

# The 2026 eSIM Tipping Point: The Shift to Software-Defined Travel

2026 marks a critical year for travel connectivity, transitioning from physical hardware to a digital software opportunity, creating new revenue streams for the entire travel ecosystem.

## THE DRIVERS OF THE 2026 TIPPING POINT



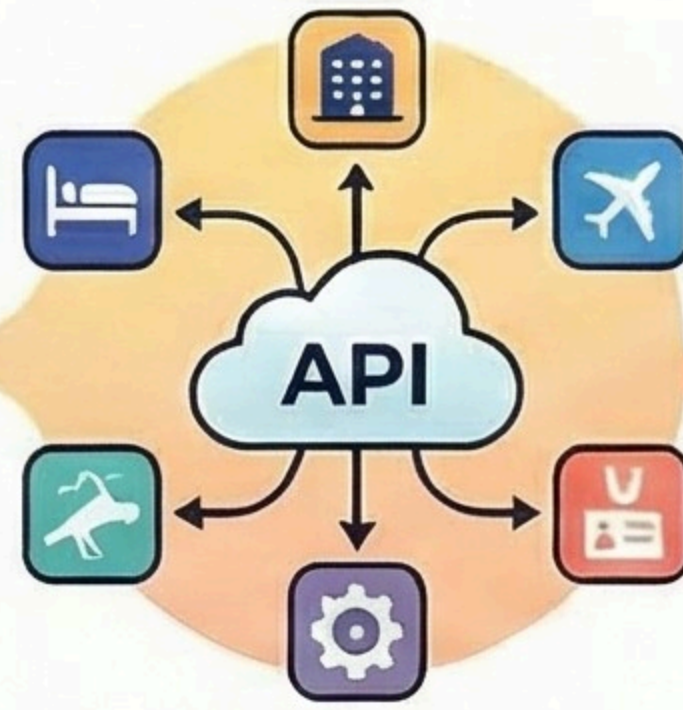
### The End of the Physical SIM Tray

Major smartphone manufacturers are making eSIM the global default, forcing ecosystem-wide adoption.



### Global Infrastructure Maturity

eSIM provisioning is now reliable in 190+ countries, allowing activation in under 90 seconds.



### API-Driven Distribution

Remote SIM Provisioning (RSP) allows non-telco brands to bundle and resell data natively.

## INDUSTRY IMPACT & OPPORTUNITIES



### Hotels: Beyond Lobby WiFi

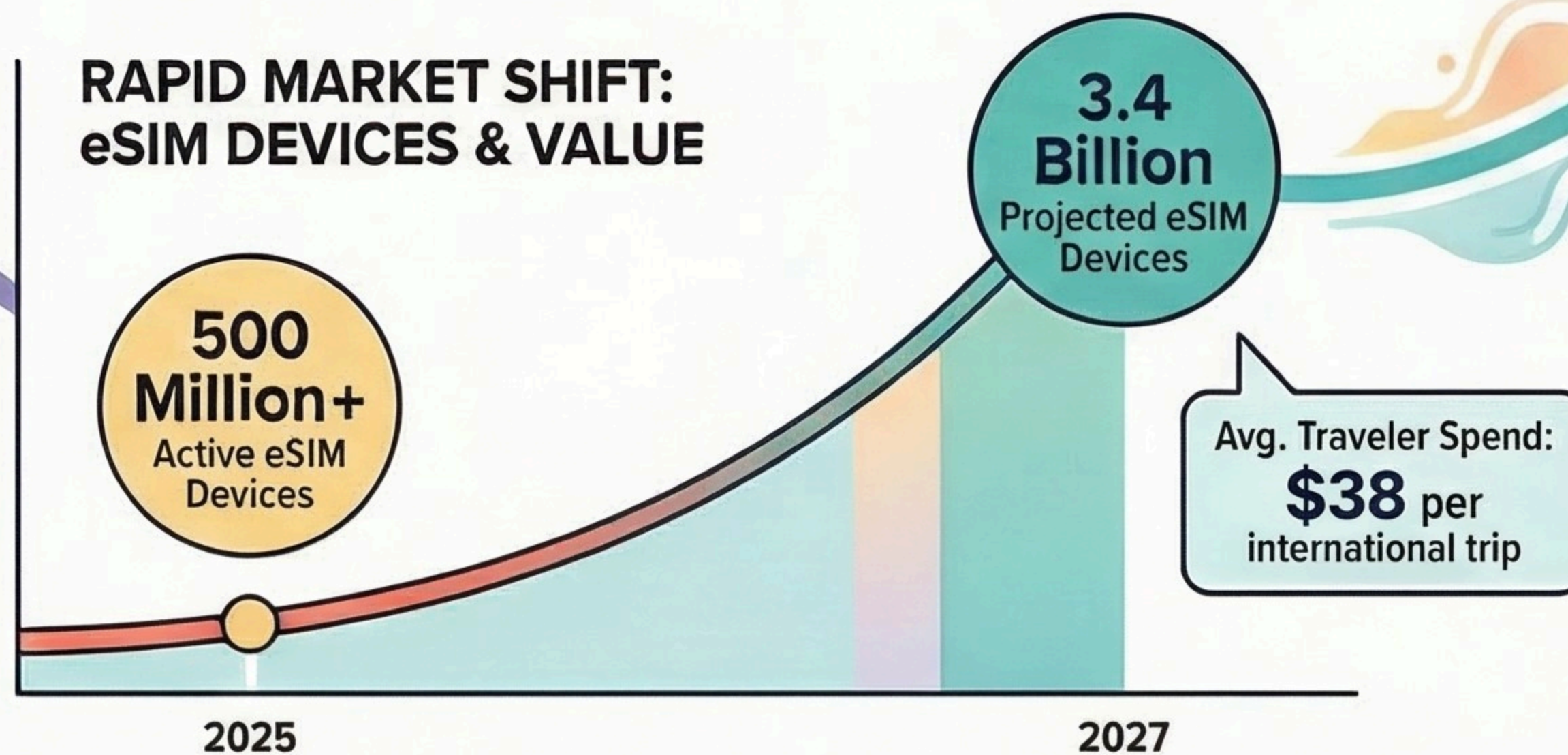
Hotels can provide "room-to-street" connectivity via QR codes, increasing guest loyalty and revenue.



### OTAs: Contextual Ancillary Revenue

Platforms can use destination data to offer high-margin data plans during the booking flow.

## RAPID MARKET SHIFT: eSIM DEVICES & VALUE



### MICE: Mass Group Provisioning

Organizers can pre-distribute connectivity to conference attendees, eliminating roaming chaos for international groups.