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The untapped potential of travel eSIMs for mobile operators and consumer brands

A Proximus Global Predictive Insights report





Milind Pathak

Chief Marketing Officer
Proximus Global

Welcome to the Proximus Global Predictive Insights report on the untapped potential of travel SIMs, conducted in collaboration with research and analytics specialist YouGov. This report uncovers critical insights into the evolving landscape of consumer behaviors around Travel eSIM technology, a growing trend in global travel connectivity. Grounded in a survey of over 6,500 adults across the US, UK, and China, the report explores travelers' awareness, understanding, and sentiment towards the adoption of eSIM technology.

With international travel expected to reach **1.8 billion people**¹ per year by 2030, up from 1.5 billion in 2019, the need for innovative connectivity solutions like eSIMs is growing. eSIMs offer flexibility and convenience, eliminating the need for physical SIM cards, and are emerging as a compelling alternative to local SIM purchases or mobile roaming. The global travel eSIM market is projected to exceed **\$3 billion by 2033**², highlighting its transformative potential.

Proximus Global is committed to staying at the forefront of technological advancements and consumer trends in digital communications. With this report, we aim to provide valuable insights into the untapped potential of travel eSIM technology. The report analyzes consumer perceptions, geographic differences, and opportunities for stakeholders in the eSIM market, providing actionable insights for telcos and enterprises to leverage eSIM technology in the evolving global travel landscape.

Contents

Methodology

The survey was conducted by YouGov between February 14 and March 4, 2025, and included responses from a total of 6,625 adults across three key markets: the US, UK, and China. The study was carried out via online interviews administered to YouGov panel members, comprised of over 2.5 million individuals who have voluntarily agreed to participate in surveys.

To ensure a randomized and unbiased approach, panellists were selected at random from the base sample and were invited to participate via email. The distribution of the sample size across the markets was as follows:



- United States: 2,541 participants
- United Kingdom: 2,141 participants
- China: 2,033 participants

This methodology ensures representative insights across diverse demographics in each region while maintaining a robust and systematic approach to data collection.

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Executive summary



Executive summary

Our recent survey across the US, UK, and China uncovered a significant gap between awareness and the market potential for eSIM technology. Once made aware of the technology and how it can assist consumers with global connectivity while traveling, a considerable appetite for the solution was noted among those polled. This presents mobile operators, retailers, and other non-traditional suppliers with a considerable opportunity.

Key Findings

Awareness Gap: Only 33% of consumers across the geographies are aware of what an eSIM is, while 42% are unsure whether their phone is equipped with one.

Strong Interest: When informed of its benefits, 49% of global respondents expressed interest in eSIM-enabled services, with higher enthusiasm in the UK (56%) and China (60%).

Provider Neutrality: Consumers are largely agnostic to whether they purchase an eSIM from their traditional telco provider or a non-traditional vendor, highlighting an opportunity for telcos to address their existing customer base, or for new market entrants and innovative partnerships.

Opportunities for Growth

Mobile operators have an opportunity to diversify offerings with flexible, cost-effective eSIM solutions tailored for travelers, to create stickiness with their existing customer base as they travel.

Retailers and other non-carrier/traditional suppliers are in a strong position to leverage customer loyalty in other consumer areas such as supermarkets, airlines, etc., to expand into eSIM offerings.

Roadmap for Success

To secure a strong position in the growing global travel eSIM market, businesses will need to educate consumers on the technology while developing innovative eSIM-enabled services that address travelers’ growing needs. Telcos and enterprises alike can also look to leverage partnerships with global communication enablers to unlock the potential for scalable travel eSIM solutions.



Jorn Vercamert
Chief Product Officer
Proximus Global

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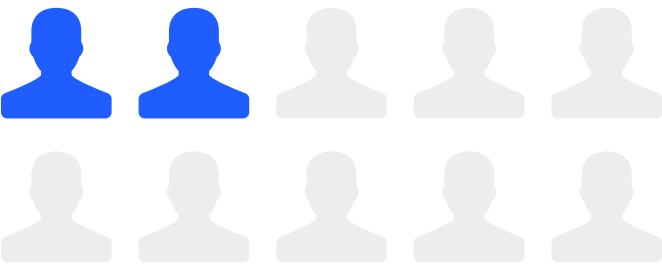
What the data says



