

Holafly 2026

Summer Travel & eSIM Report

Beyond Borders: Intentions, Predictions and the Road Ahead

Holafly

Stay connected wherever you go

EDITORIAL NOTE ON DATA FRAMING: *The 2026 data in this report is drawn from a survey conducted in May 2026, capturing travellers' intentions and plans for the summer season ahead (June–August 2026). It is predictive, not retrospective. All 2025 figures are consolidated post-season actuals from Holafly's August 2025 survey of 980 respondents. Year-on-year comparisons therefore contrast stated intentions for summer 2026 against confirmed behaviour from summer 2025. Editors should treat all 2026 directional findings as leading indicators, not confirmed outcomes.*

EXECUTIVE SUMMARY

Summer 2026 has not happened yet, but the signals coming out of it are unusually sharp. Holafly's pre-season survey of 3,048 travellers across multiple markets, conducted in May 2026, finds that 82% of respondents plan to travel this summer, up from 73% who actually did so in 2025. More significantly, nearly half of those intending to travel say they will cross an international border, 46.4% of planned trips are international, compared to 37.6% confirmed at the close of last summer. The appetite for travel in 2026 is not merely higher than 2025; it is structurally more ambitious.

The headline connectivity finding is equally striking as a prediction. Among the 3,048 respondents surveyed in May, 28.1% say they plan to use an eSIM this summer, up from the 19% who actually used one last summer, a gain of nine percentage points against a confirmed baseline. eSIM is now the single most popular stated connectivity choice among travellers planning to go exclusively abroad at 38.7%, outranking roaming at 32.6%. Local SIM cards and Wi-Fi-only access are both expected to decline. The redistribution of the connectivity market is happening faster than last year's actuals implied it would.

Three tensions define the 2026 summer story. First, Asia is surging in destination intent, Japan rises to second, South Korea leaps from tenth to fourth, at the same moment eSIM intention in Asia-Pacific reaches record levels, the two trends feeding each other. Second, business travel grows to 24.9% of all planned trips, yet employer-provided eSIM provisioning is accelerating at 21.2%, up from a confirmed 15.6% last summer, with company eSIM users expecting a positive productivity impact at 81.3% versus 52.4% for self-managed travellers. Third, sustainability consideration in connectivity choices has reached 63.3%, nearly two thirds of all planned travellers now say environmental impact is at least a factor, yet this sits in tension with a concurrent surge in long-haul international travel, the segment with the largest environmental footprint.

1. Introduction: A Season of Ambition

82%

of respondents plan to travel this summer, up from 73% who actually did in summer 2025.

Summer 2026 hasn't happened yet, but the signals are already clear. According to Holafly's latest survey across multiple markets, 82% of respondents plan to travel this summer, a notable increase compared to the 73% who actually travelled in 2025.

More significantly, nearly half of those intending to travel say they will cross an international border; 46.4% of planned trips are international, compared to 37.6% confirmed at the close of last summer. Intentions are not outcomes, but at this scale and with this level of directional consistency across markets, they constitute a reliable forward signal. The appetite for travel in 2026 is more ambitious.

The headline connectivity finding is equally striking as a prediction. Among all the respondents surveyed in May, 28.1% say they plan to use an eSIM this summer, up from the 19% who actually used one last summer. That nine-point gain in stated intent, against a confirmed 2025 baseline, is the strongest leading indicator in the eSIM adoption story since the technology began entering the mainstream.

Critically, eSIM is now the single most popular stated connectivity choice among travellers planning to go exclusively abroad, at 38.7% of that cohort, outranking roaming at 32.6%. Local SIM cards and Wi-Fi-only access are both expected to decline. The redistribution of the connectivity market is happening faster than last year's actuals suggested it would.

Three tension pairs stand out from the full cross-data analysis and deserve flagging.

First: Asia is surging in destination intent; Japan is planned as the second most-visited international destination this summer (up from third in 2025 actuals), South Korea has leapt from tenth to fourth, at the precise moment that eSIM intention in Asia-Pacific reached 40.2% in Oceania and 34.5% in Asia, suggesting that digital connectivity infrastructure is actively enabling the region's rise as a travel destination.

Second: intended business travel grew to 24.9% of all planned trips this summer, yet self-managed connectivity among those travellers is expected to fall below half for the first time, as employer-provided eSIM provisioning accelerates.

Third: sustainability awareness in connectivity choices has grown to 46.4%; nearly half of all planned travellers now say environmental impact is at least a consideration in how they stay connected, yet this sits in productive tension with the concurrent surge in ambitious, long-haul international travel, the segment with the largest environmental footprint and the lowest sustainability consideration at point of booking.

“The 2026 data tells us that travel ambition survived cost-of-living pressure, geopolitical uncertainty and every other headwind that was supposed to suppress it. What changed is not whether people want to travel, that was never really in doubt, but how far they want to go, how many places they want to see, and how much friction they are willing to tolerate to get there. The answer on friction is: less than ever.”

Pedro Maiquez, co-founder & VP of Brand at Holafly

Key Indicators: Summer 2025 vs Summer 2026

Metric	2025	2026	Change
Travel Intention	73.0%	82.0%	+9.0 pp
International travellers	37.6%	46.4%	+8.8 pp
Multi-destination travel	43.0%	51.2%	+8.2 pp



Travel Intention
+9.0 pp
 73.0% → 82.0%

International travellers
+8.8 pp
 37.6% → 46.4%

Multi-destination
+8.2 pp
 43.0% → 51.2%

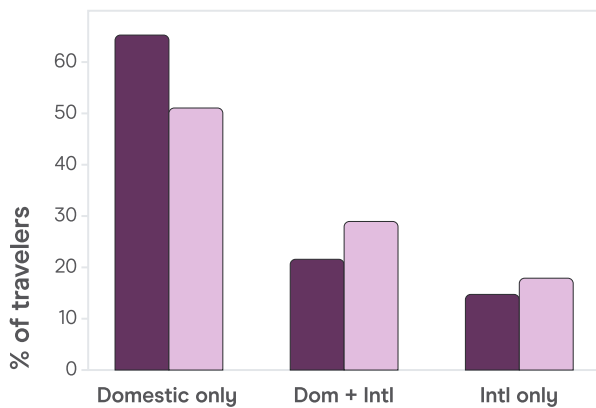
2. A Summer Full of Adventures

2.1 Domestic vs International Travel

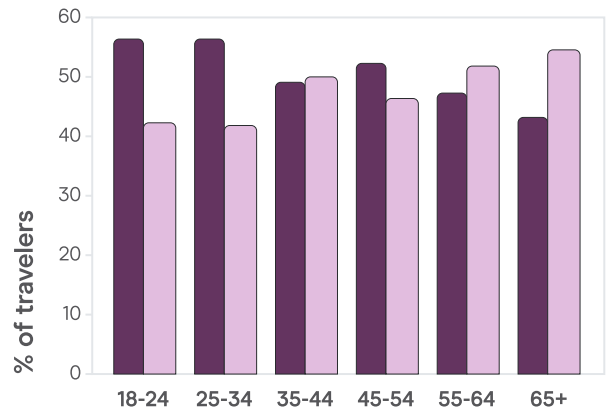
The first number worth sitting with is 82%: the share of respondents who plan to travel this summer. Compared to the 73% who actually travelled in summer 2025, it represents a nine-point gap between last year’s confirmed behaviour and this year’s stated intentions. The more revealing figure sits one layer down. Of those planning to travel, 46.4% intend to cross an international border, compared to 37.6% who actually did so last summer. The proportion planning domestic-only trips has fallen from 62.6% in 2025 actuals to 53.4% in 2026 intentions. People are not simply planning to travel more; they are planning to travel further and with greater itinerary complexity.

The multi-destination shift sharpens this story. **Fifty-one per cent of planned travellers intend to visit more than one destination this summer**, against 43% who actually did so last summer, an eight-point gap that is among the largest year-on-year movements in the entire dataset. A traveller visiting two or three countries in a single summer has fundamentally different logistical needs from one who flies to a single resort and stays put. Their tolerance for physical SIM-swapping, unexpected roaming charges or patchy Wi-Fi access is structurally lower. The growth in multi-destination intent is, among other things, a leading indicator for eSIM demand.

Travel Mix Shift (2025 vs 2026)



Travel Intent by Age (2026)



Domestic vs International Travel, 2025 vs 2026

Travel Type	2025	2026	Change
Domestic only	62.6%	53.4%	-9.2 pp
Domestic + International	21.8%	28.7%	+6.9 pp
International only	15.6%	17.7%	+2.1 pp
Multi-destination travel	43.0%	51.2%	+8.2 pp

International Travel Intent by Age Group, Summer 2026

Age Group	% Planning International Travel	% Domestic Only
18–24	57.7%	42.3%
25–34	58.0%	42.0%
35–44	49.5%	50.5%
45–54	51.8%	48.2%
55–64	48.7%	51.3%
65+	43.8%	56.2%

The age breakdown tells us precisely who is driving this internationalisation. Under-35s are the engine: 57.7% of 18–24 year-olds and 58.0% of 25–34 year-olds plan to cross at least one border this summer. That share falls to 49.5% among 35–44 year-olds and continues declining through each older cohort, reaching 43.8% among the 65+ group. The generational gradient is steep and consistent, international travel ambition is concentrated in the cohort that is also driving eSIM adoption, multi-destination itineraries and business travel growth. These are not independent trends. They are the same demographic expressing the same values across every dimension of the survey.

Reasons for Not Travelling This Summer, Categorised from Open Responses

Category	Share of Non-Travellers
Financial constraints (cost, lack of funds, too expensive)	54.1%
Work commitments or insufficient leave	10.8%
Personal circumstances (health, family, life events)	3.8%
Seasonal preference (prefer other time of year)	2.5%
Other / no specific reason given	28.8%

2.2 Top International Destinations











South Africa was the story of summer 2025, second in the global destination rankings, powered by Cape Town and Durban. In 2026 it falls to ninth. In its place, Asia surges. Japan is planned as the second most-visited international destination this summer, up from third in last year's confirmed data. South Korea jumps from tenth to fourth. These are not marginal shifts. A six-place rise for South Korea in a single year, signals a sustained and accelerating movement that has been building since 2023.

