



Kaleido Intelligence



TRAVEL ESIM

**A CATALYST FOR DIGITAL TRANSFORMATION IN
BORDERLESS CONNECTIVITY**

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TRAVEL eSIM 2025 Travel Connectivity Market Summary

MARKET DRIVERS

Reasons for using travel eSIM alternative to roaming.

#1 Lower cost than roaming

#2 Better connectivity and network coverage

#3 Convenience and ease of use

#4 No bill shock or unexpected charges

AVERAGE TRAVEL eSIM
SPEND PER TRIP

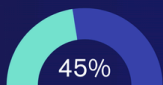
\$12 ↓ -25% yoy

AVERAGE ROAMING
SPEND PER TRIP

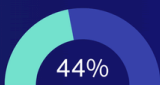
\$46 ↑ 12% yoy

PURCHASE CHANNEL PREFERENCES FOR TRAVEL eSIM

Likelihood to purchase eSIM plans from types of vendors



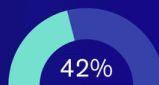
Airports



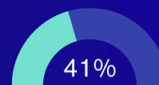
Hotels



Payment Card
Providers



Airline



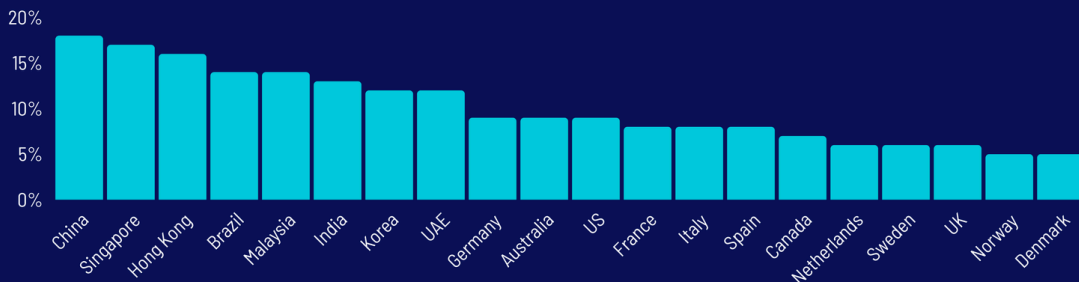
Travel Agents
Booking Sites

TRAVEL eSIM ADOPTION IS GROWING: KEY MARKETS

Proportion of Travellers Purchasing a SIM-based Alternative to Roaming (Local SIM, Travel SIM, Travel eSIM)



Proportion of Travellers with Subscription to Digital SIM-based (eSIM & Soft SIM) Travel Packages