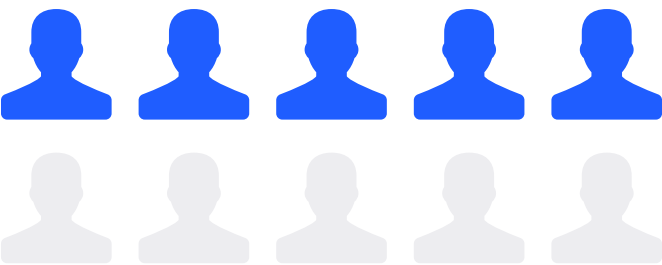
Global consumer awareness of eSIM technology is low



Globally
one third (33%) of consumers say they've heard of an eSIM and know what it is.

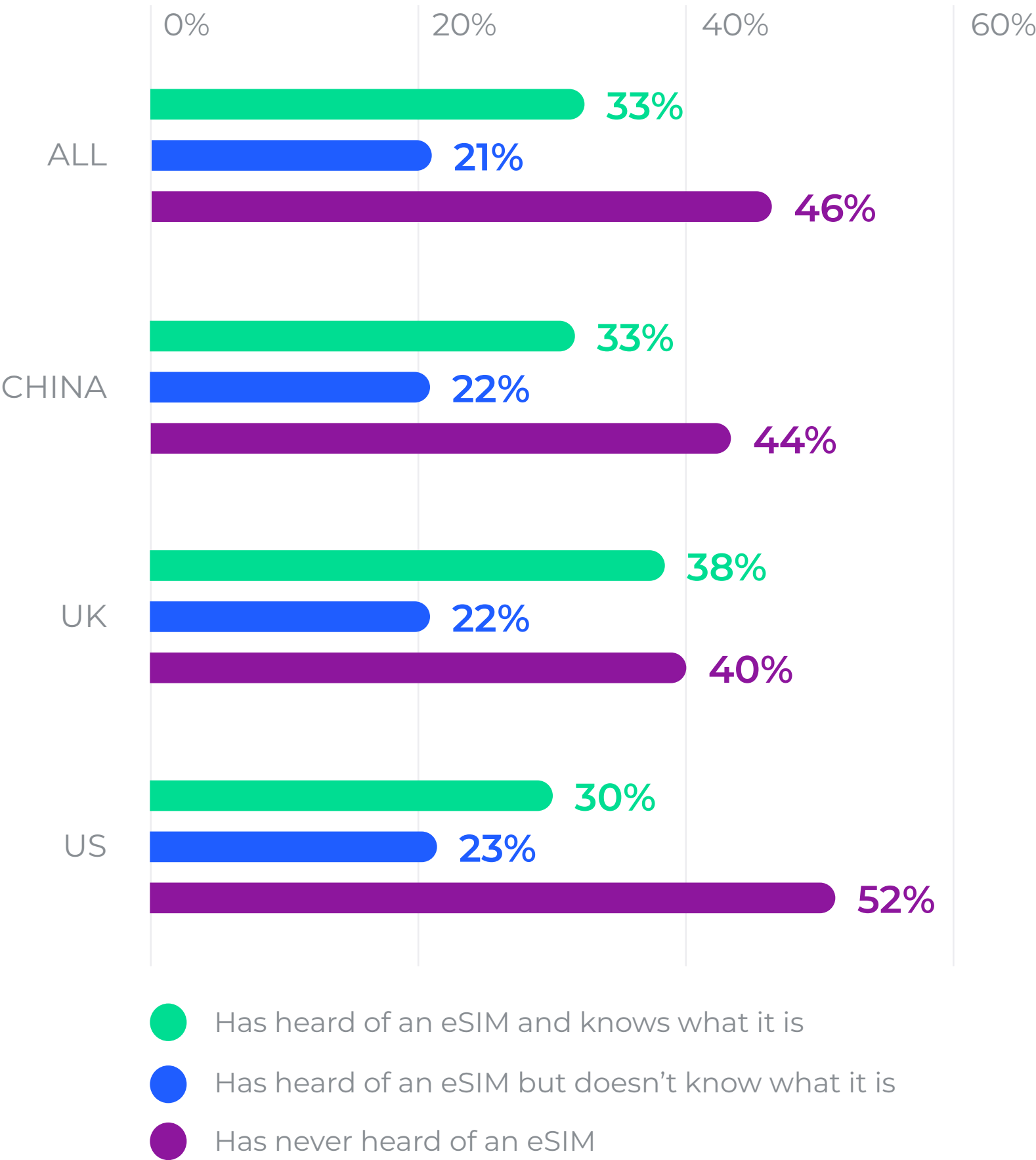


A further
21% have heard of eSIM but don't understand what it is.

