

BEYOND BORDERS



SUMMER 2025

TRAVEL eSIM

REPORT



Holafly

1.

Introduction: A season of rediscovery

38%

of people travelled internationally this summer

Travel bounced back: nearly three-quarters of respondents travelled between June and August. Most stayed within their own borders, but more than one in three crossed into other countries, either exclusively abroad or in combination with domestic journeys.

The top destinations ranged from Spain and South Africa to Japan and the United States, reflecting a blend of long-haul adventures and regional favourites. Alongside this movement, we saw experimentation with new ways to stay online and the first signs of sustainability beginning to influence decision-making.

Staying digitally connected has become non-negotiable. Travelling completely offline is no longer an option; everyone relies on some form of internet access. Local SIM cards and roaming plans still dominate, but eSIM adoption is gaining ground: almost one in five travellers used a digital SIM this summer, and nearly all of them said they would do so again. Users highlighted the ease of activation and cost savings as major benefits, dovetailing with expert commentary that eSIMs offer a flexible, efficient alternative to physical SIM cards and enable seamless switching between networks.

At its heart, this report tells a story: travellers young and old seeking both comfort and adventure; busy professionals blending work with leisure; and a nascent shift toward greener choices. The following sections combine concrete data with narrative insights to paint a holistic picture of how people explored the world in Summer 2025.



“The 2025 season confirmed that people’s appetite for travel hasn’t faded: almost three-quarters of those we surveyed packed their bags, many rediscovering destinations close to home and others venturing back to long-haul trips. At the same time, digital access has become an inseparable travel companion: although traditional SIM cards and roaming still dominate, eSIM adoption is accelerating and virtually everyone who tried one would do so again. This desire to explore, to stay effortlessly connected, and an emerging awareness of sustainability encourage us to keep innovating so that, wherever they go, travellers can always feel at home.”

Pablo Gómez, CEO at Holafly

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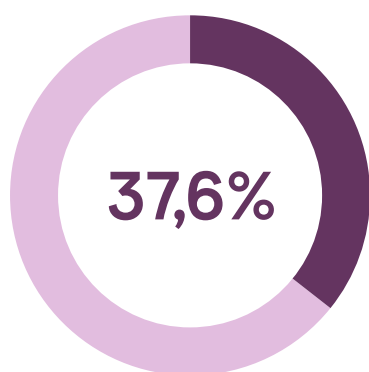
A Summer full of adventures

Travelling means freedom.

What we know is that travel means freedom, as there isn't a direct correlation between where people come from and the destinations they visited, but the diverse range of destinations underscores the truly global character of today's travel.

Our survey reached nearly a thousand people across four continents, and their choices show that international mobility is no longer confined to a privileged few.

Only 37,6% of travellers went abroad this summer.



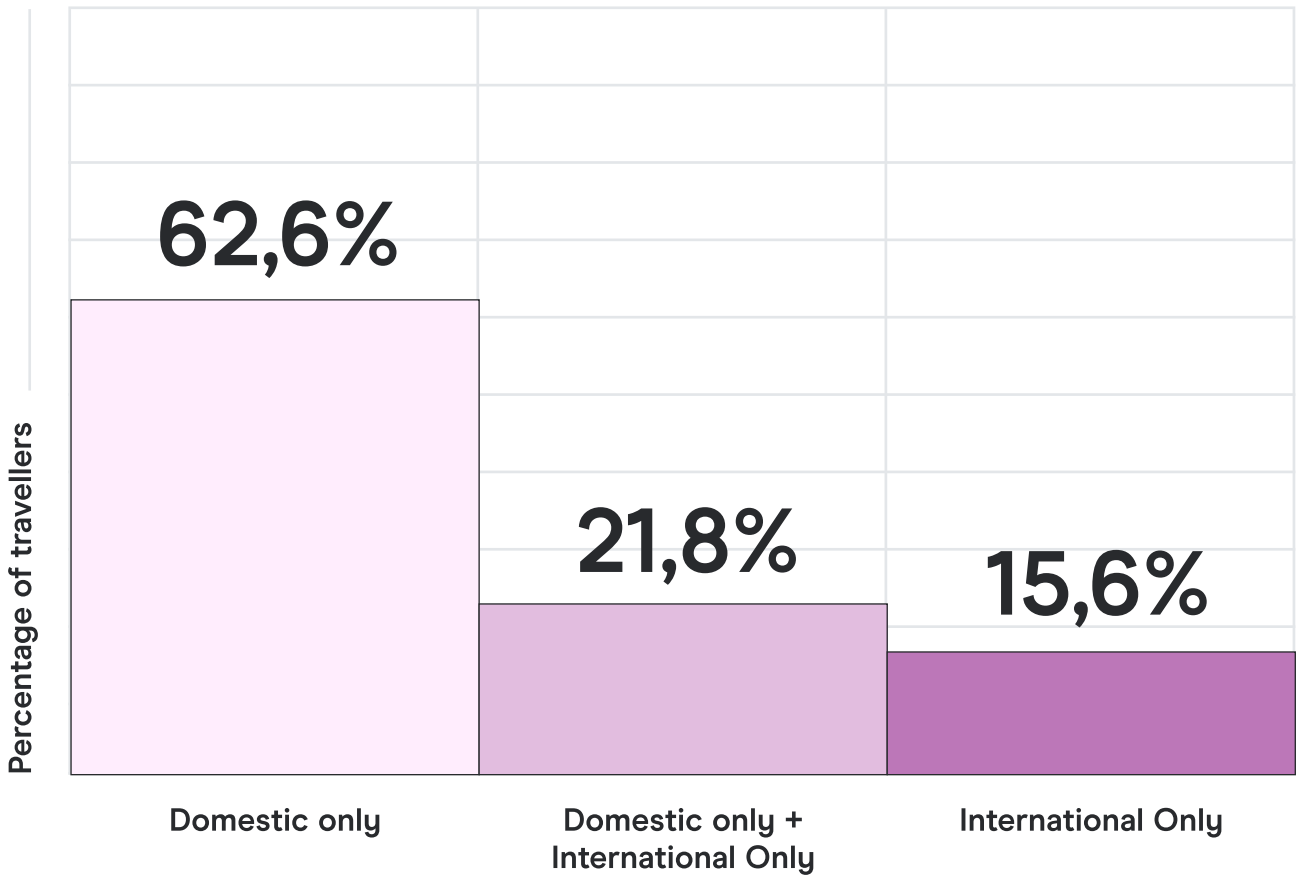
of travellers
crossed borders
this summer.

This summer, when nearly three out of four people took to the road or the skies, many chose to look inward rather than outward. Our survey shows that almost 63% stayed within their own borders, trading far-flung adventures for the comfort and simplicity of familiar places. In a world still rattled by economic and geopolitical headwinds, rediscovering hometown beaches, national parks and small towns feels both secure and satisfying.

Yet the urge to roam hasn't disappeared altogether: 22% blended local breaks with an overseas escape, and a bold 15.6% ventured exclusively abroad, whether to reconnect with distant family or finally tick off a long-delayed bucket-list trip.

Together, these patterns suggest a travel landscape defined as much by caution and resourcefulness as by a persistent curiosity about the wider world.

Type of Travel - Summer 2025



For those who travel abroad, the rise of multi-destination travel is one of the clearest signals that this summer was about maximising every journey.

43%

With 43% of travellers visiting more than one place, the single-stop holiday is giving way to itineraries that feel more like mini-expeditions.

Several dynamics are shaping this trend. First, airline and rail networks in key regions like Europe and Asia make it easier than ever to string together multiple cities or even countries. A Paris escape naturally extends to London, while an Asian adventure can connect Seoul, Tokyo, and Bangkok with short regional flights.

Second, the desire to squeeze more value out of each trip plays a role: if people are spending more to travel abroad, they are also seeking richer returns by exploring several destinations at once.



So a destination is no longer just the soul of a city; but also it's the identity of an entire region.

When we asked travellers to share their international destinations, the answers revealed a truly global spread. Some thought in terms of countries, choosing whole nations as their canvas; Spain, South Africa, Japan, or Canada.

Others went straight to specific places, naming the exact cities where their summer memories were made. Together, their responses map a travel landscape that is both diverse and deeply interconnected.

In total, respondents mentioned 582 unique destinations across nearly 40 different countries, proof of how wide-ranging global travel has become. What stands out is not just the names themselves, but the way people conceptualise travel: sometimes through the magnetism of an iconic city, sometimes through the broader spirit of a nation.

Spain leads the ranking, confirming once again that Mediterranean energy, cosmopolitan cities, and coastal escapes remain irresistible. Mentions ranged from Barcelona and Madrid to Málaga and Sevilla, showing that Spain continues to embody a mix of vibrant culture and laid-back lifestyle.

Looking at the broader patterns, Asia emerges as the rising star of 2025, with Japan and South Korea leading the way and destinations like Singapore, China, and Thailand not far behind. Europe holds strong through Spain, France, and the UK, balancing beach escapes with cultural heritage. The Americas remain a powerhouse, driven by the enduring appeal of the U.S., Mexico, and Canada. And Africa's breakthrough, with South Africa claiming second place overall, is perhaps the most exciting story of all.

What this ranking makes clear is that international travel is not a single narrative but a mosaic of perspectives. For some, it's about the heartbeat of a city; for others, the richness of an entire nation. What unites them is the same desire: to explore, connect, and rediscover the world beyond their borders.

Top 10 destinations visited during Summer 2025 for international travellers:



1. Spain

Spain takes the crown as the most popular international destination. Barcelona's blend of Gaudí's architecture, Mediterranean beaches, and cosmopolitan energy stood out, while Málaga, Madrid and Seville highlighted the enduring magnetism of southern Spain's cultural depth and sun-drenched lifestyle. Spain remains the Mediterranean's beating heart.



2. South Africa

South Africa makes a remarkable showing, powered by Cape Town and Durban. Travellers praised Cape Town's dramatic coastal scenery and cultural mix, while Durban's beaches and lively spirit offered a different taste of adventure. Together, they cement South Africa as Africa's flagship destination for both nature and city life.



3. Japan

Japan continues to inspire as a land of contrasts. Tokyo dazzled with neon skylines and innovation, Kyoto with its temples and timeless culture, and Osaka with its food and nightlife. Travellers see Japan as a complete journey where tradition and modernity co-exist seamlessly.



