 From Where to Why: The Purpose of Travel

- *Leisure is the most popular reason for travel, but business trips are increasing*
- *Most people see travel as part of their identity, and many post their trips on social media*

The reasons why we travel are also shifting. Leisure is still the most popular reason by far, with around two thirds of people (67%) primarily leaving home to go on vacation. But this represents a sharp decline from last year, when three quarters (75%) cited it as their main reason for travelling.

The figures show Europeans to be the most vacation-oriented. Leisure travel comes out well above the international average for travellers from Spain (73%), Germany (77%), Italy (78%) and the United Kingdom (78%).

Why people travelled in 2026







71% combine leisure & work

in the same trip

After a major decline during the past decade, business travel is continuing to come back. This year, 25% of survey respondents specified it as their primary reason for travelling.

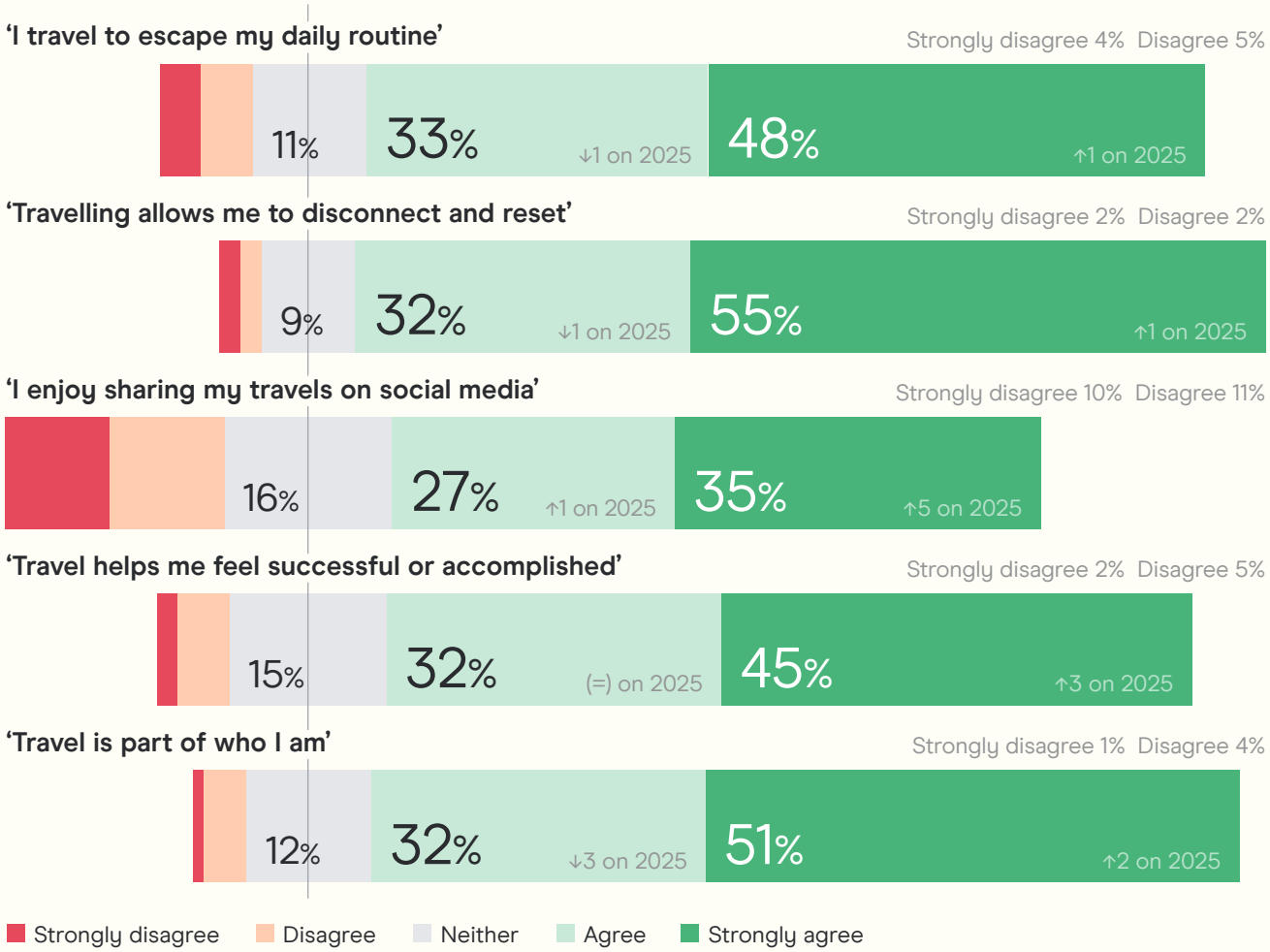
Those aged 25-34 are most likely to travel primarily for work, at 31%. Each older group includes fewer people taking business trips – just 20% of the 55-64s, and 15% among the 65+ group.

It's worth noting that vacations and business travel are no longer exclusive. Across all ages and nationalities, 71% have combined leisure and work in the same trip – a massive increase from the 51% who reported doing so in last year's survey.

This encompasses a wide range of activity, from young professionals grabbing a few hours each day on the laptop, to "digital nomads" hopping between co-working spaces, and executives bringing their families so they can extend a business trip into a "workation". Not long ago, this idea of "bleisure" travel was seen as novel or remarkable. Today, it's commonplace, aided by better availability of fast, secure and reliable internet connection while abroad.

The number of travellers who take trips mainly to see family and friends remains stable, at 8%. New Zealanders were the big outliers here, with 20% saying it's their main reason for making a journey.

Why people choose to travel[2]



The question of why we travel goes beyond the simple purpose of each trip. Often, the impulse is rooted in a complex web of attitudes, emotions and self-identity.

More than four in five of those polled (83%) said that travelling is part of who they are, and more than half (51%) strongly agreed with this sentiment. In some countries, an even higher percentage said that travel was part of their identity, including 88% from Mexico, 90% from India and 96% from Brazil.

Four in five (80%) travel to escape their daily routine, while 78% agree that travel helps them feel successful or accomplished[3]. This represents a slight increase on last year's figure of 74%.

However, the biggest increase since last year is in those who enjoy posting about their travels on social media: 62%, up from 56% in 2025. It's of greatest importance to younger generations, peaking at 74% among the 18-24 group. Women are far more enthusiastic users than men (67% vs. 58%).

For many of today's travellers – even the increasing number who choose to go solo – sharing the journey is an inextricable part of the experience. It's another reason why a reliable mobile data connection is at the top of the agenda.

2.4 Top Destinations: Where the World Went in 2026

- *The United States holds its place as the most visited nation*
- *Over three quarters of travellers visited a new country last year*

The world's most celebrated travel destinations are famous for a reason – and these big-hitters have built up a loyal following.



Nine of the top ten countries in the 2025 survey feature in this year's chart, and the top four positions remain unchanged. There's only one new entry, with Mexico taking the place of Portugal at number ten. Across each of the top ten destinations, at least 7 in 10 visitors say they plan to return in the near future.

In 2026, travellers showed an increased willingness to seek out new experiences. The survey showed 77% spent time in at least one country they had never visited before – 6 percentage points more than in 2025.

Younger travellers are even more likely to explore new surroundings. Only 1 in 10 (12%) of 18-24s visited no new countries at all over the past 12 months. Older generations are more conservative: 56% of those aged 65+ stuck to familiar ground.

The United States was the most common first-time destination, increasing its share of the vote from last year's 6% to 8%. It was followed by France (6%), Australia (5%), Japan (5%) and Canada (5%).



United States

U.S. tourism has faced another turbulent year. From January to July 2026, international arrivals were down 4.7% compared with the same period in 2025, according to the U.S. Travel Association[4]. However, the United States has easily retained its place as the world's most visited destination in the survey, and the one attracting the largest number of first-time travellers.

The American offer is a uniquely compelling one. No nation can match its variety, from the bustle of New York and the thrills of Florida's theme parks to the breathtaking splendour of the mountains, canyons and Great Plains. Visitors mostly come from the Americas and Asia, and fly home with a renewed appetite to explore this vast nation: 81% plan to come back. The U.S. also emerged as the all-time favourite destination among international travellers, as it did in 2025.

4 in 10
travellers visited for the first time

8 in 10
travellers plan to return



France

France comfortably retained its second position in the list of most visited destinations. Its cultural heritage, art, architecture and gastronomy are a draw for travellers from all around the globe, and particularly from Europe and the Americas. There is no typical visitor – the survey shows that France's appeal holds consistent across all ages and generations.

First-time visitors to France soon find themselves captivated and converted, with 73% pledging to return. There is much to explore, from the rural heartlands ("La France profonde") to some of the world's glitziest beaches and most celebrated ski resorts. And, of course, Paris – one of the most visited cities in the world, with more than 18 million international arrivals each year according to Euromonitor International[5].

4 in 10
travellers visited for the first time

7 in 10
travellers plan to return



Canada

Canada is a vast canvas on which to paint the biggest adventures. Its popularity is growing, with official figures recording a rise of 3.5% in international visits this year[6]. The great outdoors is the main attraction, from rainforests and Arctic tundra to the world's longest coastline. But urban Canada is equally compelling, including cosmopolitan Vancouver, dynamic Toronto and the strikingly distinct culture of French-speaking Montreal.

Millennials make up the backbone of visitor numbers, with the 35-44 age group particularly well represented. Many are from the Americas, along with small but enthusiastic cohorts from Asia, Africa and Europe. The friendly culture and can-do attitude go a long way to ensuring almost three quarters of visitors (73%) make plans to return.

4 in 10
travellers visited for the first time

7 in 10
travellers plan to return



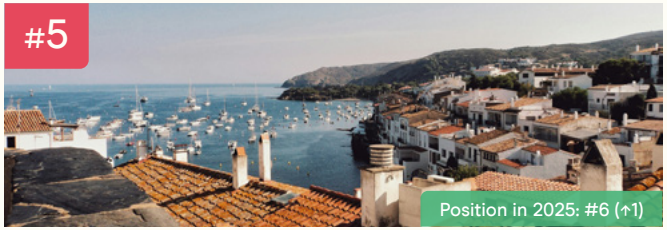
Italy

Over centuries, the cradle of the Renaissance has lost none of its power to captivate visitors. Italy's attractions, both natural and man-made, are timeless: great cities that are treasuries of art and architecture, beautiful lakes and mountains, and the elegant lifestyle characterised as "La dolce vita".

The attention of the world fell on Milan and the Dolomites earlier this year, as the Winter Olympic Games helped drive an estimated 66.7 million international arrivals to Italy – a 9.3% rise year on year, according to official forecasts[7]. Almost three quarters of all visitors (74%) would like to return. Most come from other European nations or from North America, and the survey results suggest Italy is particularly popular with cultured travellers in the 45-54 age bracket.

4 in 10
travellers visited for the first time

7 in 10
travellers plan to return



Spain

This year sees Spain move up the destination rankings, with 10% of survey respondents having visited – a 1 percentage point increase on 2025. What attracts them remains the same: golden beaches on the Atlantic and Mediterranean, a unique historical and artistic heritage, a world-famous cuisine, and a laid-back way of life that manages to encompass both siesta culture and the liveliest (and latest) nightlife on the continent.

Spain remains a perennial favourite among older travellers, with 17% of the 65+ age group going there in the past year. The largest visitor cohorts are from Europe – particularly the United Kingdom – and Spanish-speaking parts of Latin America.

4 in 10
travellers visited for the first time

7 in 10
travellers plan to return



United Kingdom

The United Kingdom has made the biggest leap in the top ten, moving from eighth place up to sixth. Despite mixed fortunes for British tourism over the past year, with inbound tourism becoming sluggish after a strong start[8], the UK continues to attract large numbers of visitors from throughout the English-speaking world, as well as from mainland Europe. Three quarters say they intend to return.

They come for history and pageantry, world-class cities and idyllic countryside. Britain's trump card is its global eminence in the creative arts, including a year-round calendar of festivals, exhibitions and other events. Most explorations start in London. It's not only Europe's most visited capital, but welcomes more international arrivals than any city outside Asia, according to Euromonitor International[9].

4 in 10
travellers visited for the first time

8 in 10
travellers plan to return



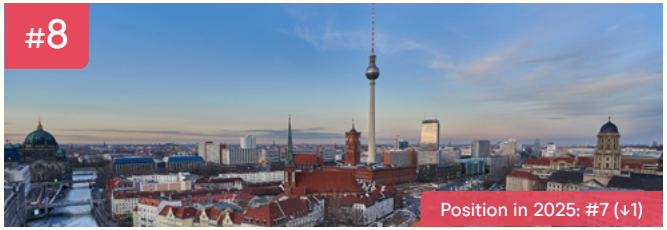
Australia

For travellers from many parts of the world, Australia's geographical remoteness puts a visit squarely into the "big trip" category. But with wildlife and natural scenery that's found nowhere else on earth, and a famously welcoming culture, Australia continues to draw the curious and the adventurous.

First-timers make up just under half of all visitors (49%), and the profile skews young: 25 to 34-year-olds make up the largest group. Many are from Asia, Africa and Oceania, and 74% say they plan to return – roughly the same as last year. This was no empty promise, as official statistics show. Official figures estimate that the number of inbound trips is up 10% on 2025, with visitors having spent 9% more nights in Australia[10] this year.

5 in 10
travellers visited for the first time

7 in 10
travellers plan to return



Germany

Germany's appeal rests on many different factors. The country is an astonishingly varied patchwork of regions and cities, each fiercely proud of its own culture. Some visitors come to experience the cabaret scene of Berlin or Bavaria's famous beer halls; others to see the fairytale castles of the Rhine Valley, or explore Hamburg's seafaring heritage. All can benefit from excellent standards of service and an efficient transport system.

Official estimates suggest that tourism in Germany has grown by 3.2% since last year[11], at last rebounding to pre-pandemic levels. The survey suggests that most international travellers are from other countries in mainland Europe, and that Germany is equally popular with every age group above 25. Most trips are for leisure, but the country continues to be a major global hub for meetings, conventions and conferences.

4 in 10
travellers visited for the first time

7 in 10
travellers plan to return



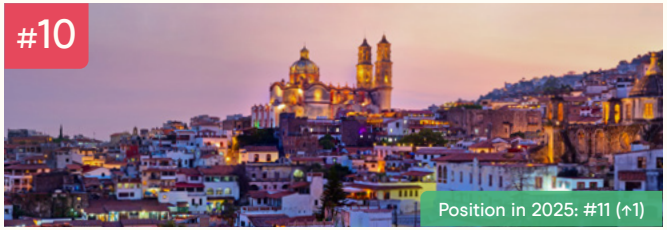
Japan

A trip to Japan is the ultimate immersive experience. It's a heady mix of old and new that never loses its capacity to surprise, with ancient Shinto shrines sitting in the midst of gaudy neon cityscapes. More travellers are now making inroads into rural Japan – which, with its sleepy villages and onsen baths, remains delightfully unspoilt.

It's the country that welcomed the highest proportion of first-time visitors (58%), and 78% were impressed enough to plan a return visit. As might be expected of a technologically pioneering nation, it's most popular with Generation Z – many of whom will have grown up as digital natives. Most visitors come from Asia and Oceania. Japan is still a niche destination for European travellers, but one whose profile is growing stronger each year.

6 in 10
travellers visited for the first time

8 in 10
travellers plan to return



Mexico

Mexico is the only new entrant in the top ten. It owes its appearance to a strong performance in the North American market: 17% of Canadians said they had visited in the past year (up from 15% in 2025) as well as 12% of travellers from the United States, equalling last year's score. Most visitors are in the under-55 age group, and 74% hope to make a return trip.

Several groups can find their dream vacation in Mexico. Beach lovers flock to the big coastal resorts, many of them on all-inclusive deals. Culture seekers come to discover the colonial-era architecture of the cities, and the ancient ruins left by the Aztec and Maya civilisations. Mexico is increasingly attractive to digital nomads and remote workers, too, thanks to low living costs and good visa availability for many nationalities.

4 in 10
travellers visited for the first time

7 in 10
travellers plan to return



Bubbling under

The top ten destinations are dominated by the classic favourites, with no country shifting more than two places since 2025. However, there's more movement within the next ten destinations snapping at their heels, offering a glimpse into the visitor hotspots of the future.

China and Brazil look likeliest to break into the first division over the coming years. The United Arab Emirates, South Korea and Switzerland also climbed two or more places.



#11 China (↑2)

#12 Brazil (↑3)

#13 Portugal (↓3)

#14 Argentina (↓2)

#15 United Arab Emirates (↑2)

#16 Greece (↓2)

#17 Thailand (↑1)

#18 South Korea (↑3)

#19 Austria (↓3)

#20 Switzerland (↑3)

2.5 Hopes and Likes: Where People Said They Were Going

» *Last year's list of predicted travel hotspots proved largely accurate*

» *The United States remains travellers' favourite destination overall*

The map of top destinations for 2027 has yet to be drawn. But to see more clearly into the future, it's worth looking back, and judging whether last year's travel predictions came true.