The cultural drivers are now confirmed by official data. South Korea's tourism sector broke its own all-time record in 2025, surpassing 18.7 million international arrivals, 108% of pre-pandemic levels and the highest figure in the country's history. The Korea Tourism Organisation attributed the surge explicitly to the strategic integration of Hallyu, K-pop, K-food, K-drama, with targeted digital marketing toward younger travellers in their 20s and 30s. Arrivals from the Americas grew 45.8% against pre-pandemic benchmarks, Oceania 44.5%, and the United States alone saw arrivals 42.1% above 2019 levels. This is the engine behind South Korea's leap in Holafly's rankings: not a single event or a pricing advantage, but years of accumulated soft-power influence converting entertainment consumption into confirmed travel behaviour at scale.

Japan's rise to second is driven by a different dynamic. The country's sustained weak yen has made it materially more affordable for Western and Oceanian travellers, and the raw destination mentions in the survey confirm the story: Japan leads all country-level mentions, and Tokyo is the third most-cited city globally. No other destination achieves Japan's breadth of cross-regional appeal, it appears as a top destination for North American, Asian and Oceanian travellers simultaneously, the only country in the top ten to achieve that span.




















South Africa's drop in ranking, from second place in 2025 actual travel to ninth in 2026 intentions, creates an interesting contrast with broader tourism trends. The country welcomed 10.5 million international arrivals in 2025, marking a 17.7% year-on-year increase and surpassing pre-pandemic levels for the first time since 2019, with early 2026 data pointing to continued growth. Rather than a contradiction, this reflects a broader acceleration of global travel demand and a shift in traveler attention. In a highly competitive summer, destinations like Seoul and Tokyo are capturing disproportionate mindshare, driven by strong cultural momentum and global visibility.

International Travel Intent by Age Group, Summer 2026

2026 Rank	Destination	2025 Rank	Movement
1 	Spain	1	-
2 	Japan	3	↑ +1
3 	United States	5	↑ +2
4 	South Korea	10	↑ +6
5 	Mexico	8	↑ +3
6 	Canada	4	↓ -2
7 	France	6	↓ -1
8 	Thailand	-	New entry
9 	South Africa	2	↓ -7
10 	Italy	-	New entry

When it comes to cities, Paris leads the rankings, confirming that travellers think in destinations, not countries. France does not crack the top ten by country, but its capital is the most-cited city. London follows closely, and Tokyo claims third place despite Japan already dominating the country-level rankings. The presence of Gold Coast and Sydney in the top fifteen, alongside Melbourne, signals that Australia’s appeal is spread across its urban centres rather than concentrated in a single flagship city. Bali is the only non-capital, non-major-city destination to break into the top thirteen, a reflection of the island’s enduring power as a standalone travel brand. Rio de Janeiro and Cape Town both rank above their own capital cities, confirming that in Brazil and South Africa it is the iconic coastal city that captures international imagination.

Top 19 Cities by Mention, Summer 2026

2026 Rank	Destination
1 	Paris
2 	London
3 	Tokyo
4 	New York
5 	Berlin
6 	Rio de Janeiro
7 	Toronto
8 	Cape Town
9 	Rome
10 	Barcelona
11 	Sydney
12 	Cancún
13 	Bali
14 	Melbourne
15 	Gold Coast
16 	Madrid
17 	Los Angeles
18 	Amsterdam
19 	Vancouver

2.3 Regional Travel Patterns: Where Each Region Is Headed

The regional breakdown reveals not just how many people plan to travel internationally, but where they are going, and the two questions produce very different answers depending on where the traveller starts.

Europeans stay close. Spain, Italy, Greece and Paris dominate their destination intentions, with intra-European movement accounting for the bulk of planned outbound trips. This is the Roam Like at Home effect made visible: free roaming within the EU lowers the friction of short cross-border trips to the point where they feel almost domestic. Berlin and Barcelona both appear in the top eight, confirming that city-break culture within Europe remains as strong as ever. Europe is also the most outbound region in absolute terms, with 72% of European respondents planning to cross at least one border this summer, up from a confirmed 57.2% last summer, and the lowest non-travel rate of any region at just 10.8%. Its respondent base is the youngest outside Latin America at 57.8% under 35, a demographic profile that directly feeds the international travel and eSIM adoption numbers.

Regional Outbound Travel, 2025 vs 2026

Region	2025 Outbound	2026 Outbound	Change	Non-travel Rate
Europe	57.2%	61.4%	+4.2 pp	10.8%
Latin America	27.2%	31.5%	+4.3 pp	12.8%
North America	88.3%	84.6%	-3.7 pp	18.6%
Asia-Pacific	72.7%	76.9%	-	18.1%
Oceania	-	56.6%	-	19.5%

North America looks further but leans on the familiar. Japan and France lead the outbound destination list alongside internal destinations like Toronto, New York and Vancouver, reflecting both the aspirational pull of Asia and the enduring comfort of Anglophone Europe. Despite that international ambition among those who do go abroad, 63.2% of US and Canadian respondents plan to stay within their own country this summer, outbound intent has fallen from 88.3% in 2025 to 84.6%, the only region in the dataset to show a decline, and the non-travel rate at 18.6% is the highest of any Western market. North America also has the most balanced age distribution of any region (42.0% under 35, 28.6% aged 35–44, 29.5% over 45), meaning the domestic lean reflects cultural and economic preference, not demography alone.

Latin Americans travel predominantly within their own region. Brazil and Rio de Janeiro top the destination list, followed by Argentina and Buenos Aires, a pattern driven by currency volatility and cost sensitivity. The notable exceptions are Madrid and Miami, which signal a transatlantic pull that linguistic and cultural ties sustain even at distance. Despite a relatively low non-travel rate of 12.8%, the majority who do travel will do so close to home, and with the youngest regional population in the survey at 72.3% under 35, the appetite for travel is real; it is the economic headroom that constrains its geography.

One finding cuts across all regions: Japan appears as a top destination for three separate origin regions, North America, Asia and Oceania, making it the single most cross-regionally appealing destination in the 2026 survey. No other country in the top ten achieves this breadth of origin diversity.

Asian travellers split between regional hops , Japan, China, Thailand , and longer-haul aspirations toward Paris and Australia, a pattern consistent with a growing middle class extending its travel radius one tier at a time. Asia also shows the highest business travel rate of any region at 30.2% of planned trips, consistent with its age profile and professional travel culture. Oceania's travellers are the most globally dispersed of any region: Japan tops their list, followed by Bali, Europe as a region, Singapore and Vietnam. The fact that Oceanian respondents show both the highest eSIM adoption intention (40.2%) and the most geographically ambitious destination list is not coincidental , long-haul multi-country travel and eSIM adoption are correlated throughout the dataset, and Oceania exemplifies that relationship at its most concentrated.

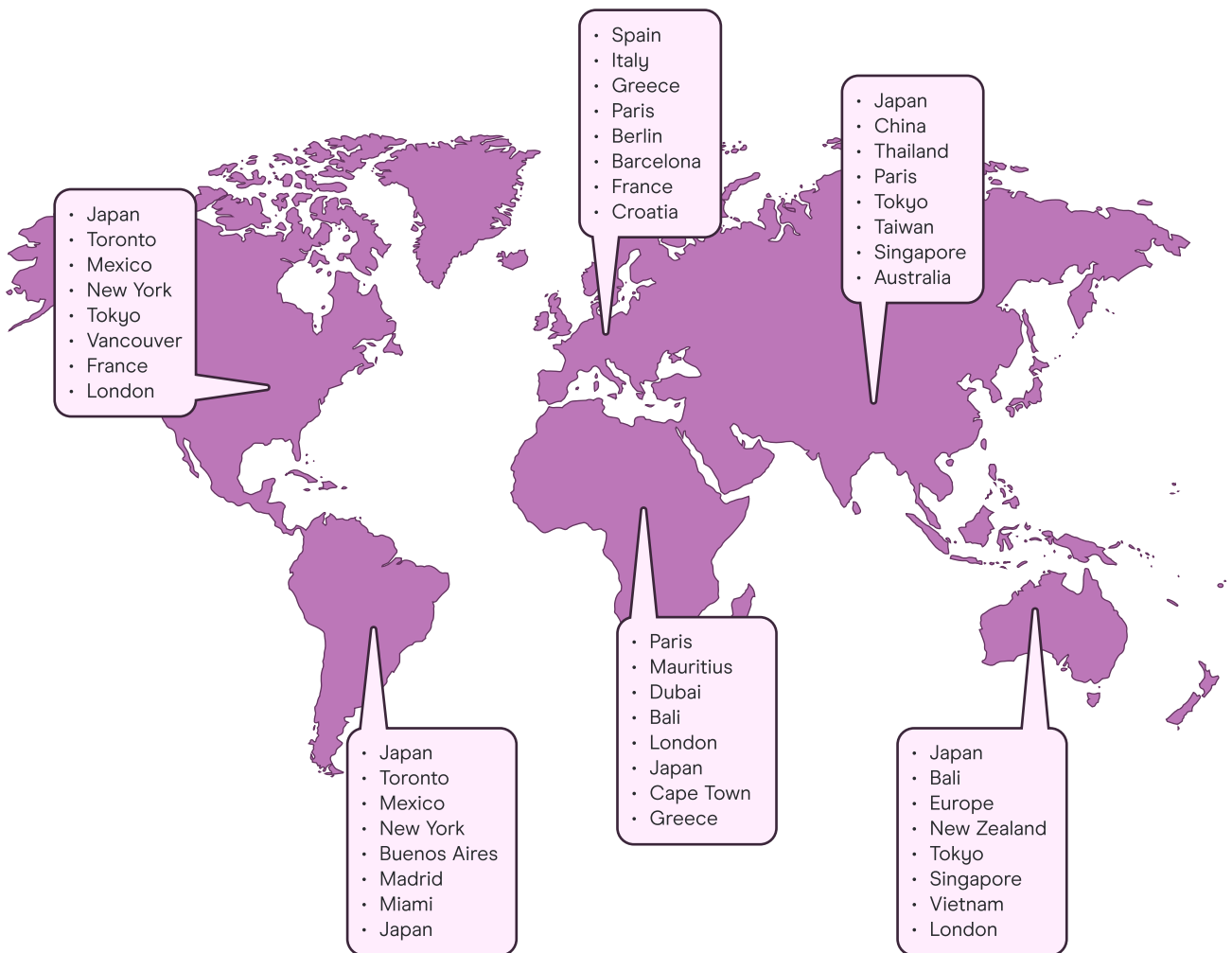
African outbound travellers gravitate toward Paris and Dubai, with Bali and Greece emerging as newer aspirational destinations alongside more established flows to London and Cape Town. The presence of Mauritius , an intra-African destination , in second place reflects the region's strong intra-continental travel culture among those with the means to travel internationally at all.