4. Canada

Canada drew travellers to both bustling cities and serene landscapes. Toronto stood out for its multicultural energy, while Vancouver and Victoria highlighted the country's unique ability to balance world-class urban life with coastal calm and natural beauty.



 **5. United States**

The U.S. retained its pull with iconic names like Las Vegas and New York, alongside natural escapes such as Florida and California. Travellers were drawn to its sheer variety; from entertainment capitals to wide-open landscapes.



 **6. France**

Paris once again stole the spotlight as the capital of romance, gastronomy, and culture. Mentions of the French Riviera added glamour, while quieter countryside escapes showed why France remains an enduring favourite.



 **7. United Kingdom**

London’s cosmopolitan energy and Cornwall’s rugged coasts illustrate the UK’s diverse appeal. Travellers recognised it as a destination balancing heritage with contemporary urban life.



 **8. Mexico**

Mexico charmed with Cancún’s tropical allure and Mexico City’s cultural vibrancy. Coastal resorts and vibrant cities combined to showcase Mexico’s dual spirit of relaxation and discovery.



 **9. Australia**

Australia’s appeal came through Melbourne’s creativity, Queensland’s sunshine, and Sydney’s coastal lifestyle. Travellers highlighted its mix of modern cities and laid-back escapes.



 **10. South Korea**

South Korea closes the Top 10, with Busan, Seoul and Jeju Island drawing attention. K-culture, shopping and nightlife combined with natural wonders, showing why South Korea is rising as a global travel icon.

When it comes to cities, the summer map takes on its own personality. Cape Town and Durban lead the way, reinforcing South Africa into a powerful symbol of coastal adventure and cultural depth.

Toronto embodies Canada’s multicultural energy and urban charm, while Las Vegas proves that entertainment capitals still hold their magnetic pull, promising spectacle and escape under neon lights. Busan completes the top five, showcasing South Korea’s seaside appeal and the growing global influence of K-culture.

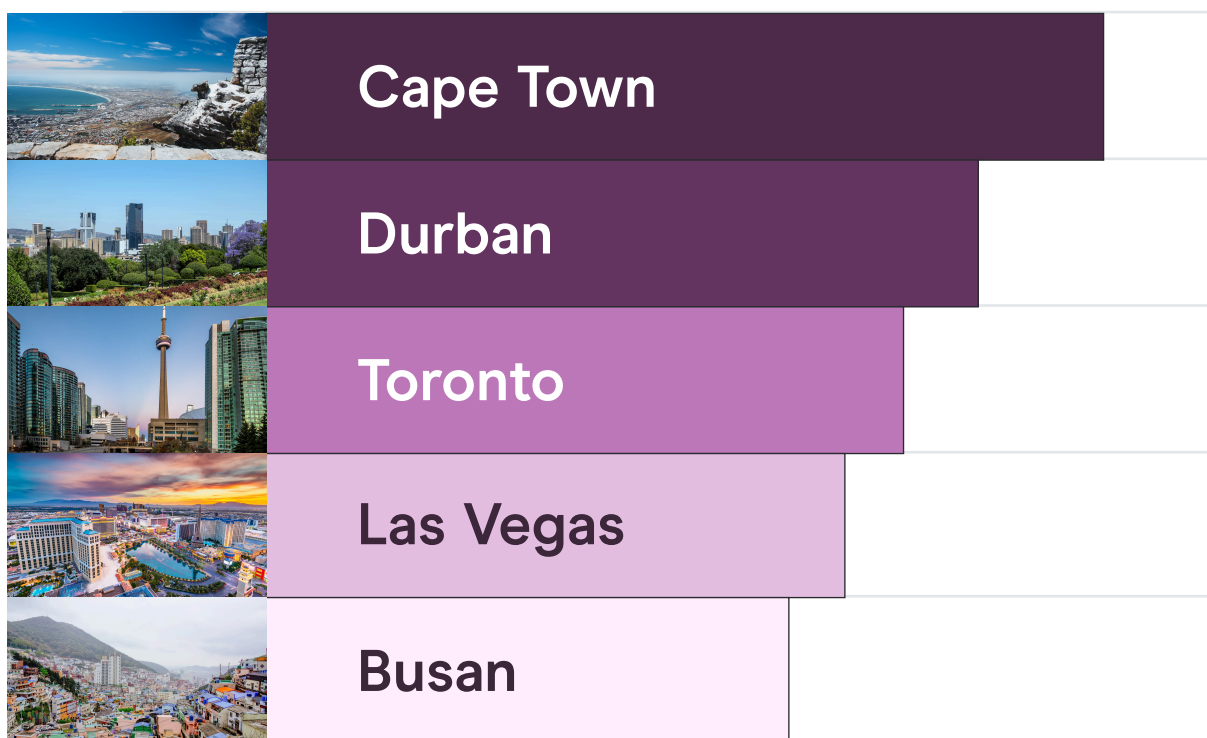
Looking beyond the top five, the city ranking broadens into a mosaic: Santiago de Chile, London, Málaga and Vancouver each gathered strong mentions, while Paris, Cancún, Melbourne, Madrid and Barcelona all shared tenth place, proof of just how diverse summer travel has become.

Interestingly, several regions rather than cities also appeared in the responses, such as Cornwall in the UK or Queensland in Australia. Their presence shows that travellers don’t always think in terms of single urban centres, but sometimes in broader coastal or regional escapes that capture the spirit of an area rather than the life of one city.

But this shift reinforces a deeper trend:

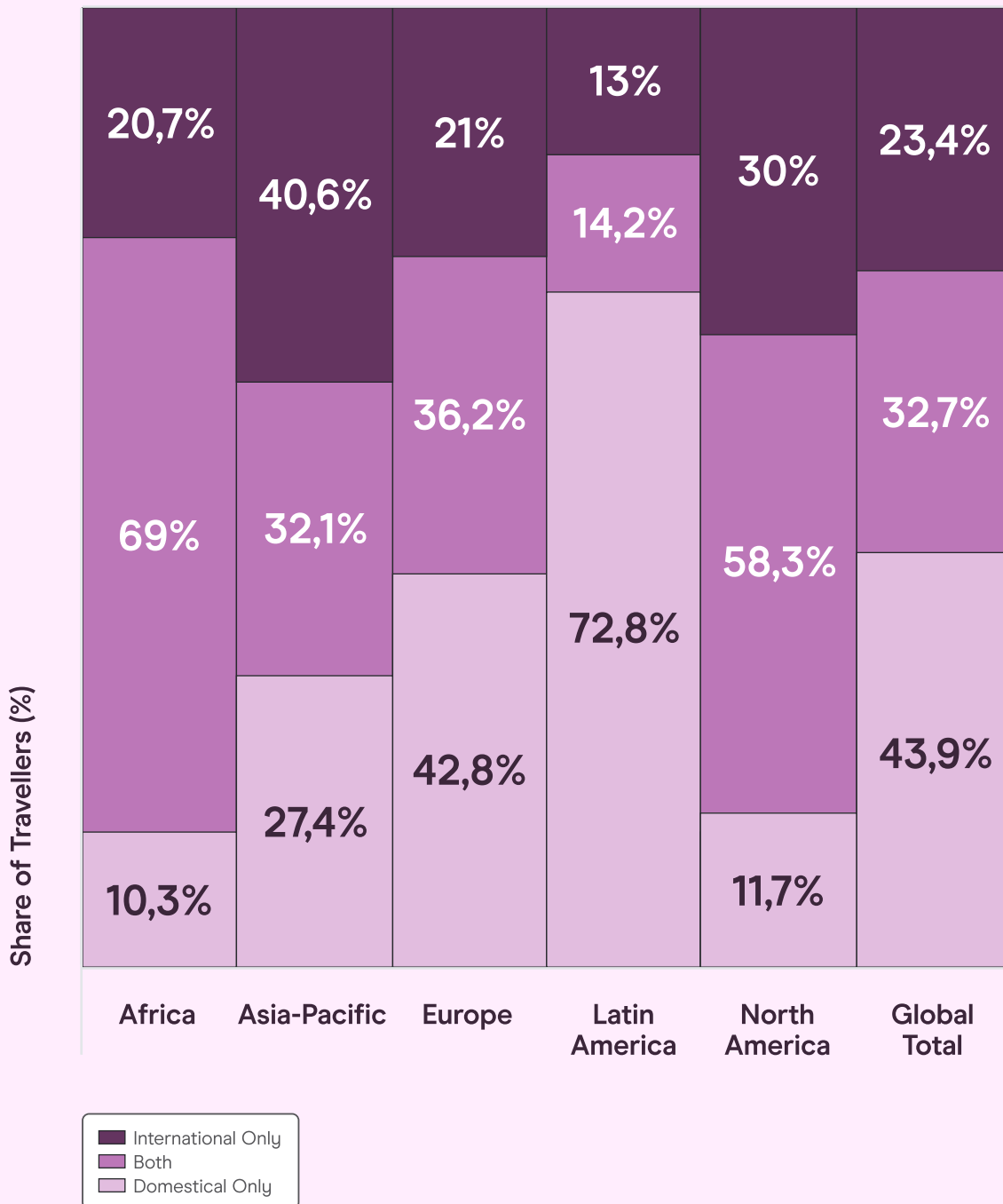
People are no longer travelling just to tick cities off a list, but to live experiences that connect them with culture, nature, and a sense of place.

Top 5 cities visited during Summer 2025 for international travellers.



Globalised but regionalised: rediscovering the power of proximity.

Domestic vs. International Travel by Region - Summer 2025



Latin America stands out as the most domestic region.

More than 70% of travellers stayed within their borders. This pattern is especially strong in Mexico and Chile, which together represent 95,8% of all domestic-only trips in the region.

Among those who did go abroad (just 27%), Chile and Mexico themselves also appeared as cross-border destinations, while Spain acted as the natural transatlantic magnet, a reminder of deep cultural and linguistic ties. Within the region, Colombians were the most internationalised, while Mexicans were the least, underscoring how country size and internal diversity influence the propensity to travel abroad.

This reflects a wider context: economic volatility and uneven currency strength have made domestic travel the safer choice for many households.

Europe shows a different balance: about 57% travelled abroad while 43% stayed domestic.