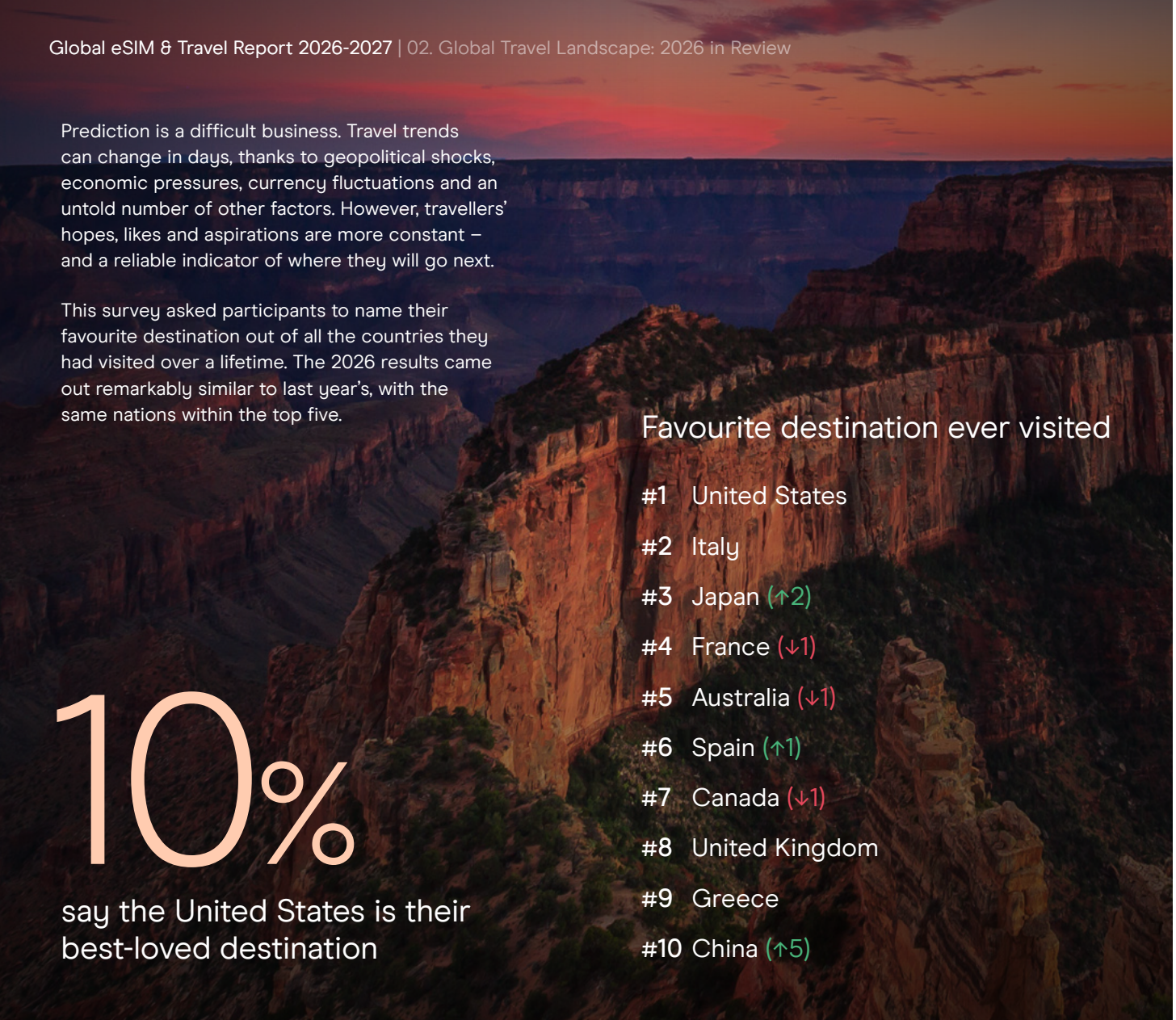
The last edition of the Holafly Global eSIM & Travel Report put forward a list of the regions and nations people were expected to visit in 2026. Out of the ten countries mentioned, eight featured in this year's actual list of most popular visitor destinations.

Where people planned to go vs where they actually went in 2026

Planned to visit	Actually visited	
#1 Spain	#1 United States	↑3
#2 Italy	#2 France	↑1
#3 France	#3 Canada	New
#4 United States	#4 Italy	↓2
#5 Japan	#5 Spain	↓4
#6 Mexico	#6 United Kingdom	↑1
#7 United Kingdom	#7 Australia	New
#8 Thailand	#8 Germany	↑1
#9 Germany	#9 Japan	↓4
#10 Portugal	#10 Mexico	↓4

Prediction is a difficult business. Travel trends can change in days, thanks to geopolitical shocks, economic pressures, currency fluctuations and an untold number of other factors. However, travellers' hopes, likes and aspirations are more constant – and a reliable indicator of where they will go next.

This survey asked participants to name their favourite destination out of all the countries they had visited over a lifetime. The 2026 results came out remarkably similar to last year's, with the same nations within the top five.



Favourite destination ever visited

#1 United States
#2 Italy
#3 Japan (↑2)
#4 France (↓1)
#5 Australia (↓1)
#6 Spain (↑1)
#7 Canada (↓1)
#8 United Kingdom
#9 Greece
#10 China (↑5)

10%

say the United States is their best-loved destination

The United States remains the best-loved destination, picked by 10% of travellers overall.

Its popularity is even higher among Latin American visitors: 14% among those from Brazil, and a massive 27% among Mexicans.

Second place goes to Italy at 7%, down from 8% in 2025. Its cultural treasures are particularly well appreciated by older visitors, with 10% of the 55-64 age group choosing it. Japan rose two places to third with 6% of the vote, up from 5%.

It was followed by France (6%) and Australia (5%), both polling the same percentage as last year. Australia's score was buoyed up by very favourable results among travellers from Asia and Oceania.

China is the only new entrant in the top ten, leaping five places to tenth. This result, together with its rise to 11th place in the most-visited countries, marks it out as an up-and-coming destination that will almost certainly perform stronger in future reports.

See section 08 below for a detailed prediction of where the world will be headed in 2027.

The Connected Traveller in 2026

3.1 Greater Expectations: The eSIM Revolution
3.2 Access Without Frontiers
3.3 Our Digital Activity Abroad

03

This year not only represented a step change in the where and why of travel, but also the how. For many people, an internet connection is now as essential on a trip as it is at home.

While abroad, travellers depend on continued internet access for an amazingly wide range of activities – not just messaging and maps, but changing reservations on the fly, keeping on top of work, or sharing their experiences on social media. Yet all too often, there are frustrations to contend with: slow and patchy internet, losing coverage across borders, or being unable to raise technical help when it's needed.

More than ever before, travellers expect a digital journey that's smooth, seamless and stress-free. To achieve this goal, many are prepared to adopt new ways of managing their mobile connection.



How people primarily connect abroad

Travellers are less likely to rely on third-party Wi-Fi to stay connected, and many are switching to eSIM solutions.

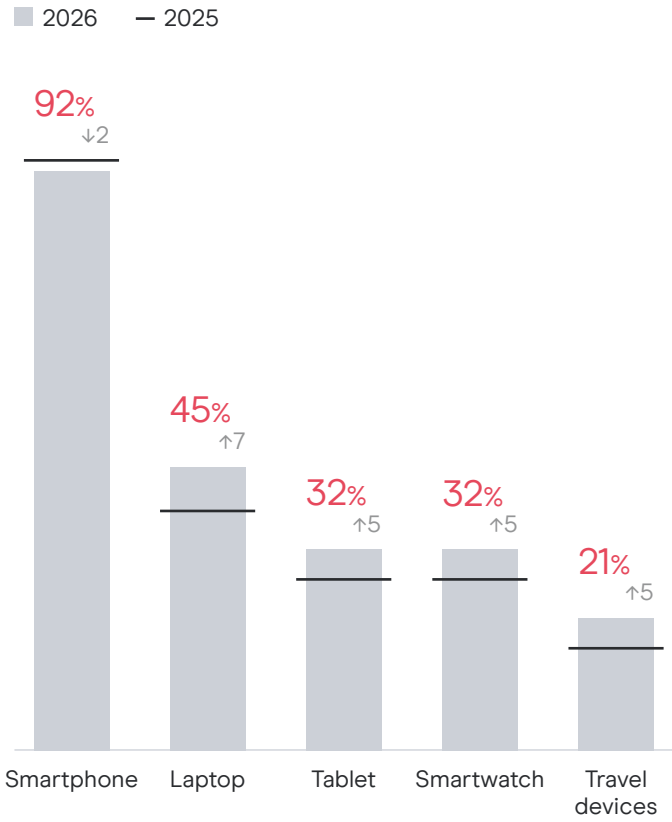
42% International roaming — 2025 - 43%

29% eSIM — 2025 - 17%

16% Wi-Fi — 2025 - 25%

10% Physical SIM — 2025 - 11%

Devices used while travelling



More than 9 in 10 use smartphones while travelling, but use of all other types of device is growing.

Top frustrations when connecting abroad

Slow/unreliable internet	Loss of coverage	Unexpected charges	Complicated setups	Bad customer support
57% ↑1 on 2025	45% (=) on 2025	45% (=) on 2025	31% ↑4 on 2025	26% ↑3 on 2025

Users are irritated by connection issues such as low speed and drop-outs, as well as roaming charges.

Importance of mobile access while abroad



International travellers rank mobile access second in importance, behind sustainability.



"People no longer want to hunt for Wi-Fi or worry about spotty connections.



They expect instant, secure mobile access the second they land. This makes reliable network availability a vital part of the travel experience."

Chris Hills

VP of Carrier and Network Operations, Holafly

3.1 Greater Expectations: The eSIM Revolution

- *Far more travellers are turning to an eSIM to provide a connection abroad*
- *International roaming remains popular, but Wi-Fi use is sharply down*



Just 2%

of travellers stay offline while abroad, compared with 3% last year

Not too long ago, mobile service abroad was seen as an add-on. Today, it's as indispensable as a passport or flight ticket.

In 2026, only 2% of travellers said they remained offline while abroad. Staying connected is now a priority for people across all age groups – even those who would previously leave their devices at home. Last year, 1 in 10 over-65s were still happy to ditch their digital connection while travelling. In 2026, that figure is down to 7%.

The big story of 2026 is the massive leap in eSIM use. In 2025, only 17% of travellers used this as their primary method of connecting. Usage now sits at 29%, and even higher among younger people.

The 25-34 age group lead the way, with eSIM adoption touching 33%. The 35-44 and 18-24 age bands are not far behind, at 32% and 31% respectively. Every single age group has seen a steep increase in eSIM use. But the phenomenon is most impressive among travellers aged 45 and over, where use has doubled in just 12 months.

However, international roaming remains the most commonly used option, with 42% choosing this method to stay digitally connected.

This is just 1 percentage point below the 2025 level, but a deeper dive into the data reveals some big variations by age and generation. Roaming use is down in all groups under 55, with a 9 point drop among 18-24-year-olds. Only those in the 65+ age bracket have become more enthusiastic about roaming than last year, with a rise of 12 points. With a greater number of people in this age group now wanting to stay connected while travelling, roaming may serve as a familiar, tried-and-tested option.

29%

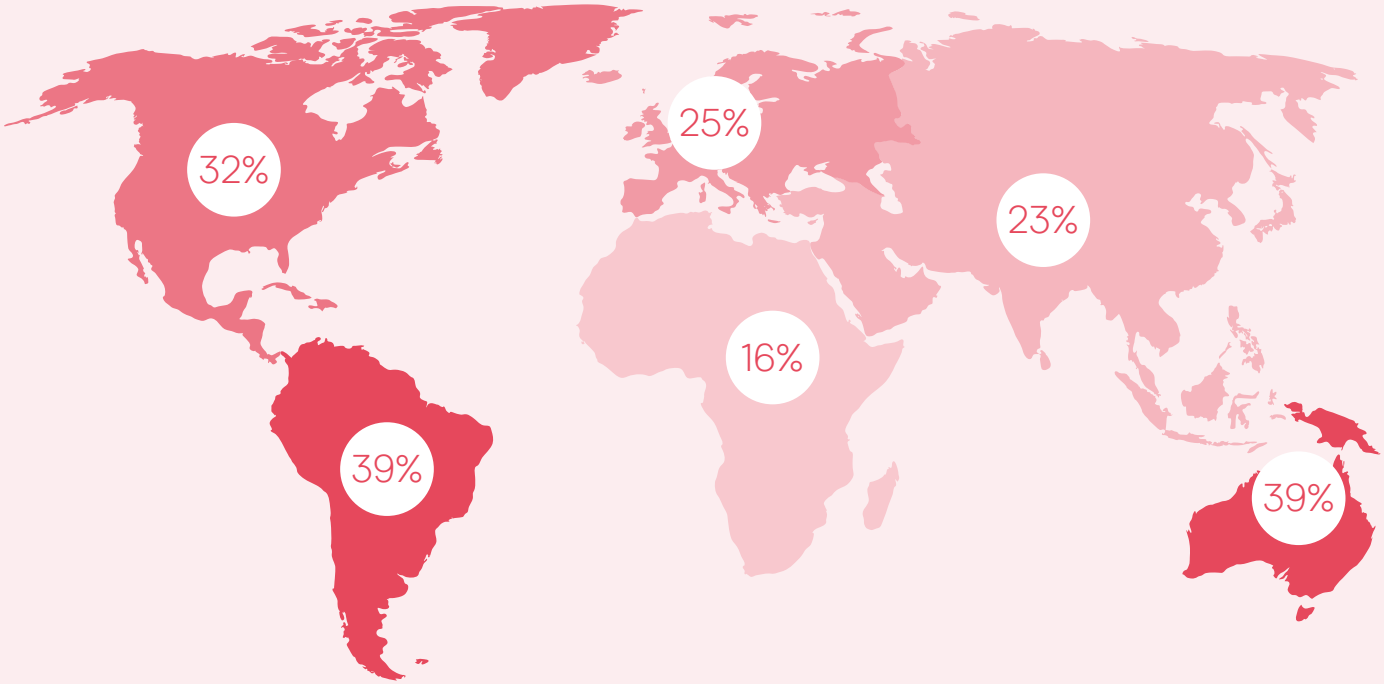
of travellers use an eSIM

An eSIM is now the leading solution for travellers from several nations.

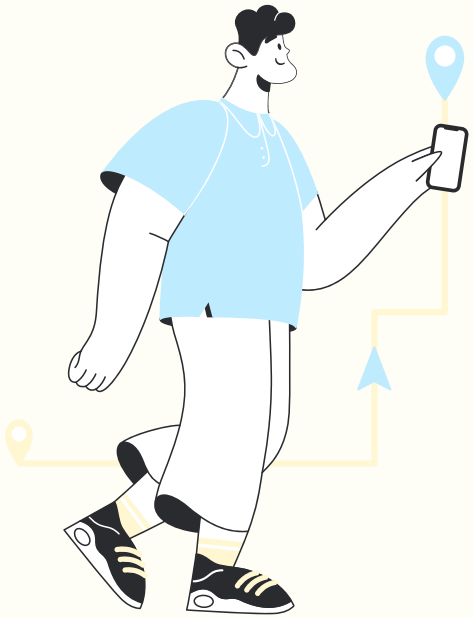
These include Australia (39%), Canada (37%), Mexico (45%) and New Zealand (39%). It has even achieved a 38% share among Germans, who benefit from European Union "Roam Like at Home" regulations to cap roaming costs when visiting other European countries.

While more travellers report using an eSIM as their main way to connect abroad, fewer primarily rely on Wi-Fi. The number of people using Wi-Fi as their preferred method has declined massively, from 25% last year to 16%.

eSIM use by region



The trends are clear. While roaming remains popular, use is down in all but the highest age bands. Wi-Fi, as a main method of getting online, is static or down across all ages – and likewise, the rise in eSIM adoption is robust across all age bands, from 18 to 65+.



How different age groups typically stay connected abroad

	18-24	25-34	35-44	45-54	55-64	65+
Roaming	36% ↓9 on 2025	41% ↓2 on 2025	42% ↓3 on 2025	43% ↓5 on 2025	42% (=) on 2025	47% ↑12 on 2025
eSIM	31% ↑5 on 2025	33% ↑8 on 2025	32% ↑9 on 2025	28% ↑14 on 2025	21% ↑11 on 2025	11% ↑5 on 2025
Wi-Fi	16% (=) on 2025	14% ↓5 on 2025	14% ↓7 on 2025	16% ↓8 on 2025	24% ↓9 on 2025	26% ↓12 on 2025
Physical SIM	15% ↑4 on 2025	11% ↓1 on 2025	10% ↓2 on 2025	11% (=) on 2025	7% ↓2 on 2025	6% ↓3 on 2025
N/A - don't connect	1% ↓1 on 2025	1% (=) on 2025	1% (=) on 2025	2% (=) on 2025	5% (=) on 2025	7% ↓3 on 2025
None of these	0% (=) on 2025	1% ↑1 on 2025	1% ↑1 on 2025	1% (=) on 2025	1% ↓1 on 2025	3% ↑1 on 2025

Darker = higher share

3.2 Access Without Frontiers

» *Slow or glitchy internet is the top frustration for travellers going online*

» *Most connect on a smartphone, but use of laptops and other devices is climbing*

When crossing a physical border, every traveller expects a certain amount of friction, from filling out customs declarations to waiting in the passport queue.

But when it comes to digital connection, today's voyagers expect a seamless journey across frontiers – and while they're abroad, they want the same reliable internet service they would receive at home.