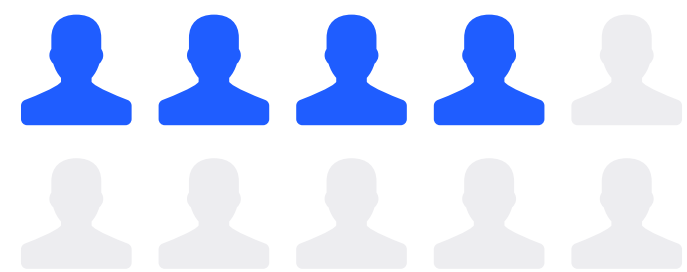


In the U.S., awareness is even lower:
over half (52%) of consumers say they've never heard of an eSIM at all.

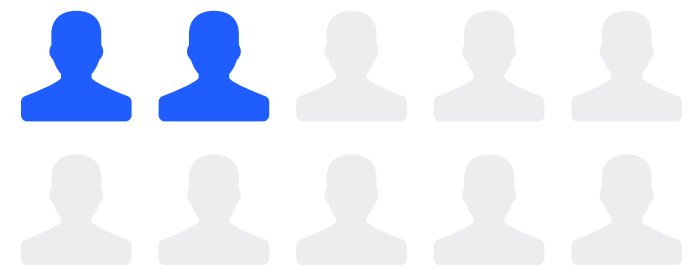
Have you heard of an eSIM?



Consumer understanding of their own handset technology is also low



Four in ten people (42%) globally are unsure whether their phone has an eSIM.