Here, proximity plays a crucial role; borders are short, low-cost flights abound, and cultural diversity is only hours away. Europeans combined long-haul aspirations such as South Africa, with the convenience of continental favourites such as France and Spain. Within Europe, UK travellers dominated, making up 64,6% of all Europeans who went abroad, while Spaniards were the least international, reflecting the fact that Spain itself offers plenty of variety for domestic tourism.

The picture mirrors Europe's position in a fragmented world: strong infrastructure and open borders facilitate mobility, yet ongoing inflation and geopolitical uncertainty encourage many to rediscover destinations closer to home.

North America was highly internationalised, with 88% of travellers going abroad.

Canadians and Americans displayed remarkably similar habits: of all those who travelled abroad, 54,7% were Canadian and 45,3% were American, showing how closely aligned the two neighbours are when it comes to crossing borders.

Most of their long-haul journeys were to Australia and South Africa, underlining a strong appetite for destinations well beyond their hemisphere. Yet the difference becomes clearer when looking at national propensities: 38,7% of Canadians travelled abroad this summer, compared to just 28,2% of Americans.

This gap reflects how Canadians, despite the vastness of their own country, are relatively more inclined to cross borders, while Americans, with an even larger domestic offer, rely more heavily on internal travel. It also hints at diverging economic moods: a resilient Canadian middle class leaning outward versus Americans more cautious in a year marked by election uncertainty and shifting global alliances.

Africa shows a distinctive pattern: among those who did travel this summer, nearly 90% went abroad rather than staying within their own country.

South Africa, India, and Canada topped the list of destinations, reflecting both diasporic links and ties with emerging economies. Yet it is important to acknowledge that this picture only represents the segment of the population with access to international travel. A large share of Africans did not travel at all this summer, and many would not be captured in surveys like this due to structural barriers, from limited air connectivity and high costs to visa restrictions and economic inequality. For those who did travel, however, the outlook was increasingly global, stretching beyond Europe to Asia and the Americas.

Asia-Pacific travellers were 73% international, but still maintained a significant domestic bloc.

Canada and Chile ranked among the top choices, showing that many in the region are willing to go far beyond their immediate neighbourhood. Within the region, Australians made up 44,2% of outbound travellers, followed by Indians at 19,5%. Emerging markets like India are gaining momentum, while secondary players such as South Korea, Singapore, and Japan ensure that international travel is spread across a broad base rather than concentrated in one or two countries.

This reflects Asia-Pacific's economic transformation: the world's fastest-growing middle class, expanding air connectivity through low-cost carriers and major hubs, and the unique position of being both a source and a destination. Its residents travel widely abroad, while its cities and coastlines attract millions of visitors from around the world.

In short, Asia-Pacific's travel flows are a microcosm of globalisation, powered by rising incomes, enabled by new air routes, and increasingly diverse in the countries that take part.

Together, these flows highlight a paradox of our time: travel in 2025 is both globalised and regionalised. People balance the convenience of regional escapes with the aspiration of long-haul journeys. Economic scale, historical ties, and improved air corridors shape where travellers go.

But beyond the numbers, one truth emerges: the summer of 2025 was a mirror of our world itself, marked by inflation, shifting alliances, and climate anxiety, yet also by an unstoppable human drive to explore, connect, and feel free.

The Rise of Bleisure

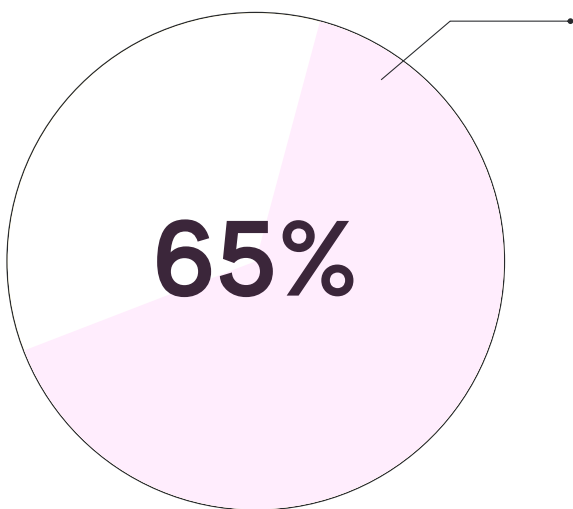


1 in 5 trips this summer had a professional purpose.

Business travel may be smaller than leisure, but it has taken on a new identity. About 19,6% of travellers this summer flew abroad for professional reasons, and many turned those obligations into opportunities for exploration. The era of flying in and out for meetings is giving way to a model where people extend their stays, combining work with leisure in a single trip.

The rise of bleisure is more than a lifestyle tweak, it reflects a deeper change in how professionals perceive mobility. Work trips are increasingly seen as gateways to cultural exchange, relaxation, and inspiration. For destinations, this shift means a chance to reposition themselves: not just as functional hubs for business, but as places where career, curiosity, and wellbeing converge. What underpins this change is a mix of economic and cultural forces. On the one hand, the cost of long-haul travel has pushed professionals to extract more value from each trip, making an extended stay more rational.

On the other hand, hybrid work and flexible schedules have blurred the lines between office and leisure time, giving professionals the freedom to redefine what a business trip looks like. Culturally, younger generations in particular are less willing to separate productivity from personal fulfillment; they see travel as a holistic experience where professional obligations coexist with exploration.



This is clearly reflected in the data: more than two-thirds (65%) of those who travelled for work this summer were between 25 and 44 years old, underscoring how younger professionals are the main drivers of the bleisure trend.

Taken together, these dynamics suggest that bleisure is not a passing trend, but a structural transformation in corporate mobility. It will reshape not only how individuals plan their trips, but also how cities, airlines, and hotels position themselves in a world where work is no longer the opposite of leisure, but increasingly its companion.

3. Connected Everywhere: Staying Online on the Go

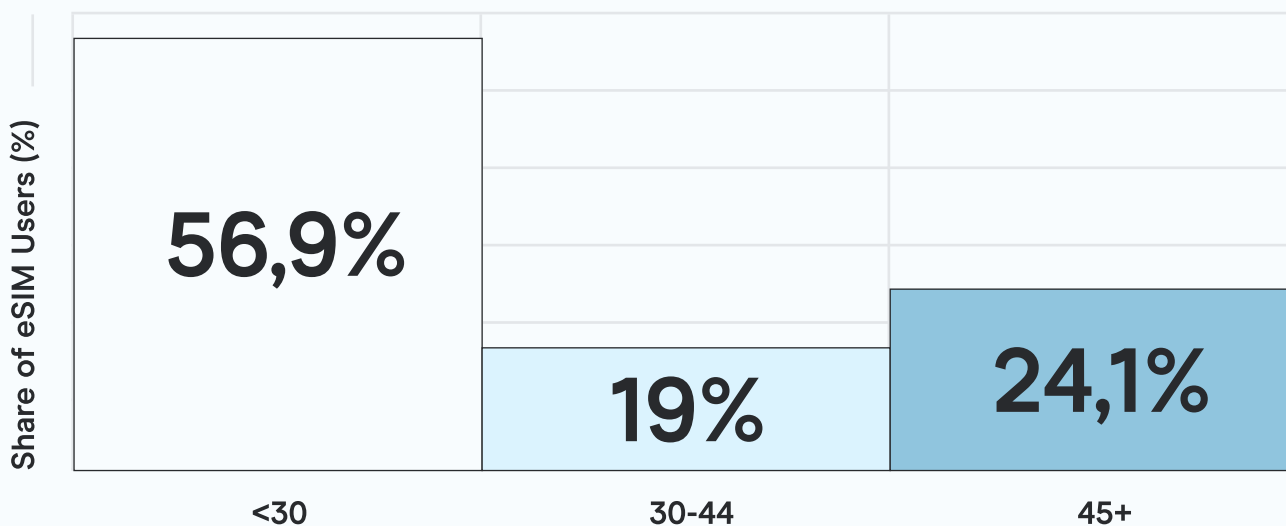
Travellers today rarely disconnect. Across all regions and languages, only **0,8% went totally offline this summer**. Everyone else found a way to stay online, but their choices reveal a balancing act between price, convenience, and reliability.

Roaming was the most popular solution, chosen in 31% of cases. Its strength lies in convenience: keeping your number and activating with a click. But that simplicity comes at a price, as many reported frustration with high fees and unexpected charges.

In fact, as the Global Strategic Business Report on Roaming Tariffs¹ (Research and Markets, 2025) points out, the global market for roaming tariffs exceeded USD 79 billion in 2024, with projections reaching USD 105 billion by 2030, growing at a CAGR of 4.9%.

Local SIM cards followed with 27%. They remain the budget-friendly option, especially common in Spain and Latin America, yet travellers often complained about the hassle of finding a shop, language barriers, and swapping cards at every border.

eSIM Adoption by Age Group - Summer 2025



eSIMs accounted for 19%, and their momentum is undeniable. Younger and tech-savvy travellers praised the simplicity of downloading a digital profile before departure and the peace of mind of transparent coverage.

For many, it was their first encounter with eSIMs, and it left a lasting positive impression.

Most users were under 30, with adoption among the over-45 segment still in progress, a clear sign that awareness and trust in this technology are still developing.

Wi-Fi-only travellers made up 17,5%, relying on cafés, hotels, and public hotspots. Their motivations ranged from budget constraints to the desire to unplug, yet many admitted to frustrations with inconsistent speeds and security concerns.

Pocket Wi-Fi devices carved out a 3,3% niche, mainly among families and groups who valued sharing data under one plan.

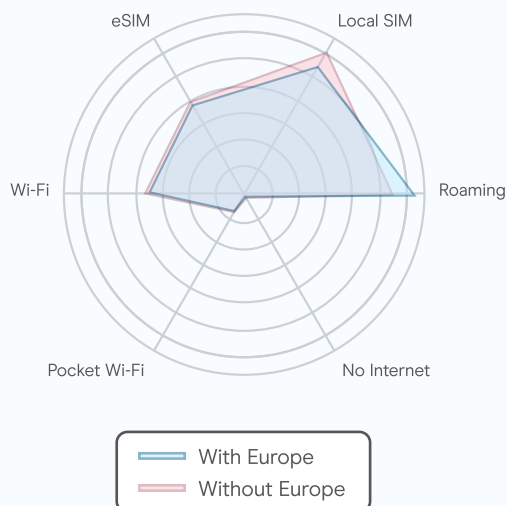
The numbers highlight a clear truth: staying online abroad is no longer optional.