More than half of international travellers (57%) nominate slow or unreliable internet as their biggest frustration – almost the same percentage as in last year's survey.

Loss of coverage across borders comes next (45%), and this is especially annoying to Generation Z (50%) and Millennials (47%). This group, comprising those born after 1981, is likely to be accustomed to smart, robust technology that works without tinkering or adjustment.

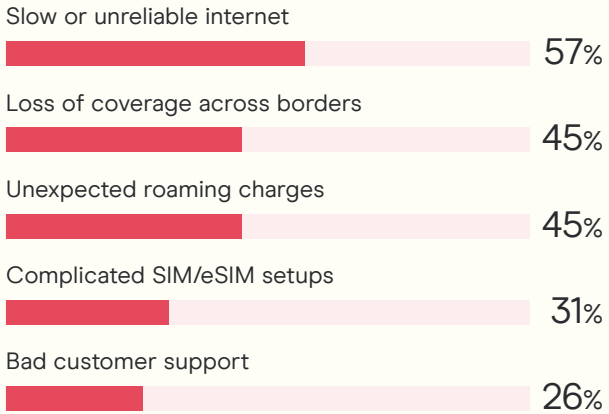
Unexpected roaming charges are mentioned by 45% as a major irritation. Despite this, awareness of the potential costs is strong, with 93% saying they are very or somewhat aware of the charges they could incur when they activate international roaming. Awareness is highest among 25-34s (95%), but falls among those aged 55+ (87%). Only 7% say they are not aware of roaming charges – a similar share to last year (8%).

Travellers expect their SIM or eSIM to work "out of the box" – and when difficulties occur, they want the ability to reach someone who can quickly put matters right.

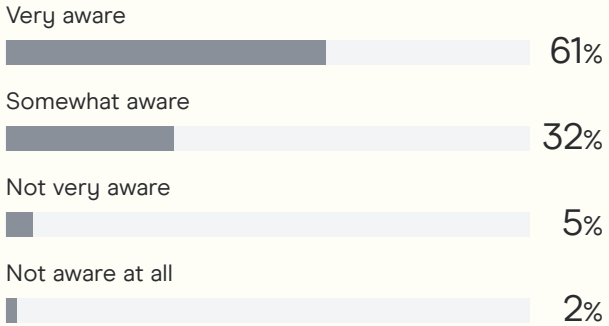
Almost a third (31%) nominated difficult SIM or eSIM setups as a top frustration: 4 percentage points more than last year. Likewise, 26% mentioned bad customer support, representing an increase of 3 points. With eSIM adoption rising, ease of use and helpful support are becoming a matter of importance for a greater number of travellers.

It's a reminder that staying connected while abroad isn't just a matter of technology, but also of service. Customers have greater expectations than ever before of their network provider, including standards of setup and support. With travellers increasingly relying on their online devices, any interruption can no longer be shrugged off as a minor inconvenience.

Top frustrations when connecting abroad



Awareness of international roaming charges

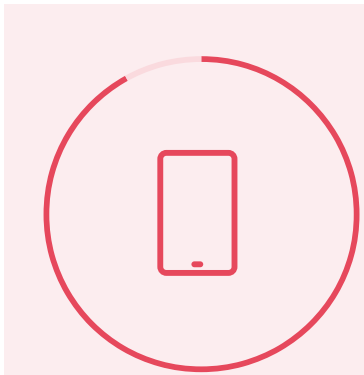


An overwhelming majority of travellers use a smartphone to keep connected. However, they're increasingly likely to be packing other digital devices in their suitcase or flight bag.

Compared with last year, there was a rise of 7 percentage points in people bringing a laptop on their international trip and using it to connect. There was also a 5 point rise in the use of tablets, smartwatches, and travel-specific gadgets such as translators or e-readers. The big increase in laptop use may reflect the greater number of "bleisure" travellers who expect to do at least some work while abroad.

The data shows big variations by age. While members of every travelling generation wouldn't think of leaving home without a smartphone, the 25-to-34 age group are by far the most likely to bring other devices such as a laptop (53%), smartwatch (41%) or tablet (36%). By contrast, fewer than one in three travellers aged 65 or older would take their laptop abroad.

Devices used while travelling



↓2 on 2025

Smartphone

92%

↑7 on 2025

Laptop

45%

↑5 on 2025

Tablet

32%

↑5 on 2025

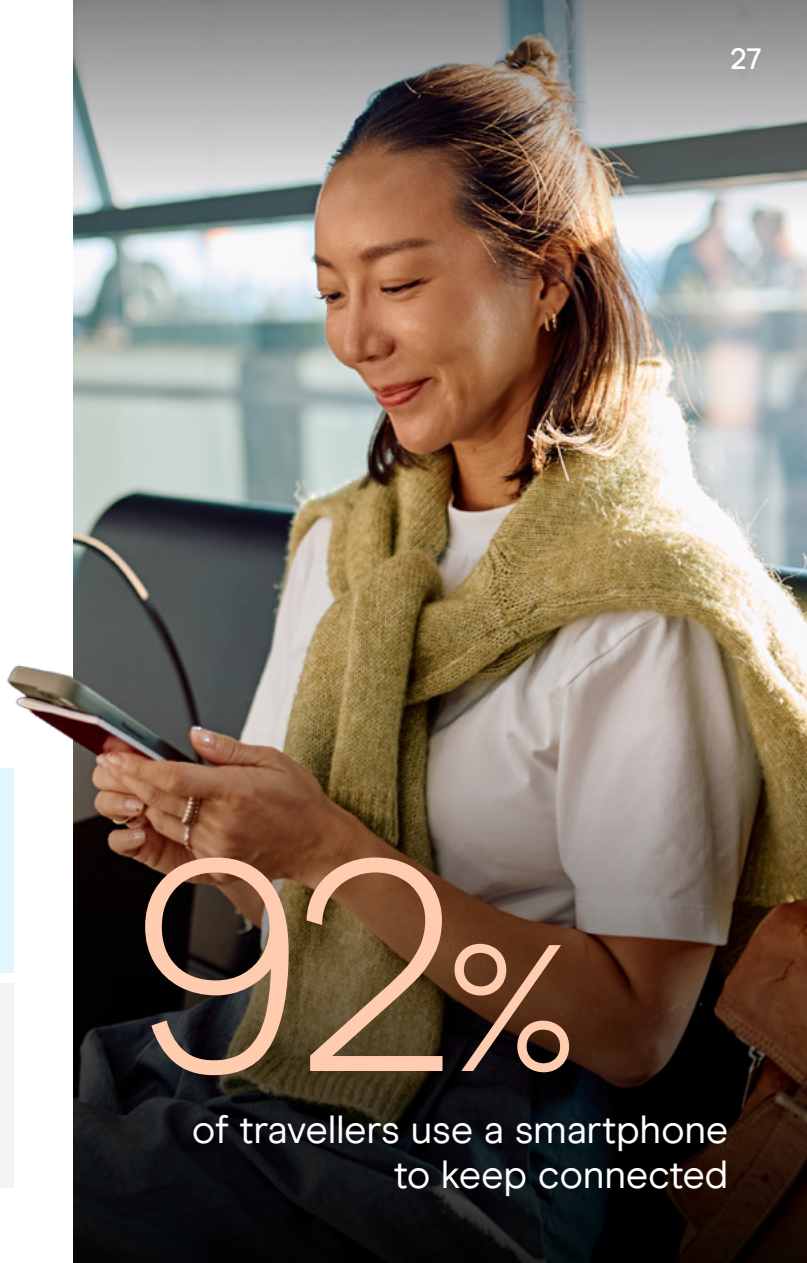
Smartwatch

32%

↑5 on 2025

Travel-specific devices

21%



92%

of travellers use a smartphone to keep connected

3.3 Our Digital Activity Abroad

- *For many travellers, mobile access is as important as personal well-being on a trip*
- *Communication is the biggest use of mobile data abroad, but social media use is up*



7 in 10

travellers use mobile data for social media on a trip

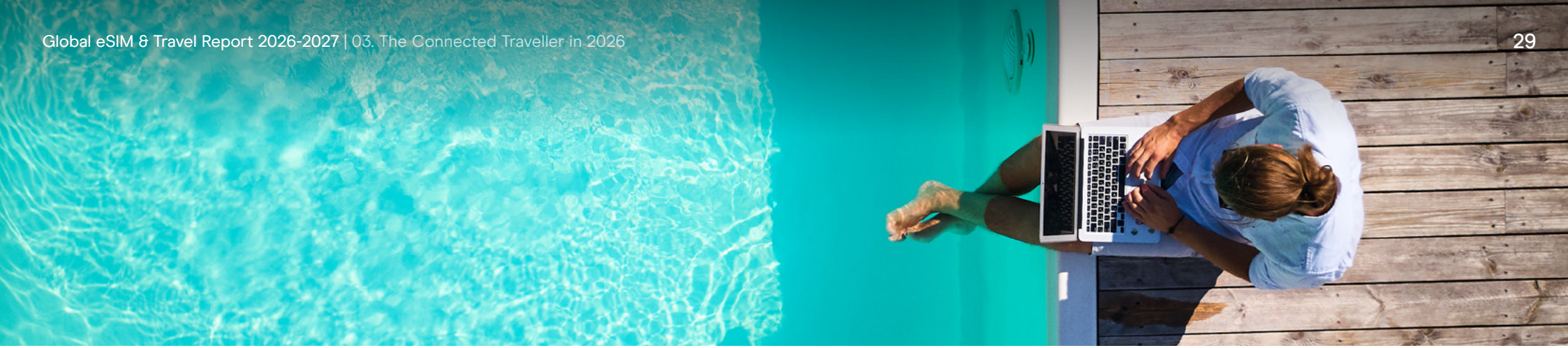
When asked about their priorities while abroad, travellers put mobile access roughly on par with personal well-being and sustainability. It's easy to understand why.

An internet connection is no longer just a means of maintaining contact with home. It has become an enabling force that transforms and enriches the travel experience.

Communication, whether by voice call or messaging, remains the most important use of mobile data while abroad (81% of all respondents). Beyond this, travellers are using their data to find their way around (76%) and make bookings and reservations (66%) in greater numbers than before.

Social media engagement during a trip has grown by 4 percentage points since last year, with 70% now using mobile data to curate and share their experiences and memories. This mirrors the finding that 62% of travellers enjoy sharing their travels on social media, up from 56%.

It's an activity that closely tracks age, with 80% of the 18-24s using their mobile data in this way, 73% of the 35-44 group, but only 38% of those 65 or older. Across all age groups, women (73%) are heavier social media users than men (68%) during a trip.

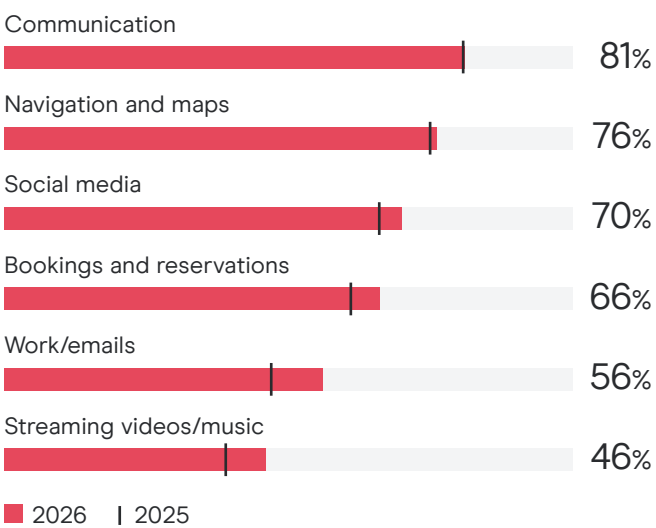


Since 2025, there has also been a leap in the number of people using mobile data to keep on top of emails, including work correspondence.

The proportion of travellers doing this has gone up by 9 points over the past year, to 56%. The 25-34 age group are by far the most likely to be tapping away at job-related tasks (62%). The British are true outliers here, with only 27% likely to do so.

Faster connections, fewer drop-outs and a more generous data allowance mean it's now possible for many travellers to access the same content they would at home, such as audio and video. More people are using their devices to stream music and movies while abroad. Activity is highest among younger travellers, but across all age groups, 46% use their mobile data in this way – an increase of 7 percentage points on last year.

How travellers use mobile data while abroad



In addition, 85% reported that they have used travel apps such as Skyscanner, Expedia or Booking.com while away on a trip, up from 80% last year. Almost everyone who did so (99%) found these apps useful, with three quarters (74%) considering them very useful.

Together, these stories paint a vivid picture of the connected traveller. A smartphone or other device is a trusted travel companion: an indispensable aid to communication, navigation, translation, reservation and even work.

Difficulty in getting online, or outages that interrupt service, can interrupt vital tasks – potentially with severe real-world consequences, from losing a flight connection to missing a work deadline. A stable, reliable connection is no longer a luxury, but a must.

Corporate Mobility in 2026

4.1 A Profile of the Business Traveller
4.2 Where the Corporate World Went
4.3 Keeping Connected: Work and Technology
4.4 How We Mix Business and Leisure
4.5 The Next Chapter of Business Mobility

04

Corporate travel is evolving. Remote meetings altered the way we communicate and collaborate, transforming the workplace into a virtual domain. Yet the business trip has proved remarkably robust, showing that there is still a place for real-world, face-to-face interaction.

What's more, the very technology that once seemed to threaten corporate mobility has now become central to it. As this survey shows, professionals are among the most eager adopters of the new generation of digital tools that can facilitate and expedite their travel experience.

In this section, business travellers are defined as those who told the survey that work or business was their primary reason for travelling (as opposed to holidays and leisure, or visiting family and friends)[12]. Of this group, 99% expect to travel internationally in the coming year.

4.1 A Profile of the Business Traveller

- *Business travellers are taking more trips annually than holidaymakers*
- *They are more likely to take actions to travel more sustainably*



As this survey shows, business travellers have a distinctive set of habits, behaviours and needs.

They are more prolific travellers than the average. While 19% of all survey respondents said they made four or more international trips last year, this figure rises to 30% for those who mostly travel on business.

Unsurprisingly, a higher amount of their travel is dictated by commitments, not personal choice (28%, vs. 17% across all travellers), and they are far more likely to take journeys on their own (45%, vs. 24%). Their spells overseas also tend to be shorter: business travellers are more likely than average to take trips lasting just 3-4 days (20%, vs. 15%).

Another differentiator is in sustainability issues. When given the choice, a greater number of business travellers will always try to choose a destination with a lower environmental impact (29%, vs. a survey average of 22%). They are also keener to take other personal actions to reduce the environmental impact of their travel – whether by choosing direct flights, staying in eco-certified accommodation, or offsetting carbon emissions.

Paying a premium for more sustainable travel options is more popular with this group: 75% are willing to do so, against 67% of all travellers polled. However, they are less disposed than the average to avoid busy periods when they travel, or to walk or use public transport while away.

Lastly, they are more inclined to enlist in travel loyalty programmes: 73% belong to at least one, against a survey average of 66%. As people who take flights and stay in hotels more frequently, this makes sound economic sense.

The 2026 business traveller at a glance

Are **travelling more** than they were two years ago

60% ↓6 on 2025

Typically take trips lasting **six days or less**

49% ↓6 on 2025

Usually travel **on their own**

45% ↑3 on 2025

Made **four or more** international trips

30% ↑3 on 2025

4.2 Where the Corporate World Went

Where the corporate world went in 2026

Rank for Business travellers	Percentage visiting	Rank for all travellers
#1 United States	27%	#1
#2 Canada	15%	#3
#3 France	15%	#2
#4 United Kingdom	12%	#6
#5 Australia	12%	#7
#6 Germany	11%	#8
#7 China	10%	#11
#8 Japan	10%	#9
#9 Spain	8%	#5
#10 Brazil	8%	#12

» *The United States heads the destination list for business travel*

» *Last year, business travellers were more likely to visit a country for the first time*

The list of top global destinations for business travel shows some subtle but telling differences from the main chart. As in previous years, it combines established economic powerhouses, innovation hubs and emerging centres of global commerce.

North America dominates the list. The United States extends its lead among business travellers, with 27% having visited this year, compared with 20% of all travellers. Canada comes next with a share of 15%. France completes the top three, which appear in the same order as they did last year.

Italy – fourth place in the overall destination list – does not feature in the business travel top ten, showing that country's reliance on the leisure market. Meanwhile, China and Brazil climb into the top division, taking 7th and 10th place respectively.

Business travellers were more likely to be visiting a country for the first time. In 2026, 81% did so, against 77% across all survey respondents. And when asked about destinations they planned to revisit, they were more likely than leisure travellers to mention the United States, Canada, Germany and China.

