



Travel eSIM: A Major Market Disruption



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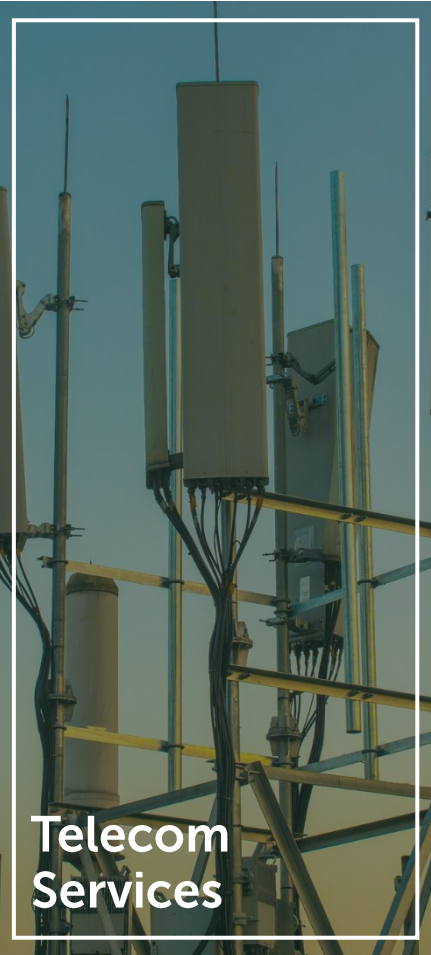


The logo for CCS Insight, featuring the text "CCS Insight" in a white sans-serif font. The text is centered within a white square, which is itself centered within a larger, rounded square. The background of this larger square is split vertically: the left side is yellow and the right side is green.

CCS
Insight

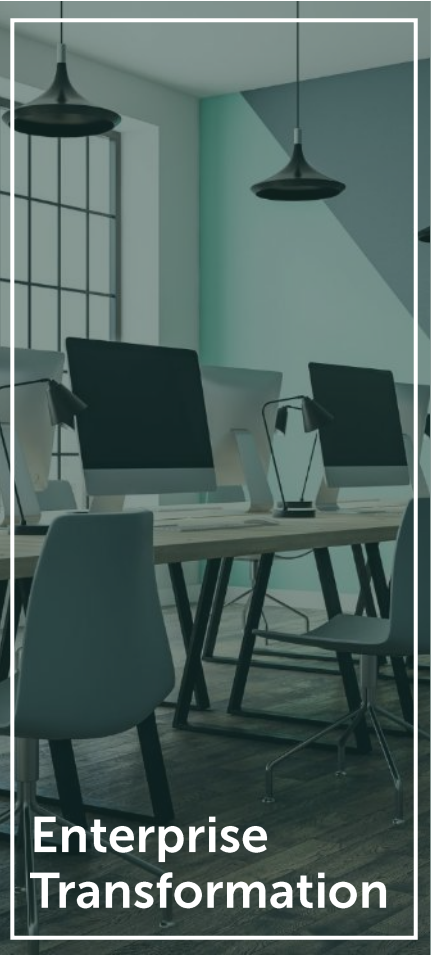
A nighttime aerial view of a city skyline, likely Kuala Lumpur, with the Petronas Twin Towers prominently featured on the right. The city lights are visible against a dark sky. Overlaid on the cityscape is a complex network of vertical lines of various colors (blue, purple, green) that extend from the ground level up to the top of the frame. Each line ends in a small, glowing dot of the same color, creating a digital or data visualization effect.

We are **CCS Insight**



**CCS
Insight**

**Making sense of
the connected
world.**



FDM acquires CCS Insight



- ✓ Detailed market analysis in PDF report and accompanying Excel data file
- ✓ eSIM in smartphones: strategy update for major manufacturers
- ✓ Assessment of travel eSIM specialists, including profiles of leading players
- ✓ CCS Insight consumer research into travel eSIM
- ✓ Forecast: travel eSIM downloads and revenue by region, device shipments by manufacturer and region (eSIM-capable and eSIM-only)
- ✓ Impact on telecom operators, assessment of travel eSIM services from Vodafone, Orange and others
- ✓ Opportunities for companies in the travel sector
- ✓ Other players moving into travel eSIM, such as financial institutions and grocery brands
- ✓ Future scenarios: how could this market play out?