Travellers want to be connected everywhere, but they weigh cost against comfort at every step. The steady rise of eSIMs points to a shift toward seamless, mobile-first solutions that are reshaping how people experience travel.

? But... Why is roaming the first choice?

At first glance, the finding may seem counterintuitive. While many believe roaming is on its way out, replaced by more affordable and flexible alternatives, our global data shows it still holds the top spot — with 31% of travellers relying on it.

Connectivity Choices - Summer 2025



Europe has the answer.

Travellers want to be connected everywhere, but they weigh cost against comfort at every step. The steady rise of eSIMs points to a shift toward seamless, mobile-first solutions that are reshaping how people experience travel.

What elsewhere is seen as an expensive trap, in Europe has become the most natural and convenient solution.

This European effect skews the global numbers:

If we exclude European travellers from the dataset, roaming immediately drops to second place (27%), while local SIMs rise to the top at 30%.

? Why some limited their access

Those who shunned constant access cited cost, security and digital detox as main reasons. Some said they wanted to live in the moment without constant notifications. Others noted they would have used an eSIM if they had known more about it.

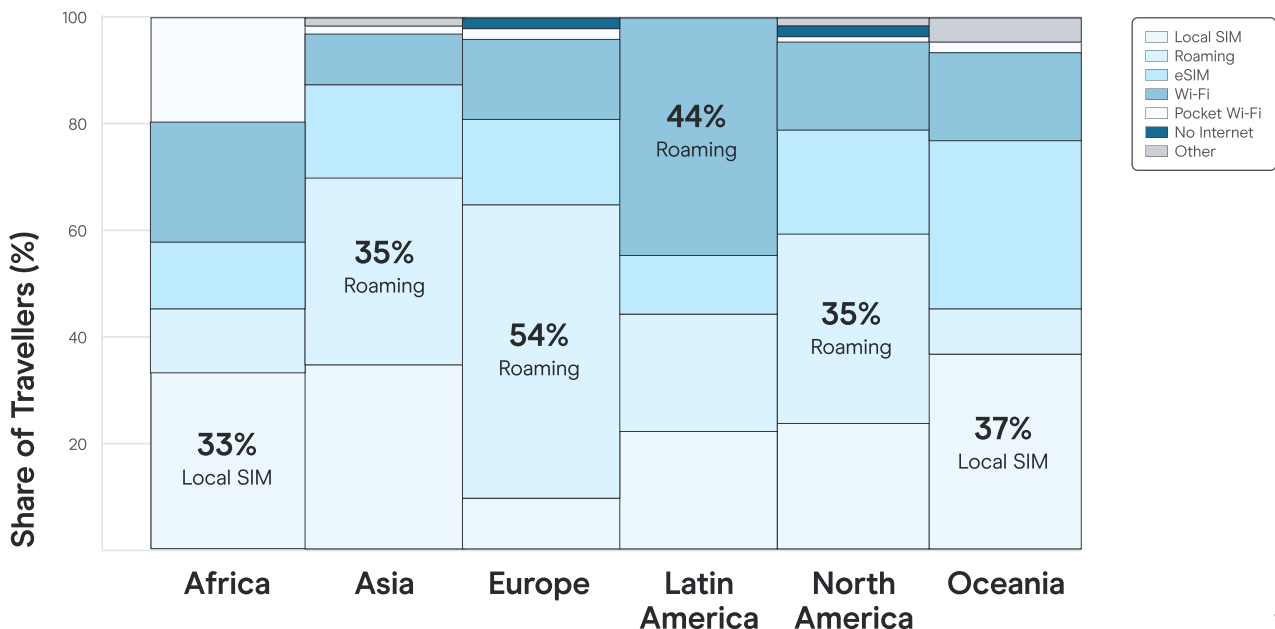
Beyond the numbers

Being online is emotional. Many travellers are willing to pay extra for roaming or switch to eSIMs not just for function, but for peace of mind, the fear of being disconnected in an unknown country is a powerful motivator.

The eSIM education gap is real. Although adoption reached 1 in 5 this summer, awareness is still holding it back. The technology is ready, but education isn't, which represents the clearest growth opportunity for the industry.

Multi-method access is on the rise. Some travellers combined methods (e.g. eSIM + Wi-Fi, or roaming + local SIM), pointing to a future where flexibility, not uniformity, defines the market.

Internet Choice by Region - Summer 2025



More than 1 in 2 Europeans relied on roaming this summer; and in nearly 9 out of 10 cases they were travelling within the EU itself.

As shown above, this behaviour is directly shaped by the Roam Like at Home regulation, which abolishes extra charges when using mobile data across EU member states. For Europeans, roaming is not an expensive luxury but a built-in convenience, making it the natural default when crossing nearby borders. Wi-Fi and eSIM each captured 16%, while local SIMs lagged at just 1 in 10.

44% of Latin Americans connected through Wi-Fi.

In Latin America, almost half of all travellers (44%) connected primarily through Wi-Fi, whether at hotels, cafés or public spots. Local SIMs and roaming each captured 22%, and only 1 in 10 used eSIMs. This behaviour reflects both affordability pressures and resilience: in a region where roaming fees remain prohibitive, travellers adapt to whatever is locally available, even if that means patchy speeds and extra effort.

For North Americans roaming is a habit.

Over a third of travellers (35%) in the US and Canada stuck to roaming, with convenience and cultural habits outweighing cost concerns. Local SIMs accounted for 24%, eSIM for 20%, and Wi-Fi for 19%. The dominance of integrated postpaid contracts means Americans and Canadians are more willing than most to absorb fees for the peace of mind of keeping their number active.

Africans used the highest % in the world of Pocket Wi-Fi when connected abroad, a 20%.

Travellers here split their choices across different methods: 1 in 3 used local SIMs (33%), 1 in 5 relied on Wi-Fi (22%), and notably, Pocket Wi-Fi devices reached 20%, the highest in the world. Roaming and eSIMs trailed at 13% each. These patterns mirror both infrastructural constraints and a strong diaspora effect, where roaming remains a lifeline despite its costs.

Oceania is the region with a major eSIM adoption, a 31%.

Australia and New Zealand reveal one of the most balanced mixes: 1 in 3 travellers used local SIMs (37%), while nearly as many embraced eSIMs (31%). Wi-Fi stood at 19%, roaming at 9%, and Pocket Wi-Fi at 2%. Geography plays a decisive role: short-haul regional trips still see some roaming, but for long-haul journeys Oceanians are rapidly adopting digital-first solutions.



"Access to data is no longer just a technical need, it is an emotional anchor. The summer of 2025 proved that travellers weigh not only cost and convenience, but also peace of mind. eSIMs point towards a mobile-first future, yet regional habits, generational divides, and a lack of awareness show that the journey toward seamless digital access is still unfolding."

For eSIM providers, the opportunity goes beyond technology: it is about building trust, closing the education gap, and tailoring solutions to regional behaviours. Those who can offer flexibility for the multi-method traveller, affordability for the price-sensitive, and simplicity for the convenience-driven will lead the next wave. In this market, being connected everywhere is no longer negotiable, but how we choose to stay online will define the travel experience of the decade."

Pedro Maiquez, Co-founder, Holafly

What these numbers reveal is clear: online access is no longer optional, but how we choose to stay online is rapidly changing.



eSIMs, once an experiment, are now a mainstream choice that promises transparency, flexibility, and confidence

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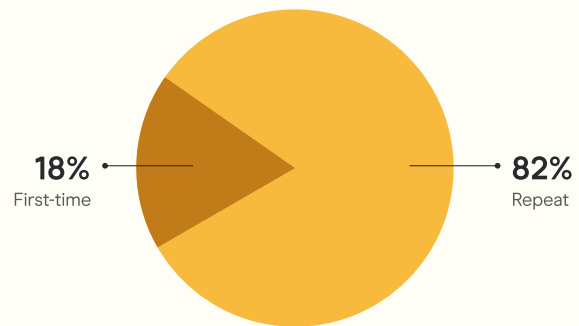
The eSIM Revolution: Reimagining Internet Abroad

The momentum is powered by newcomers.

Almost 1 in 5 eSIM users (18%) were trying it for the first time, yet an overwhelming 95% of them said they would use it again

First-time vs Repeat eSIM Users - Summer 2025

The experience itself drives adoption. Travelers highlighted the ease of activation; most were online within minutes by simply scanning a QR code. They praised transparent pricing, avoiding the hidden fees of roaming, and appreciated the ability to switch networks mid-trip, something no physical SIM or roaming plan can match.



Those who crossed multiple borders during the summer were far more likely to adopt digital tools. Among multi-destination travellers, 26% chose eSIMs, well above the global average of 18%. Their behaviour highlights a simple truth: the more complex the itinerary, the stronger the demand for flexibility and security.

Benchmarking² across industries shows first-time repeat rates typically fall between 15% and 45%, with E-commerce averaging around 28%. In contrast, the eSIM 'first-time effect' is extraordinary; 95% of newcomers plan to use it again, a rapid conversion from trial to loyalty unmatched in travel tech.



