

BENCHMARK REPORT · 2026 EDITION

Travel eSIM Value Index 2026

Why advertised prices don't always reflect the best value.

An evaluation of leading travel eSIM providers based on pricing efficiency, included benefits, customer experience, travel flexibility and connection readiness.

RANKED FIRST OVERALL
Holafly · 91.1 / 100

ALSO EVALUATED
Saily · Airalo

PUBLISHED BY
Holafly

AT A GLANCE

What the 2026 index measures

PROVIDERS RANKED
3 of 7 reviewed

CATEGORIES
5 weighted
dimensions

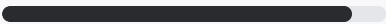
TRIP DURATIONS TESTED
1–30 days

PUBLISHER
Holafly

OVERALL RESULT

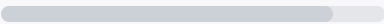
01 Holafly

91.1



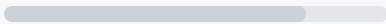
02 Saily

86.7



03 Airalo

78.6



Scores out of 100, combining five weighted categories. Weightings were fixed before data collection and remained unchanged throughout the analysis.

EXECUTIVE SUMMARY

Comparing what travellers pay with what they receive

The travel eSIM market has evolved rapidly, giving travellers more choice than ever before. Yet comparing providers has become increasingly difficult, with many purchase decisions still based primarily on advertised prices.

The Travel eSIM Value Index 2026 was developed to evaluate travel eSIM providers using the factors that most influence the overall value travellers receive throughout a journey, rather than headline pricing alone.

Instead of comparing individual advertised plans, the index measures providers across five weighted dimensions: Pricing Efficiency, Included Benefits, Customer Experience, Travel Flexibility and Connection Readiness. Together, these reflect not only what travellers pay, but what they receive in return.

The analysis found that while leading providers now offer broadly comparable coverage, activation speeds and access to local mobile networks, meaningful differences emerge in pricing models, included features and customer experience.

Across the five evaluation categories, Holafly achieved the highest overall score in the 2026 Travel eSIM Value Index.

KEY FINDINGS

- 01** The cheapest advertised travel eSIM isn't always the best value. Comparing providers based on a single advertised plan can overlook what travellers actually pay once real trip lengths are considered.
- 02** Flexible pricing can significantly reduce the real cost of staying connected abroad. Across trips lasting between 1 and 30 days, Holafly's exact-day pricing model consistently produced the lowest median real-trip cost among the providers analysed.

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- 03** Network quality is no longer the primary differentiator. Coverage, activation speed and 5G availability are broadly comparable across leading travel eSIM providers because they rely on many of the same underlying mobile operators.
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- 04** Overall value depends on more than price alone. Pricing structure, included benefits, refund policies and customer experience increasingly determine the value travellers receive.
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- 05** Holafly ranked first overall in the 2026 Travel eSIM Value Index, achieving 91.1 points, ahead of Saily (86.7) and Airalo (78.6).
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OVERALL RESULTS

The 2026 ranking

The overall ranking combines five weighted evaluation categories. Weightings were established before data collection and remained unchanged throughout the analysis.

RANK	PROVIDER	RELATIVE PERFORMANCE	SCORE
1	Holafly		91.1
2	Saily		86.7
3	Airalo		78.6

CATEGORY WEIGHTINGS

35%

Pricing
Efficiency

25%

Included
Benefits

15%

Customer
Experience

15%

Travel
Flexibility

10%

Connection
Readiness

Pricing Efficiency

CATEGORY WINNER · HOLAFLY

What we measured

Most travel eSIM comparisons focus on the advertised price of a single plan. However, this can produce an incomplete comparison because many providers only offer fixed-duration plans, while others allow travellers to select the exact number of days they need.

To better reflect real purchasing behaviour, the index compares the median cost across real trip durations between 1 and 30 days, rather than a single advertised plan.

