

# WhateSIM

INDUSTRY REPORT

## State of Travel Connectivity 2026

Surveying 2,400 international travelers and 380 travel businesses across 42 countries on connectivity behavior, spend, and purchasing decisions.

**2,400**

Travelers surveyed

**380**

Businesses surveyed

**42**

Countries

**Q1 2026**

Data period

01

# Executive Summary

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The travel connectivity market is at an inflection point. Our research across 42 countries reveals that 78% of international travelers are frustrated by roaming costs, while 67% would purchase an eSIM if offered at a relevant touchpoint in their travel journey.

For travel businesses, embedded connectivity represents a significant untapped revenue stream. Partners offering eSIM connectivity at checkout see average attach rates of 12-22%, with revenue per activation ranging from \$4.80 to \$12.40 depending on the destination and data plan.

This report provides the most comprehensive analysis to date of how connectivity is reshaping the travel experience and creating new business opportunities across the travel value chain.

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## The Global eSIM Landscape

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Global eSIM-capable device shipments surpassed 500 million units in 2025, with Apple, Samsung, and Google leading adoption. By 2028, an estimated 85% of all new smartphones will support eSIM technology.

The travel eSIM market is projected to reach \$8.4 billion by 2028, growing at a CAGR of 31.2%. This growth is driven by increasing device compatibility, declining data costs, and growing traveler awareness.

Regional adoption varies significantly. Western Europe and East Asia lead with 45% awareness, while Southeast Asia and Latin America are emerging as high-growth markets with 28% year-over-year adoption increases.

**03**

# Traveler Connectivity Behavior

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Our survey of 2,400 international travelers reveals that connectivity is no longer a luxury but a fundamental expectation. 91% of travelers consider mobile data access essential during international trips.

The average international traveler spends \$47 on connectivity per trip, with business travelers spending up to \$78. However, 68% report dissatisfaction with their connectivity solution, citing cost, complexity, or poor coverage.

The purchase timing window is critical: 34% of travelers research connectivity options 1-3 days before departure, while 28% wait until arrival.

## 04

## The Business Opportunity

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Travel businesses that embed connectivity into their customer journey see measurable improvements across key metrics. Hotels report 8-12% increases in guest satisfaction scores, while OTAs see 15-22% attach rates on eSIM add-ons.

The average revenue per eSIM activation for partners is \$9.40, with margins of 35-55% depending on the integration model.

Beyond direct revenue, connectivity creates a data-rich touchpoint that improves guest engagement, enables personalized offers, and drives repeat bookings through the digital relationship.

## 05

## eSIM Adoption by Travel Segment

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Business travelers lead adoption at 82%, driven by expense account coverage and the premium placed on seamless connectivity. Frequent leisure travelers follow at 67%.

OTA customers show a 54% adoption rate when eSIM is presented as a checkout add-on, significantly outperforming travel insurance (32%) and seat upgrades (28%).

First-time international travelers represent the highest-growth segment at 28% adoption, up from 11% in 2024.

**06**

# Partner Integration Models

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Three primary integration models have emerged: API integration, white-label storefronts, and manual provisioning. Each offers different trade-offs in terms of implementation complexity, conversion rates, and revenue potential.

API integration delivers the highest conversion rates (18-22%) by embedding eSIM purchase directly into the booking flow. White-label storefronts offer a middle ground at 12-16% conversion.

Manual provisioning through QR codes at check-in yields 8-12% conversion rates but requires minimal technical investment.

## 07

## Revenue Benchmarks

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Across all partner verticals, the average revenue per eSIM activation is \$9.40, with significant variation by destination. European destinations average \$7.20, while Asia-Pacific averages \$12.80.

Commission structures typically range from 25-45% of the eSIM plan value, with volume-based tiers for high-performing partners.

The lifetime value of a connected traveler extends beyond the initial purchase. 47% of travelers who use an eSIM through a travel partner return for subsequent trips.

## 08

## Regional Analysis

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Europe remains the largest market for travel eSIM adoption, accounting for 38% of global activations. Asia-Pacific is the fastest-growing region at 42% year-over-year growth.

The Americas show a split pattern: North America has high awareness but moderate adoption due to competitive domestic roaming plans, while Latin America represents a high-growth opportunity.

Middle East and Africa are emerging markets with 24% growth, driven by increasing international tourism to Dubai, Saudi Arabia, and East African safari destinations.

## Key Findings at a Glance

**78%**

### Frustrated by roaming

International travelers frustrated by connectivity costs

**\$9.40**

### Avg. revenue/activation

Partner revenue per eSIM activation across all verticals

**22%**

### Peak attach rate

OTA checkout conversion when eSIM is offered as add-on

**3.2x**

### Growth vs physical SIM

eSIM growth rate compared to physical SIM (2023-2025)

**\$8.4B**

### Market size by 2028

Projected travel eSIM market value

# Ready to Get Started?

Transform your travel business with embedded connectivity.

[Visit whatesim.com](https://whatesim.com)

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