For more information, please get in touch at ccsinsight.com/contact-us



More than 20 primary research interviews

Conversations with players across the ecosystem

Wide knowledge of the connectivity landscape

Global approach with data split by region

Range of case studies

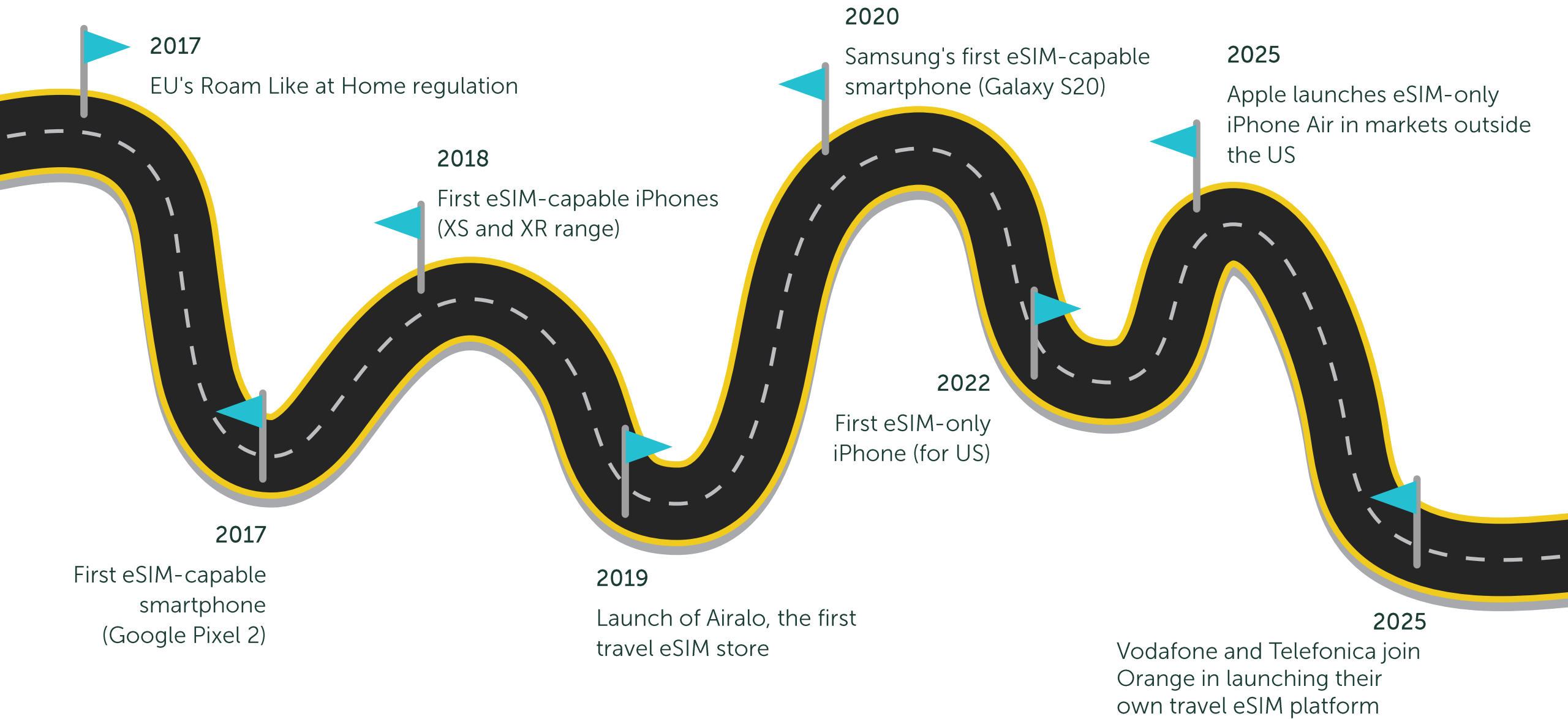


A flexible connectivity package aimed at international travellers. The eSIM acts as a replacement for a conventional roaming tariff or add-on. Its main draw is to avoid costly roaming fees from a domestic operator or the hassle of buying a local SIM card on arrival at a foreign destination.

It is usually sold on a pay-as-you-go basis, but subscription options are slowly starting to emerge.

Most often, a travel eSIM is restricted to mobile data, but calls and text messages are slowly starting to be introduced.