WORKED EXAMPLE · AN 11-DAY TRIP

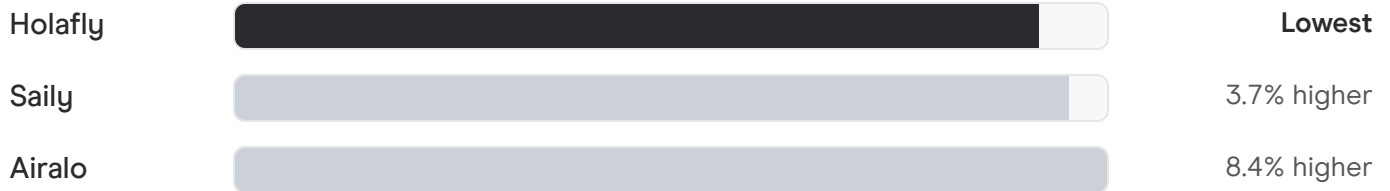
PROVIDER	PLAN REQUIRED	PRICE
Airalo	15-day plan	\$47.63
Saily	15-day plan	\$48.59
Holafly	11-day plan	\$39.85

Although the trip lasts only 11 days, both Airalo and Saily require travellers to purchase a 15-day plan, paying for four additional days they do not need. Holafly allows travellers to purchase exactly 11 days.

This pricing pattern remained consistent across destinations and trip durations analysed, with Holafly's exact-day pricing producing median savings ranging from 10% to 33% compared with equivalent fixed-duration alternatives.

Real-trip pricing

Median cost across trips of 1–30 days, indexed against the lowest median cost observed.



Why this methodology

Travellers rarely purchase plans that perfectly match the duration of their trip. Measuring the cost of the plan consumers would actually need provides a more realistic comparison than relying solely on advertised prices.

HOLAFLY

100

Pricing Efficiency score, out of 100.

SAILY

96.3

AIRALO

91.6

CATEGORY 02

WEIGHT 25%

Included Benefits

CATEGORY WINNERS · HOLAFLY & SAILY (TIE)

What we measured

This category evaluates which core travel features are included as standard, rather than requiring additional payment or not being available.

FEATURE	HOLAFLY	AIRALO	SAILY
Unlimited data	✓	✓	✓
Hotspot / tethering	✓	✓	✓
VPN	—	—	✓
Calls / SMS	Data-only	Extra cost	Extra cost
Top-ups	✓	✓	✓
Regional plans	✓	✓	✓
Global plans	✓	✓	✓
Free backup / emergency data (“AlwaysOn”)	✓	—	—
FEATURES INCLUDED (OF 8)	6 / 8	5 / 8	6 / 8
SCORE	100	83.3	100

Both Holafly and Saily include six of the eight evaluated features, although through different product approaches. Holafly is the only provider offering complimentary emergency backup data through AlwaysOn, while Saily includes a VPN. Airalo scores lower because fewer features are included as standard.

CATEGORY 03

WEIGHT 15%

Customer Experience

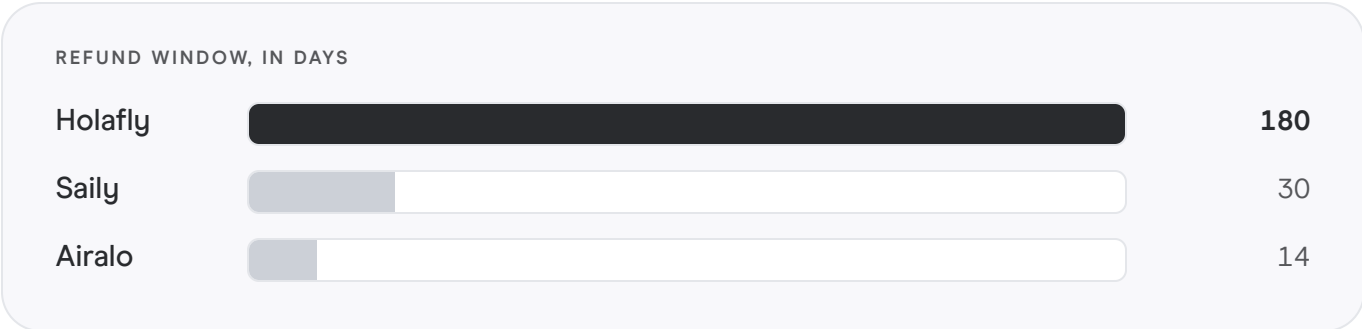
CATEGORY WINNER · HOLAFLY

What we measured

Customer Experience combines two independent measures: verified Trustpilot rating, and refund policy generosity based on both refund window and coverage of eligible scenarios.