Travel Type by Origin Region, Summer 2026

Region	Domestic only	Dom + Intl	Intl only
Europe	28.0%	43.0%	29.0%
North America	63.2%	23.2%	13.6%
Latin America	58.0%	24.1%	17.9%
Asia	55.7%	21.6%	22.7%
Oceania	43.4%	37.1%	19.5%
Africa	35.0%	39.0%	26.0%

Top Intended Destinations by Origin Region, Summer 2026

Region	Top Destinations (by mention frequency)
Europe	Spain, Italy, Greece, Paris, Berlin, Barcelona, France, Croatia
North America	Japan, Toronto, Mexico, New York, Tokyo, Vancouver, France, London
Latin America	Brazil, Rio de Janeiro, Argentina, New York, Buenos Aires, Madrid, Miami, Japan
Asia	Japan, China, Thailand, Paris, Tokyo, Taiwan, Singapore, Australia
Oceania	Japan, Bali, Europe, New Zealand, Tokyo, Singapore, Vietnam, London
Africa	Paris, Mauritius, Dubai, Bali, London, Japan, Cape Town, Greece



3. Connected Everywhere: Staying Online on the Go

3.1 Main Connection Methods

The connectivity picture for summer 2026 is one of accelerating redistribution. Roaming holds its ground as the most-used method overall at 32.8% of planned travellers, up marginally from 31% last summer. But the headline number conceals the structural story: eSIM intention has surged to 28.1%, local SIM cards are falling to 22.4%, and Wi-Fi-only access is declining to 12.3%. The two methods that require the most friction, hunting for a SIM shop or hunting for a reliable hotspot, are losing share to the method that requires the least.

Among travellers who plan to cross at least one international border this summer, eSIM is already the leading connectivity choice. Among those going exclusively abroad, 38.7% plan to use eSIM, outranking roaming at 32.6% and local SIM cards at just 13.2%. Among travellers combining domestic and international travel in the same summer, eSIM and roaming are statistically tied at 36.3% and 36.4% respectively. Taken together, more than one in three travellers heading abroad this summer intends to use eSIM as their primary connectivity method, and with international travel intent growing by 8.8 percentage points year-on-year, that share will only grow.

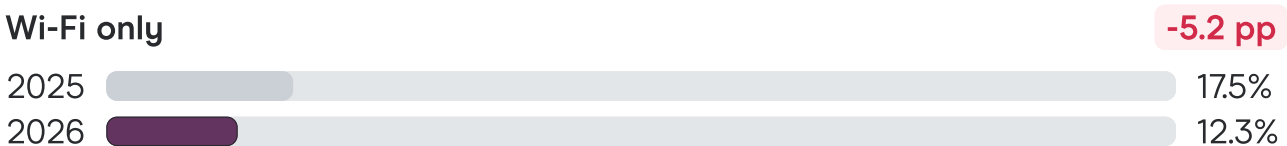
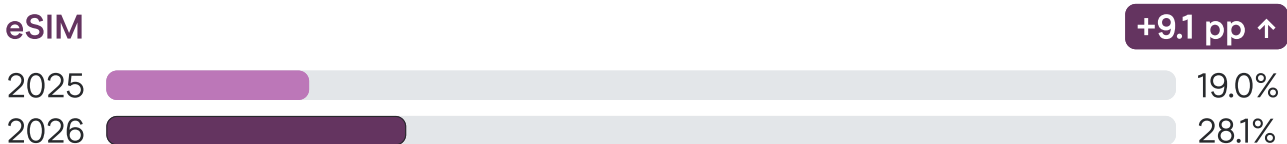
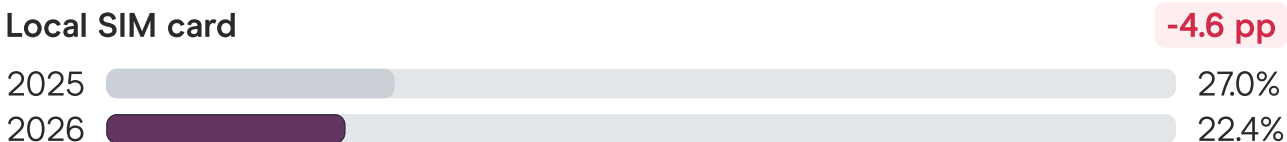
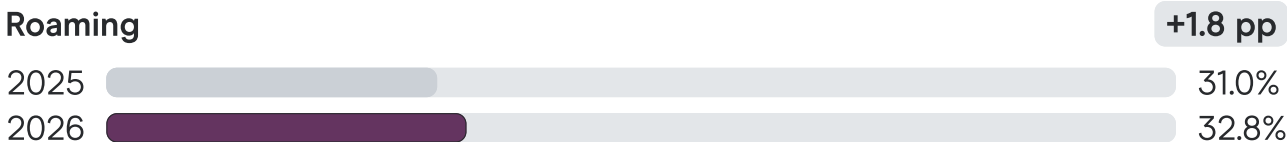
Main Connectivity Method, 2025 vs 2026

Method	2025	2026	Change
Roaming	31.0%	32.8%	+1.8 pp
Local SIM card	27.0%	22.4%	-4.6 pp
eSIM	19.0%	28.1%	+9.1 pp
Wi-Fi only	17.5%	12.3%	-5.2 pp
Pocket Wi-Fi	3.3%	2.1%	-1.2 pp
No internet access	0.8%	0.4%	-0.4 pp

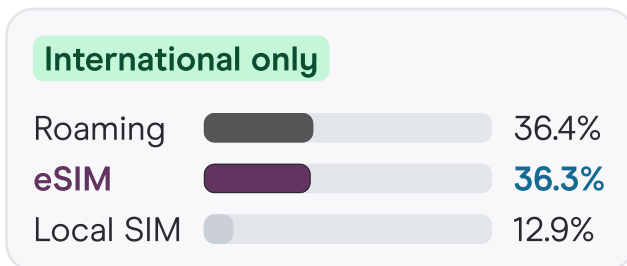
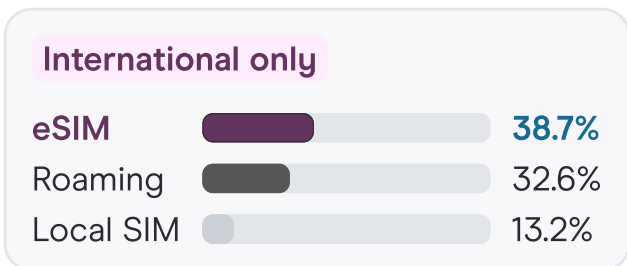
Connectivity by Travel Type, Summer 2026

Travel Type	Top Method	2nd Method	3rd Method
International only	eSIM (38.7%)	Roaming (32.6%)	Local SIM (13.2%)
Domestic + International	Roaming (36.4%)	eSIM (36.3%)	Local SIM (12.9%)

Connectivity Method - 2025 vs 2026



Connectivity By Travel Type - Summer 2026



Among travellers crossing at least one border, **more than 1 in 3 plans to use eSIM** - the top connectivity choice for international-only travellers.

3.2 Connectivity by Age

The generational divide in connectivity is as sharp as the one in destination choice. Under-35s lead eSIM intention by a significant margin: 31.7% of both the 18–24 and 25–34 cohorts plan to use eSIM this summer, making it the top connectivity choice for both groups. The signal becomes even stronger when filtered to international-only travellers: among 25–34 year-olds going exclusively abroad, 46.5% plan to use eSIM, nearly half of the cohort. Among 18–24 year-olds in the same group, the figure is 42.7%. For under-35s who have decided to cross a border this summer, eSIM is already the default, not the alternative.

From 35 onwards the picture shifts. Roaming takes over as the leading method for the 35–44 cohort at 29.2%, and its dominance grows with age, reaching 40.5% among 55–64 year-olds. Wi-Fi-only access becomes more prevalent with each decade, rising from 11.0% among under-25s to 21.6% among 45–54s and 39.6% among 65+, where it becomes the single most common connectivity choice. The 65+ group is the only cohort in the survey where Wi-Fi-only outranks every other method, a pattern that reflects both lower international travel rates and a greater reliance on whatever connectivity happens to be available at the destination, rather than a solution purchased in advance.

The barrier data explains part of the gap. Among 45–54 year-olds who are not planning to use eSIM, the top stated reason is lack of awareness at 37.4%, the only age group where awareness overtakes carrier roaming preference as the primary barrier. These are not people who have evaluated eSIM and decided against it. They are people who have not yet encountered a compelling reason to consider it. For every other age group, carrier roaming habit leads, a behavioural inertia that is harder to shift than an information gap, but equally addressable with the right message.

The stress data adds one further dimension. Prior connectivity stress rates are remarkably consistent across working-age groups, 86.7% among 18–24s, rising to 90.8% among 45–54s, yet the connectivity choices those groups are making diverge sharply. The cohort with the highest stress history is not the cohort with the highest eSIM intention. The same experience of connectivity failure is driving younger travellers toward eSIM and leaving older travellers in the same roaming patterns that caused the stress in the first place. The data does not describe a technology gap. It describes a reach gap.