Smartphone manufacturers



Mobile operators



Specialist travel eSIM providers



Intermediaries and enablers



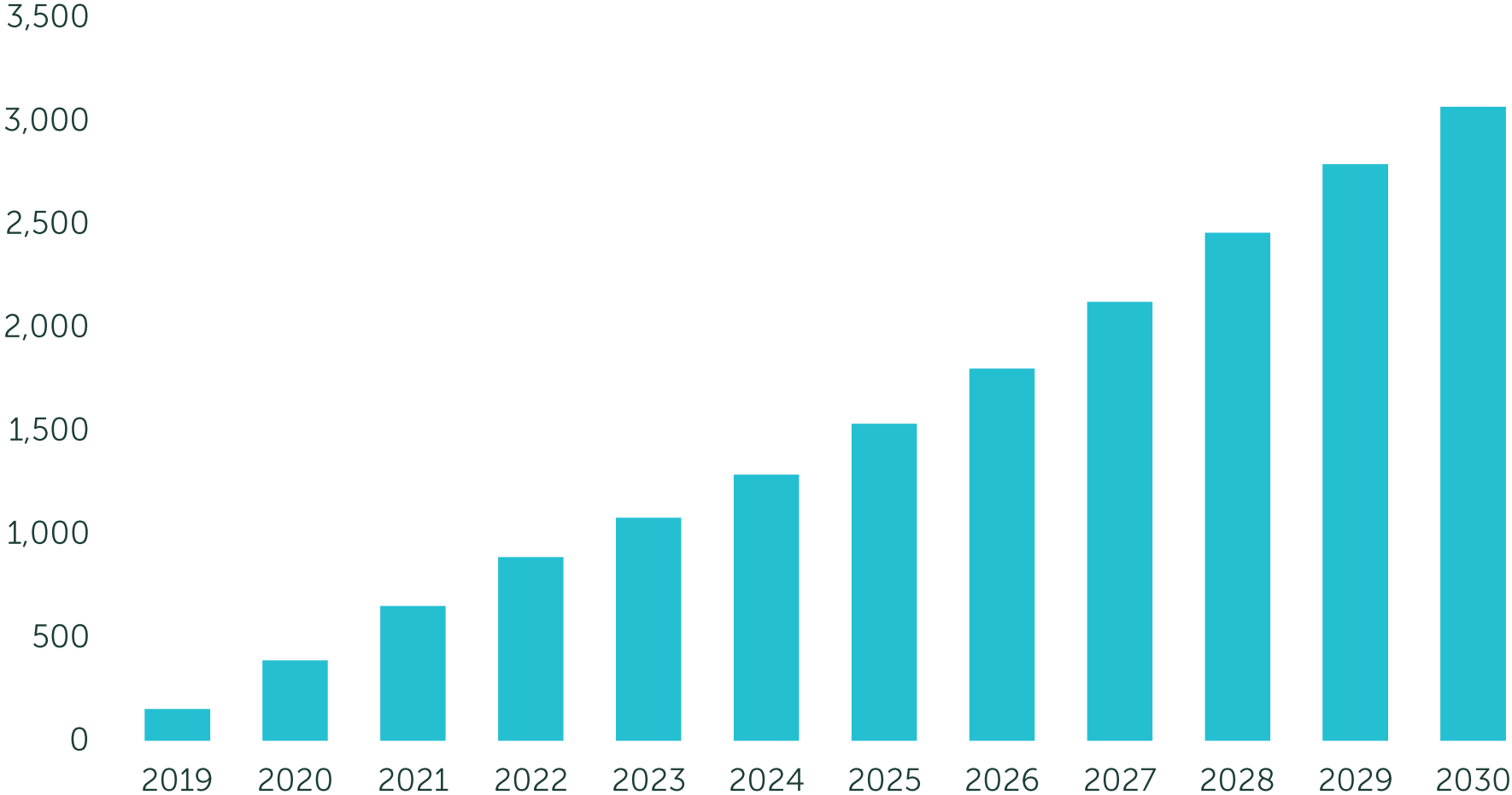
Travel companies



Other



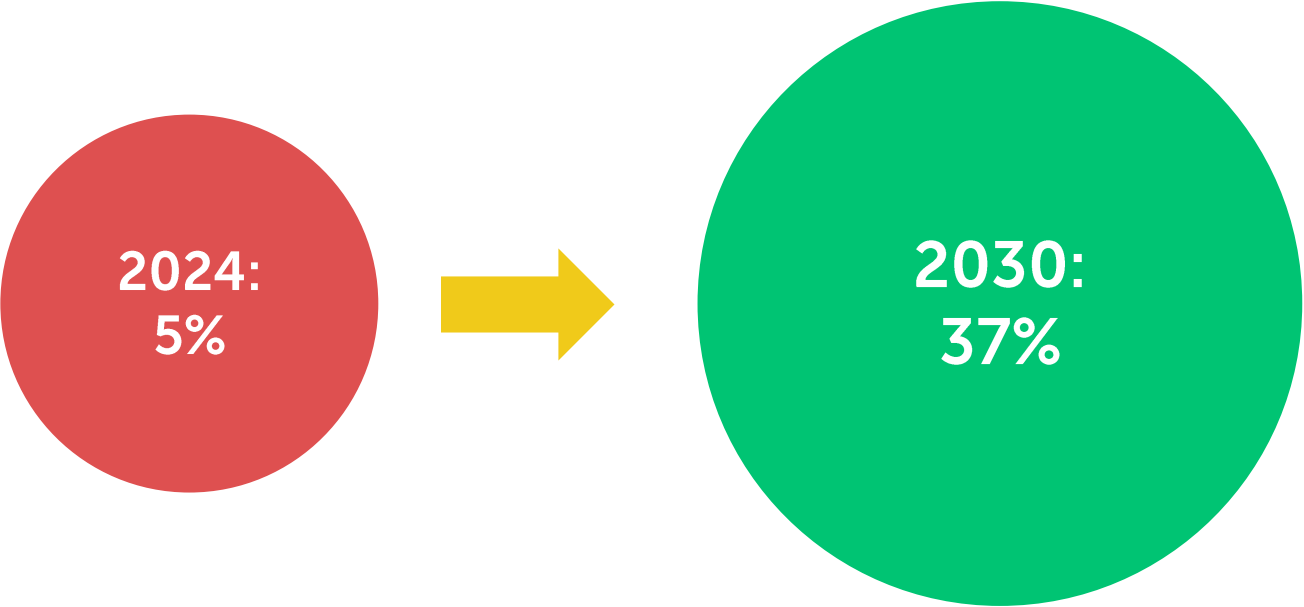
Installed base of eSIM-capable smartphones (M)