The New Reality of International Travel Connectivity

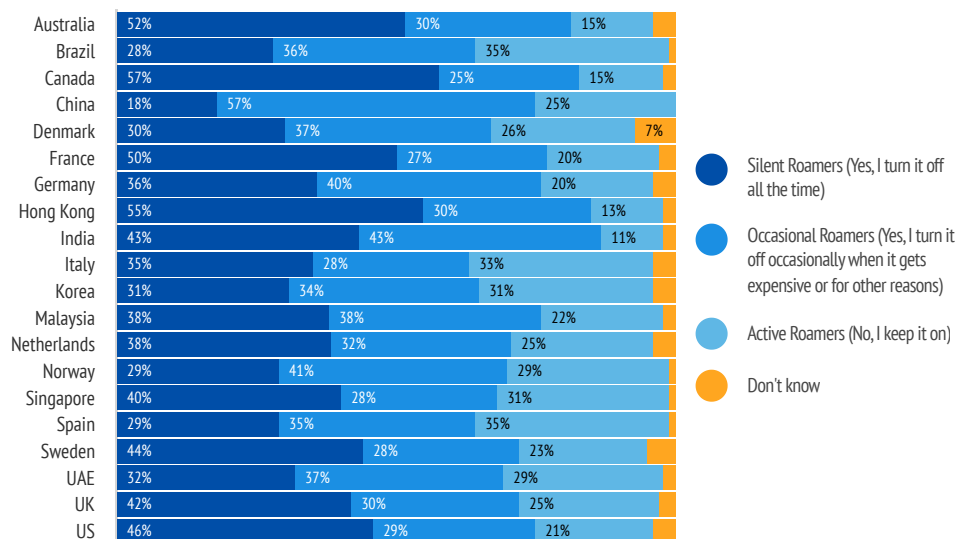
The Changing Face of Roaming in 2025

Traveller connectivity habits are rapidly evolving. With international travel expected to grow by 5% annually over the next five years, demand for flexible, affordable, and instant connectivity is rising in parallel. Kaleido's latest Q2 2025 survey of 5,000 travellers across 20 key outbound travel markets reveals a clear trend: while 58% identify as **active** or **occasional** roamers, a significant 39% now describe themselves as **silent roamers**, those who avoid using mobile data abroad or rely on alternatives like travel eSIMs/SIMs and Wi-Fi. This shift is driven by concerns around high roaming costs, bill shocks, lack of transparency, and limited choice. More travellers are turning to travel SIMs and eSIMs, drawn by cost savings, instant activation, and multi-destination flexibility.

eSIMs, in particular, are reshaping travel connectivity and retail roaming. With easy activation via QR codes, apps, or native device settings, they allow users to switch providers seamlessly, bypassing traditional constraints. This opens up new revenue opportunities but also intensifies competition in both retail and wholesale roaming. Several new and existing stakeholders stand to benefit, offering short-term, travel connectivity plans tailored to the growing base of cost-conscious digital travellers. As mobile behaviour evolves and international travel expands, travel eSIMs are emerging as a strategic enabler, offering greater choice and flexibility for the digital-first travel generation.

Travel Connectivity Behaviour

When traveling abroad, do you turn off mobile/cellular data to avoid roaming charges (so your phone won't connect to the internet unless you're using Wi-Fi)?



Source: Kaleido Intelligence Travel Survey Q2 2025

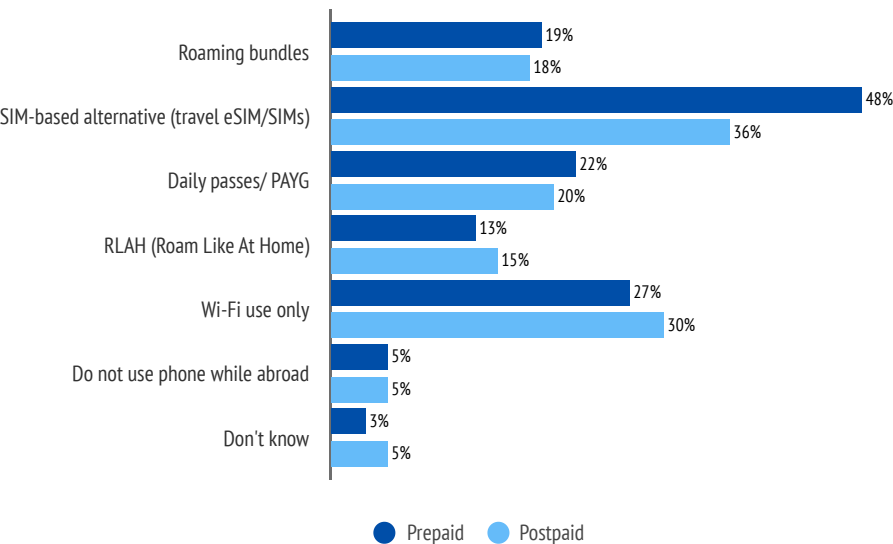
Who Are the Silent and Occasional Roamers?

Despite the growing importance of mobile connectivity while travelling, a significant portion of users remain under-connected. As noted previously, a significant proportion are either silent roamers or occasional roamers who mostly remain invisible in expensive roaming corridors. The leading barrier for these silent and occasional roamers remain unchanged from 2024: 45% of respondents cite excessive roaming charges as the main reason for not using roaming services. Network quality concerns also remain high, with 38% reporting poor coverage and 35% citing slow connection speeds. Meanwhile, the use of alternatives such as local or travel SIM cards and travel eSIMs were up notably from Kaleido's 2024 travel survey. These trends suggest silent roamers are not opting out by preference alone but are instead driven by issues of cost, control, and convenience.