Connectivity by Age Group, Summer 2026

Age Group	Top Method	2nd Method	3rd Method
18–24	eSIM (31.7%)	Local SIM (27.9%)	Roaming (25.6%)
25–34	eSIM (31.7%)	Local SIM (28.9%)	Roaming (26.5%)
35–44	Roaming (29.2%)	Local SIM (25.6%)	eSIM (24.2%)
45–54	Roaming (35.4%)	Wi-Fi only (21.6%)	eSIM (20.7%)
55–64	Roaming (40.5%)	Wi-Fi only (20.3%)	eSIM (19.6%)

3.4 Connectivity by Region

Global averages flatten the most interesting findings. Beneath the headline eSIM intention figure of 28.1% sit regional planned adoption rates that range from 19.0% in Africa to 40.2% in Oceania. Each region has its own connectivity logic, shaped by regulation, infrastructure, economic context and travel culture.

Oceania leads all regions in eSIM intention at 40.2%, up from a confirmed 31% last summer. Australia alone shows the highest eSIM intention of any single country in the survey at 40.2%. Japan sits at 35.3% eSIM intention, the highest of any Asian market, consistent with the country’s advanced mobile infrastructure. Germany shows 26.3% eSIM intention but still leans heavily on roaming at 42.9%.

Europe’s story remains the most structurally constrained: roaming dominates at 40.9%, driven almost entirely by the EU’s Roam Like at Home regulation. Remove European respondents from the global dataset entirely and roaming drops from first to second place globally, overtaken by local SIM cards. The European Roam Like at Home effect is large enough to reshape the entire global connectivity picture.

Latin America produces the most counterintuitive finding: intended eSIM adoption at 25.9% outpaces Europe’s 21.9%, despite the region’s currency volatility and higher device-incompatibility exposure. Mexico stands out within the region: roaming accounts for just 16.5% of Mexican travellers’ plans, the lowest of any major market, while eSIM sits at 23.7%, suggesting that Mexican travellers, unprotected by any equivalent of Roam Like at Home and exposed to US carrier roaming fees, have found more reason to switch than their European counterparts.

Planned Connectivity Method by Region, Summer 2026

Region	Roaming	eSIM	Local SIM	Wi-Fi only	Pocket Wi-Fi
Europe	40.9%	21.9%	20.8%	14.2%	1.0%
Latin America	22.1%	25.9%	38.2%	12.5%	1.1%
Asia	21.6%	34.5%	24.1%	14.9%	4.0%
North America	32.2%	26.5%	15.1%	21.3%	2.9%
Oceania	14.1%	40.2%	32.4%	11.3%	2.0%
Africa	20.0%	19.0%	32.0%	14.0%	14.0%

eSIM vs Roaming Intention by Country, Summer 2026

Country	eSIM Intention	Roaming Intention
Australia	40.2%	14.1%
Japan	35.3%	22.7%
Canada	30.5%	31.1%
Germany	26.3%	42.9%
Brazil	25.5%	33.1%
USA	24.6%	32.8%
Mexico	23.7%	16.5%
Argentina	22.7%	28.2%
Poland	21.1%	34.2%
United Kingdom	17.1%	45.6%

Regional Connectivity Highlights, YoY

	2025	2026	Change
Oceania, eSIM	31.0%	39.2%	+8.2 pp

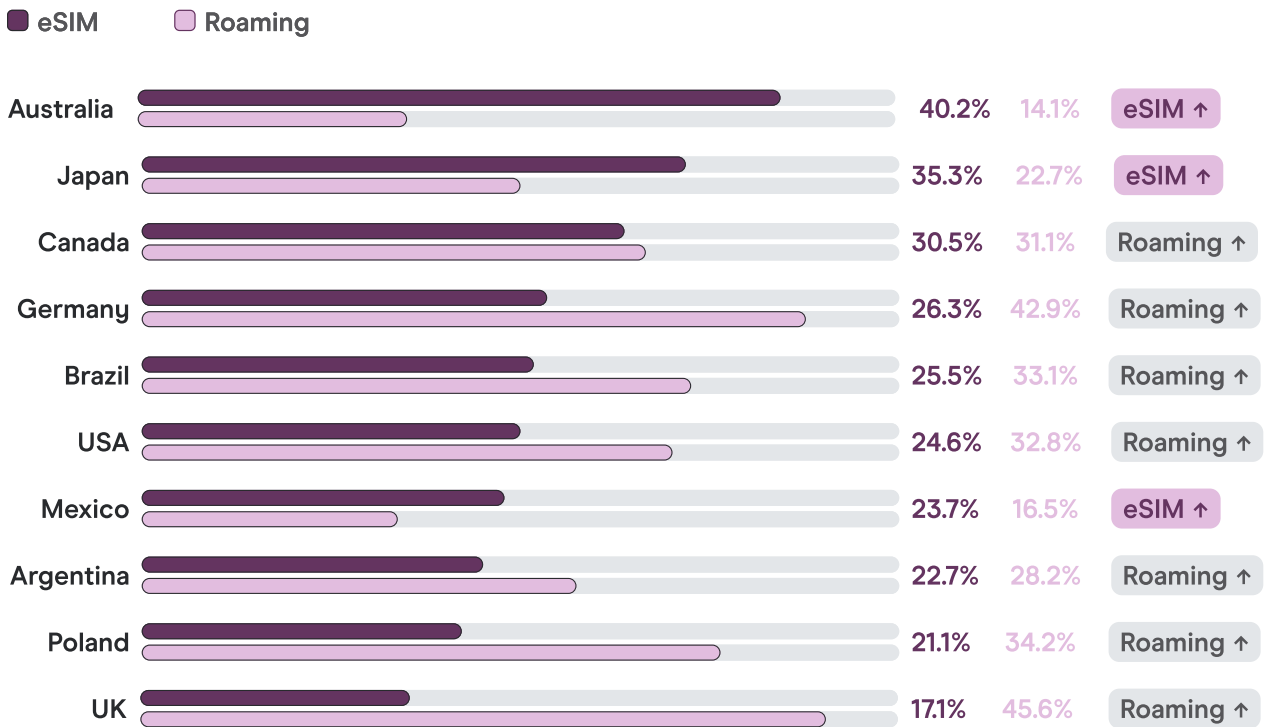
Regional Connectivity Breakdown – Summer 2026

Region	Roaming	eSIM	Local SIM	Wi-Fi only	Pocket Wi-Fi
Europe	40.9%	21.9%	20.8%	14.2%	1.0%
Latin America	22.1%	25.9%	38.2%	12.5%	1.1%
Asia	21.6%	34.5%	24.1%	14.9%	4.0%
North America	32.2%	26.5%	15.1%	21.3%	2.9%
Oceania	14.1%	40.2%	32.4%	11.3%	2.0%
Africa	20.0%	19.0%	32.0%	14.0%	14.0%

Cell colour = dominance within row

■ eSIM
 ■ Roaming
 ■ Local SIM

eSIM vs Roaming by country - Summer 2026



3.5 The Stress Signal

When asked whether they had previously experienced stress from a lack of connectivity while travelling, 91.2% of planned eSIM users said yes, the highest stress rate of any connectivity group. Roaming users follow at 85.3%, local SIM users at 86.3%, and Wi-Fi-only users at 74.6%. The finding is counterintuitive at first glance: why would the people choosing the most advanced connectivity solution also be the most stressed by past connectivity failure? The answer is selection effect. Travellers who have been burned by roaming bills, failed SIM activations or unreliable hotspots are precisely the ones most motivated to find a better solution. Past stress is the conversion trigger. eSIM is the answer they arrived at.

The regional stress data adds further texture. Latin America records the highest traveller stress rate of any region at 22.9%, though this figure reflects only those who reported stress as a proportion of all travellers, not the intensity of that stress. Africa follows at 45.0%, a figure that likely reflects both infrastructural challenges and the complexity of connectivity decisions in markets with less developed eSIM ecosystems. Europe and Oceania record the lowest rates, at 13.0% and 11.3% respectively, consistent with their access to free intra-EU roaming and high eSIM adoption rates.

Prior Connectivity Stress by Method, Summer 2026

Connectivity Method	Previously Stressed
eSIM	91.2%
Local SIM card	86.3%
Roaming	85.3%
Wi-Fi only	74.6%

4. The eSIM Evolution

4.1 From Experiment to Default

In summer 2025, 19% of travellers actually used an eSIM. In May 2026, 28.1% say they plan to. That nine-point gap between last year's confirmed behaviour and this year's stated intentions is the most significant leading indicator in the eSIM adoption story to date, and it becomes more meaningful when you look at what is driving it.

The repeat user figure tells the loyalty story. Among all the respondents planning to use an eSIM this summer, 85.3% have used one before, up from 82% in 2025. This is not a market being driven by novelty or curiosity. It is a market driven by satisfaction. People who tried eSIM last summer are coming back, and they are coming back at a higher rate than before. In a category where the main adoption barrier is awareness rather than reluctance, a repeat rate above 85% is a structural asset.

The first-timer figure tells a different but equally important story. The 13.3% who say this would be their first time is lower than the 18% first-timer share recorded in 2025, not because fewer people are trying eSIM for the first time in absolute terms, but because the overall user base has grown faster than the first-timer cohort. In raw numbers, 95 first-timers in a sample of 714 planned eSIM users represents a meaningful new adoption wave. These are people who have decided to try eSIM without prior experience, on the basis of recommendation, research or growing ambient awareness. Their conversion to repeat users next summer will be the metric to watch.

The multi-country traveller data confirms what the regional and travel-type analysis already suggested: itinerary complexity is the single strongest predictor of eSIM adoption. Among travellers planning more than one destination this summer, 35.4% intend to use eSIM, up from 26% who actually did so last summer, a nine-point gain that directly mirrors the nine-point gain in overall eSIM adoption. These two trends are not running in parallel by coincidence. They are causally linked. A traveller crossing three borders in six weeks has a fundamentally different relationship with connectivity logistics than someone flying to a single resort and staying put.