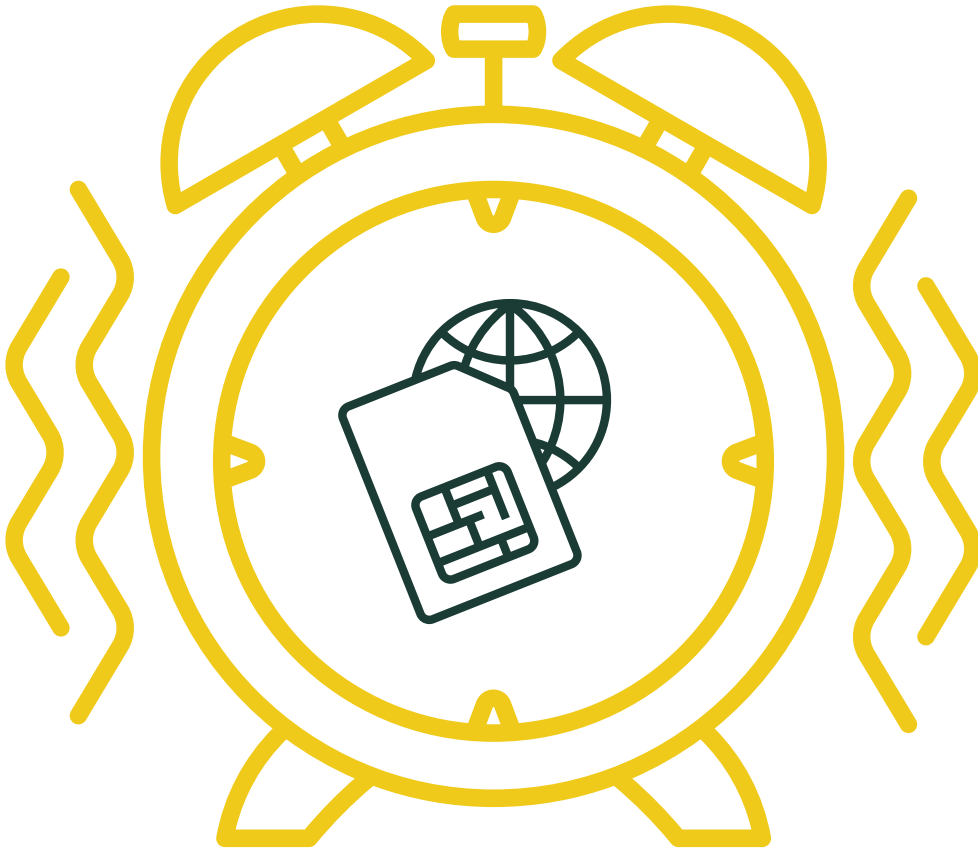
Growth from less than 1.3 billion in 2024 to over 3 billion in 2030

Source: CCS Insight Spotlight: Travel eSIM, September 2025

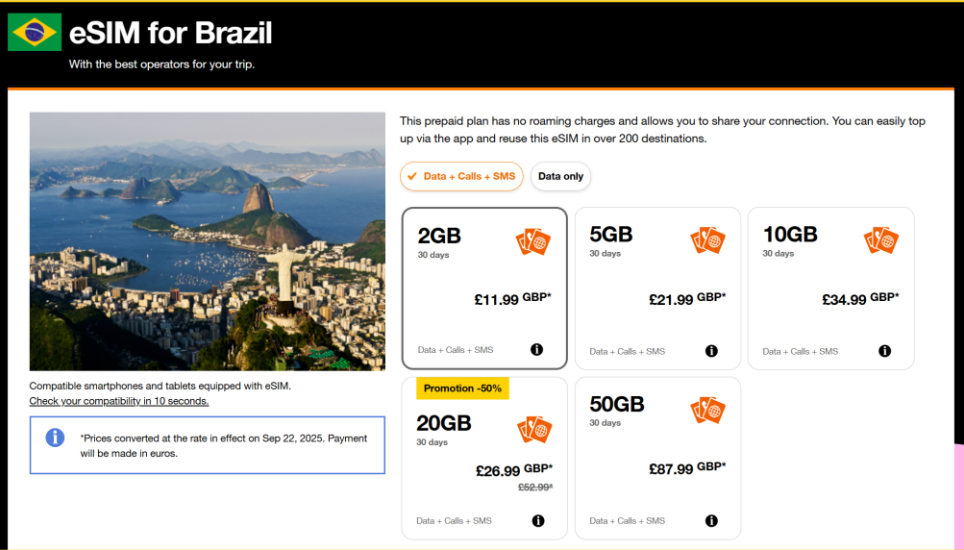
Share of eSIM-only smartphone shipments







Orange Travel



eSIM for Brazil
With the best operators for your trip.

This prepaid plan has no roaming charges and allows you to share your connection. You can easily top up via the app and reuse this eSIM in over 200 destinations.