“We see that many of our customers travel across borders, nearly a quarter of eSIM users were on multi-country trips. Because we know these travellers and their needs, we’ve created regional products like Europe or Asia packs, so they can move freely across the continent without changing their eSIM,”

Lidia (Yingyan) Hu, Co-founder of Holafly

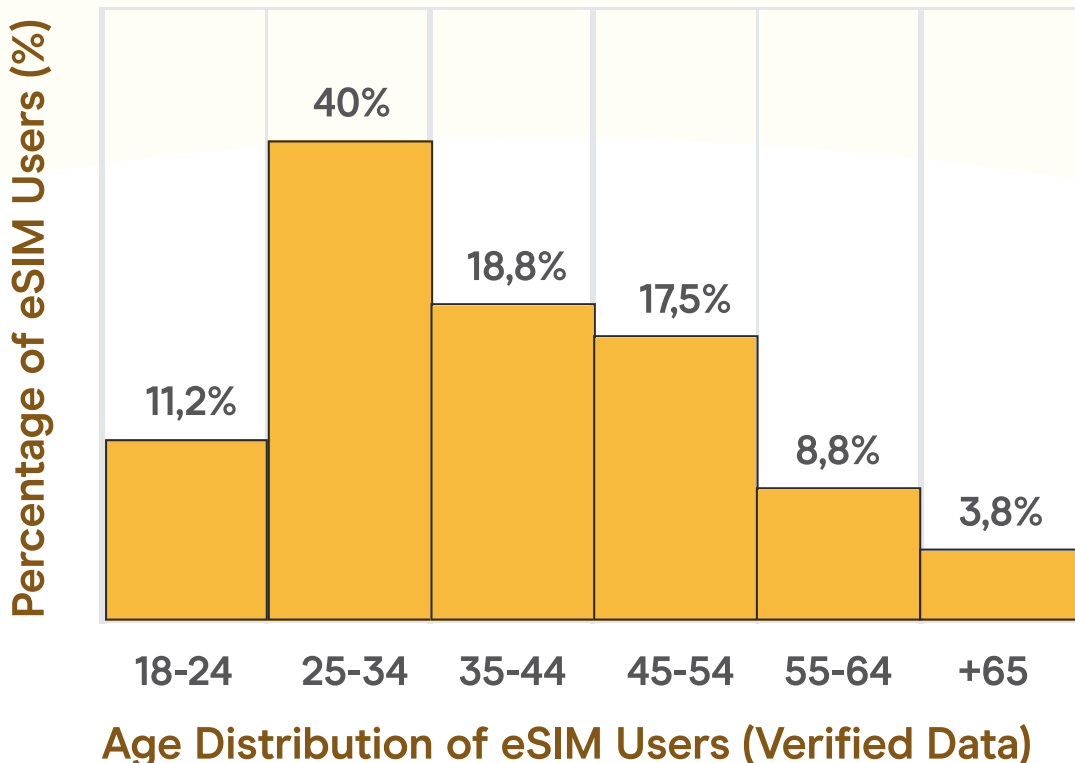
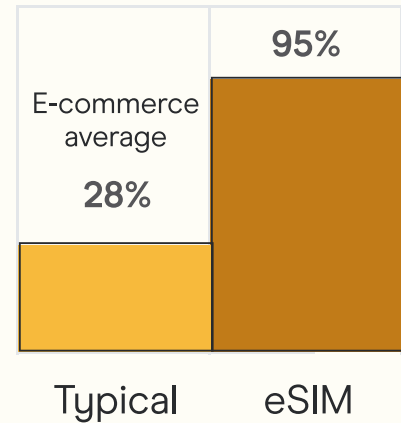
The takeaway is clear: eSIMs are reshaping the travel experience. What was once a technical alternative is now an emotional upgrade, about confidence, transparency, and the freedom to move seamlessly. In a world where staying connected everywhere is non-negotiable, eSIMs are fast becoming the traveller’s new default.

Even the small minority who would not use an eSIM again did not reject the technology outright, their concerns were practical. Device compatibility was the biggest barrier, with older phones unable to support digital profiles. Others pointed to coverage gaps in remote regions, while a few admitted they simply preferred the familiarity of a physical SIM or roaming. But these are not deal-breakers, they are reminders of a technology still maturing.

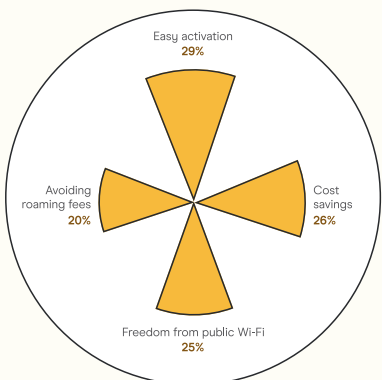
As handset adoption expands and awareness grows, such obstacles are likely to fade, paving the way for eSIMs to become the natural standard for staying online abroad.

Generational divides are sharp. Just over half of eSIM users are under 35, underscoring how younger travellers see digital access as second nature. Adoption falls among older groups, with only three in ten users aged 45 or above, reflecting lower awareness and slower trust in new technology.

Benchmarking first-time repeat rates across industries



Redefining the Essentials of Travel



Travellers this summer were remarkably aligned in what they valued most: ease, savings, and independence.

Nearly a third (29%) highlighted the simplicity of getting connected in just a few taps, proving that seamless setup is no longer a “nice to have” but a core expectation.

Close behind, 26% emphasised cost savings, showing that transparency and avoiding hidden expenses remain powerful motivators.

One in four (25%) valued the freedom of not relying on public Wi-Fi reflecting a desire for safety, reliability, and control.

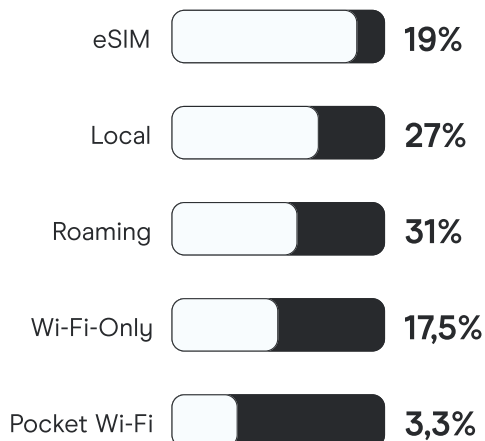
And 20% singled out avoiding roaming fees, a long-standing pain point that continues to drive change. Taken together, these priorities paint a clear picture of the modern traveller: practical, cost-conscious, and eager for smooth, stress-free digital access.

Unpacking the Patterns

The summer of 2025 revealed not just where people travelled, but how they chose to stay online along the way. What emerges is a story of shifting habits, where old solutions still hold ground but new ones are rapidly claiming their place. The choices travellers make are rarely random; each option reflects a mindset, whether prioritising convenience, chasing the lowest price, or embracing the flexibility of digital-first solutions. Together, these patterns show us how quickly the landscape is evolving.

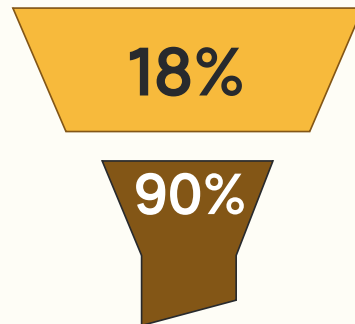
Scale of adoption

eSIMs have broken through the threshold of experimentation and into the mainstream. They now account for 1 in 5 connections globally (19%), outpacing Wi-Fi-only access (17.5%) and dwarfing the shrinking niche of Pocket Wi-Fi (3.3%).



First-time effect

What is striking is not just the scale, but the speed of adoption. Nearly 1 in 5 eSIM users (18%) were trying it for the first time this summer, yet more than 9 in 10 said they would use it again. In an industry where loyalty usually builds slowly, this kind of immediate conversion is rare, and speaks to the clarity of value once travellers experience it.



Trip profile

eSIM adoption was particularly strong among those on multi-country itineraries. For these travellers, the ability to switch networks seamlessly is more than a perk; it's a game-changer. Compared to the hassle of buying multiple SIMs or paying steep roaming fees, eSIMs offer freedom without friction, a trait especially prized by globetrotters who cross borders frequently.



Comparative motivations

Underneath the statistics lies a psychology of choice. eSIM users tend to prize flexibility and security, leaning into solutions that let them stay agile while feeling protected. By contrast, those who still opt for physical SIM cards (27% global share) are guided mainly by price, valuing the tangible sense of affordability. Meanwhile, roaming users, who still represent the largest group at 31%, reveal a different mindset: one driven by convenience and the comfort of sticking with what they know, even if it costs more.



Flexibility & Security



Convenience



Low Cost Local

Taken together, these patterns illuminate a transition in progress. Traditional options remain resilient, but digital-native solutions are scaling with a speed that suggests their dominance is not a question of if, but when.

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Green Connections: Sustainability in Focus

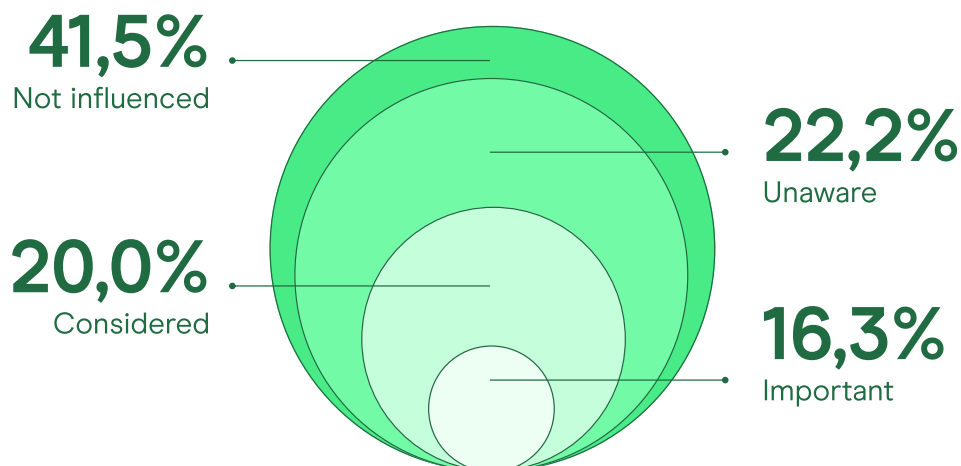
Travel today is not only about the places we visit, but also about the footprints we leave behind.

As travellers seek meaning in their journeys, many are beginning to ask a new question: how can I stay connected without weighing down the planet? The idea of linking sustainability with using eSIMs is still emerging, but its presence signals a shift in how we think about the invisible infrastructure that powers our trips.

Environmental considerations are beginning to influence travel choices, but the shift is still in its early days. Among those who weighed in on sustainability:

- **16.3%** said it was important in their decision to choose their staying online abroad method.
- **20.0%** considered it, but other factors weighed more.
- **22.2%** admitted they weren't aware of footprint differences.
- **41.5%** said it did not influence them.

Sustainability Influence on eSIM Users Decisions

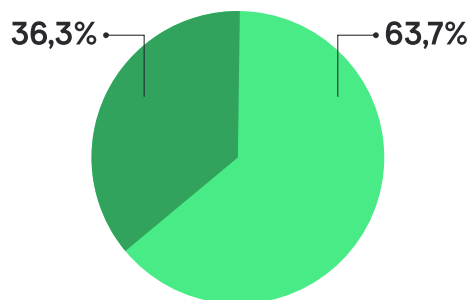


For most eSIM users, cost and convenience still outweigh sustainability when deciding how to stay connected abroad.