4.3 Keeping Connected: Work and Technology

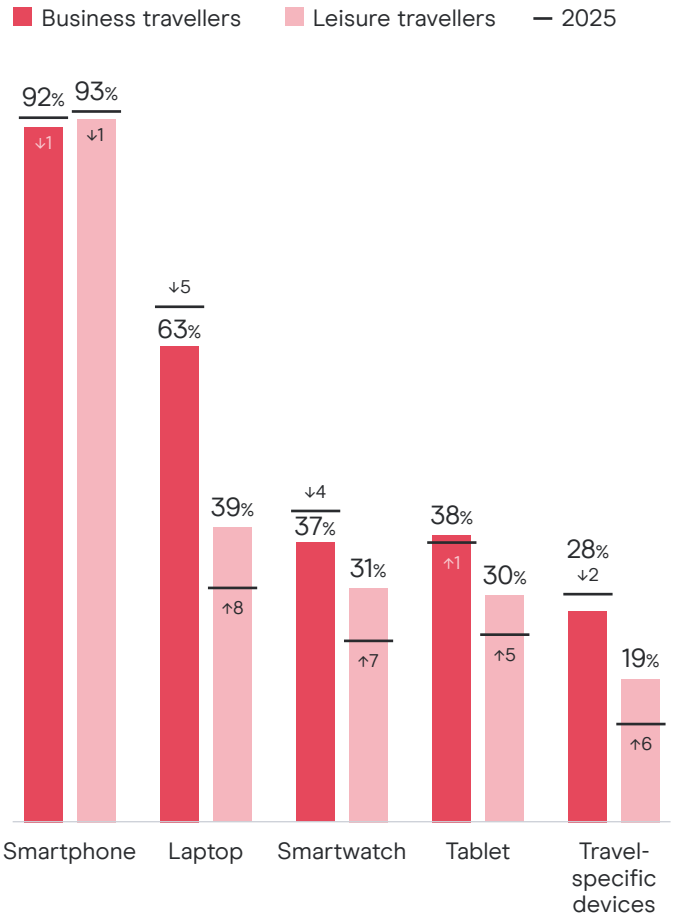
» *Business travellers are likely to use a laptop and other devices while abroad*

» *More professionals are using an eSIM as their primary way to go online*

Maintaining a fast, reliable internet connection is no longer an optional perk of corporate travel – it's ingrained in the infrastructure of business mobility.

Whenever business travellers have the ability to choose their destination, they are more likely to opt for somewhere with strong digital connectivity. This is mentioned as a priority by 43% of the group, compared with 36% across all travellers.

Devices regularly used to stay connected while travelling



Once they have arrived, the way they use their mobile data varies little from other people, but with one predictable exception. Among all travellers polled in the survey, 56% rely on their connection to access work email. In the business travel group, this figure stands at 81% – the same proportion as last year.

A phone is no longer a simple means of taking work calls or keeping in touch with the office, but a vital part of the remote working toolkit. Next year, 38% of business travellers intend to do all their travel admin from their smartphone, compared with a survey average of 34%.

Business travellers are also far likelier to go online with other devices while abroad – suggesting that they need to bring many of their work tools with them on a trip.

After a smartphone, a laptop is the most important device in the remote office, with 63% of business travellers regularly using one to access the internet during a trip. There is also higher take-up of smartwatches, tablets and travel-specific devices such as translators or e-readers.

In their list of frustrations about mobile connectivity, slow or unreliable internet heads the list: it's cited by 59% of business travellers. They are also far more likely than holidaymakers to be irritated by losing coverage across borders (51%, vs. 43% among leisure travellers) or by a lack of customer support (32%, vs. 23%).

For this group, the need for a reliable connection – and speedy access to the right help if it fails – is paramount.

When it comes to the way they connect, the proportion of business travellers using an eSIM is 28%, broadly in line with the survey average. This figure has risen by 7 percentage points since last year's survey.

As a group, they show a high level of receptiveness to emerging technology such as AI. Before departure, 83% of business travellers use AI-powered tools to help plan their itinerary[13], compared with a survey average of 74%. After leaving home, 53% say they continue to benefit from AI tools, against 46% of all those polled.





83%

of business travellers use AI-powered tools to help plan their itinerary

4.4 How We Mix Business and Leisure

"Bleisure" has become a buzzword of 21st-century travel, and with good reason. More and more people are now prepared to mix leisure and work in the same trip.

- *Business travellers are more inclined than holidaymakers to mix work and leisure*
- *Travellers aged 25-34 are most likely to have done this before, with plans to do it again*

It's a practice that's firmly established among business travellers, with 75% saying they have combined work and leisure, and plan to do so again. Most recently, it's a practice that has risen also sharply among leisure travellers, with 46% answering likewise. This represents a leap of 18 percentage points on the 2025 result.

The proportion of people who have combined business and leisure and are planning to do so again hits its peak in the 25-34 age group (65%), before declining in each older age band. Only 17% of the 65+ group have done it and intend to do so in 2027 – though a further 24% have tried and abandoned it.

Combining business and leisure on the same trip

Business travellers

75%	Have done and plan to in 2027	↓2 on 2025
12%	Done before, won't in 2027	↑1 on 2025
7%	Never done, plan to in 2027	(=) on 2025
5%	Never done, won't in 2027	↑1 on 2025

It serves to suggest that the dividing line between work and play is becoming increasingly blurred. Bleisure is no longer a fringe idea, but an attractive option for a large contingent of travellers.

Leisure travellers

46%	Have done and plan to in 2027	↑18 on 2025
19%	Done before, won't in 2027	↑4 on 2025
9%	Never done, plan to in 2027	↑2 on 2025
14%	Never done, won't in 2027	↓3 on 2025
12%	Don't travel for work	↓21 on 2025

4.5 The Next Chapter of Business Mobility

» *A big majority of business travellers will take three or more trips next year*

» *They expect a higher level of service from their eSIM or mobile data provider*



The boom in business travel looks set to continue into 2027 and beyond. The survey shows that those who make frequent work trips take an optimistic view on the future of corporate mobility.

Overwhelmingly, business travellers expect to make more international journeys next year than those whose trips are mainly leisure-oriented. Among those who anticipate going away three or more times, a gap of 25 percentage points opens up between the two groups.

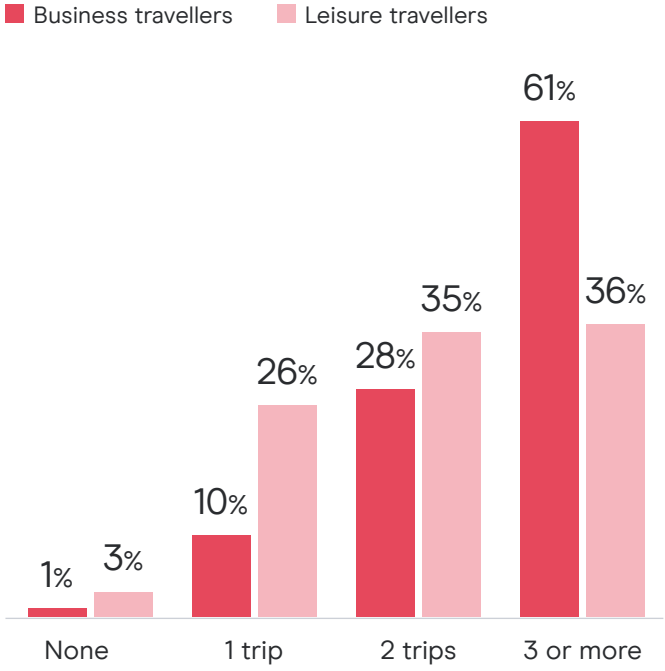
In the list of regions that business travellers expect to visit next year, the call of the United States comes across loud and clear. While 50% plan to travel most in Europe – matching the result across all people surveyed – a further 20% think they will spend the greatest amount of time in North America. This is 3 percentage points above the score for North America among all survey respondents.

On digital technology and connectivity, commercial travellers have a distinct wish list for 2027. And when it comes to what they want from their eSIM or service provider, they have consistently higher demands than vacationers.

Their expectations include rewards for frequent travellers (36%, vs. 32% among leisure travellers), transparency on matters of sustainability (39%, vs. 30%), and AI-powered assistance (36%, vs. 29%). They are also far more likely to want their provider to provide other digital travel services, such as further AI tools (82%, vs. 72%).

Digital access is now a given. Business travellers want to be able to take their office with them, and re-establish it anywhere in the world with minimal hindrance. Over the coming years, the role of the eSIM provider as a facilitator of remote working looks certain to rise in importance.

Number of expected international trips next year



Purpose and Motivation: Why We Travel

5.1 A World of Possibilities
5.2 The Emotional Dimension of Travel

05

When we look into the state of travel in 2026, destination lists only take us so far. As well as putting pins in the map, we need to tease out the reasons why people choose these places and exclude others.

What influences travel plans the most?

48%
say it's personal choice
↓10 on 2025

17%
say it's mostly commitments
↑4 on 2025

34%
say it's a mixture of both
↑6 on 2025

There's also the emotional landscape to consider. Like few other activities, travel has the ability to evoke intense feelings – from freedom and excitement to gratitude, nostalgia, or even worry. Every traveller has their own emotional palette, and a unique set of desires that they hope to satisfy through travelling.

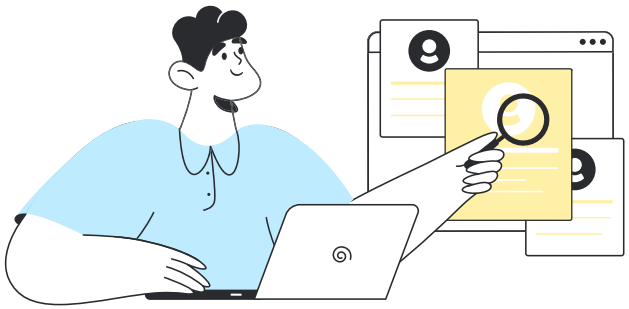
We know that the majority of journeys begin with a conscious decision. This year's survey shows that 82% of trips are wholly or partly down to personal choice, rather than dictated by external commitments such as family, work or education.

Circumstances, motivations and emotions may vary, but beneath it all is the timeless joy of embarking on a journey. As the results of this survey show, travel never loses its ability to inspire wonder.

5.1 A World of Possibilities

- *Culture and food remain top priorities when choosing a destination*
- *More now want a reliable internet connection, and the ability to mix work and leisure*

When travellers pick a destination in 2026, online research will almost certainly form part of the decision process. However, many of the factors influencing their choice will be ones that long predate the digital age.



As with last year, culture and food emerged as the biggest motivation, chosen by 70% of all travellers. Good weather (63%) and affordable prices (63%) came next. All of these factors were deemed slightly less important than in 2025. Nature and outdoor experiences came out next, at 58% – the same as last year.

The biggest rise is in those who want the ability to combine work and leisure while abroad. This was mentioned by 37% as a consideration – an 11 percentage point rise on last year. This chimes with the big increase in "bleisure" travellers who are happy to combine business with a vacation.

Strong digital connectivity is now a must for 36% when choosing a destination. This represents a 7 percentage point increase on last year. There was a big uptick, too, in the number of travellers who look to social media for advice on where to go: 33%, up by 5 points.

What was once a "nice-to-have" has become a "must have". Ensuring good digital access for the duration of the trip is now an essential part of travel planning.

"Smart technology works best when it feels completely natural.



When you integrate digital tools directly into how people plan and manage their journeys, you can remove a lot of friction – leaving them free to focus on the trip itself."

Dennis Morgenstern

Global Director of Strategic Partnerships, Holafly

Different generations have differing priorities when picking a destination. While culture, food, weather and affordability are vital to all age groups, younger travellers are far more likely to insist on good digital connectivity and the ability to mix work and leisure.

One oddity is that fewer travellers in the very youngest age group (18-24s) now worry about strong connectivity when planning their trip: just 35%, down 6 percentage points on last year.

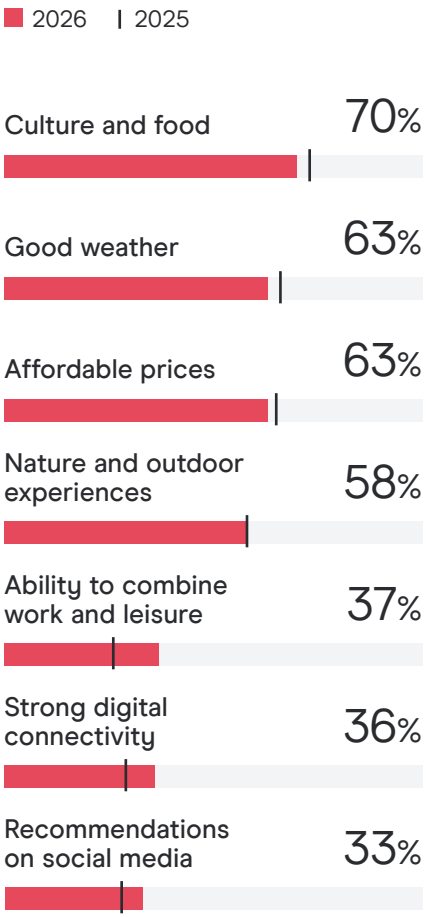
Another interesting development is the big growth in older travellers wanting the ability to combine business and pleasure.

This was up by 13 percentage points in the 45-64 age bracket, and 11 points in the most senior group aged 65 and over. The picture of the young digital nomad is now well out of date. Older travellers are increasingly keen to keep on top of work while away.

Across regions, different nuances can be seen. Nature and outdoor experiences carried more weight for travellers from South Asia and Africa. Affordability was the top priority among travellers from Oceania, reflecting the vast distances and bigger financial outlay involved in voyaging to other regions of the world.

Motivations when choosing a travel destination

All travellers



By age group

18-24	25-34	35-44	45-54	55-64	65+
72% ↓5 on 2025	70% ↓5 on 2025	68% ↓5 on 2025	72% ↓3 on 2025	72% (=) on 2025	71% ↑4 on 2025
61% ↓5 on 2025	65% ↓2 on 2025	64% ↓2 on 2025	64% ↓2 on 2025	60% ↓7 on 2025	59% ↓7 on 2025
63% ↓4 on 2025	62% ↓2 on 2025	61% ↓2 on 2025	67% ↑4 on 2025	64% ↓5 on 2025	61% ↓8 on 2025
59% ↓3 on 2025	60% ↓3 on 2025	59% ↓1 on 2025	56% ↑3 on 2025	53% ↓3 on 2025	52% ↓1 on 2025
44% ↑3 on 2025	46% ↑4 on 2025	39% ↑6 on 2025	33% ↑13 on 2025	23% ↑13 on 2025	15% ↑11 on 2025
35% ↓6 on 2025	45% ↑4 on 2025	38% ↑2 on 2025	31% ↑8 on 2025	26% ↑8 on 2025	14% ↑3 on 2025
45% ↓5 on 2025	41% ↓2 on 2025	34% (=) on 2025	26% ↑3 on 2025	20% ↑9 on 2025	9% ↑4 on 2025

5.2 The Emotional Dimension of Travel

» *A large majority associate travel with excitement and freedom*

» *Most travellers are seeking relaxation and peace of mind*

The impulse to make a journey doesn't just come from the head – it also comes from the heart. Travel has the power to evoke powerful emotions.

In 2026, as in 2025, the predominant feeling is one of excitement. In the survey, 72% said they associated it with travel. This represents a 3 percentage point fall on last year's figure.

The survey suggested four other positive emotions linked to travel: freedom, gratitude, reconnection and nostalgia. Each was picked by a greater number of respondents than last year.

This shows that the prospect of leaving home on a trip is still an emotionally charged experience, though some groups are more reserved with their feelings. Travellers from Europe showed themselves to be less emotionally invested, with lower numbers associating a voyage with excitement (65%), gratitude (37%) or reconnection (25%). Younger generations were more likely to link strong feelings to travel – something that declined in older age groups.

Only around 1 in 10 associated travel with negative emotions such as stress (10%) or anxiety (9%).

The United Kingdom was an outlier here, with almost twice as many people (19%) admitting to stress, and 13% mentioning travel-related anxiety.

Emotions linked with travel

Excitement 72% ↓3 on 2025

Freedom 70% ↑2 on 2025

Gratitude 41% ↑2 on 2025

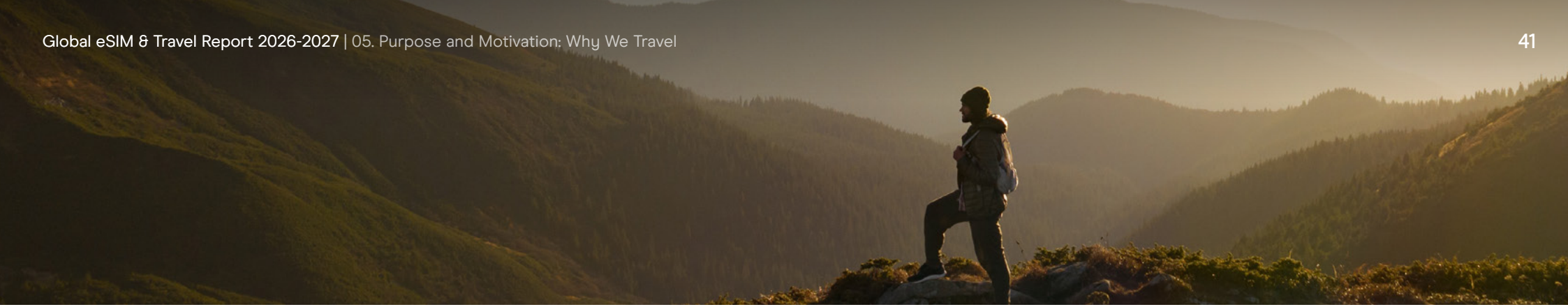
Reconnection 31% ↑2 on 2025

Nostalgia 18% ↑4 on 2025

Stress 10% ↑1 on 2025

Anxiety 9% (=) on 2025



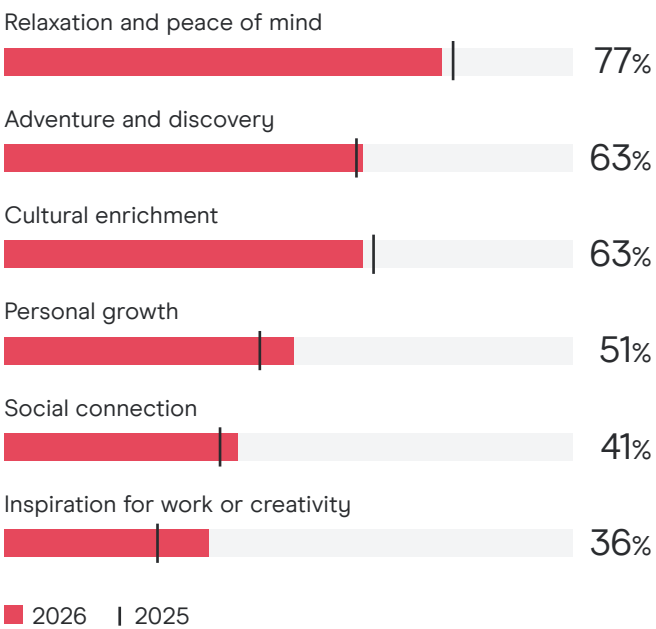


What are today's travellers hoping to gain from the experience? The answer is complicated. The survey showed that different groups have very different expectations, and that they have shifted considerably since last year.