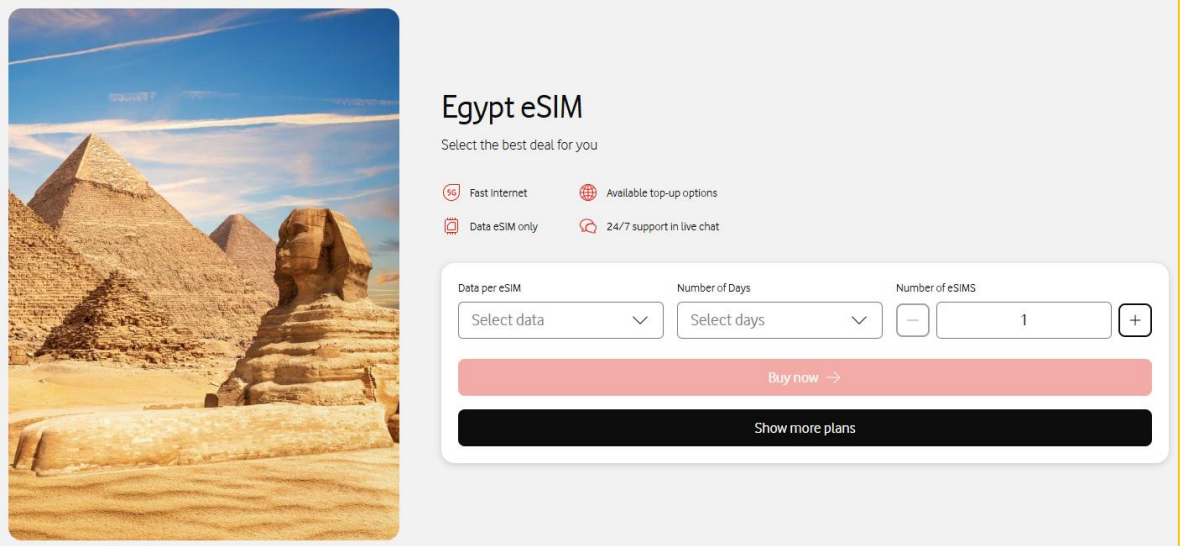
Data + Calls + SMS Data only

Plan	Duration	Price (GBP)	Includes
2GB	30 days	£11.99	Data + Calls + SMS
5GB	30 days	£21.99	Data + Calls + SMS
10GB	30 days	£34.99	Data + Calls + SMS
20GB	30 days	£26.99 (Promotion -50%) £52.99*	Data + Calls + SMS
50GB	30 days	£87.99	Data + Calls + SMS

Compatible smartphones and tablets equipped with eSIM. Check your compatibility in 10 seconds.

*Prices converted at the rate in effect on Sep 22, 2025. Payment will be made in euros.

Vodafone Travel eSIM



Egypt eSIM
Select the best deal for you

- Fast internet
- Available top-up options
- Data eSIM only
- 24/7 support in live chat

Data per eSIM: Select data (dropdown)
Number of Days: Select days (dropdown)
Number of eSIMs: 1 (with +/- buttons)

[Buy now ->](#)

[Show more plans](#)



Opportunities

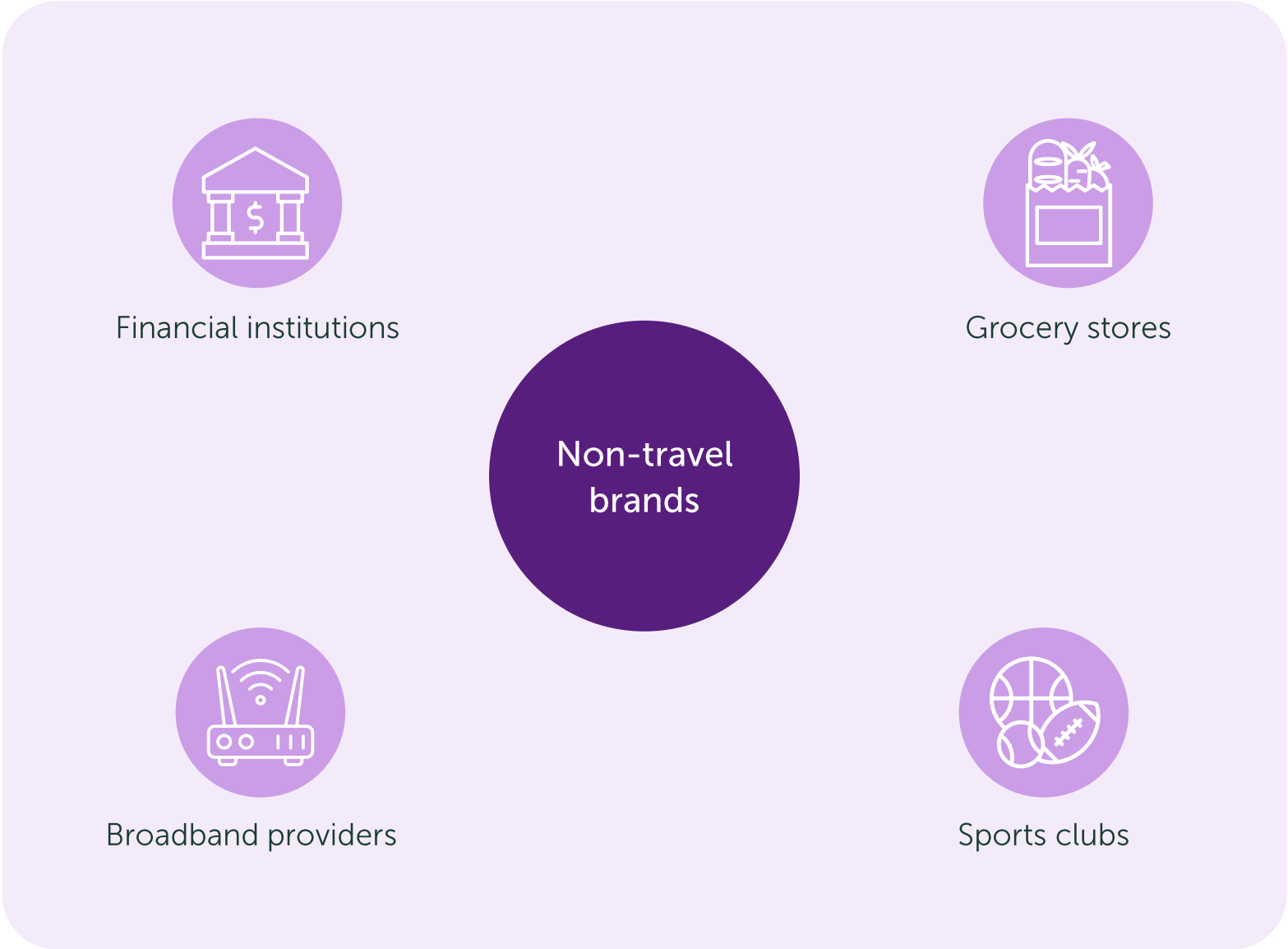
- 1 Target new revenue from "silent roamers"
- 2 Build broader understanding of eSIM
- 3 Build brand loyalty and trust
- 4 Target new customers with domestic plans
- 5 Option to diversify further into travel