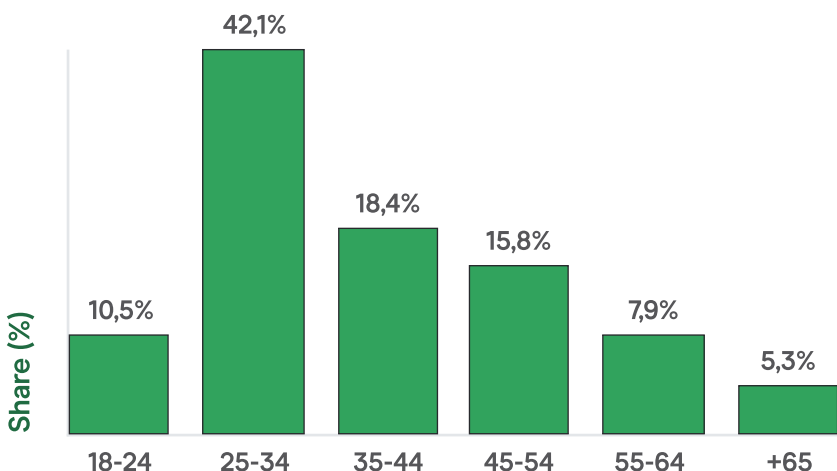
The fact that more than one in three eSIM users (36.3%) already consider environmental impact, either as a key factor or something they weighed against other priorities, shows that the conversation has begun.

Another 22.2% admitted they were unaware that different options carry different footprints, which reveals untapped potential: once travellers understand that some solutions are greener than others, their choices may shift significantly.

1 in 3 eSIM users already consider environmental impact



At first glance, these figures suggest that **sustainability is not yet a decisive factor** when it comes to internet decisions. But when we cross the data, a more nuanced story emerges:



Age Distribution of eSIM Users Considering Sustainability

Sustainability does not appear to be a decisive factor in how travellers make their choices.

Yet when we look closer, a generational divide emerges. Almost two-thirds of those eSIM users who considered environmental impact are under 45, signalling that younger adults are leading the shift towards greener decision-making.

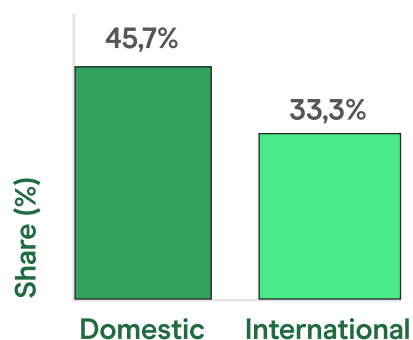
This group has grown up with both climate awareness and digital-first habits, making them more likely to connect the two. For them, sustainability is not an abstract concern but part of a broader expectation that travel should align with their values. By contrast, travellers over 45 are less engaged with the issue, often prioritising convenience and reliability over environmental factors.



“Sustainability will become mainstream not because of regulation or industry pressure, but because tomorrow’s travellers already see it as part of the experience they want. At Holafly, we believe this shift is unstoppable: the new generation is choosing products that match their values, and our role is to make it effortless for them to travel lighter, both digitally and environmentally.”

Daniela Prado, Brand Director at Holafly

When it comes to trip types, domestic travellers were more inclined to weigh sustainability in their choices, with 45.7% acknowledging it as a factor compared to just 33.3% of international travellers. The shorter and more familiar the journey, the more space there seems to be for reflection on environmental impact. But as soon as trips cross borders and become longer or more complex, practical concerns such as reliability and access take over.

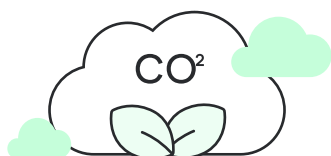


The paradox remains: those journeys with the largest footprint are precisely the ones where sustainability is least present in decision-making.

This gap highlights the untapped potential of raising awareness around long-haul travel’s impact, an area where even small shifts in behaviour could make a disproportionately large difference.

External signals reinforce this trend. Airlines and online travel agencies already display carbon footprints alongside bookings, while telecoms are beginning to highlight the environmental benefits of their solutions.

Research by Carbon Trust (commissioned by Truphone)³ indicates that eSIMs can reduce emissions³ by up to 87% compared to physical SIMs, by eliminating plastic cards and shipping. Based on Holafly’s 13.6 million eSIMs sold to date, this translates into an estimated 1,563 tons of CO₂ emissions avoided, the equivalent of taking around 340 cars off the road for a year, based on EPA⁴ averages.



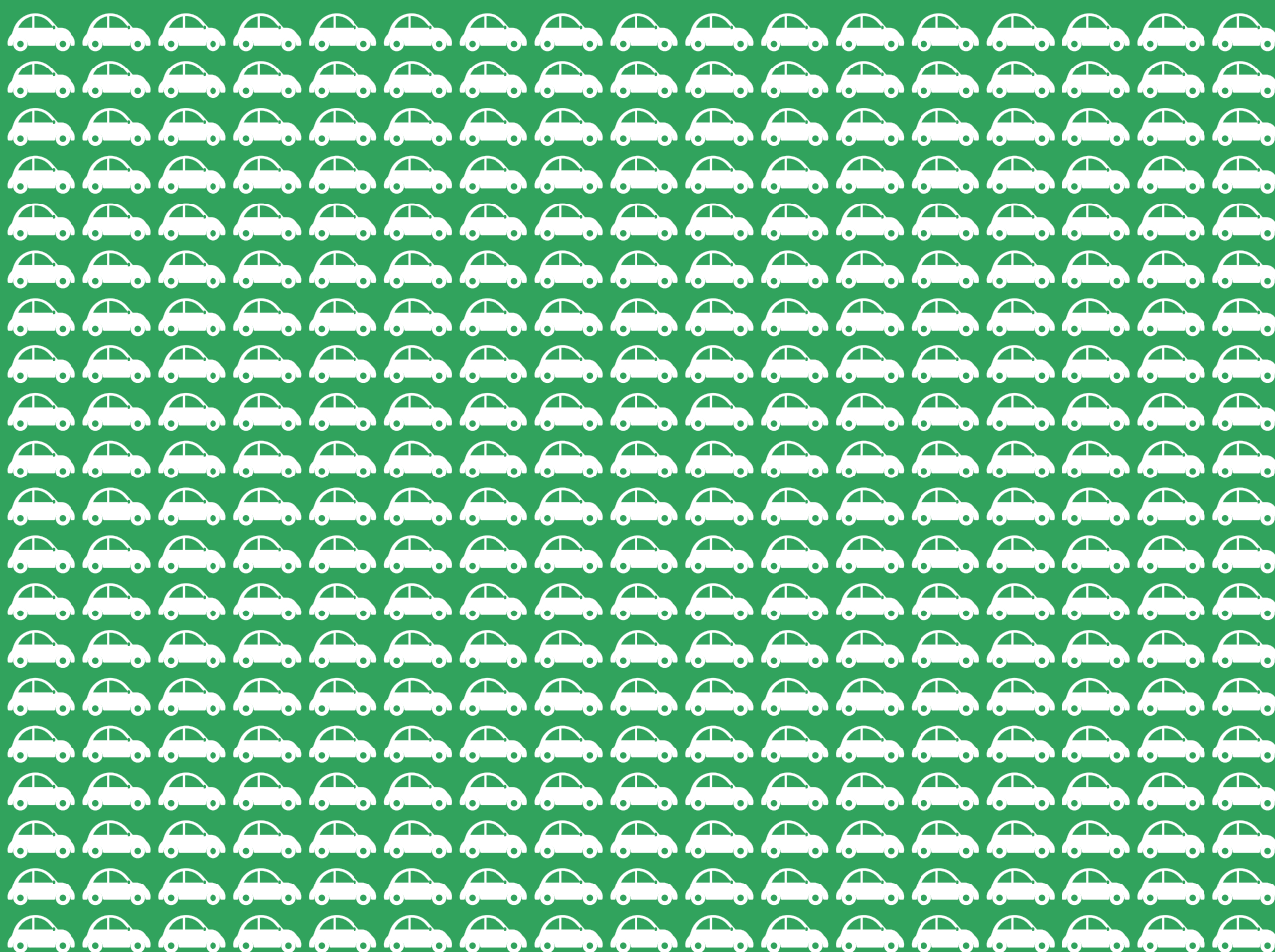
The paradox remains: those journeys with the largest footprint are precisely the ones where sustainability is least.

Sustainability is not yet the main driver; cost and convenience still dominate.

But it is already part of the conversation, and conversations are how change begins. As awareness spreads, the greener choice could become the natural choice.

In that future, choosing an eSIM would mean more than just a way to staying online abroad, it would mean travelling lighter on the planet, too.

Holafly eSIM Impact: Equivalent Cars Removed ≈ 340 cars off the road for a year.



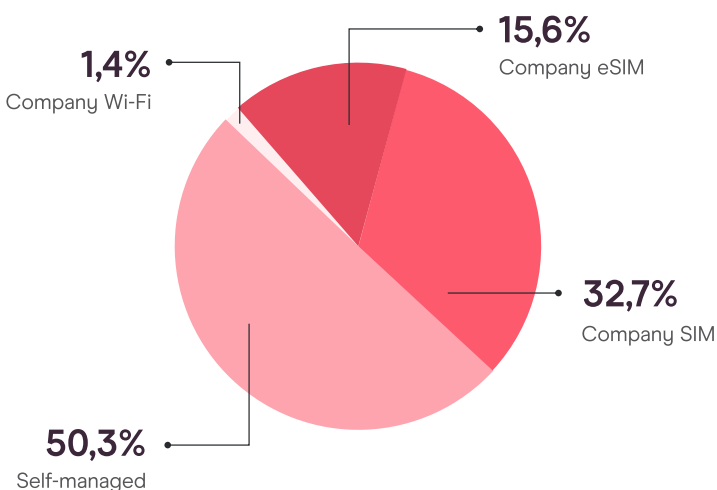
6. Work in Motion: Business Travel

Business travel is back, and it is evolving fast.