Relaxation and peace of mind have kept their place at the top of the list, chosen by more than three quarters of all respondents. This figure rose as high as 81% among Generation X and Boomers, and right up to 82% for travellers from Asia.

This widely held desire for relaxation and freedom from worry is notable. It helps explain why practical difficulties while abroad – such as issues with technology – can have such a negative impact on the overall travel experience, and are worthy of attention.

Experiences that travellers are seeking



Travellers aged 18 to 34 were the most likely group to be seeking out adventure and discovery. And while cultural enrichment is something that featured strongly in the wish list of every age band, it was down by 6 percentage points overall.

The biggest story, however, was the steep rise in motivations that could be described as inward-looking: personal growth (up 6 percentage points since 2025), social connection (up 3 points) and inspiration for work or creativity (up 9 points).

This trend was even stronger among travellers from the Americas, Africa and Asia. It's also a generational concern, with each of these motivations scoring at least 8 percentage points higher than the survey average among members of Generation Z.

Increasingly, the souvenirs that people bring home are psychological. For many, a trip is an opportunity to gain inspiration and insight that can enrich their lives long after they return.

Sustainable Travel: Closing the Action Gap

6.1 The Art of the Possible
6.2 A Conscious Choice of Destination
6.3 The Digital Footprint

06

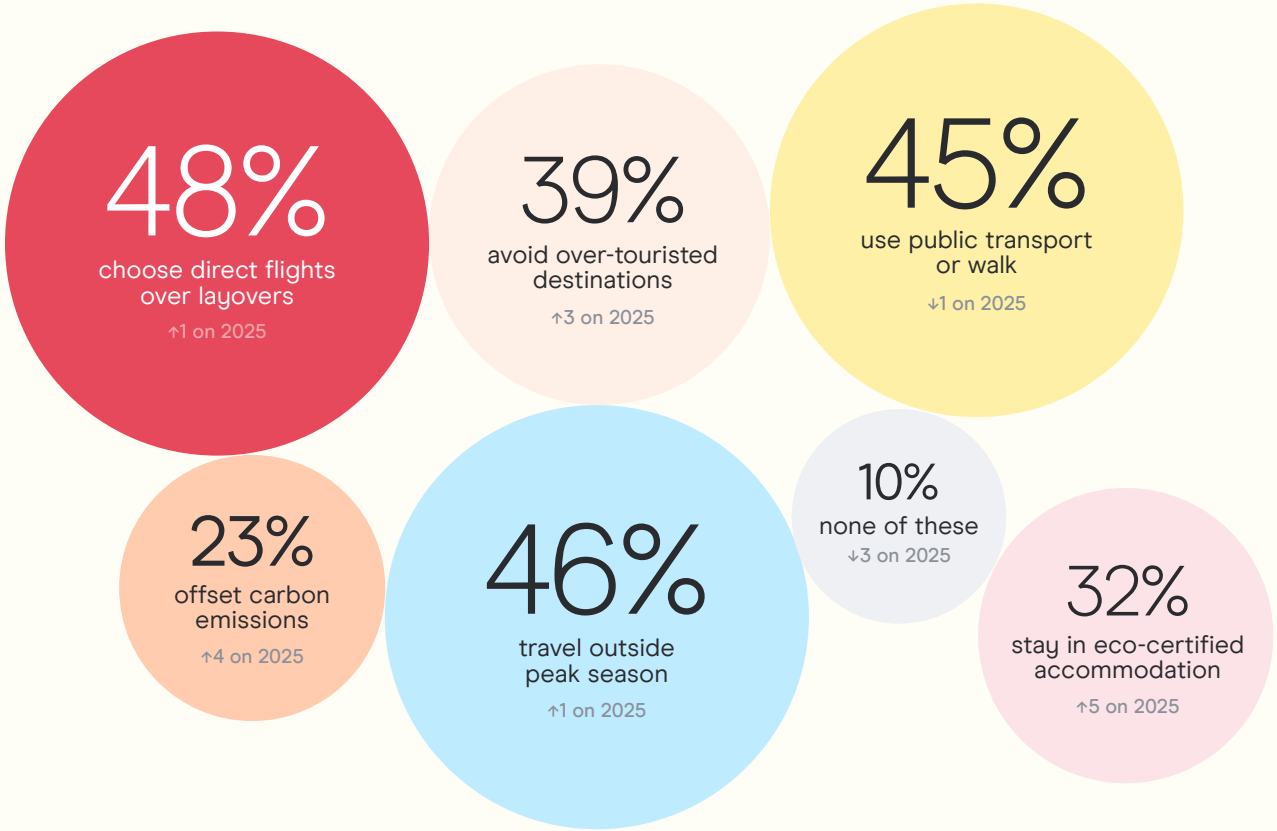
For many travellers, sustainability has been a consideration but not a priority. That is now changing – and changing at speed. Last year's survey showed how travellers were at last beginning to turn awareness into action. The 2026 results show how much this process is accelerating.

More than half of all travellers – 53%, up from 42% last year – say they have actively made travel decisions to reduce their impact on the environment. This number has shown an increase among travellers from every region, and across every age group. Conversely, those reporting that they have never done so has dropped markedly, from 46% to 38%.

Sustainability is no longer a niche concern, but a practical, everyday consideration for a majority of people. In everything from finding a holiday destination and booking flights to choosing how they get online while abroad, travellers are taking rational, achievable actions to lower their impact on the world.

6.1 The Art of the Possible

What travellers actively consider doing to reduce their environmental impact



» *People are prepared to take more steps to lower the environmental impact of their trip*

» *More travellers would pay a premium for sustainable travel, or are open to persuasion*

Sustainable travel is not so much a moral framework as a toolkit of pragmatic actions. This year's survey shows a small but consistent increase in the practical steps people are prepared to take to reduce their environmental impact.

The most common intentions are choosing direct flights to lower carbon emissions, taking trips at times of year less popular with other travellers, and getting around on foot or by public transport. The 2026 survey saw the biggest increases in the number of travellers happy to choose eco-certified accommodation, and those who would use a scheme to offset the carbon emissions of their trip.

The appetite to take these steps varies considerably by region and age. Choosing direct flights, for instance, is less achievable for travellers from Oceania, given the geographic remoteness of their countries from other regions. It's also less popular in Europe than elsewhere.

In many cases, the most willing are in the 25-34 age bracket. This group is particularly keen on avoiding destinations with too many visitors, staying in eco-certified accommodation and offsetting carbon emissions. However, all these practices have found less favour with the oldest age groups, and particularly those aged 65 and above.

Since last year, a far greater number of people would pay a premium to travel more sustainably. More than two thirds (67%) of travellers say they would do so, compared with 58% in the 2025 survey.

Overall, 32% said they were very willing to pay more to ensure a greener trip. There was a corresponding drop in those unwilling to do so (16%, from 21%) or remaining neutral on the question (18%, from 21%).



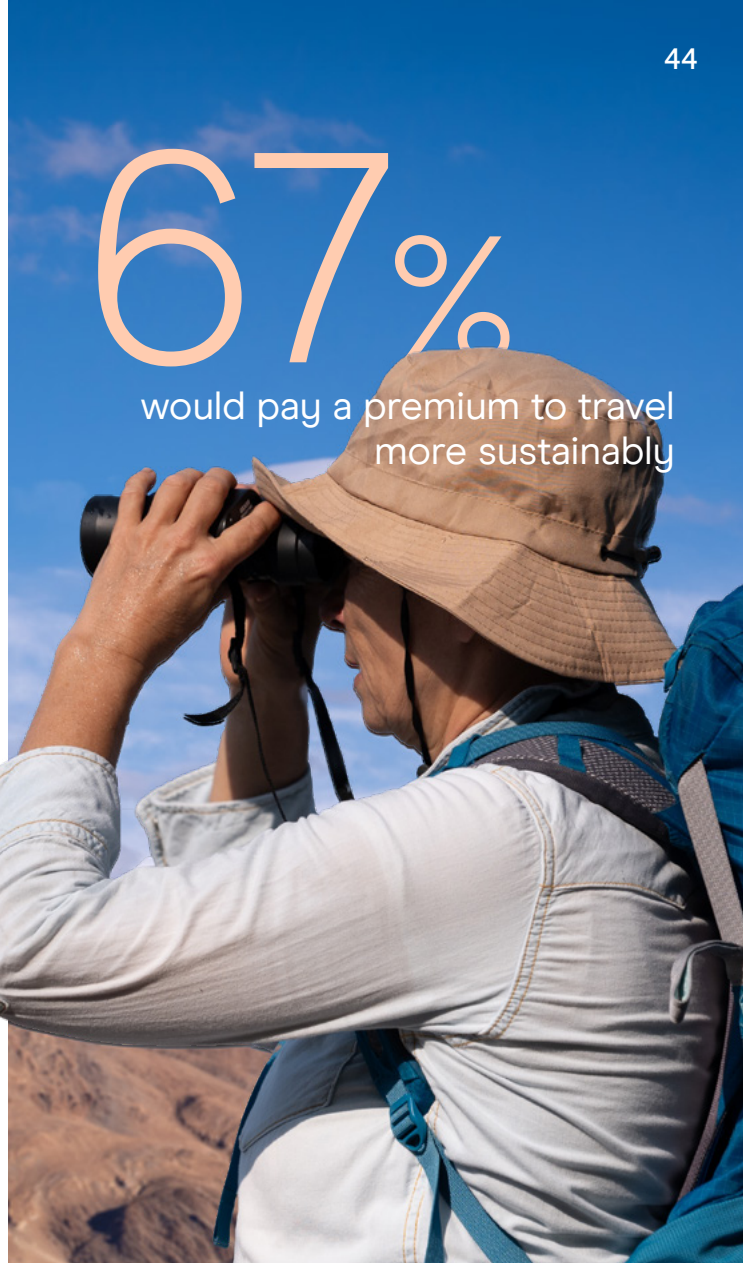
The response to this question differed greatly by age, gender and home region. Younger travellers were most prepared to pay more, including 8 in 10 of the youngest age group (18-24). Women were more enthusiastic than men (70% vs. 64%), and the regions most favourable to the idea were Latin America (85%) and Africa (83%). By contrast, only around half of respondents from Europe (51%) and Oceania (49%) were happy to spend extra.

Even those who are not yet ready to pay more to travel sustainably say they are open to persuasion.

Better information about environmental benefits would convince more than half (56%) to choose a greener option over a cheaper one, up from 50% last year.

Incentives or discounts could make 53% of travellers change their behaviour – the same proportion as in 2025 – while 42% mentioned being able to offset cost or emissions (up from 39%) and 39% wanted clearer certification or eco-labels (up from 33%). Only 7% said that nothing would make them more likely to choose a more sustainable option over a cheaper one.

All these results add up to one of the strongest findings in the 2026 survey. When it comes to sustainable travel, the gap between vague intentions and a willingness to take concrete actions is at last being bridged. What's more, travellers are genuinely interested in finding new ways to lighten their impact on the environment, facilitated by the latest digital tools.



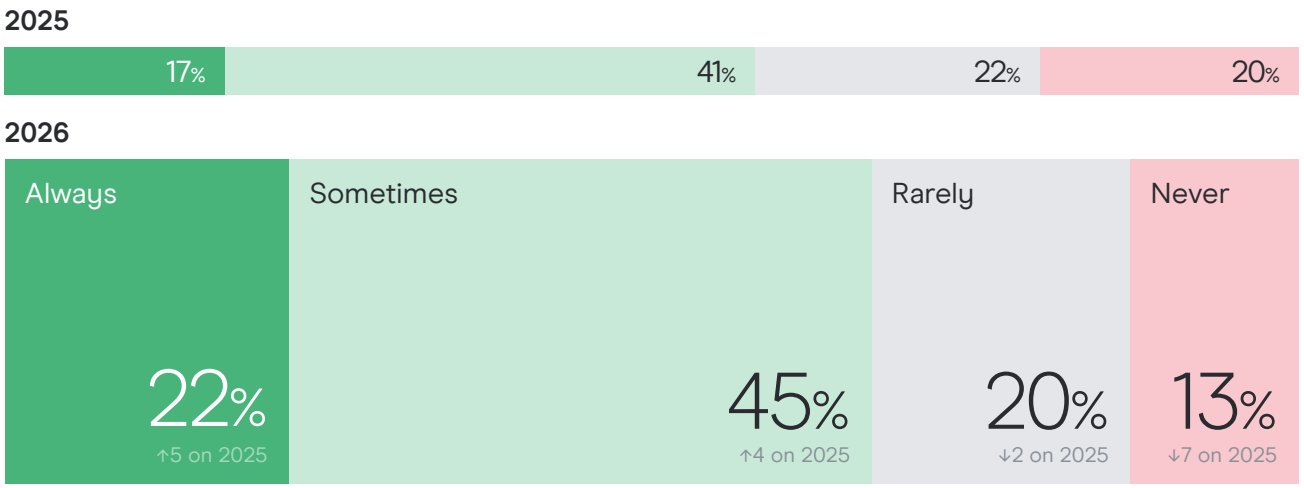
6.2 A Conscious Choice of Destination

» *A majority of travellers think environmentally when choosing where to go*

» *However, affordability is still the number-one deciding factor*

Many factors may come into play when selecting a destination. This year, more than two thirds of travellers are considering sustainability when making their choice.

Travellers choosing a destination to have a lower environmental impact



According to the survey, 22% always intentionally choose a destination in order to have a lower environmental impact, while 45% sometimes do – a big leap from last year's figures of 17% and 41%. The proportion of those who never do so has dropped to 13% from 20%.

The figures show a very pronounced generation gap. Out of the 18-24 age group, 82% always or sometimes include sustainability in their decision-making. That number plunges to 33% in the most senior group (65+), and this looks to be quite an ingrained belief: last year's figure was only 2 percentage points lower, at 31%.

When travellers are asked for their priorities in choosing a new destination, practical considerations still top the table. However, elements linked to sustainability are slowly gaining in importance.

Affordability comes first (though 5 percentage points down on last year) followed by authentic culture and accessibility. A rising number of travellers this year placed importance in preserving the environment and supporting local businesses, while around a third said they tried to avoid mass tourism areas – the same proportion as in 2025.



overhyped or too crowded

69% say this is the case for some destinations

There is widespread acknowledgment that overtourism is a problem. Asked whether they thought some travel destinations were overhyped or too crowded, 69% of those surveyed answered yes.

A growing number of travellers are sensitive to the impact their visit can have on local communities and ecosystems, and are instead keen to follow less-beaten paths.

What matters most when visiting a new destination

Affordability
52% ↓5 on 2025

Cultural authenticity
51% (=) on 2025

Accessibility and convenience
49% ↑2 on 2025

Preserving the natural environment
38% ↑2 on 2025

Avoiding mass tourism areas
34% (=) on 2025

Supporting local businesses
31% ↑4 on 2025

What matters most when visiting a new destination

	Europe	Latin America	Asia	North America	Africa	Oceania
Affordability	53% ↓5 on 2025	40% ↓8 on 2025	50% ↓3 on 2025	56% ↓7 on 2025	57% ↓11 on 2025	64% ↓7 on 2025
Cultural authenticity	49% ↓3 on 2025	53% ↑3 on 2025	50% ↑1 on 2025	55% ↑5 on 2025	53% ↑4 on 2025	49% ↑3 on 2025
Accessibility and convenience	41% ↑1 on 2025	57% ↑8 on 2025	62% ↑1 on 2025	44% ↓3 on 2025	62% ↑15 on 2025	44% (=) on 2025
Preserving the natural environment	33% ↓2 on 2025	49% ↑4 on 2025	43% ↑5 on 2025	37% ↑10 on 2025	38% (=) on 2025	30% ↑3 on 2025
Avoiding mass tourism areas	41% ↑1 on 2025	35% ↓4 on 2025	28% ↑5 on 2025	32% ↓1 on 2025	29% ↓12 on 2025	30% ↑1 on 2025
Supporting local businesses	30% ↑3 on 2025	32% ↑6 on 2025	26% ↑5 on 2025	36% ↓4 on 2025	35% ↑12 on 2025	29% ↓3 on 2025

In choosing a destination, travellers from different cultures have vastly different priorities. The survey results defy generalisation, but a number of signals can be heard through the noise.