Challenges

- 1 Likelihood of cannibalizing some roaming revenue
- 2 Need to evolve from local to global mind-set
- 3 Investment required
- 4 Loss of opportunity to upsell







27%

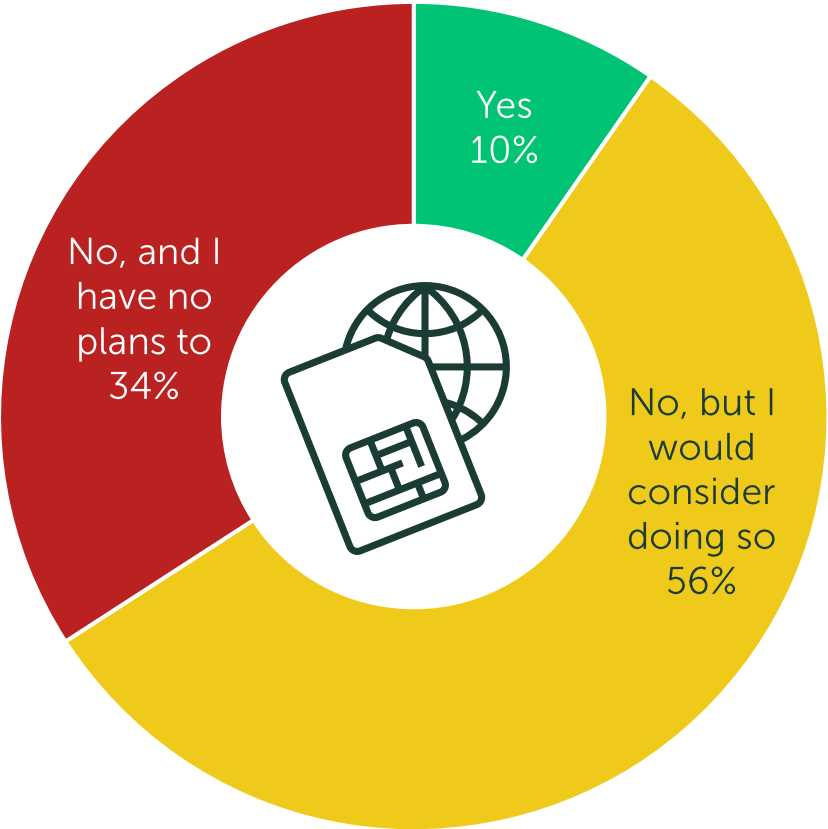
of people have heard of a travel eSIM provider

Q: Here is a list of travel eSIM providers. They offer connectivity to international travellers. Which have you heard of?