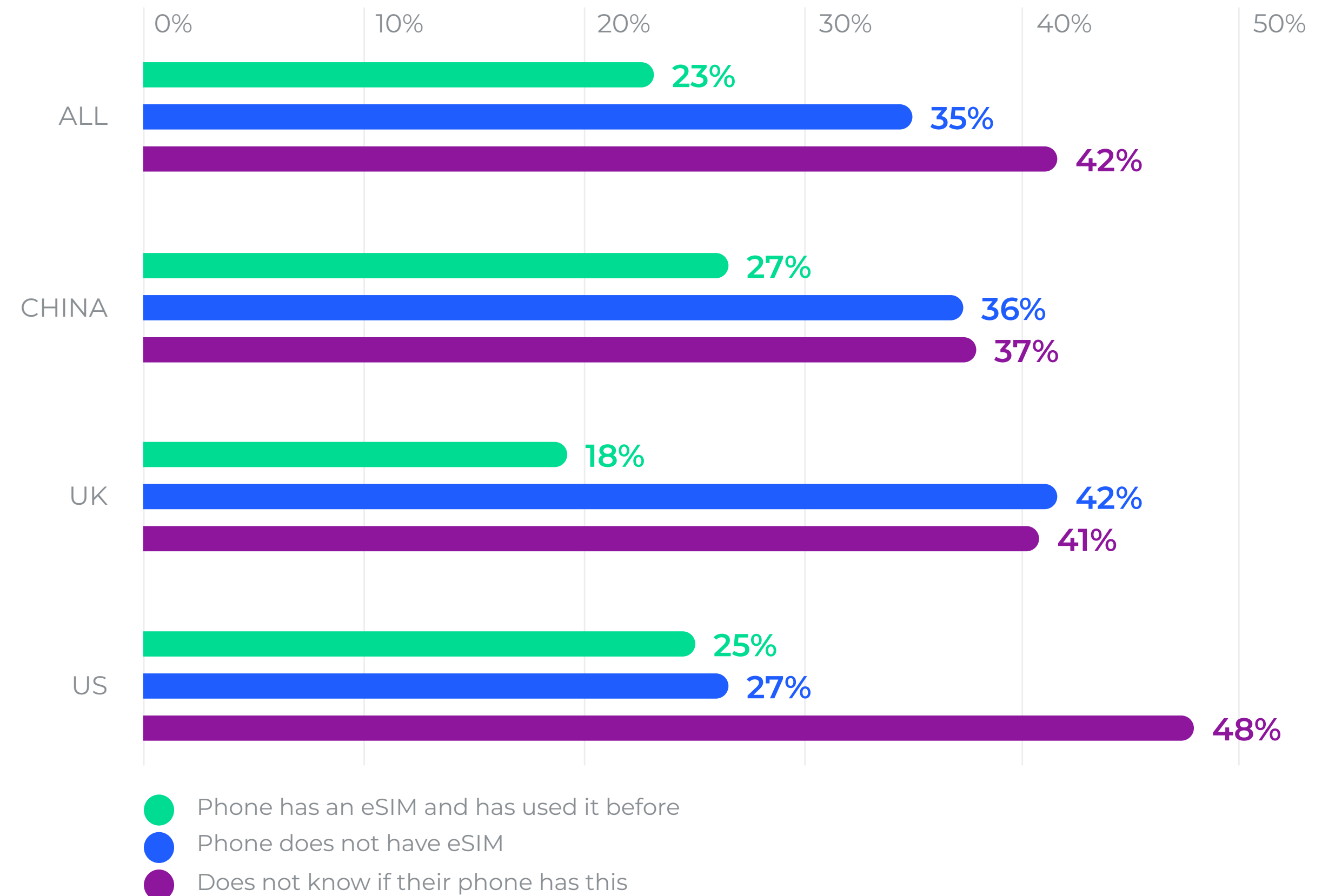


Only 18% of consumers in the UK say their phone is equipped with an eSIM.



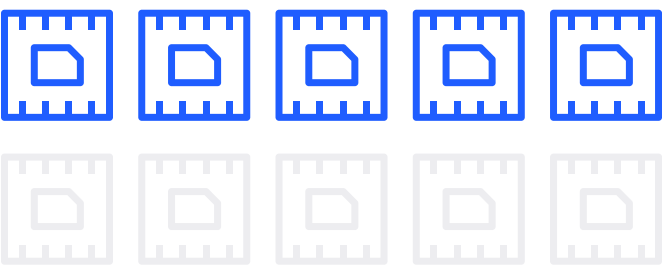
48% of consumers in the US are unsure whether their phone has an eSIM.

Do you know if your phone is equipped with an eSIM?



Global consumer interest in eSIM services is strong

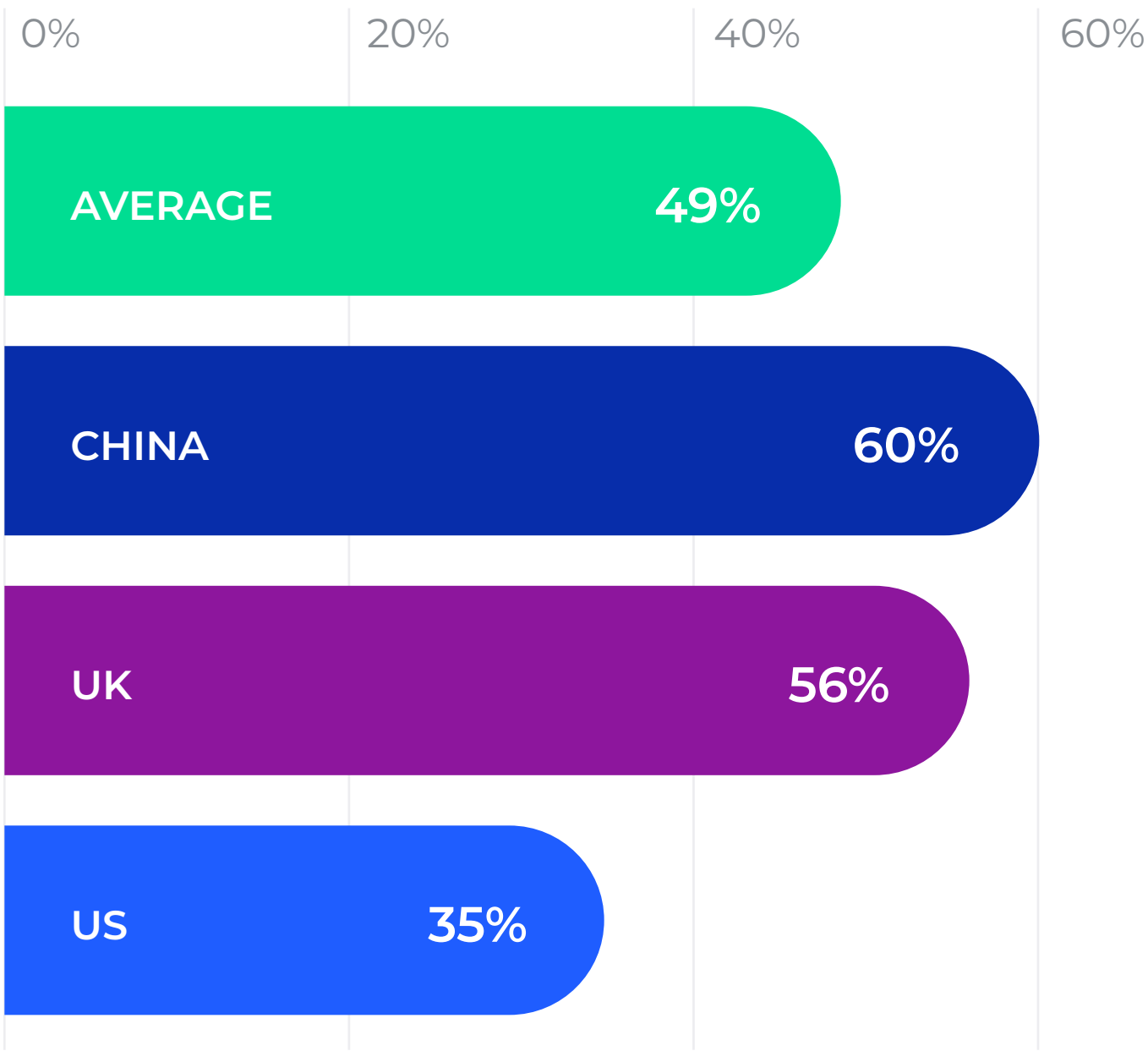
In the test group, once consumers were introduced to a basic explanation of eSIM technology and how it can assist in seamless global connectivity for travelers, they indicated a strong interest in adopting this technology - even despite initial low awareness and understanding. This highlights the opportunity for eSIM providers to cater to consumer appetites.