Europeans emerge as the most sensitive to crowds and most likely to shun tourism blackspots. Travellers from Latin America are most inclined towards preserving the natural environment, while those from Asia and Africa prize accessibility and convenience above all else.

Cultural authenticity wins out for North American travellers, and many from Oceania are seeking value for money – most likely because of the distance and cost of travel to other regions.



6.3 The Digital Footprint

- *Awareness is growing that using mobile data can generate greenhouse gases*
- *Many travellers are willing to take action to reduce their digital carbon footprint*

Almost everyone is aware of the environmental cost of taking a flight. Fewer travellers know that using data abroad can contribute to greenhouse gas emissions.

However, awareness is fast increasing. This year's survey showed that over two thirds (67%) were now aware of their digital carbon footprint, up from 57% last year – and 35% considered themselves fully aware, compared with 26% last year.

A third (33%) said they knew nothing about this aspect of sustainability until they were polled for the survey. Awareness was at its lowest among the highest age groups, and travellers from the Americas, Asia and Africa were more familiar with the idea than those from Europe and Oceania.

Awareness that mobile data and cloud use contributes to carbon footprint

35%
Fully aware
↑9 on 2025

32%
Somewhat aware
↑1 on 2025

33%
Not aware
↓10 on 2025

Once they know about it, many travellers are prepared to take action to reduce their digital carbon footprint.

Out of those who stay connected while travelling, 39% – up from 34% last year – say that if they knew that a connectivity provider offsets the emissions generated by their usage, it would definitely influence their choice. This figure was as high as 47% among Generation Z and 44% among Millennials.

A further 44% (up from 43%) said it might influence them, depending on other factors. Only 7% (down from 10%) said it would not be a factor in their decision at all.

This could represent a clear opportunity for brands offering high standards in both connectivity and sustainability. Today's always-on traveller is unlikely to accept any compromise in the quality of their digital experience – but increasingly, they may seek out and favour providers who share their environmental goals.

Using connected technology abroad may carry an environmental burden, but travellers also believe it can help reduce their carbon footprint. Since last year, there has been a big increase in the use of digital tools that assist people in travelling more sustainably.

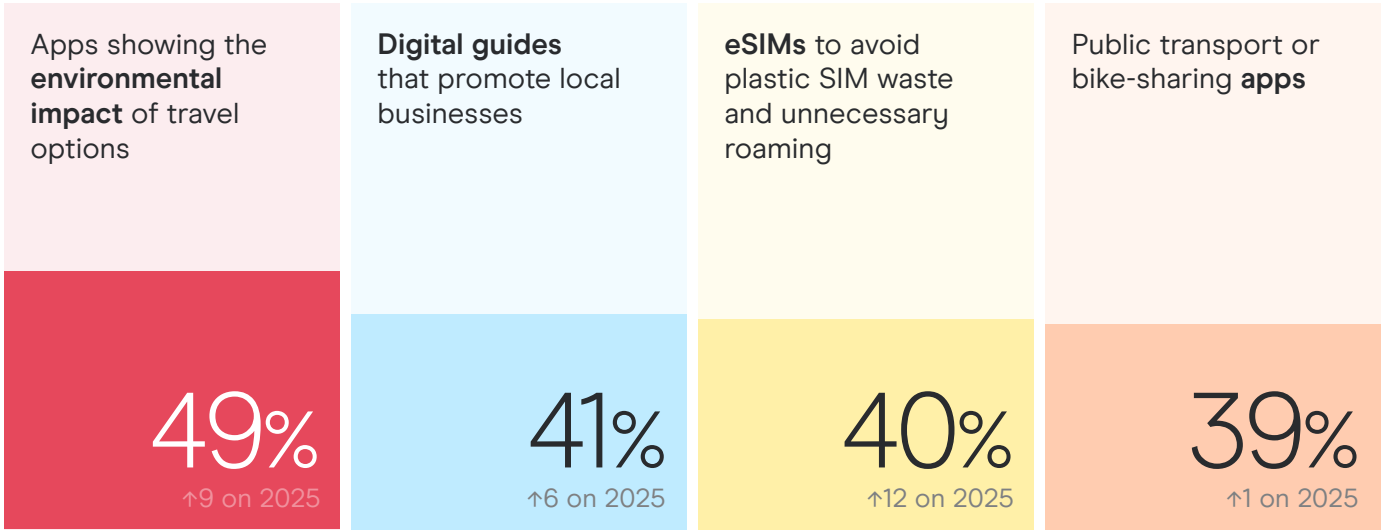
The biggest uptick is in eSIM use. This year, 40% of travellers said they had used an eSIM on the basis that it "avoided plastic SIM waste and unnecessary roaming" – even if they didn't use it as their primary method of getting online. This represented an increase of 12 percentage points in just 12 months.

Around half of all travellers have used apps that tell them about the environmental impact of their trip, and 4 in 10 have relied on digital guides to help them choose local businesses above multinational chains.

↑12pp

rise in travellers using eSIMs to cut plastic waste

Technologies used "to help travel more consciously and sustainably"



Planning and Booking Travel in 2026

7.1 How We Book and Why
7.2 Loyalty Programmes: Why They're Back
7.3 Planning with AI: Growing Use and Trust

07

Today, most journeys begin in the digital realm. The process of booking has changed beyond all recognition over the past 20 years. And with each passing year, the tools we rely upon to organise our travel become more sophisticated.

Yet for all this, booking is still one of travel's biggest headaches. While technology has democratised travel, it has brought complications of its own. Planning a trip can now mean dealing with overwhelming choices, and the prospect of spending endless hours comparing options.

The latest generation of AI-powered technology promises something new: to clarify and simplify the process, offering the same degree of personalised advice that was once provided by a travel agent. Whether it can deliver on this promise is still very much a live debate. But as this survey shows, many more travellers are now willing to put their confidence in AI.

As in 2025, this survey shows that travellers are increasingly demanding a tailored service. People want a booking experience that eliminates friction by remembering their habits, anticipating their preferences, and generating an itinerary that's as individual as they are.

7.1 How We Book and Why

» *Online travel agencies are the most popular way to book both flights and hotels*

» *Price is the vital factor, but trust is equally important to many travellers*

Online travel agencies (OTAs) are more popular than ever. Among travellers surveyed in 2026, they not only emerged as the favourite method of booking international flights, but showed a 5 percentage point increase in use.

There is now a massive 14 point gap between OTAs and the second-most popular method, booking direct via airline websites – a practice that plunged by 6 percentage points in 2026. Online booking sites are now favoured by almost half of all the travellers polled.

Millennials are the most faithful to OTAs, with use at its greatest among the 25 to 44 age group. Their popularity varies greatly by country: two-thirds (66%) of Indian travellers use them, but less than a third (30%) of those booking flights in the United Kingdom. It's a reminder that every nation has built up its own individual booking culture.

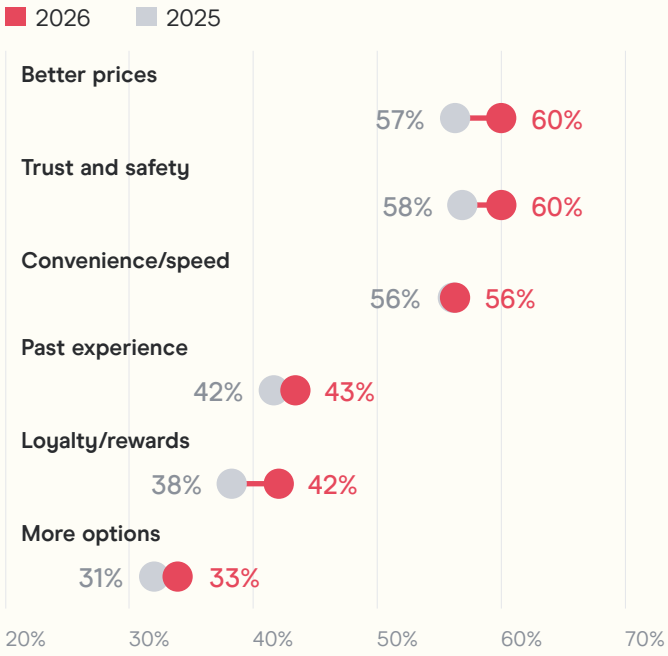
Travellers who book direct with airlines are generally older, with a peak at 45 to 64. The most senior age brackets are most likely to use travel agencies, with use rising to almost a quarter of the 65+ group. However, one unexpected finding is that the youngest group (18-24) are also far more likely than average to consult travel agents.

Overall, the number of people using travel agents to arrange their flights held steady at 11%, but those relying on recommendations or referrals rose sharply to 4%.

How travellers usually book flights...

Online travel agencies	Direct via airline website	Travel agent	Recommen-dations or referrals
49%	35%	11%	4%
↑5 on 2025	↓6 on 2025	(=) on 2025	↑3 on 2025

...and why they choose this method

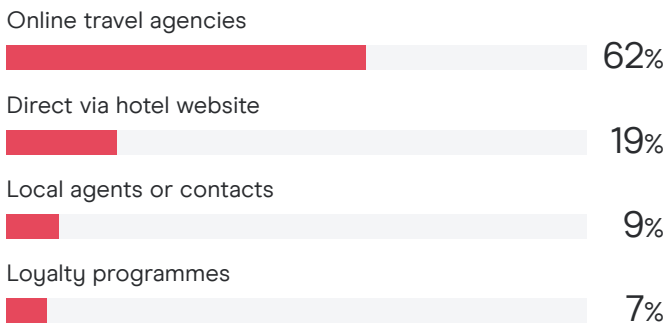


When reserving flights, trust is now as important as price. Asked why they chose their favoured booking method, an equal number of travellers mentioned better prices (60%) and trust and safety issues (60%).

Convenience and speed held steady, while there was a modest rise in those swayed by their past experience, and a more pronounced increase in those attracted by the ability to get rewards through loyalty schemes.

This shows that grabbing the best bargain is far from the only consideration of the air traveller in 2026. Travellers care deeply about trustworthiness – and many still want to establish a strong, ongoing relationship with brands that provide hassle-free service and incentives for repeat customers.

How travellers usually book accommodation





trust & safety

60% say it shapes where they book flights

When it comes to reserving accommodation, travellers are even more likely to put their trust in OTAs. More than 6 in 10 (62%) said they use them as their main booking method.

This is not a new phenomenon. The survey responses have changed very little since last year, with around 2 in 10 people still booking directly with the hotel, and smaller numbers using local agents, contacts or loyalty programmes.

A deep dive into the data reveals some interesting variations. Just like in 2025, Indian travellers are the most likely to put their faith in an OTA, but those from North America and the United Kingdom are less enthusiastic. And once again, it is the 25-44 age group who use OTAs most, while the 55+ group are the most likely to make a reservation by getting in touch directly with the hotel.

The attractions of booking with an OTA are well understood. The same percentage as last year said they were seeking the easiest way to compare prices and offers. Better deals represented another evergreen reason to use an OTA, particularly among survey respondents from North America and South Asia.

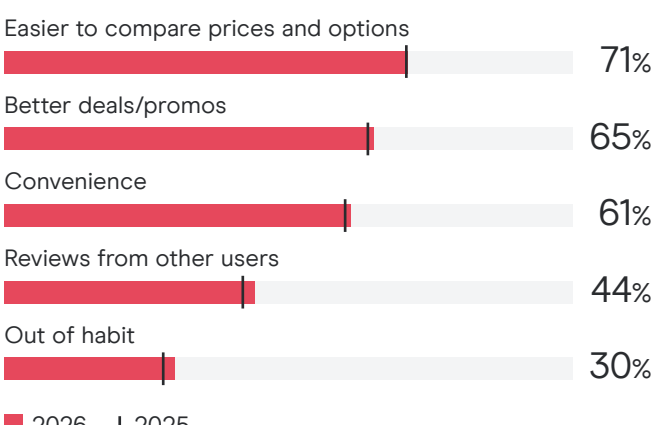
When it comes to those who prefer to book direct, the 2026 survey throws up some interesting clues. Trustworthiness is the biggest motivator, but there's an increase in those saying they're attracted by loyalty points, room upgrades or other perks.

It's further confirmation that the best price point doesn't always secure a booking. A notable number of travellers still seem keen to establish relationships with hotel chains – even individual hotels – that last beyond a single visit. Loyalty still matters.

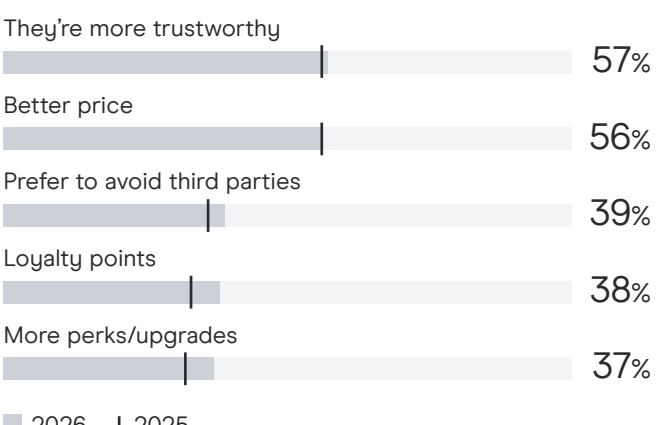


Why travellers book accommodation...

...via online travel agents



...directly with hotels



7.2 Loyalty Programmes: Why They're Back

» *Two thirds of travellers belong to a travel loyalty scheme*

» *Airline programmes are most popular, followed by those linked to hotels*

Travel loyalty programmes have been around for a long time, but it's a mistake to view them as a legacy of the pre-digital era. Two thirds of survey respondents belonged to at least one scheme.

Indeed, loyalty programme membership has increased from 61% in 2025 to 66% in 2026. Airline programmes are most popular, chosen by 71% of all loyalty-scheme members. Hotel schemes follow at 58%, followed by those linked to credit cards at 50% and OTAs or travel agencies at 39%.

Membership is at its most common in North America, where these programmes first originated, and are also strong in Latin America and Oceania. They have yet to achieve the same degree of market penetration in Europe.



66%
belong to a **loyalty programme**
↑5 on 2025

Out of this group...

71%
are in an **airline** loyalty programme
↓1 on 2025

58%
are in a **hotel** loyalty programme
↑3 on 2025

50%
are in a **credit-card** loyalty programme
↑3 on 2025

39%
are in a **travel agency** reward programme
↑4 on 2025



It was in the 1980s that airline frequent-flyer programmes and hotel schemes first gained popularity – though one report suggests that these programmes can be traced back as far as the 18th century[14]. Today, loyalty – like travel itself – has gone digital.

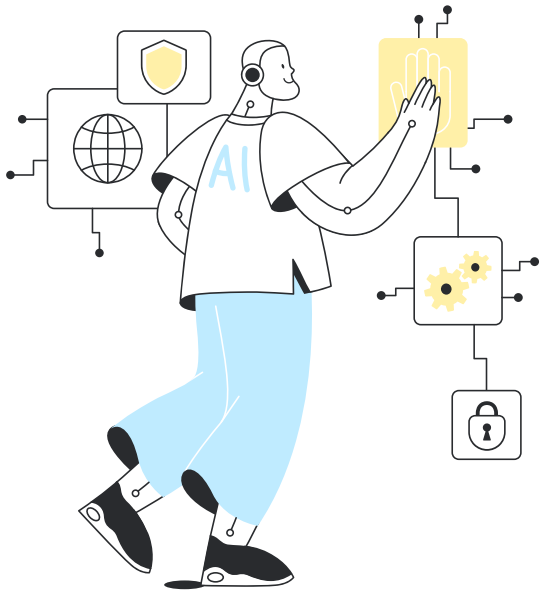
For travel brands, loyalty programmes are now vital sources of customer data, helping them gain unprecedented insight into their client base. Each interaction provides the chance to refine their offer and tailor it more closely to each individual: a “virtuous circle” that builds continued loyalty and trust.

Last year’s report predicted that loyalty schemes would become increasingly collaborative, with cross-industry alliances among airlines, hotels and other providers surpassing what any single link in the chain could achieve. This seems more likely than ever. For travellers, it will help eliminate friction throughout the whole journey. For brands, it will provide a wider perspective on the end-to-end travel experience of their customers.

Ultimately, 21st-century loyalty programmes have become core infrastructure in the brand-audience relationship. They are vital in helping to connect personalisation, data strategy and emotional value into one seamless experience.

7.3 Planning with AI: Growing Use and Trust

- *A large majority have used AI to plan a trip, and many keep using it while abroad*
- *Travellers now trust AI for many tasks, from finding hotels to dealing with disruption*



One of the big stories of the survey is that artificial intelligence has broken further into the mainstream. Almost three quarters of travellers have used AI tools at least once to plan their trips, up from just over half in 2025.

The proportion who have used it frequently stands at 44%, while a further 29% have done so once or twice. Interestingly, the survey recorded a notable drop in the number of people who have not yet used AI but intend to do so.