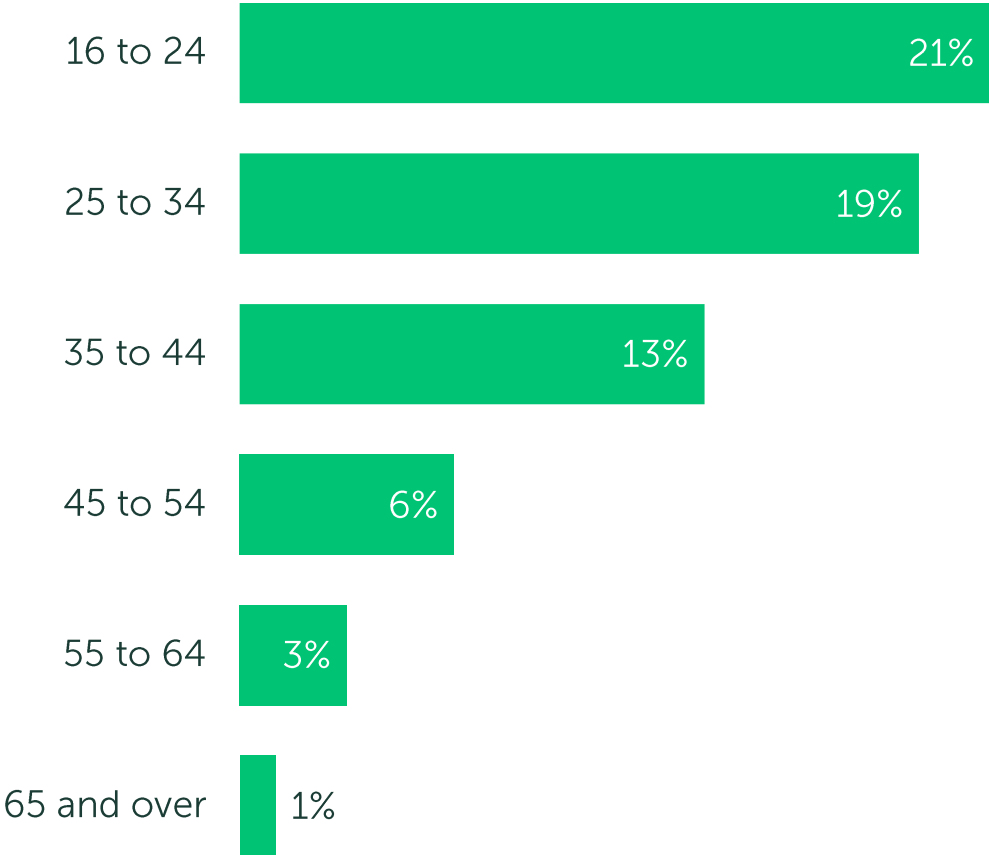
Base: 5,022 (across the UK, US, Germany, Spain and Australia)

Source: CCS Insight *Spotlight: Travel eSIM, September 2025*

Have you used a travel eSIM?



Travel eSIM use by age



Q: Have you ever used a travel eSIM provider before (e.g. Airalo, Holafly, Nomad)?