This summer confirmed a turning point: professionals are once again on the move, combining work with international mobility. Yet what truly stands out is not the return of business trips themselves, but the way travellers stayed connected, and how those choices directly impacted both performance and wellbeing.

On the move

How Business Travellers Stayed Connected (Global)



Business travellers showed a clear preference for autonomy. Just over 50% managed their own connection abroad, purchasing local SIMs, roaming plans or eSIMs depending on the country.

Around 33% relied on company-provided SIMs or roaming packages, while 16% were equipped with corporate eSIMs, a sign that employers are slowly starting to adopt this technology for its cost efficiency and logistical advantages.

Only 1% reported company-provided Wi-Fi, a solution that is clearly fading into obsolescence.



“The data shows a new balance of power. Employees want flexibility, while companies are beginning to see the strategic value of eSIMs. The future lies in hybrid solutions that give travellers choice, while keeping costs and security under control.”

Alex Bryszkowski, VP B2B & Partnerships.

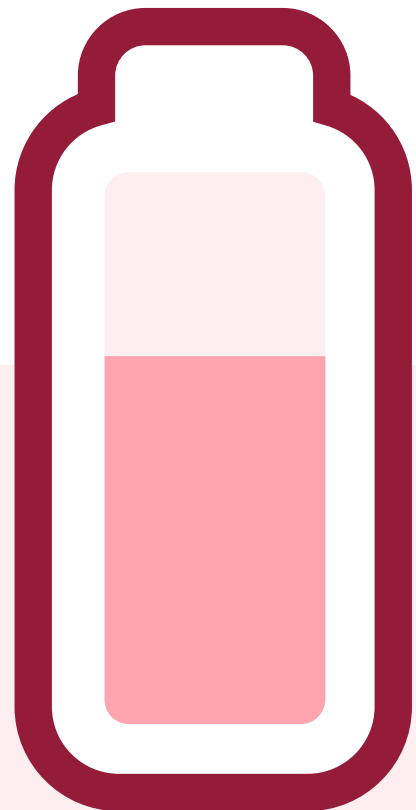
Productivity and Wellbeing

Internet access is no longer just an enabler in the background. For business travellers, it has become a decisive factor in how effective and balanced their trips feel.

Our data shows that 57% of respondents experienced a clear productivity boost thanks to strong internet connections, which allowed them to handle emails instantly, join video calls without friction, and share documents as if they were at their desks. Reliable access has turned into a performance multiplier, enabling work continuity on the move.

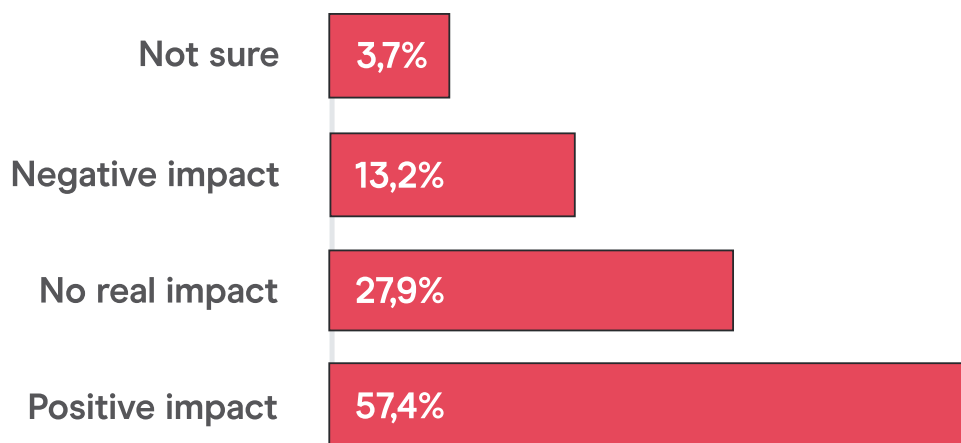
57%
**reported a
productivity
boost**

thanks to strong internet
connections



At the same time, 13% reported negative effects, highlighting how poor or unstable data access undermined their output. For this group, being disconnected did not only slow down their tasks, it also increased stress levels, as they were forced to search for alternatives or pay premium rates for temporary fixes.

Impact of Connectivity on Productivity (Business Travellers)



In practice, weak data access became a source of frustration and pressure, eating into both time and mental energy.

The remaining 30% described the effect as neutral, suggesting that while they managed to “get by”, they rarely felt that digital access gave them a real advantage. For many in this group, data access was simply adequate, enough to keep things moving, but not strong enough to add value.

This uneven experience is a reminder that staying online abroad is no longer just a technical issue. It now touches on wellbeing, job satisfaction, and the perception of employer support.



“Unreliable data access is no longer a minor inconvenience. It impacts mental health, job satisfaction, and even the perception of an employer’s support. In 2025, digital wellbeing is part of employee wellbeing.”

Alex Bryszkowski, VP B2B & Partnerships.

The message is clear: in an era where work and travel blend more than ever, ensuring robust digital access is not just about efficiency, it is about safeguarding employee wellbeing and maintaining trust between companies and their people.

What matters most to business travellers

Internet access is no longer just an enabler in the background. For business travellers, it has become a decisive factor in how effective and balanced their trips feel.

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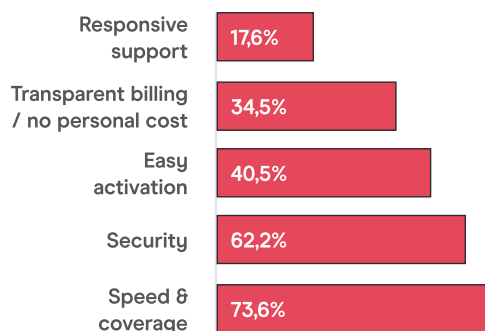
For business travellers, staying online abroad is not a luxury, it is the backbone of how they work on the move. Our data across all languages shows a clear hierarchy of priorities:

Speed & coverage tops the list, mentioned by nearly three in four respondents (74%).

For travellers, stable performance is the entry ticket to productivity.

Without it, every other feature loses relevance: secure connections, transparent pricing or simple activation are meaningless if the network is slow or unavailable. Speed is also where expectations converge, whether self-managed or company-provided, travellers demand a connection that simply works everywhere.

Share of respondents mentioning (%)



Security
62%

Protecting sensitive data is central

Security follows closely at 62%, showing that protecting sensitive data is not optional but central to the travel experience. For corporate travellers in particular, a secure connection is not just about peace of mind, it is about compliance, safeguarding company assets, and maintaining client trust.



41%

Even small frictions in setup matter

Ease of activation matters to 41%, highlighting how even small frictions in setup can cast a shadow on a trip. In a world where time is the scarcest resource, travellers are unwilling to waste minutes navigating complex instructions or unreliable QR codes.



35%

Avoiding personal cost is valued

Transparent billing and avoiding personal cost are valued by 35%, proving that clarity is as important as cost itself. For employees, this avoids the stress of expense claims and reimbursement delays; for companies, it strengthens fairness and control over budgets.



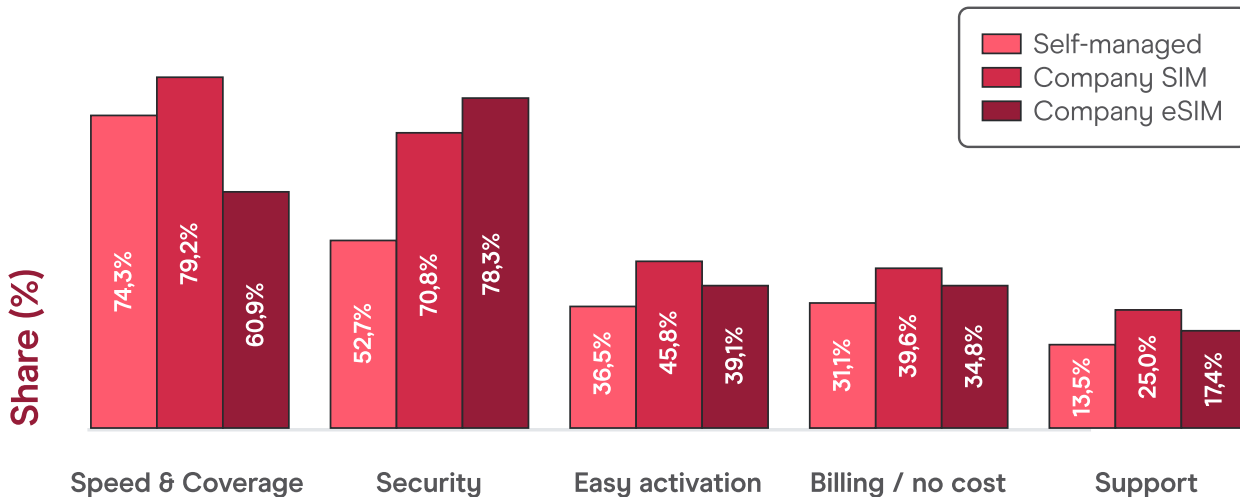
18%

More important if company-provided

Responsive support, while lower at 18%, becomes significantly more important when companies are directly providing the service. This shows that once responsibility shifts from the traveller to the employer, expectations rise, employees demand not only a tool but also the assurance of help when things go wrong.

The provider matters: self-managed vs company-provided

A striking difference emerges when we compare travellers who manage their own data access versus those equipped by their employers:



Self-managed users optimize for speed and coverage.

With 74% prioritising performance and 37% easy activation, their focus is on getting online quickly and affordably. Security is mentioned by just over half (53%), signalling that while it matters, it remains secondary when both the choice and the cost are on their shoulders. Their mindset is pragmatic: give me speed, make it simple, and let me move on.

Company SIM users are more demanding across the board.

With 79% focused on speed and coverage and 71% highlighting security, their expectations rise sharply once the employer provides the service. Support is flagged by 25%, almost double the level of self-managed travellers, reflecting an accountability shift: if the company chooses the solution, it must also guarantee reliability, security and assistance.

Company eSIM users stand out as the most security-conscious.

With 78% citing security, they outpace all other groups, underlining how corporate adoption of eSIM aligns naturally with IT standards and data protection priorities. At the same time, 61% still value speed and coverage, showing that digital-first does not mean compromising on performance. For this segment, eSIM elevates both confidence and convenience, merging seamless access with trusted safeguards.