The international-versus-domestic split is the sharpest expression of this dynamic. Among travellers going exclusively abroad, 38.7% plan to use eSIM, the single highest adoption rate of any segment in the survey. Among domestic-only travellers, that figure falls to 15.7%. The gap between those two numbers, 23 percentage points, is the clearest quantification of eSIM's value proposition in the dataset. Cross a border and the case for eSIM becomes immediately compelling. Stay home and there is no case to make at all.

eSIM Adoption, 2025 vs 2026

Metric	2025	2026	Change
Overall eSIM adoption	19.0%	28.1%	+9.1 pp
First-time eSIM users (of eSIM users)	18.0%	13.3%	-4.7 pp
Repeat eSIM users (of eSIM users)	82.0%	85.3%	+3.3 pp
eSIM among multi-country travellers	26.0%	35.4%	+9.4 pp
eSIM among intl-only travellers	-	38.7%	New metric
eSIM among domestic-only travellers	-	15.7%	New metric

4.2 eSIM Adoption by Age

Under-35s lead planned eSIM adoption by a significant margin: 31.7% of both the 18–24 and 25–34 cohorts plan to use eSIM this summer, making it the top connectivity choice for both groups, ahead of local SIM and roaming. This is not simply a youth effect. It reflects a coincidence of behaviours: under-35s are the most internationally mobile age group, with 57.7% of 18–24s and 58.0% of 25–34s planning to cross at least one border this summer, and the data shows clearly that international travel intent and eSIM adoption move together. Their motivations are also the most activation-driven of any cohort: 63.8% of 18–24 eSIM intenders cite easy activation and 55.9% cite cost savings, the highest rates on both measures across all age groups.

Age Group	Top Method	eSIM Share	Roaming Share	Wi-Fi only Share
18–24	eSIM (31.7%)	31.7%	25.6%	11.0%
25–34	eSIM (31.7%)	31.7%	26.5%	9.5%
35–44	Roaming (29.2%)	24.2%	29.2%	18.2%
45–54	Roaming (35.4%)	20.7%	35.4%	21.6%
55–64	Roaming (40.5%)	19.6%	40.5%	20.3%
65+	Wi-Fi only (39.6%)	14.6%	31.2%	39.6%

From 35 onwards the picture shifts. Roaming takes over as the leading method for the 35–44 cohort at 29.2%, with eSIM second at 24.2% and local SIM third at 25.6%. The gap between eSIM and roaming narrows considerably compared to younger groups, but eSIM is still the second choice, not yet displaced. Among 45–54s, roaming leads at 35.4% and Wi-Fi-only climbs to second place at 21.6%, pushing eSIM to third at 20.7%. The 55–64 cohort shows the most entrenched roaming behaviour of any age group at 40.5%, with Wi-Fi-only at 20.3% and eSIM at 19.6%. The motivations among older eSIM users shift meaningfully: among 55–64 intenders, avoiding roaming fees is cited at 51.6%, the highest rate of any age group on that measure, suggesting that when older travellers do choose eSIM, the financial pain of roaming bills is often what drove them there.

Age Group	Top eSIM Motivation	2nd Motivation
18–24	Easy activation (63.8%)	Cost savings (55.9%)
25–34	Easy activation (61.3%)	Cost savings (54.7%)
35–44	Easy activation (59.6%)	Freedom from Wi-Fi (46.8%)
45–54	Easy activation (52.9%)	Cost savings (52.9%)
55–64	Easy activation (54.8%)	Avoiding roaming fees (51.6%)

The 65+ cohort tells the most unexpected story in the age data. Wi-Fi-only dominates at 39.6%, with roaming second at 31.2% and eSIM at just 14.6%. But among those 65+ travellers who do plan to use eSIM, 42.9% have never used one before, the highest first-timer rate of any age group by a wide margin. Every other cohort shows a first-timer rate below 16%. Read alongside the barrier data, where 33.3% of 65+ non-users cite roaming preference and an equal 33.3% cite lack of awareness, the picture that emerges is not one of rejection. It is one of unreached potential. The small number of 65+ travellers who encounter eSIM appear to convert. The challenge is not convincing them; it is reaching them in the first place.

Age Group	Top Barrier (Non-Users)	2nd Barrier
18-24	Carrier roaming (30.9%)	Lack of awareness (27.4%)
25-34	Carrier roaming (32.0%)	Lack of awareness (27.0%)
45-54	Lack of awareness (37.4%)	Carrier roaming (36.0%)
55-64	Carrier roaming (41.5%)	Lack of awareness (31.4%)
65+	Carrier roaming / Lack of awareness (33.3% each)	Too complicated (13.9%)

The barrier data by age reveals one important divergence between younger and older non-users. Among 18-24 and 25-34 non-users, the top two barriers are carrier roaming preference and lack of awareness, in roughly equal measure. Among 45-54 non-users, lack of awareness actually leads at 37.4%, overtaking carrier roaming at 36.0%, a reversal that suggests older travellers are less likely to have encountered eSIM marketing through their media channels. Among 65+ non-users, carrier roaming and lack of awareness are tied at 33.3% each, with 'seemed too complicated' appearing as the third barrier at 13.9%, the only age group where complexity is prominent enough to rank.

4.3 Why Travellers Plan to Use eSIM

The motivations shaping planned eSIM use have shifted in ways that signal mainstream rather than enthusiast adoption. Easy activation is the most cited reason at 60.1% of intending eSIM users, followed by cost savings at 52.9%, avoiding roaming fees at 42.7%, and freedom from public Wi-Fi dependence at 42.6%. These are not the motivations of early movers. They are the motivations of people who have made a practical calculation and arrived at eSIM as the rational answer. The doubling of 'easy activation' as a stated reason compared to 2025 suggests not that the technology changed overnight, but that the expanding user base now includes people who were genuinely surprised by how straightforward the process was, and who are reporting that surprise as a motivation.

The first-time versus repeat split, however, tells a more nuanced story than the headline suggests. Among the 95 first-time eSIM intenders, easy activation leads at 60.0% and cost savings follows at 56.8%. Among the 609 repeat users, easy activation also leads at 59.9%, almost identically, but freedom from public Wi-Fi climbs to 43.0%, four points higher than among first-timers. Repeat users are not choosing eSIM because they are still impressed by the setup process; they already take that for granted. What grows with experience is the appreciation of being autonomously connected, not dependent on hotel Wi-Fi or café hotspots. The product benefit that converts first-timers into repeat users is not activation ease. It is the lived experience of being free.

The regional breakdown is where the motivations data becomes most commercially instructive, because each region tells a different story about why its travellers are choosing eSIM, and those differences map directly onto the connectivity conditions they face at home.

Europe is the only region where cost savings outranks easy activation as the primary motivation: 60.1% versus 55.5%. The reason is structural. European travellers already have effectively free roaming within the EU through Roam Like at Home. When they choose eSIM, they are almost by definition heading outside EU territory, to Japan, the US, Southeast Asia, where roaming bills can be severe. For these travellers, eSIM is not about convenience versus their carrier. It is about avoiding a bill that their carrier cannot protect them from. Cost is not just a motivation; it is the trigger.

Main Reasons for Choosing eSIM, 2025 vs 2026

Reason	2025*	2026**	Direction
Easy activation	29.0%	60.1%	↑ Strongest growth
Cost savings	26.0%	52.9%	↑
Freedom from public Wi-Fi	25.0%	42.6%	↑
Avoiding roaming fees	20.0%	42.7%	↑

* 2025: Single-choice responses. ** 2026: Multi-select responses.

North America shows the highest rate of 'avoiding roaming fees' of any region at 52.9%, closely followed by 'freedom from public Wi-Fi' at 50.4%. Both figures reflect the US and Canadian carrier landscape, where international roaming fees remain high and corporate data plans often provide no international coverage. American and Canadian eSIM adopters are, more than any other cohort, choosing eSIM as a direct response to a pricing problem they have personally experienced. The 'freedom from Wi-Fi' figure is equally telling: in a market where many travellers have historically relied on hotel and café connections abroad, the desire for autonomous connectivity is strong.

Asia produces the most striking single data point in the motivations dataset: easy activation at 76.7%, the highest of any region by more than 15 points. In markets like Japan, South Korea and Singapore, where smartphone penetration is extremely high and digital fluency is near-universal, the frictionlessness of eSIM setup resonates with particular force. The 'avoiding roaming fees' motivation is the lowest of any region at 28.3%, suggesting that Asian eSIM adopters are not primarily driven by pain avoidance but by the positive experience of a product that simply works the way technology is supposed to work.

Latin America's profile sits between Europe and Asia: easy activation leads at 58.6%, but freedom from public Wi-Fi is notably high at 51.0%, the second highest of any region after North America. In markets where reliable public connectivity is less consistent and data security concerns are higher, the ability to travel with your own private connection carries particular weight.

Motivation	Europe	North America	Latin America	Asia	Oceania	Global
Easy activation	55.5%	50.4%	58.6%	76.7%	58.3%	60.1%
Cost savings	60.1%	41.3%	51.7%	56.7%	54.4%	52.9%
Avoiding roaming fees	48.6%	52.9%	37.2%	28.3%	46.6%	42.7%
Freedom from Wi-Fi	35.3%	50.4%	51.0%	37.5%	39.8%	42.6%

4.4 Barriers to eSIM Adoption

The direct survey data on eSIM barriers reveals a picture somewhat different from the YoY summary figures cited elsewhere. The most cited reason for not planning to use an eSIM is carrier roaming at 33.5%, not device incompatibility. This distinction matters. In Europe, not adopting eSIM is not a failure of awareness or technology; it is a rational response to a regulatory environment that makes roaming the cheapest and most convenient option for the majority of intra-EU trips. Device incompatibility, often assumed to be the primary barrier, ranks fourth globally at 11.2%, well behind carrier roaming preference, lack of awareness and physical SIM preference. The barrier landscape is more behavioural and less technical than commonly assumed.

The 29.9% who say they simply did not know about eSIMs is the most commercially actionable finding in the barriers data. These are not people who evaluated eSIM and declined. They are people who have never encountered a compelling reason to consider it. The barrier is not scepticism; it is reach. And reach is solvable. The 8.3% who cite perceived complexity and the 1.2% who cite distrust of the technology together represent a small and declining minority, a reminder that the technology itself is no longer the obstacle for most non-adopters.