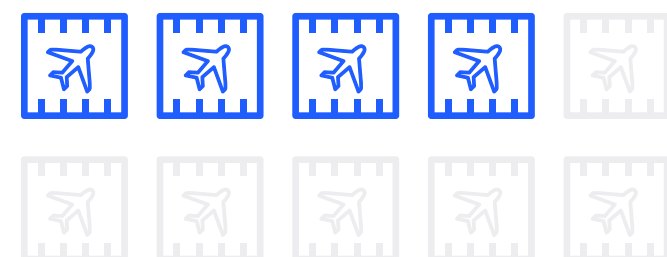
Nearly half of consumers in China, U.S. and U.K

would consider using an eSIM when traveling abroad, with an average of 49% expressing interest and China leading the way at 60% interest—11% higher than the global average.

Would you ever consider using an eSIM when traveling abroad?

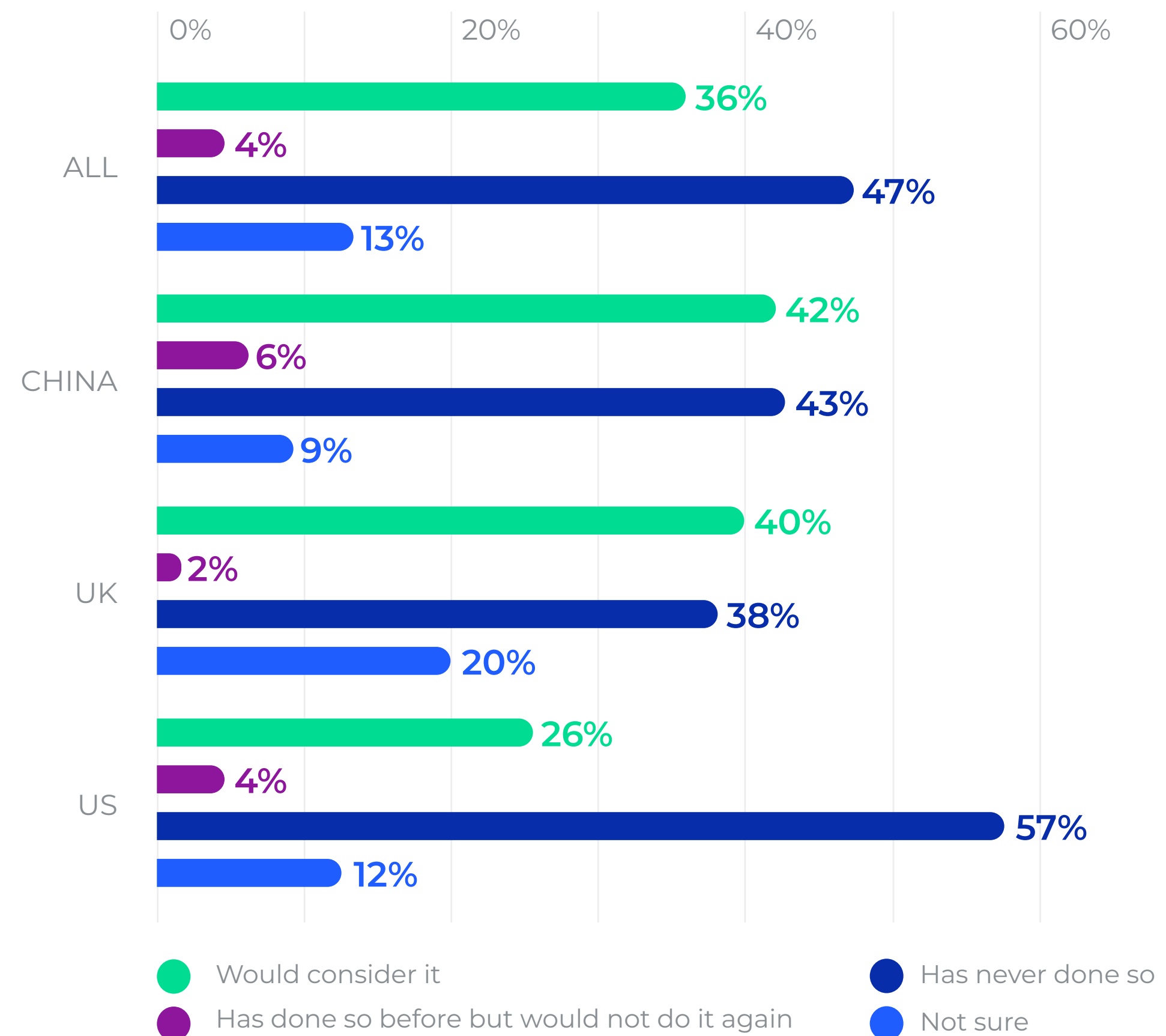


Consumers are open to buying travel SIMs from non-traditional carriers



36% of consumers would consider purchasing a travel SIM from a non-traditional provider.

Would you ever buy a travel SIM package from a non-traditional carrier, for example, a supermarket, airline or travel website?



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Our guidance



Our research highlights the tremendous opportunity for telcos, retail and travel brands to drive adoption and cross-sell travel eSIMs within their existing customer base:



New market potential & improved customer relationships

Travel eSIMs can help companies enhance their offerings, improve customer satisfaction, and achieve operational efficiencies, leading to stronger market positions and increased profitability.

For operators, there is an opportunity to replace roaming revenues with eSIM services. This requires work in taking the lead on increasing consumer awareness and educating on device compatibility.



Transforming business travel

There is also the potential to educate enterprises on the role of eSIMs in replacing multiple devices for employees (for example, having a work and personal number on the same device).



First mover advantage

Broad awareness of eSIMs is still low considering the relative ease of use and tangible benefits they provide. Awareness and demand for eSIMs among consumers is expected to grow.

Companies stand to gain by establishing themselves as first movers and leaders in this market.