The data reveals a clear hierarchy: individual choice leans toward convenience, while corporate provision raises the bar on security. And when the solution is digital-first, such as eSIM, the emphasis on trust and compliance becomes even stronger.

This suggests that as companies transition from physical SIMs to eSIMs, the value proposition evolves. It moves beyond cost savings or flexibility to become a strategic enabler, embedding security, transparency, and resilience into the very fabric of business travel.

What we see is not just a list of features, but a shift in mindset.

Travellers expect speed as standard, but when the company steps in, the conversation quickly extends to security, accountability, and support. This suggests that the future of business travel connection will not be defined by raw performance alone, but by trust, transparency, and protection.

Staying online while abroad is becoming a proxy for how companies care for their employees. Providing secure, seamless, and transparent digital access signals investment in both productivity and wellbeing.

Conversely, neglecting it risks frustration, disengagement, and even reputational damage.

In a world where hybrid work and bleisure travel are rising, being connected abroad will increasingly shape not just efficiency, but talent retention and corporate culture.



“Corporate travellers are telling us very clearly: speed gets you in the game, but security and transparency are what win their trust. The more companies embrace eSIM, the more they align with employee expectations for both performance and protection.”

Alex Bryszkowski, VP B2B & Partnerships.

Key takeaways

- **Self-management still dominates, but eSIM is gaining corporate ground.**

Half of all business travellers (50,3%) still manage their own data access, buying SIMs, paying for roaming, or activating eSIMs on their own. Yet, 32,7% already use company-provided SIMs and a growing 15,6% are equipped with corporate eSIMs. This shift marks a new phase: while autonomy remains strong, employers are beginning to take a more active role, and their tool of choice is increasingly digital-first.

Implication: companies that move faster into eSIM will not only save costs but also align better with employee expectations of security and reliability.

- **Productivity and wellbeing are directly tied to connection quality.**

Among business travellers, 57% said good data access boosted productivity, while 13% said poor service reduced it, often adding stress and frustration. The remaining 30% experienced it as neutral: good enough to get by, but rarely empowering.

Implication: data access is now both a performance driver and a wellbeing issue. Failing to provide strong, reliable service risks not only efficiency but also mental health and job satisfaction.

- **Universal expectations are reshaping business and leisure travel alike.**

When asked what they value most, travelers pointed to a clear hierarchy of priorities. This applies whether a trip is business, leisure, or bleisure: the line has blurred, and providers must deliver against a universal set of standards.

Implication: travelers may tolerate slow moments, but they will not forgive feeling unprotected or left to absorb hidden costs. Trust is built when companies show they have their people's backs

7. From Pain Points to Power Plays: How Companies Can Empower the Digital Traveller

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. Our data shows this is changing. Today, how people access the digital world on the move has become a frontline factor: it directly influences productivity, mental wellbeing, and even how employees perceive their company's support.

Half of business travellers (50.3%) still manage their own options.

50,3%

Half of business travellers still manage their own options



They are pragmatic: they choose what's fast to set up, cheap enough, and reliable enough to get by. But the other half already rely on company-provided solutions, and here a different story unfolds. 32.7% use corporate SIMs and 15.6% corporate eSIMs — a sign that employers are beginning to take a more active role, and that digital-first solutions are gaining traction.

Where travellers feel the pain

Employees who handle things themselves are often left frustrated by three recurring issues:

- **Cost burdens:** Many still pay out-of-pocket and then wait for reimbursement. This creates unnecessary tension and undermines fairness.
- **Friction in setup:** A simple step like activating a SIM can mean long queues, confusing instructions, or unreliable QR codes, and when time is scarce, even small frictions feel like big losses.
- **Lack of support:** Self-managed travellers accept being on their own. But when the company steps in, expectations rise sharply. If something fails, employees expect fast, responsive help.

What travellers really want

When we look at the data, the top features employees value align closely with corporate responsibility:

- **Secure solutions:** More than 70% of company-provided users cite this as essential. Security is no longer an optional benefit, it's a compliance requirement and a matter of trust.
- **Frictionless experience:** 41% highlight ease of activation. No one wants to waste time on technical issues when travelling for work.
- **No personal cost:** 35% value transparency and not having to advance expenses, showing that clarity and fairness are as important as the service itself.

What this means for companies

The data shows that priorities shift depending on who makes the decision. Self-managed employees optimize for speed and ease, while company-provided solutions amplify expectations around security, support and transparency. The more digital the solution (e.g. corporate eSIMs), the stronger the association with IT standards and data protection.

This reveals an opportunity: companies that move decisively towards eSIM-based solutions can cover all bases at once, delivering the convenience employees love, while also embedding the trust, security, and transparency that organisations require.

Half of business travellers (50.3%) still manage their own options.

What is at stake is bigger than internet access. It is about how companies care for their employees. Providing secure, seamless, and fair digital access signals investment in both productivity and wellbeing. Neglecting it risks frustration, disengagement, and even reputational damage.

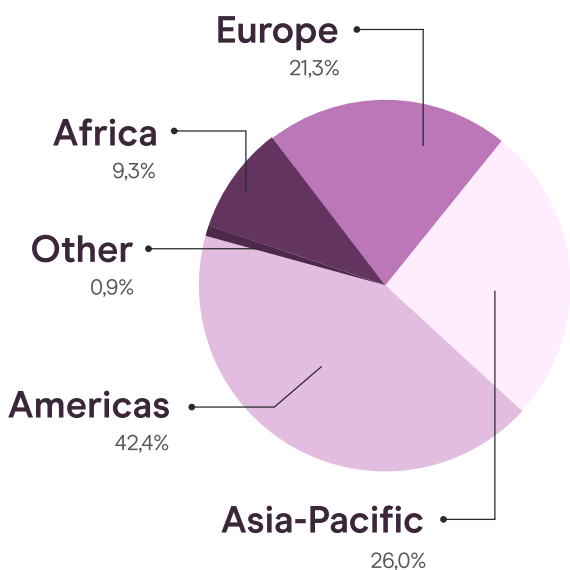
In an era where business, leisure and bleisure blend together, expectations are universal: speed, security, and simplicity must always be there. For providers like Holafly, the opportunity lies in bridging the gap between today's pain points and tomorrow's expectations, turning what was once a source of stress into a competitive advantage for companies and a symbol of care for their people.

8.

Methodology Overview

This report is based on a dedicated survey carried out during the summer of 2025, designed to capture the real experiences and expectations of travellers across multiple markets.

Number of respondents: The survey collected input from 980 unique participants, ensuring a broad and diverse base of insights. Percentages were always calculated using valid responses to each specific question.



Geographical breakdown: Of the 980 respondents, 804 specified their country of origin, with strong representation across Latin America, Europe, Asia and North America. To ensure comparability, responses were cleaned and harmonised before analysis.

Timeframe: The survey was conducted in August 2025, coinciding with the peak summer season. This timing ensured that responses reflected recent travel experiences.

Languages: To capture a wide audience, the survey was available in English, Spanish, Japanese, and Korean. All responses were translated and standardised before analysis to allow for accurate comparisons across regions.

Open responses: Destination preferences were collected through an open-response field. Mentions of countries were aggregated and normalised to build the list of most popular destinations.

Looking Ahead: Final Thoughts

As Summer 2025 comes to a close, the picture that emerges is both familiar and new. Travel has returned at scale, yet the ways people stay online while crossing borders are undergoing a profound shift.

Traditional options like roaming and local SIMs still dominate, but eSIM has crossed into the mainstream. Nearly one in five travellers (19%) chose it this summer, with adoption especially strong among those navigating multi-country journeys. What sets eSIM apart is its staying power: over 90% of first-time users said they would use it again, confirming that once people experience its mix of simplicity, transparent pricing, and flexibility, they rarely turn back.

Regional contrasts sharpen this story. In Latin America, six in ten relied on local SIMs, a reflection of budget-conscious travel in a region where economic volatility makes cost control critical. North America leaned the opposite way, with half of travellers defaulting to roaming, prioritising convenience above price. Europe showed its continental pragmatism, blending roaming with local SIMs across short borders and cheap flights. Asia stood out as the most experimental, where eSIM and pocket Wi-Fi gained stronger traction, pointing to a market open to innovation.

Generational patterns also came into focus. Younger travellers, particularly those under 45, are leading the charge on awareness of environmental impact. Among eSIM users, 36% already weigh sustainability in their decisions, and a further 22% admitted they had not realised different digital options carry different footprints. Two-thirds of those sustainability-minded eSIM users are under 45, signalling that once awareness spreads, the greener choice could naturally become the default.

For companies, the message is equally clear. Half of business travellers still self-manage their data access, but employers are stepping in with digital-first solutions. Already, 16% of corporate travellers are equipped with company-provided eSIMs, and expectations change dramatically when businesses take the lead. Security, transparency and support rise to the top of the agenda, turning digital access from a personal hassle into a corporate advantage that strengthens productivity and wellbeing.

The story of this summer is also about momentum. Almost one in five eSIM users were newcomers, yet their loyalty was instant, a rare “first-time effect” that points to an accelerated adoption curve. Add to this the cultural and economic context, cost in Latin America, convenience in North America, experimentation in Asia, pragmatism in Europe, and a clear picture emerges: eSIM adapts to the values of each market while steadily becoming the universal standard.

At the intersection of personal and corporate travel, of bleisure and sustainability, a new travel archetype is forming. These travellers are early adopters, sensitive to environmental impact, and eager to simplify both work and leisure journeys. What they embrace today often sets the tone for tomorrow.

In short, digital access is no longer just a technical choice, it is becoming a reflection of values, priorities, and identity. The future belongs to the solutions that manage to combine convenience, security, and responsibility.



“We are entering a new chapter where digital access is not just about being connected, but about empowering travellers to move with freedom, confidence, and purpose. eSIM is at the heart of this transformation, a technology that simplifies today and opens the way for a more sustainable tomorrow.”

Pablo Gómez, CEO at Holafly

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Boiler Plate About Holafly:

Holafly is the **global leader in eSIMs for travellers**, offering coverage in over 200 destinations.

With an outstanding 4.5/5 rating on Trustpilot and more than 10 million satisfied users, it has become the preferred eSIM choice for international travellers. Its **unlimited data offering ensures peace of mind** anywhere in the world.

Press Contact

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