The regional breakdown maps the conversion strategy almost precisely. In Europe, carrier roaming leads by a wide margin: the value proposition for eSIM needs to be built around trips outside EU territory, where Roam Like at Home does not apply and roaming bills can be severe. In North America and Latin America, lack of awareness leads, these are markets where marketing and education investment will yield the highest conversion rates. In Asia and Oceania, carrier roaming preference and physical SIM preference appear as the top two barriers, suggesting a product familiarity challenge rather than a pricing or awareness one.

According to the YoY summary data, 72.4% of non-eSIM users say they would consider using eSIM in the future. That figure, read against the barrier breakdown, defines the shape of the opportunity: a large majority of non-users are not opposed to the technology. They are either in a regulatory environment that makes their current method rational, unaware that a better option exists, or attached to the familiarity of a physical SIM. None of these barriers is permanent.

The no-internet segment is small, just 24 respondents, or 0.4% of planned travellers, but the data within it is editorially interesting. Of those who plan to travel without any internet access, 52.2% cite disconnection as a deliberate choice, 26.1% say they are simply unaware of available options, and 21.7% are driven by cost. The digital detox motivation is not just real; it is the dominant reason people go offline. More than half of the no-internet cohort is making an active choice to be unreachable, not being forced offline by budget or ignorance. That is a different kind of traveller entirely, and one who, by definition, is unlikely to be converted by any connectivity product, eSIM or otherwise.

Barriers to eSIM Adoption, Direct Survey Data, Non-eSIM Intenders

Barrier	Global Share
I use my carrier's roaming	33.5%
I didn't know about eSIMs	29.9%
I prefer a physical SIM card	16.0%
My phone is not compatible	11.2%
It seemed too complicated	8.3%
I don't trust the technology	1.2%

Top Barrier to eSIM by Region, Summer 2026

Region	Top Barrier	2nd Barrier
Europe	Carrier roaming (EU regulation effect)	Lack of awareness
North America	Lack of awareness	Carrier roaming
Latin America	Lack of awareness	Carrier roaming
Asia	Carrier roaming	Prefer physical SIM
Oceania	Carrier roaming	Prefer physical SIM

Why Travellers Choose Not to Have Internet Access, Summer 2026

Reason	Share
Cost reduction	38.2%
Digital detox	34.9%
Dependence on hotel / public Wi-Fi	18.5%
Security / privacy concerns	8.4%

“Twenty-eight per cent planning to use eSIM before the summer even starts is a different kind of data point from nineteen per cent who actually used it last August. One is a trailing indicator. The other tells you where the market is going. When you see a nine-point swing in intentions in a category that is already at scale, you pay attention.”

Chris Hills, VP of Carriers at Holafly

5. Green Connections: Sustainability in Focus

5.1 A Growing Consideration

Sustainability is the trend with the largest gap between aspiration and action, and the 2026 data captures that gap precisely. Among all the respondents planning to use an eSIM this summer, 24.1% say sustainability will be an important factor in their connectivity choice, 39.2% say they will consider it without it being decisive, 22.8% say they are not influenced by it, and 13.9% were not aware that different connectivity options carry different environmental footprints. The combined consideration rate of 63.3%, nearly two thirds of planned eSIM users, is a striking finding, and the 13.9% unawareness figure represents a directly addressable opportunity: travellers who have not yet connected sustainability to their connectivity decision, but who, once informed, may factor it in.

The most striking finding in this section, however, is the business travel split. Among planned eSIM users who are also travelling for work this summer, 39.6% say sustainability is an important factor in their connectivity choice, and the combined consideration rate reaches 74.7%. Among leisure eSIM users those figures fall to 18.8% and 59.4% respectively. The gap, nearly 21 percentage points on the 'important' measure, is the largest sustainability divergence in the entire dataset. Business travellers who choose eSIM are not doing so only for security or billing transparency. A significant portion are making an environmentally aware choice. For Holafly's corporate proposition, this is a commercially valuable signal: the B2B eSIM customer is not just more productive and less stressed than the self-managed traveller. They are also more likely to value the sustainability dimension of the product.

The first-time versus repeat user split, by contrast, is surprisingly flat. First-time eSIM users show a combined consideration rate of 64.2%, versus 63.1% for repeat users, a gap of barely one percentage point. Neither the motivated early adopter nor the pragmatic mainstream newcomer is significantly more or less likely to factor in the environmental dimension. Sustainability awareness, in the eSIM user population, is evenly distributed regardless of experience level.

Sustainability Influence on Connectivity Choice, eSIM Intenders, Summer 2026

Response	Share (eSIM Intenders)
Yes, it will be important	24.1%
I will consider it, but it won't be a key factor	39.2%
No, it will not influence me	22.8%
I wasn't aware of sustainability differences	13.9%

5.2 Who Cares Most, and Where

The age breakdown reveals a more nuanced picture than a simple under-45 vs over-45 split. The combined sustainability consideration rate (important + considering) is highest among 18–24 year-olds at 67.1%, followed by 25–34 year-olds at 65.0%. But the 45–54 cohort records 58.8%, not dramatically lower, while the steepest drop occurs at 65+, where only 42.9% consider sustainability at all. The generational story is real, but it is concentrated in the 65+ cohort rather than representing a clean young-vs-old divide across all age groups.

The regional picture is the most commercially interesting dimension of the sustainability data. Asia leads all regions with 35.8% of eSIM intenders saying sustainability is important, and a combined consideration rate of 77.5% including those who will consider it. Latin America follows at 26.2% important and 71.0% combined. Europe and North America trail significantly, Europe at 16.8% important and 59.0% combined, North America at 17.4% important and 44.6% combined. The finding that the regions with the lowest incomes are the most sustainability-conscious is consistent with broader consumer behaviour research: when environmental consequences are more proximate and visible, sustainability salience in purchasing decisions tends to be higher. The unawareness rates reinforce this reading: North America records the highest unawareness among eSIM users at 18.2%, while Asia records the lowest at 11.7%, the region that leads on sustainability consideration also understands best that connectivity choices carry an environmental dimension.

Sustainability Consideration by Age, Summer 2026 (eSIM Intenders)

Age Group	Important	Will Consider	Combined	Not Influenced
18–24	25.0%	42.1%	67.1%	32.9%
25–34	23.7%	41.3%	65.0%	35.0%
35–44	24.4%	36.5%	60.9%	39.1%
45–54	26.5%	32.4%	58.8%	41.2%
55–64	16.1%	38.7%	54.8%	45.2%
65+	28.6%	14.3%	42.9%	57.1%

Sustainability Consideration by Region, Summer 2026 (eSIM Intenders)

Region	Important	Will Consider	Combined	Not Influenced
Asia	35.8%	41.7%	77.5%	10.8%
Latin America	26.2%	44.8%	71.0%	15.9%
Oceania	21.4%	35.9%	57.3%	27.2%
Europe	16.8%	42.2%	59.0%	27.2%
North America	17.4%	27.3%	44.6%	37.2%

5.3 The Paradox That Remains

The honest reading of this data is that cost and convenience will still dominate the moment of decision for the majority of travellers this summer, regardless of what they said in May. **The travel type breakdown makes the paradox concrete: domestic eSIM users show the highest combined sustainability consideration at 65.8%, while international-only eSIM users, whose trips carry the largest footprint, show the lowest at 62.8%. The gap is only three percentage points, but the direction is consistent across every cut of the data. The journeys with the largest environmental impact remain the ones where sustainability is least present at the moment of decision.**

Travel Type	Important	Combined	Not Influenced
Domestic only	25.1%	65.8%	20.9%
International only	20.6%	62.8%	22.9%
Domestic + International	26.0%	62.2%	24.0%

The structural case for optimism, however, does not depend on travellers consciously choosing green. Research by Carbon Trust indicates eSIM technology can reduce emissions by up to 87% compared to physical SIM cards by eliminating plastic and shipping. As eSIM adoption grows for entirely practical reasons, cost, ease, multi-destination flexibility, the environmental benefit accrues automatically. The question of whether travellers are choosing eSIM for green reasons is, in one sense, beside the point. The outcome is the same either way.

6. Work in Motion: Business Travel

6.1 The Rise of Bleisure

One in four planned trips this summer has a professional purpose. The 24.9% of respondents who say they are travelling for work compares to a confirmed 19.6% in summer 2025, a five-point increase that would, if confirmed at the end of the season, represent the largest single-year growth in business travel in Holafly's survey history. The 25–34 age group accounts for 39.6% of all planned business trips, with 35–44 year-olds adding a further 27.1%, bringing the combined 25–44 share to 66.7% of all intended business travel. The 45+ group's share has fallen from 23.7% to 16.1% in a single year, a generational handover that is reshaping not just who travels for work, but what they expect when they get there.

The regional distribution is equally telling. Asia records the highest business travel rate of any region at 30.2% of planned trips, nearly double Oceania's 14.5% and well above Europe's 15.6%. Latin America follows at 24.6% and North America at 21.7%. Asia's dominance is consistent with its age profile, high proportions of working-age under-35s combined with a strong professional travel culture, but the productivity data adds a further dimension: Asian business travellers expect a positive productivity impact from good connectivity at 80.0%, the highest of any region by a wide margin and 28 points above Oceania's 48.6%. Asia is not simply the region with the most business travel. It is the region where connectivity is most directly tied to professional performance expectations. For connectivity providers, Asia's combination of 30.2% business travel rate, 34.5% eSIM intention and 80.0% positive productivity expectation represents the clearest commercial convergence in the dataset.

Business Travel, 2025 vs 2026

Metric	2025	2026	Change
Trips with professional purpose	19.6%	24.9%	+5.3 pp
25–44 age group share of biz travel	65.0%	69.8%	+4.8 pp
Under 25 share of biz travel	11.3%	14.1%	+2.8 pp
45+ share of biz travel	23.7%	16.1%	-7.6 pp

Business Travel Rate by Region, Summer 2026

Region	Business Travel Rate
Asia	30.2%
Latin America	24.6%
North America	21.7%
Europe	15.6%
Oceania	14.5%

6.2 How Business Travellers Plan to Stay Connected

The majority of planned business travellers still expect to manage their own connectivity this summer, with 53.4% self-managing, a figure that is broadly stable against last summer's confirmed 50.3%. Company SIM and roaming provisioning is expected to fall sharply from 32.7% to 25.4%, while company-provided eSIM rises from a confirmed 15.6% to a planned 21.2%, a 5.6-point gain that is the single largest shift in the corporate connectivity landscape. Among business travellers making their own connectivity choice, eSIM leads at 31.4%, ahead of local SIM at 26.4% and roaming at 25.9%, the first time eSIM has topped the personal connectivity preference ranking for this cohort.