Regular AI use is closely associated with age. The 18-24 group are the most eager adopters, with 55% saying they frequently rely on it to assist travel planning. The percentage of regular AI users drops with each older age band, down to just 15% among the 65+ group. However, it is worth noting that this score has tripled since last year, when just 5% in this age bracket said they were habitual AI users.



It's a sign that the age of the AI user is changing fast. Digital technology – from social media and travel apps to eSIMs and AI – is percolating through to travellers of all ages, including groups that were traditionally resistant.

Travellers are trusting AI to perform more tasks. Out of all the scenarios mentioned in the survey, each one registered an increase of 4 percentage points or more. Last year, travellers were most likely to trust AI for translating and navigating. In the current survey, the task they are most likely to trust it with is recommending where to go and stay. More than half of respondents also have confidence in the ability of AI to find flight deals or create an itinerary, while around a third believe it could help to overcome travel disruptions or changes in real time.

There has been a big drop in those not engaging with AI at all. The number who said they had no interest in using it to help plan trips has almost halved, from 20% to 11%. A similar proportion reported that they would not trust it for any travel-planning tasks: 10%, down from 16% last year.

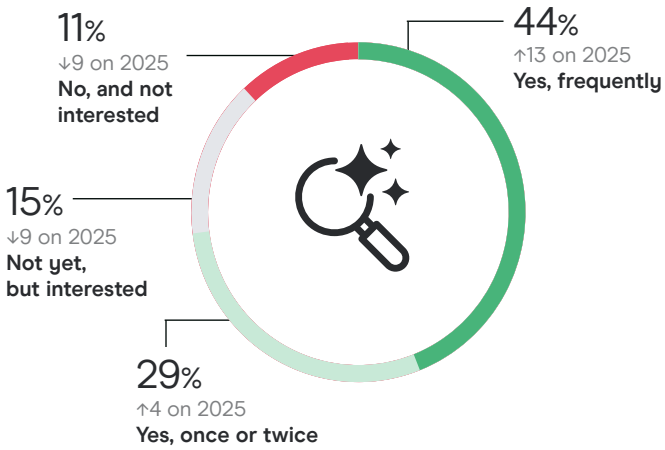
Mistrust of AI is at its greatest in the Anglosphere. English-speaking countries have the biggest percentages reporting no confidence in using AI tools for travel planning: 14% in Australia, 16% in New Zealand, and as high as 40% in the United Kingdom. The United States is the outlier here, with only 5% similarly resistant to AI.

Almost half of all travellers continue to make use of AI while they are away on a trip: 46% reported using AI-powered tools such as Trip Planner by Expedia, Roam Around, Layla AI or GuideGeek during their time abroad.

This represents an increase from the 34% who were doing so in 2025. And of this group, 67% said they found these tools very useful, with a further 31% considering them somewhat useful.

Both before and during a trip, AI is becoming a trusted assistant: a digital Passepartout with the ability to help deal with novel situations, overcome hindrances, and greatly simplify the process of travel.

Travellers using AI tools to help plan trips[15]



What travellers trust AI to help with



The Future of Travel

8.1 Where the World is Headed
8.2 The Smartphone: A Travel Essential
8.3 What Travellers Want Next

08

The story of travel in 2026 is one of positivity and renewed confidence. People are travelling more, and more often, taking full advantage of the possibilities of digital technology.

75%

of travellers plan to make **more than one international trip** in 2027

42%

expect to take **three or more**

The travellers polled in this survey show every intention of continuing these trends. Three quarters (75%) say they intend to make two or more international journeys in 2027 – a big increase on the 67% who expressed the same intention in last year's survey.

The number expecting to take three or more trips has leaped to 42%, from 35%. Only 3% predict they will cross no borders at all next year, down from 4%.

In sharing their ambitions, the survey participants show that this year is unlikely to be a blip in the graph. If their confidence proves well founded, global mobility will continue to flourish – with an emerging generation of confident, curious and digitally connected explorers at its vanguard.

8.1 Where the World is Headed

» *Europe is the most popular region for 2027, with half of travellers planning a trip there*

» *France heads up the list of countries likely to be visited next year*

When we project people's travel intentions for 2027 on to the map, a familiar picture emerges.

On a regional level, this year's survey delivered almost exactly the same results as the previous one.

Two forces are influencing people's movement: regional loyalty and global curiosity. On the one hand, a large proportion of travellers will stay within their own region. On the other, long-haul journeys will predominantly end in Europe, with North America and Asia vying for second place.

A deeper analysis of the data highlights the following countries as next year's top destinations.

Projected top 10 countries travellers will visit in 2027*

#1	France
#2	Spain
#3	Italy
#4	United Kingdom
#5	United States
#6	Germany
#7	Portugal
#8	Canada
#9	Switzerland
#10	Japan

*Ranking compiled by asking respondents which global region they intended to visit the most in 2027, and each of the countries they hoped to revisit. These results were multiplied for each country to produce the top-ten projection.



Most popular regions for travel in 2027

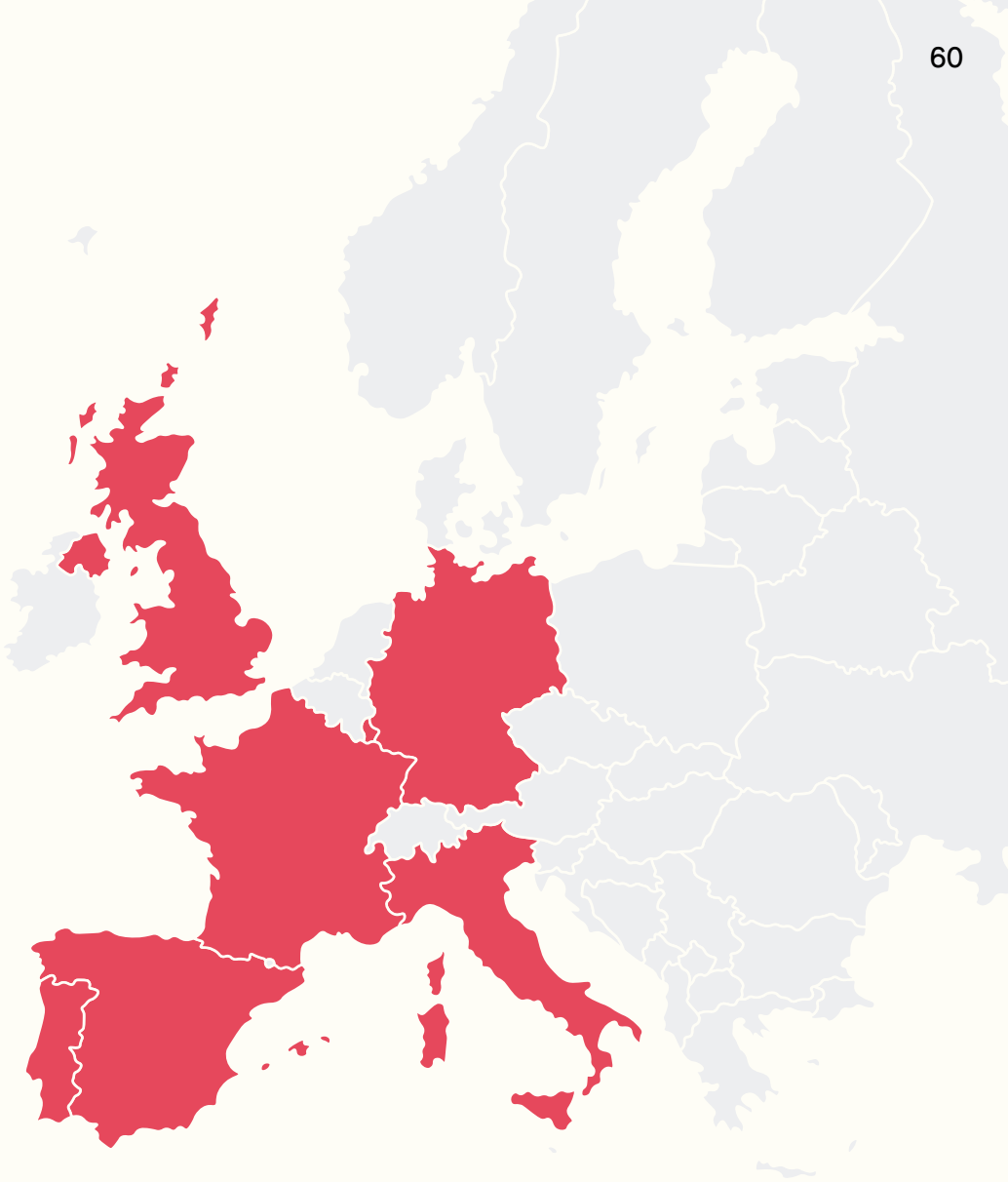
#1 Europe

Europe is set to be the world's most visited region in 2027, with half of all global travellers (50%) expecting to focus their itineraries on the continent. Their target nations are likely to be France, Spain, Italy, the United Kingdom, Germany, Portugal and Switzerland.

The ambition to spend time in Europe rises with age, from 45% of 18-24s to 56% of the 65+ group. A large number of these visitors will be residents of European countries themselves – 72% of those living in Europe plan to travel within their home continent next year. But Europe's appeal is truly global. It is the leading region for travellers from Asia, Latin America and Africa.

Countries in this region from the projected top 10

#1	France
#2	Spain
#3	Italy
#4	United Kingdom
#5	United States
#6	Germany
#7	Portugal
#8	Canada
#9	Switzerland
#10	Japan



#2 North America

Around 17% of all global travellers expect to spend time in North America during 2027. Almost all of them will be heading to the United States or its northern neighbour, Canada. The pull of North America is felt most strongly by Millennials: nearly 1 in 5 would like to come next year.

Meanwhile, 36% of travellers already living in North America plan to base their explorations in the region, but many other visitors will be from further afield: 22% of Latin American travellers want to visit North America, plus 18% of those from Africa and 15% of those living in Asia.



Countries in this region from the projected top 10

#1	France
#2	Spain
#3	Italy
#4	United Kingdom
#5	United States
#6	Germany
#7	Portugal
#8	Canada
#9	Switzerland
#10	Japan



#3 Asia

The number of all global travellers with ambitions to visit Asia over the coming year has held steady, at 17%. Japan is the regional powerhouse, both as a tourist destination and as a place to do business. The age profile of the average visitor has a dual peak. The youngest and oldest groups are the keenest to explore Asia, while Millennials are marginally less enthusiastic.

Geographically, the group most likely to have Asia on their travel agenda is from Oceania: 37% of those living in this region intend to visit Asia next year. Around 3 in 10 Asian travellers also intend to spend time travelling in their home region.

Countries in this region from the projected top 10

#1	France
#2	Spain
#3	Italy
#4	United Kingdom
#5	United States
#6	Germany
#7	Portugal
#8	Canada
#9	Switzerland
#10	Japan





Latin America

Latin America is on the 2027 wish list for 6% of all global travellers.

Around 15% of Latin American residents intend to travel within their own region, and 7% of their continental neighbours in North America are also planning a trip there. It's primarily a young person's destination, with Generation Z and Millennials driving visitor numbers.



Oceania

Around 4% of all global travellers have plans to visit Oceania during next year, and will predominantly go to Australia.

Around a fifth of those who already live in Oceania intend to travel in the region. For others, it's a minority destination – the next-largest visitor group is from Asia, where 3% of travellers hope to go. Across all nationalities, it's a particular draw for travellers in the 65+ age group who have the time and the means to plan a "trip of a lifetime".

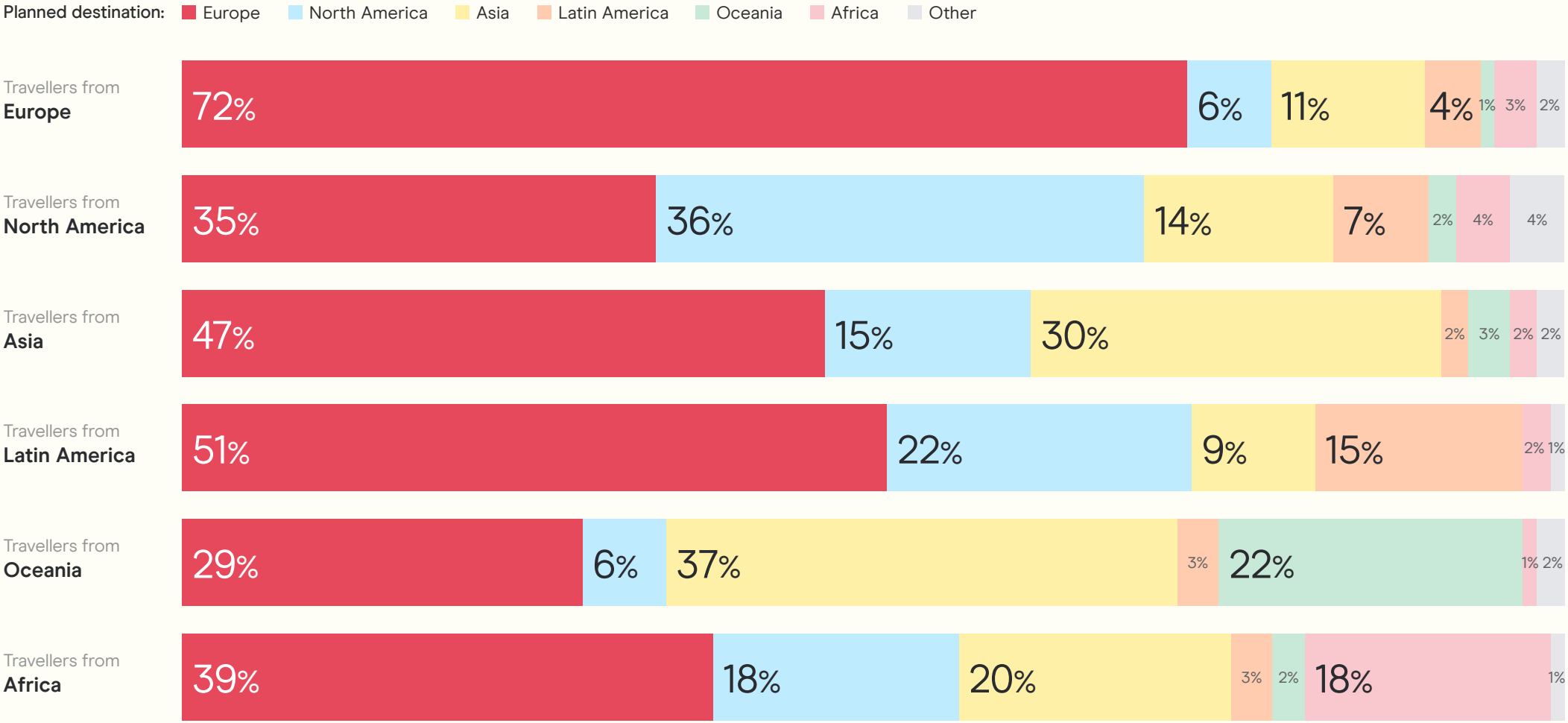


Africa

The number of global travellers keen to go to Africa stands at 4%, and the lure of Africa is at its most powerful for travellers in the 18-24 age bracket.

In this vast area, intra-regional travel by those already living in Africa will account for the greatest number of visitors. There will also be small contingents from North America and Europe.

Where travellers from each region plan to go most in 2027



8.2 The Smartphone: A Travel Essential

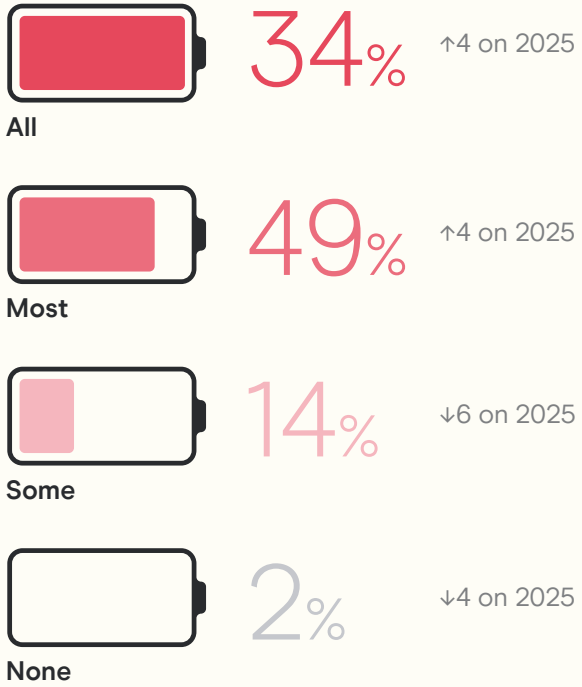
- *Over 8 in 10 expect to manage all or most travel tasks from their phone in 2027*
- *Seamless internet access is a top priority for around a quarter of travellers*



Over the coming year, 34% of travellers expect to manage all their travel experience – such as planning and booking – on their smartphone. This represents a 4 percentage point rise from last year's figure of 30%. This number rises to 41% among Generation Z and among Millennials, although it drops to 14% among Boomers.

Across all respondents, just under half think they will use their phone for most of their travel tasks in 2027, with a further 14% expecting to use it for some. Only 2% said they don't expect to use it for travel-related tasks at all.