PROVIDER	TRUSTPILOT	REVIEWS	REFUND WINDOW	TRUST	REFUND	COMBINED
Holafly	4.7 ★	100,000+	6 months	94	87.5	90.75
Saily	4.7 ★	28,000	30 days	94	45.9	69.95
Airalo	4.0 ★	35,000	14 days	80	28.9	54.45

Trust and Refund sub-scores out of 100; Combined is their unweighted mean.



Why Holafly ranked highest

Holafly matched Saily's Trustpilot rating while offering the most generous refund policy among the providers analysed, with a six-month refund window compared with 30 days for Saily and 14 days for Airalo.

CATEGORY 04

WEIGHT 15%

Travel Flexibility

NO CATEGORY WINNER · THREE-WAY TIE

What we measured

Travel Flexibility evaluates two aspects: the ability to purchase an eSIM matching the exact duration of a trip, and the ability to extend an existing plan without purchasing a new eSIM.

PROVIDER	CUSTOM TRIP DURATION	EXTEND ACTIVE PLAN WITHOUT NEW PURCHASE	SCORE
Holafly	✓ Any length, 1–90 days	— Requires new purchase	50
Airalo	— Fixed blocks only	✓ Can extend active plan	50
Saily	— Fixed blocks only	✓ Can extend active plan	50

Each provider offers a different type of flexibility. Holafly allows travellers to purchase an exact trip duration, while Airalo and Saily allow active plans to be extended. As a result, all three providers achieved the same overall score.

CATEGORY 05

WEIGHT 10%

Connection Readiness

NO CATEGORY WINNER · THREE-WAY TIE

What we measured

Connection Readiness considers destination coverage, activation speed, multi-network support and 5G availability.

PROVIDER	COUNTRIES	ACTIVATION	MULTI-NETWORK	5G	SCORE
Holafly	200+	Instant	✓	✓	100
Airalo	200+	Instant	✓	✓	100
Saily	200+	Instant	✓	✓	100

Leading travel eSIM providers rely on many of the same underlying mobile network operators worldwide. As a result, coverage, activation speed and 5G availability are broadly comparable across providers. Increasingly, competitive differentiation comes from commercial factors such as pricing models, included features and customer experience rather than network access itself.

SCORECARD

Overall results, category by category

CATEGORY	WEIGHT	HOLAFLY	SAILY	AIRALO
Pricing Efficiency	35%	100	96.3	91.6
Included Benefits	25%	100	100	83.3
Customer Experience	15%	90.75	69.95	54.45
Travel Flexibility	15%	50	50	50
Connection Readiness	10%	100	100	100
OVERALL SCORE	100%	91.1	86.7	78.6

Scope

This edition of the Travel eSIM Value Index evaluates Holafly, Airalo and Saily, the three providers for which comparable real-trip pricing could be calculated consistently across identical travel scenarios.

Nomad, Ubigi, Yesim and Roamless were reviewed for the non-pricing categories to provide broader market context but were not included in the final ranking because equivalent real-trip pricing comparisons were not available.

METHODOLOGY

How the index is built

The Travel eSIM Value Index compares leading travel eSIM providers across five weighted dimensions: Pricing Efficiency (35%), Included Benefits (25%), Customer Experience (15%), Travel Flexibility (15%) and Connection Readiness (10%). Weightings were established before data collection and remained unchanged throughout the analysis.

SOURCES USED

Official provider pricing

Official product documentation

Public refund policies

Verified Trustpilot ratings

Verified App Store ratings

Full source-level data available on request

Real-trip pricing is based on the median cost across trips lasting between 1 and 30 days, rather than advertised list prices alone.



ABOUT THE TRAVEL ESIM VALUE INDEX

The Travel eSIM Value Index is a benchmarking framework developed by Holafly to evaluate the overall value delivered by leading travel eSIM providers.

Rather than focusing solely on advertised prices, the index measures the factors that most influence travellers' real experience, helping consumers make more informed purchasing decisions while tracking how the travel eSIM market evolves over time.

PUBLISHED BY **Holafly** · 2026 EDITION