The regional breakdown of company eSIM adoption reveals a striking divergence. North America leads all regions at 29.3% of business travellers equipped with company eSIM, nearly double Oceania's 13.5% and significantly above Europe's 17.1%. The pattern maps almost exactly onto the roaming fee landscape: US and Canadian business travellers face some of the highest international roaming costs of any developed market, and their employers have responded faster than those in regions where regulatory protections (Europe's Roam Like at Home) or lower roaming tariffs reduce the financial urgency. Latin America, despite its high business travel rate, shows the lowest company eSIM adoption at 15.9%, a gap that likely reflects both the cost of corporate technology investment in the region and the prevalence of self-managed solutions among Latin American professionals.

Business Travel Connectivity, 2025 vs 2026

Method	2025	2026	Change
Self-managed	50.3%	53.4%	+3.1 pp
Company SIM / roaming	32.7%	25.4%	-7.3 pp
Company eSIM	15.6%	21.2%	+5.6 pp

Connectivity Method Among Business Travellers, Summer 2026

Method	Share
eSIM	31.4%
Local SIM card	26.4%
Roaming	25.9%
Wi-Fi only	10.9%
Pocket Wi-Fi	5.2%

6.3 Productivity, Wellbeing and the Stress Signal

Among all the respondents planning business trips this summer, 60.8% expect reliable connectivity to positively impact their productivity, 24.7% say it probably will not, 8.5% expect a negative impact, and 6.0% are unsure. The aggregate, however, conceals the most commercially important finding in the chapter: the differential by provision type. Business travellers whose company provides an eSIM expect positive productivity impact at 81.3% and negative impact at only 5.7%. Self-managed travellers show 52.4% positive and 10.0% negative. That 28.9-point gap quantifies, in productivity confidence terms, what employer eSIM provisioning is worth. Company SIM and roaming sits between the two at 61.2% positive, better than self-managed, but 20 points behind company eSIM.

Productivity Impact by Company Provision Type, Summer 2026

Provision Type	Positive Impact Expected	Negative Impact Expected
Company eSIM	81.3%	5.7%
Company SIM / roaming	61.2%	7.5%
Self-managed	52.4%	10.0%

The regional productivity picture reinforces Asia's commercial significance. At 80.0% positive expectation, Asian business travellers lead every other region by a margin that goes well beyond statistical noise, 28 points above Oceania, 29 points above Europe. This is not simply a reflection of Asia's younger age profile. It reflects a professional culture in markets like Japan, South Korea and Singapore where digital connectivity is deeply integrated into how work gets done on the road, and where expectations of what reliable data access should deliver are correspondingly high. Europe and North America, at 51.2% and 52.5% respectively, sit at almost exactly the global average, suggesting that Western business travel cultures have lower baseline expectations of what connectivity can contribute to a working trip.

The age dimension adds one important anomaly. The 45–54 cohort shows the lowest positive productivity expectation of any working-age group at 44.6%, below every other age bracket, including 18–24s at 63.3%, 25–34s at 64.2% and even 55–64s at 64.3%. This cohort also records the highest stress rate from prior connectivity failure at 90.8%. The combination, highest historical stress, lowest forward-looking confidence, suggests a group that has been most damaged by poor connectivity experiences and has been least successful at finding solutions. They are precisely the cohort that company-provisioned eSIM is best positioned to serve, and precisely the cohort currently least likely to have it.

Business Traveller Prior Stress by Age

Age Group	% Previously Stressed
18–24	86.7%
25–34	86.9%
35–44	87.3%
45–54	90.8%
55–64	67.9%

Connectivity Impact on Productivity, 2025 vs 2026

Impact	2025	2026	Change
Yes, positively	57.4%	60.8%	+3.4 pp
Probably not	27.9%	24.7%	-3.2 pp
Yes, negatively	13.2%	8.5%	-4.7 pp
Not sure	-	6.0%	New metric

Behind all these forward-looking expectations sits a stress dataset that should concern any employer with a mobile workforce. Across every working-age group bar 55–64, more than 86% of planned business travellers have previously experienced stress from connectivity failure while travelling. Latin American business travellers record the highest stress rate at 92.8%, followed by Asia at 87.6% and Europe at 83.7%. For nearly nine in ten planned business travellers under 55, poor data access on the road is not a theoretical risk. It is a lived memory, and one that the provision type data shows is directly addressable.

Business Traveller Stress by Region

Region	% Previously Stressed
Latin America	92.8%
Asia	87.6%
Europe	83.7%
North America	82.8%
Oceania	78.4%

6.4 What Business Travellers Value Most

The connectivity priorities of business travellers diverge sharply from leisure eSIM adopters, and they diverge further still depending on whether the company is paying. Security leads overall at 41.7%, almost the inverse of the consumer motivation picture where easy activation dominates. Speed and coverage follow at 31.8%, with no personal cost third at 14.0% and hassle-free activation fourth at 10.7%. But those global averages mask a meaningful split by provision type that maps directly onto where accountability sits.

Among self-managed business travellers, security and speed are nearly tied at 37.3% and 35.1% respectively, the pragmatic priorities of someone who is making their own decision and bearing their own cost. The moment the company steps in and provides a SIM card or roaming plan, security pulls ahead at 42.2% and speed drops to 32.7%, accountability has shifted, and the employee's expectations shift with it. When the company provides an eSIM specifically, security surges to 52.0%, the highest of any provision type, while speed drops further to 22.8% and hassle-free activation climbs to 16.3%. Company eSIM users are not simply more security-conscious. They are expressing the expectation that when their employer makes a digital-first choice on their behalf, data protection is the non-negotiable minimum.

The regional picture adds one important nuance. Latin America is the only region where speed and coverage leads over security as the top business connectivity priority at 44.2%, compared to security at 36.2%. In markets where infrastructure reliability is less consistent and network quality varies significantly between locations, having a connection that simply works everywhere is a more immediate concern than whether it is protected from data interception. The priority hierarchy is not universal. It is shaped by the infrastructure context travellers have learned to navigate.

Every other region, North America (46.5%), Asia (47.6%), Europe (35.0%) and Oceania (38.9%), puts security first. For all of them, the corporate eSIM pitch is not about speed or ease. It is about trust.

What Business Travellers Value Most in Connectivity, 2025 vs 2026

Priority	2025	2026	Change
Speed & coverage	73.6%	76.9%	+3.3 pp
Security	62.2%	68.5%	+6.3 pp
Easy activation	40.5%	44.8%	+4.3 pp
Transparent billing / no personal cost	34.5%	38.9%	+4.4 pp
Responsive support	17.6%	52.4%	+4.5 pp

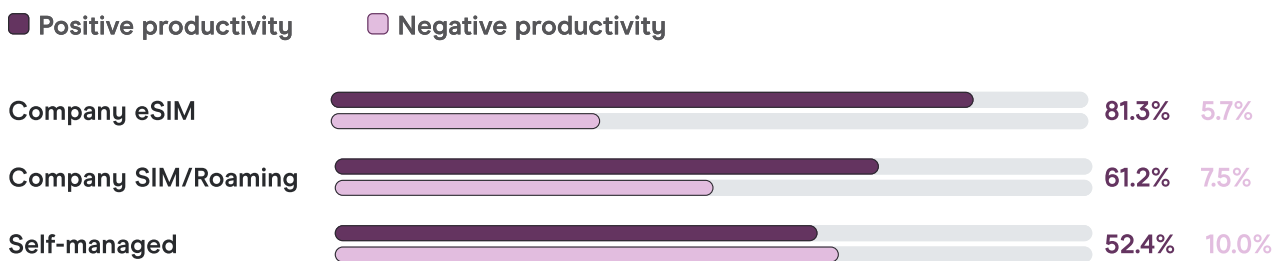
Priority	Self-managed	Company SIM/Roaming	Company eSIM
Secure connection	37.3%	42.2%	52.0%
Speed and coverage	35.1%	32.7%	22.8%
No personal cost	14.6%	18.4%	7.3%
Hassle-free activation	11.7%	4.1%	16.3%
Responsive support	1.3%	2.7%	1.6%

Region	Top Priority	2nd Priority
North America	Secure connection (46.5%)	Speed & coverage (22.2%)
Asia	Secure connection (47.6%)	Speed & coverage (29.5%)
Europe	Secure connection (35.0%)	Speed & coverage (26.0%)
Oceania	Secure connection (38.9%)	Speed & coverage (27.8%)
Latin America	Speed & coverage (44.2%)	Secure connection (36.2%)

“When 86% of the people you’re sending on business trips this summer have previously been stressed by bad connectivity, that’s not an infrastructure question anymore. That’s a duty-of-care question. The companies treating eSIM as a logistics upgrade are missing the point. It’s an employee wellbeing upgrade.”

Alex Bryszkowski, VP of Holafly for Business

Productivity Expectations & Stress - By Company Provision Type



Company eSIM gap vs self-managed
+28.9 pp
 in positive productivity expectation

Company eSIM - security priority
52.0%
 vs 37.3% self-managed

Overall stress rate
+8.2 pp
 of business travellers

7. From Pain Points to Power Plays

For years, the way employees stayed online during work trips was treated as a secondary detail, something individuals solved on their own with roaming plans, airport SIM shops or hotel Wi-Fi. The 2026 data shows this is changing, but not fast enough. More than half of planned business travellers still expect to manage their own connectivity this summer. They will do so pragmatically: choosing whatever is fastest to set up, cheap enough, and reliable enough to get by. But the data also shows what happens when connectivity fails: stress rates above 86% across every working-age cohort, and a 28.9-point gap in positive productivity expectations between those equipped with company eSIM and those left to manage their own. That gap is not an abstraction. It is the accumulated value of getting the provisioning decision right.