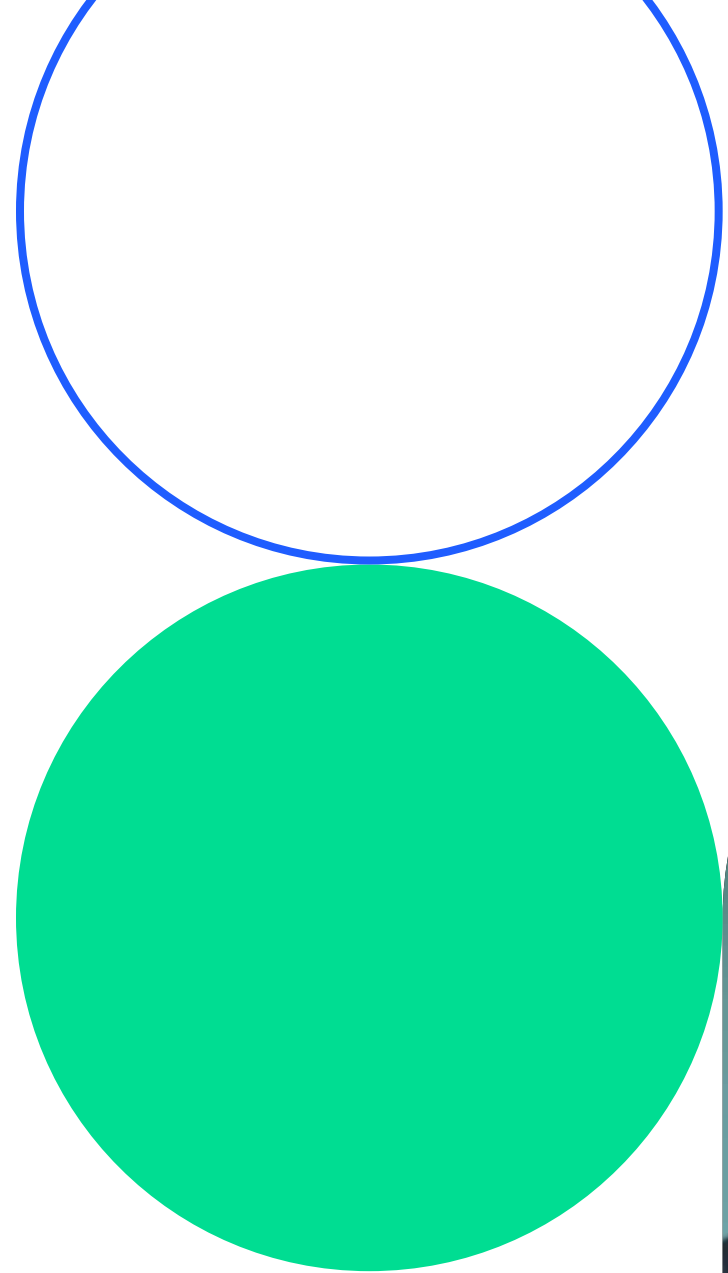
Cross-sell potential for travel brands

For wider businesses already in the travel industry, there is a relatively straightforward cross-sell opportunity to bundle eSIM services into their offering and add a new revenue stream by partnering with plug-and-play connectivity providers, who can white-label eSIM services.



Increasing consumer awareness and demand

36% of global consumers would consider buying an eSIM from a non-traditional connectivity provider, of which 11% have already done so. We anticipate this number to increase over time as broader awareness of eSIMs increases through increased marketing and advertising and word of mouth promotion from previous users and 11% have already done so.



Surash Patel
Chief Revenue Officer
Proximus Global

“Our research highlights the significant potential for brands in the global travel eSIM market. Demand for eSIM technology is rapidly increasing. Companies that act now will be well-positioned to capture substantial market share. This opportunity isn’t limited to telcos; with the right partner, establishing an eSIM offering is straightforward. Retail and travel brands can leverage their customer base to drive adoption and explore cross-selling opportunities for travel eSIMs.”

Sources:
1 | UN Tourism, <https://www.unwto.org/investment/un-tourism-investment-guidelines-SA1>
2 | Kaleido Intelligence, <https://kaleidointelligence.com/esim-travel-plans-surge-traveller-spending-projected-to-top-3-3-billion-by-2025/>

Proximus Global, combining the strengths of Telesign, BICS, and Route Mobile, is transforming the future of communications and digital identity. Together, our solutions fuel innovation across the world’s largest companies and emerging brands. Our unrivaled global reach empowers businesses to create engaging experiences with built-in fraud protection across the entire customer lifecycle. Our comprehensive suite of solutions – from our super network for voice, messaging, and data, to 5G and IoT; and from verification and intelligence to CPaaS for personalized omnichannel engagement – enables businesses and communities to thrive. Reaching over 5 billion subscribers, securing more than 180 billion transactions annually, and connecting 1,000+ destinations, we honor our commitment to connect, protect and engage everyone, everywhere.

Want to know more about Travel eSIMS? Discover our **Travel eSIM solution** for MNOs.