How much travellers expect to manage their travel experience on their phone in 2027





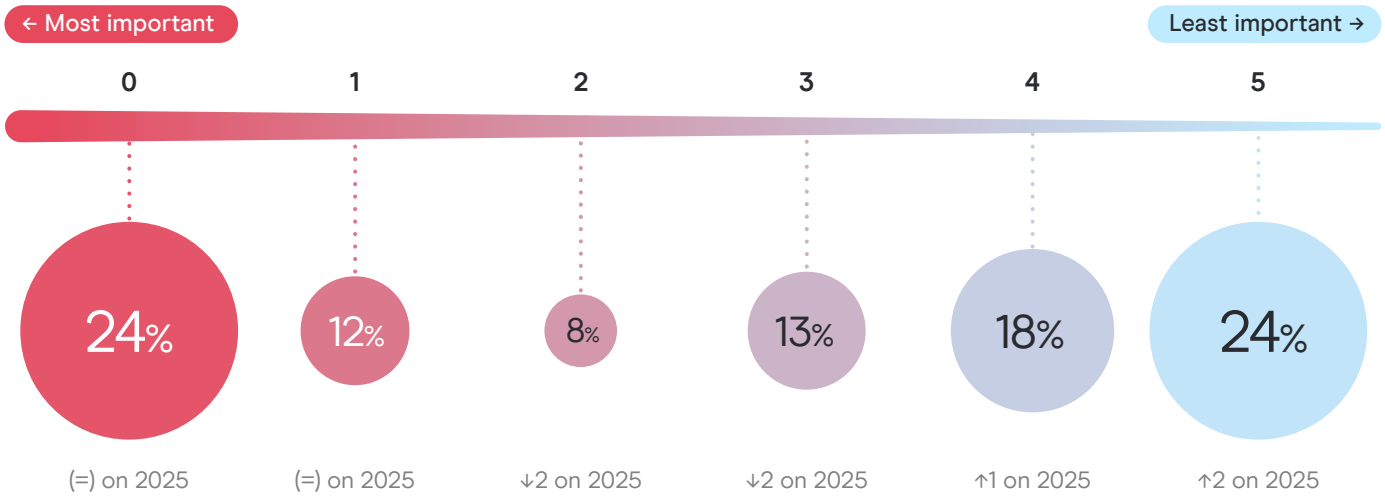
27%

of 25-34s rate seamless connectivity as top priority

The survey participants were asked to rate the necessity of seamless mobile connectivity (such as fast internet and no SIM switching) in 2027, using a six-point scale of importance. More than 4 in 10 travellers (44%) placed it in the three most important bands, with around a quarter (24%) giving it the highest rating.

However, just as many (24%) gave it the lowest rating, and more than half (55%) placed it in the three least important bands. There were big generational differences. Importance peaked among the 25-34 age group, where 27% put seamless access in the top category, but only 16% of the 65+ group assigned it the highest level of importance.

How important will seamless mobile connectivity be in 2027?



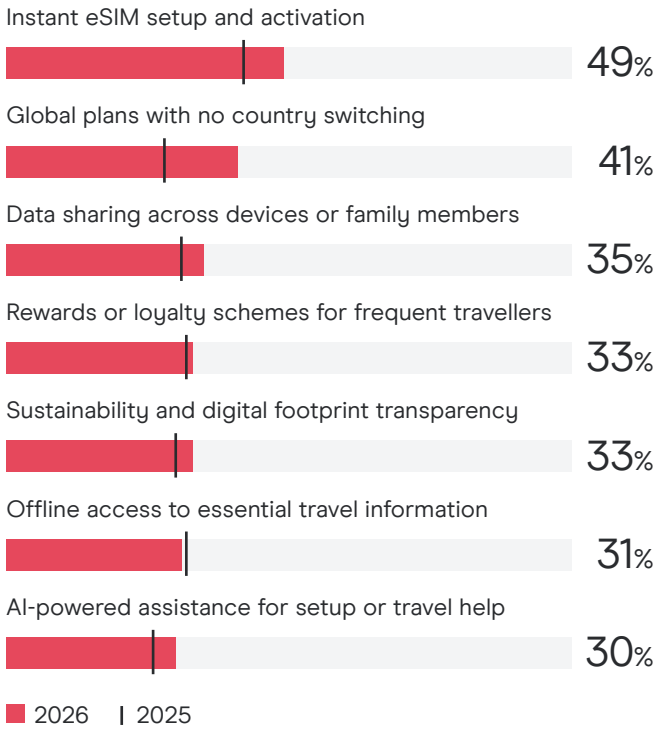
8.3 What Travellers Want Next

- *Travellers will demand higher service standards from their mobile data provider*
- *Almost three quarters would use their provider for other digital services*

If internet access is critical, so is the service provider that makes it possible. Choosing the right one is a vital decision: one that deserves as much thought as selecting an airline or hotel.

In the survey, 74% deemed it likely that they would consider using their mobile data or eSIM provider for other travel services – such as AI tools, planning or deals. This represents a 12 point rise on last year's figure of 62%.

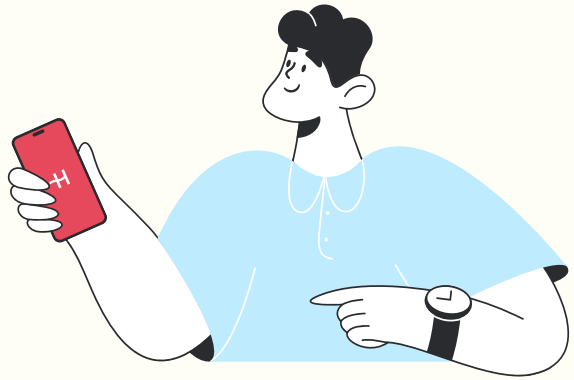
What will travellers expect from an eSIM/travel mobile data provider in 2027?



When asked what they most expected from their provider in 2027, almost half (49%) opted for instant eSIM setup and activation.

As with last year, second place on the wish list was also linked to convenience, with 41% hoping for global plans that eliminate country switching. The proportion of travellers wanting to share data across family members rose by 4 points to 35%, and there was a similar increase in those wanting the ability to call on AI-powered assistance: 30% will expect this service next year.

These results suggest that when signing up for an eSIM in 2027, travellers will want more than just a barebones package to keep them online. They will expect a solution that's user-friendly, hassle-free, and able to provide a range of extra services geared to their needs and habits.



Final Thoughts

09

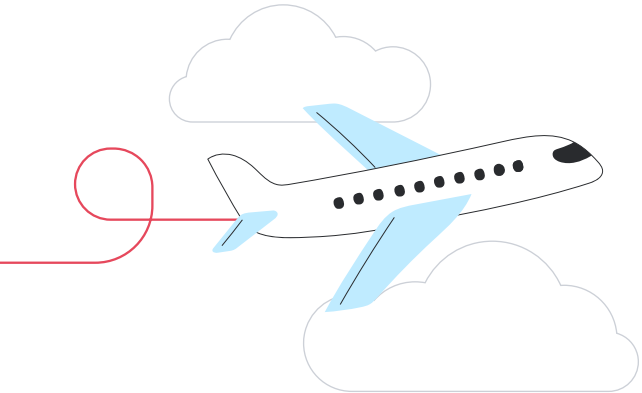
Our travel culture is itself in transition.

Over the past year, our expectations have shifted greatly, and in many ways – from the number of trips we anticipate taking, and the ease with which we expect to find and book a flight, to our ability to change travel plans in seconds on a phone screen at the air terminal.



If there's one word that permeates this report, it is confidence – including confidence in these digital tools that accompany almost every traveller on their journeys. But underpinning this confidence is trust, in an infrastructure that is mostly invisible.

To win this trust, providers need to provide travellers with what this survey shows they want: a fast and reliable internet connection across frontiers; easy, straightforward setup; and responsive support that's always on hand when it's needed.



Of all the respondents who took part in this survey, more than three quarters pointed to relaxation and peace of mind as an experience they're seeking from travel, and 7 in 10 associated it with freedom. Frustrations with mobile access – such as slow, unreliable internet, loss of coverage across borders, complicated setup, or a lack of support – can erode these emotions.

This is why finding the right mobile provider is so vital, and for an increasing number of us, that means an eSIM. Adoption has reached a critical point, with nearly 3 in 10 choosing this method of going online. For travellers from several countries, it now represents the most popular solution.

This year has also seen a step change in AI acceptance. Since last year, trust in AI tools for recommending destinations or hotels (56%), translating or navigating (53%), finding flight deals (52%) or creating a travel itinerary (51%) has risen to more than half of all survey respondents. As never before, travellers are showing a willingness to realise the potential of AI.

"Looking forward to 2027, travel is becoming more deeply personal.



Dennis Morgenstern

Global Director of Strategic Partnerships, Holafly

Continuous digital access will help people plan unique, spontaneous journeys anywhere in the world."

Methodology

The Holafly Global eSIM & Travel Report 2026-2027 was built upon an online survey of 5,220 adults who had been abroad in 2026.

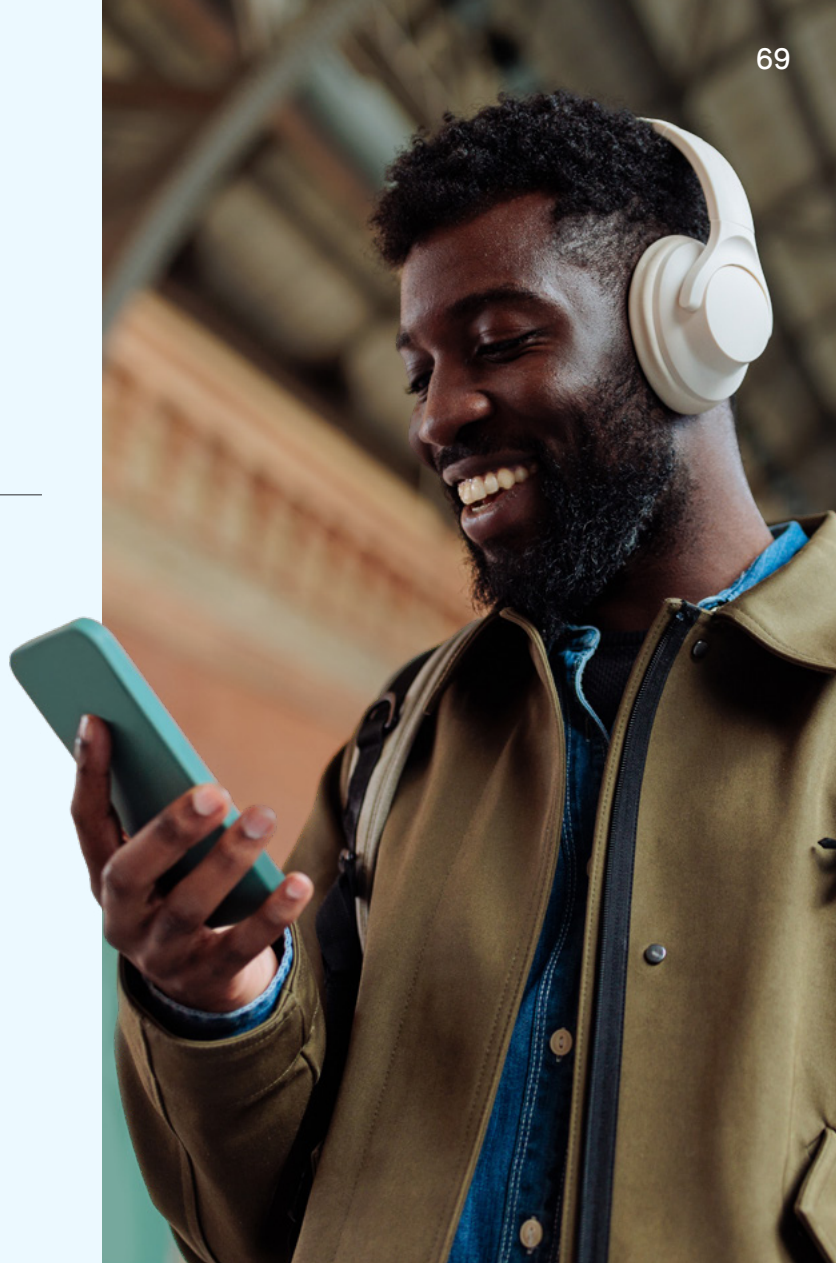
10

It was commissioned by Holafly and conducted by market research company OnePoll, in accordance with the Market Research Society's code of conduct. Data was collected between 8 August and 24 August 2026.

All participants were double-opted in to take part in research, and were paid an amount depending on the length and complexity of the survey.

This survey was overseen and edited by the OnePoll research team. OnePoll are MRS Company Partners, corporate members of ESOMAR and members of the British Polling Council.

OnePoll®



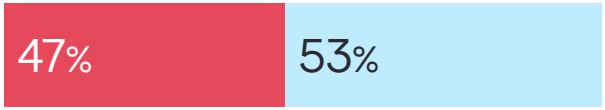
Sampling and respondent profile

Sample size

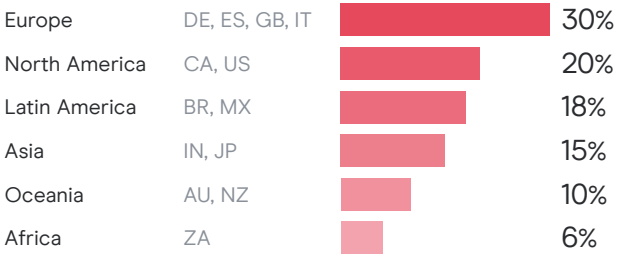
5,220

respondents from 13 countries

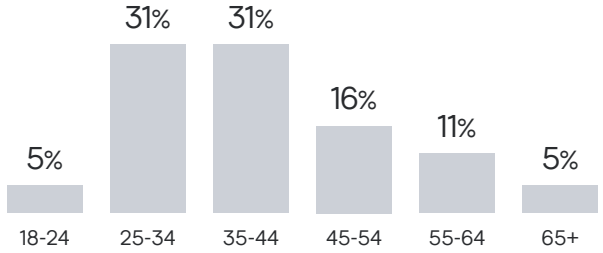
Gender



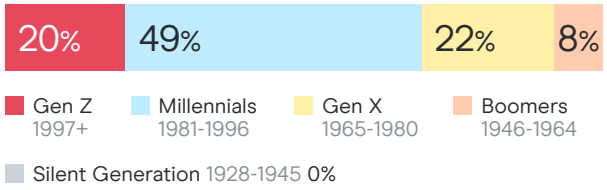
Regional composition



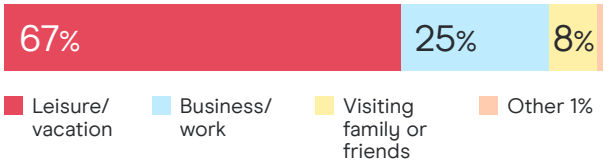
Age distribution



Generations



Primary reason for travel



Analytical notes

The data was not weighted. Reported percentages in each survey question may not sum exactly to 100%, due to rounding.

For the purposes of section 04, business travellers were defined as those who told the survey that business/work was their primary reason for travelling. This group comprised 1,297 respondents.

The “Projected top destinations for 2027” ranking was compiled by multiplying intended revisit rates for each country by the 2027 travel intentions for their wider region. The ten countries with the highest scores formed the top ten.

Countries represented

Australia (AU), Brazil (BR), Canada (CA), Germany (DE), Spain (ES), United Kingdom (GB), India (IN), Italy (IT), Japan (JP), Mexico (MX), New Zealand (NZ), United States (US), South Africa (ZA)

References

1. UN Tourism. (2026). “International tourism up 2% in Q1 2026 amid growing uncertainty”.
2. Note: the “Agree” and “strongly agree” responses above have been rounded to whole numbers.
3. Note: these net values represent the total proportion of respondents who expressed agreement. The “Agree” and “strongly agree” responses above have been rounded to whole numbers.
4. U.S. Travel Association. (2026). The U.S. Travel Insights Dashboard.
5. Euromonitor International. (2025). Top 100 City Destinations Index.
6. Government of Canada. (2026). National Travel Survey and Visitor Travel Survey.
7. Oxford Economics. (2026). Milano-Cortina Winter Olympics: Wider Footprint, Wider Wins.
8. VisitBritain / VisitEngland. (2026). Tourism State of the Nation.
9. Euromonitor International. (2025). Top 100 City Destinations Index.
10. Australian Government. (2026). International Visitor Survey Results March Quarter 2026.
11. German National Tourism Board. (2026). News: 11 September 2026.
12. Note: this group comprised 1,297 respondents.
13. Note: net value includes those who answered “yes, frequently” and “yes, once or twice” when questioned about use of AI tools to plan travel. Values for these individual responses are rounded to the nearest whole number elsewhere in this report.
14. McKinsey & Company. (2023). “Travel invented loyalty as we know it. Now it’s time for reinvention.”
15. Note: these responses have been rounded to whole numbers.

About Holafly

Holafly is the global leader in eSIMs for travellers, offering coverage in over 200 destinations and the best value for money. With an outstanding 4.7/5 rating on Trustpilot and more than 25 million eSIMs sold, it has become the preferred eSIM choice for international travellers. Its unlimited data offering and built-in backup plan give travellers peace of mind wherever they go.

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