The companies stepping in with provisioned solutions, particularly eSIM, are not simply solving a logistics problem. They are addressing a wellbeing one. Company-provided eSIM is now planned by 21.2% of business travellers, and the expectations that come with it are distinctly higher than those of self-managed travellers. Security rises sharply as a priority when the employer provides the solution, as does responsive support. This makes intuitive sense: when the company chooses the tool, the employee expects the company to guarantee it works. And the data shows that when eSIM is the company’s choice, employees’ confidence in their own productivity rises to 81.3%, the highest of any provision type by nearly 20 points.

The strategic implication is clear. Companies moving decisively toward eSIM-based solutions can satisfy all three core demands simultaneously: the convenience that self-managed travellers optimise for, the security that corporate IT requires, and the transparency that removes the most persistent source of post-trip friction. The organisations moving fastest will not only reduce costs; they will differentiate their employer proposition at a moment when the 25–44 cohort, which accounts for two thirds of all business travel, has higher expectations of mobile-work infrastructure than any generation before it.

What is at stake is bigger than internet access. Providing secure, seamless and fair digital access signals investment in both productivity and wellbeing. Neglecting it risks frustration, disengagement and, in an era where employer brand is increasingly scrutinised, reputational damage. In a world where business, leisure and bleisure blend together, connectivity on the road is becoming a proxy for how much a company actually values the people it sends into it.

Business Travel, 2025 vs 2026

Metric	2025	2026	Change
Trips with professional purpose	19.6%	24.9%	+5.3 pp
25–44 age group share of biz travel	65.0%	69.8%	+4.8 pp
Under 25 share of biz travel	11.3%	14.1%	+2.8 pp
45+ share of biz travel	23.7%	16.1%	–7.6 pp

8. What This Means for Summer 2026 and Beyond

If the intentions expressed in this May 2026 survey convert at anything close to their stated rate, summer 2026 will be the most internationally ambitious, most digitally connected and most eSIM-heavy travel season on record. Travel participation is up, international share is up, multi-destination complexity is up, eSIM intention is up, business travel is up, sustainability consideration is up. These are not isolated signals. They are mutually reinforcing trends, each making the others more likely to confirm. The travellers planning the most ambitious itineraries are the same people choosing eSIM, travelling for work, and expecting their employers to provision their connectivity. It is the same demographic expressing the same set of values across every dimension of the survey.

The productivity differential between provision types is the most commercially actionable finding in this year's report. The 28.9-point gap between company-eSIM and self-managed travellers in positive productivity expectations quantifies, in concrete terms, what employer eSIM provisioning is worth. Corporate eSIM provisioning is planned at 21.2% of business trips this summer, up from a confirmed 15.6% in 2025. If that confirms, more than one in five business travellers will have been equipped with employer-provided eSIM, and the self-managing majority will represent the last majority rather than a permanent one. The companies accelerating toward provisioned eSIM in the next twelve months are not optimising a travel expense line. They are making a talent and wellbeing investment at a moment when 86%+ of their mobile workforce carries documented prior experience of connectivity-induced stress.

The longer horizon question is whether the intentions data here represents the high-water mark of a normalising adoption curve, or the beginning of a steeper climb. The corrected barrier data suggests the latter. Carrier roaming preference, the largest single barrier at 33.5%, is largely a European regulatory phenomenon that will not disappear quickly. But the second barrier, lack of awareness at 29.9%, is directly addressable. And the 72.4% of non-eSIM intenders who say they would consider switching, combined with a first-timer stress conversion rate of 91.2%, defines a conversion pool that is large, reachable and already motivated. If those conditions hold, the 28.1% planned eSIM share of summer 2026 will look, in retrospect, like the moment the technology stopped being an alternative and started being the default.

"We are entering a summer where digital access is not just about being connected, but about empowering travellers to move with freedom, confidence and purpose. The data tells us that the people planning the most ambitious trips, multiple countries, international borders, complex itineraries, are exactly the people most likely to choose eSIM. That convergence is not a coincidence. It is the market finding its logic."

Pedro Maiquez, co-founder & VP of Brand at Holafly

9. Methodology

Aquí tienes la metodología completa y definitiva:

9. Methodology

This report is based on a primary survey of 3,048 respondents, all of whom completed the questionnaire in full. The survey was conducted over two days, 4 and 5 May 2026, capturing travel intentions for the June–August 2026 summer season ahead of the peak booking period. All 3,048 responses are classified as completed; no partial responses are included in the analysis.

Respondents were recruited exclusively through Prolific, an independent academic-grade research platform used widely in peer-reviewed social science and consumer behaviour research. Prolific's panel is pre-screened for demographic diversity and response quality; all participants are verified adults who have consented to take part in research studies. No Holafly customer data was used in the recruitment process for either the 2025 or the 2026 survey. This approach eliminates self-selection bias and produces findings representative of the broader travelling population rather than any provider's existing user base. The survey was available in five languages, English, Spanish, German, Japanese and Korean, with all responses translated and standardised before analysis to allow accurate cross-market comparison.

Age Group	n	Share
18–24	566	18.6%
25–34	1,089	35.7%
35–44	739	24.2%
45–54	396	13.0%
55–64	199	6.5%
65+	59	1.9%

Geographic coverage. The survey reached respondents from 87 countries. Regional groupings follow standard geographic conventions; respondents not assignable to the six primary regions (Europe, Latin America, North America, Asia, Oceania and Africa) are classified as 'Other' and included in global totals but excluded from regional breakdowns. The regional distribution of the final sample was: Europe 29.1% (n=886), Latin America 21.1% (n=642), North America 18.4% (n=560), Asia 13.9% (n=425), Oceania 10.4% (n=318), Africa 3.5% (n=106) and Other 3.6% (n=111). The 15 largest origin markets are detailed in the table below.

Age distribution. The 25–34 cohort is the largest at 35.7% (n=1,089), followed by 35–44 at 24.2% (n=739) and 18–24 at 18.6% (n=566). The 45–54 cohort accounts for 13.0% (n=396), 55–64 for 6.5% (n=199), and 65+ for 1.9% (n=59). Findings for the 65+ group should be interpreted with caution given the small base size.

Non-travel reasons. The 444 respondents not planning to travel were asked an open-ended question about their primary reason. All responses were reviewed and categorised manually across five languages into five themes: financial constraints, work or time commitments, personal circumstances, seasonal preference, and other. Financial constraints emerged as the dominant category at 54.1% of categorised responses.

Question routing and valid bases. The survey used conditional routing throughout. All 3,048 respondents answered the travel participation question. The 2,604 who said they planned to travel (85.4%) were routed to questions on destination, connectivity method and business travel. The 444 non-travellers (14.6%) were routed to questions on reasons for not travelling. eSIM-specific questions, including prior eSIM experience, sustainability consideration and future eSIM consideration, were shown only to the 714 respondents planning to use an eSIM (27.4% of the travelling cohort). Business travel questions, including company connectivity provision, productivity expectations and connectivity priorities, were shown only to the 579 respondents planning to travel for work (22.2% of the travelling cohort). eSIM barrier questions were shown to the 1,703 non-eSIM travelling respondents. All percentages in this report are calculated on the valid base for each question, not on the total sample of 3,048 unless explicitly stated.

Destination data. Destination preferences were collected through an open-response field. The survey produced 3,137 destination mentions across 1,477 unique raw values before normalisation. These were manually reviewed, normalised for spelling variants and transliterations across five languages, and deduplicated before analysis. Country-level and city-level mentions were counted separately; where respondents named a region rather than a specific country or city, responses were categorised to the most appropriate geographic unit. Rankings reflect relative mention frequency within the international traveller cohort only.

Regional Group	n	Share
Europe	886	29.1%
Latin America	642	21.1%
North America	560	18.4%
Asia	425	13.9%
Oceania	318	10.4%
Africa	106	3.5%
Other	111	3.6%

Year-on-year comparisons. All 2026 data represents stated intentions, not confirmed post-season behaviour. Year-on-year comparisons are made against Holafly's Summer 2025 survey of 980 respondents, also conducted via Prolific, in August 2025 following the summer season. That survey captured confirmed behaviour retrospectively. The temporal distinction, 2026 pre-season intentions versus 2025 post-season actuals, is the most important methodological caveat in this report and is preserved throughout. Directional findings are considered reliable leading indicators; absolute figures will not be fully validated until the equivalent post-season survey is conducted in August 2026.

Methodological notes on specific chapters. The sustainability question (Chapter 5) was shown only to the 714 planned eSIM users, not the full travelling cohort; sustainability figures therefore reflect eSIM adopters specifically and cannot be extrapolated to all travellers without adjustment. The 2025 sustainability data used a different question format and a broader population base; both datasets point in the same direction but absolute numbers should not be directly compared. The 2026 eSIM motivation questions (Chapter 4) used multi-select format, allowing respondents to cite multiple reasons; the 2025 equivalents used single-choice. Directional shifts between years are meaningful, but percentage totals are not directly comparable across years.

Question module	Base
Travel participation	All respondents (n=3,048)
Destination / connectivity / business travel	Travellers only (n=2,604)
Business travel questions	Business travellers only (n=579)
eSIM-specific questions	eSIM intenders only (n=714)
eSIM barrier questions	Non-eSIM travellers (n=1,703)
Non-travel reasons	Non-travellers only (n=444)

Country	n
United States	368
United Kingdom	328
Australia	317
Germany	285
Japan	208
Canada	192
Brazil	161
Argentina	131
Poland	129
Mexico	115
Chile	114
Colombia	112
Spain	99
India	92
South Africa	75

Business Travel, 2025 vs 2026

	Summer 2025	Summer 2026
Total respondents	980	3,048
Survey timing	August 2025 (post-season)	May 2026 (pre-season)
Data type	Confirmed behaviour	Stated intentions

10. About Holafly

Holafly is the **global leader in eSIMs for travelers**, offering coverage in over 200 destinations. With an outstanding 4.6/5 rating on Trustpilot and more than 15 million satisfied users, it has become the preferred eSIM choice for international travelers. Its **unlimited data and build-in back up plan offering ensures peace of mind** anywhere in the world.

For press enquiries: press@holafly.com