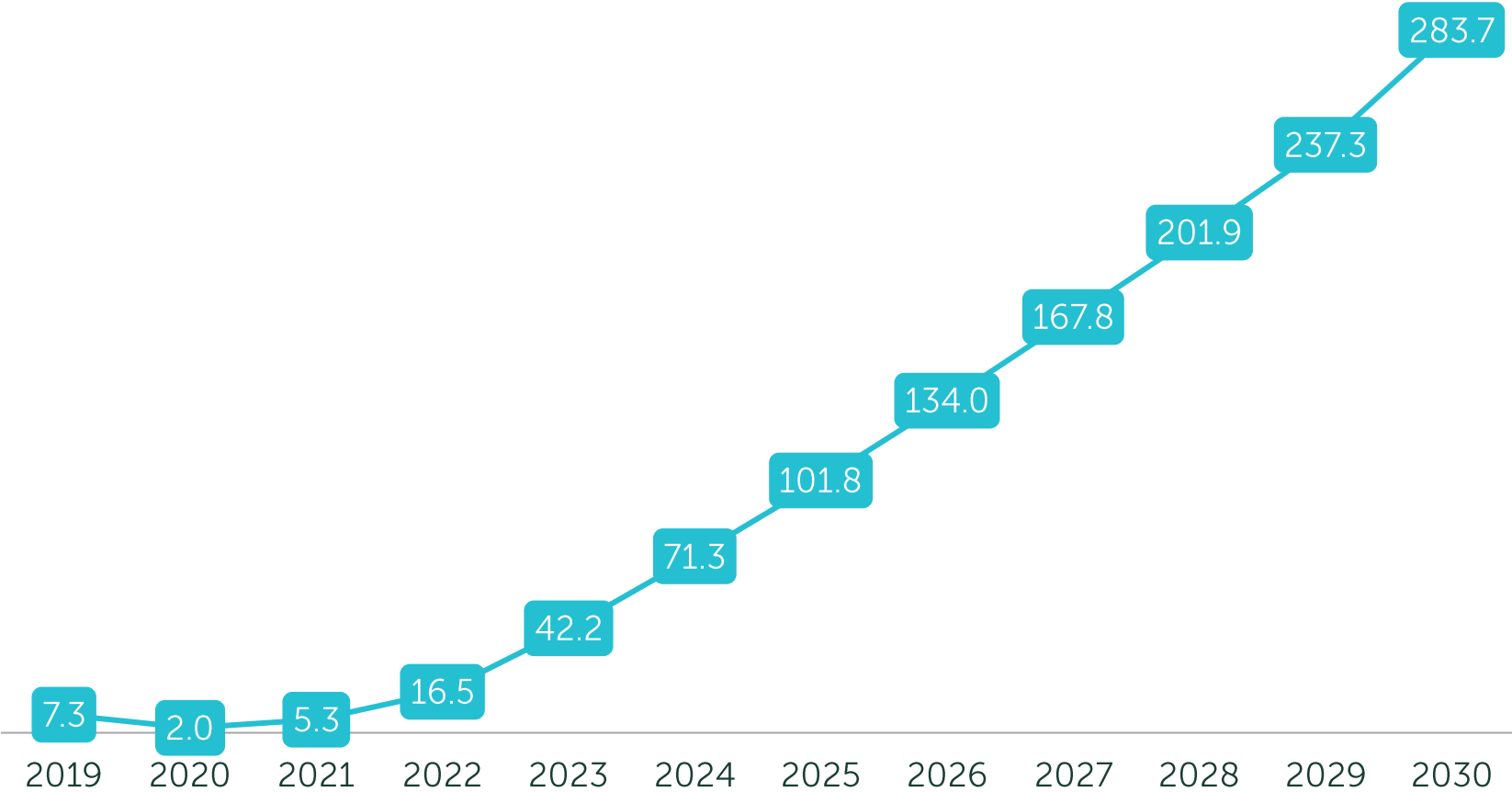
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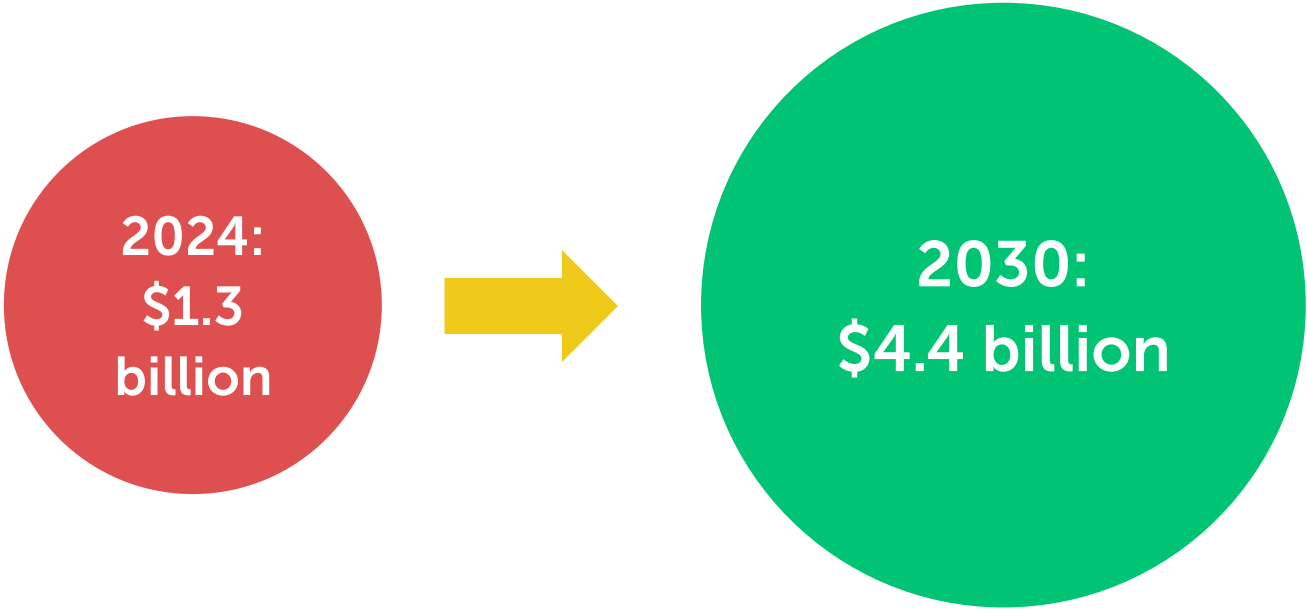
Travel eSIM Market Forecast

Number of travel eSIMs provisioned per year (M)



Source: CCS Insight Spotlight: Travel eSIM, September 2025

Total industry revenue from travel eSIM packages sold





Multiple factors are spurring strong growth of travel eSIM



There is a wide range of players in the ecosystem



The market is poised for a major shake-up



More operators are expected to launch travel eSIM services in response



CCS Insight's *Spotlight* report assesses different angles of the industry

The banner features a vibrant purple-to-pink gradient background. On the left, the CCS Insight logo is shown as two overlapping squares, one white and one purple. To its right is the FDM logo in a white rounded rectangle. The main title 'PREDICTIONS' is in large white bold letters, with '2026 AND BEYOND' below it. The date '23 October 2025 | London' and the call to action 'Register your interest now' are in white text. On the right side, the text 'In partnership with' is above the Vodafone and 3 logos. Below that, 'With support from' is above the Qualcomm, SAMSUNG, and TCL logos.

CCS Insight | FDM

In partnership with  

PREDICTIONS

2026 AND BEYOND

23 October 2025 | London

Register your interest now

With support from



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Q&A



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