For operators, silent roamers represent a large untapped market. Addressing their concerns through transparent pricing, better onboarding, and improved access to travel eSIMs can help convert them into engaged users, thereby unlocking new revenue and loyalty. Meanwhile, usage patterns vary notably between prepaid and postpaid roamers. Prepaid users are more likely to seek cost control through SIM-based alternatives (43%), compared to 31% of postpaid users, reflecting a higher sensitivity to roaming charges. Use of roaming bundles and daily charges is relatively similar across both groups, but overall, the trend toward alternative solutions is growing, as reflected in the chart, which shows rising adoption of travel SIMs/eSIMs and Wi-Fi use, and a notable decline in traditional cellular roaming from 2024 to 2025.

Travel Connectivity Behaviour

How do you keep your personal mobile phone connected when you travel abroad for leisure?



Source: Kaleido Intelligence Travel Survey Q2 2025

The percentages do not total 100%, as respondents could select multiple answers.

Travel eSIM Market Status & Adoption

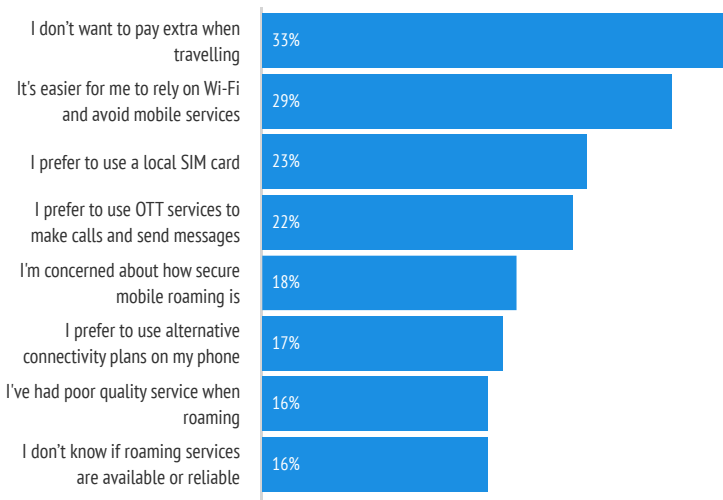
Why Silent Roamers Are Ripe for eSIMs

The travel eSIM market is gaining momentum as digital-first travellers seek flexible, cost-effective ways to stay connected abroad. Traditional roaming still holds ground and is the preferred option, but the growing shift toward alternatives like travel eSIMs signals a deeper behavioural change, particularly among silent roamers, who represent a sizeable portion of international travellers. According to Kaleido's 2025 survey, 33% of silent roamers avoid using roaming to prevent extra charges, 29% prefer relying on Wi-Fi, and 23% opt for local SIMs. Additionally, 22% use apps like WhatsApp instead of mobile calls or SMS. These behaviours reflect a strong desire for control, affordability, and ease of access. Kaleido's survey also revealed a decline in features considered appealing by silent roamers, suggesting that their disengagement is no longer feature-driven, it's structural.

Price remains the top barrier (24% won't pay extra, and only 13% accept a \$1 daily charge), but ease of management and service quality are also key factors, particularly in markets like the UAE and India, where demand for faster connectivity and better mobile service access is growing. Postpaid silent roamers seek more advanced service improvements, while prepaid users focus primarily on cost. The consistent call across both group of users is for simplified, transparent roaming alternatives, a gap that travel eSIMs are increasingly filling. With instant activation, competitive pricing, and growing device integration, travel eSIMs are not just an alternative to roaming, but in some cases they are becoming the preferred choice for silent roamers seeking simplicity, savings and control.

Barriers to Roaming Usage

Why do you not use roaming services while travelling abroad?



Price Sensitivity

Over 50% of roamers report they start looking for alternatives at a daily roaming charge of more than \$2.

Source: Kaleido Intelligence Travel Survey Q2 2025

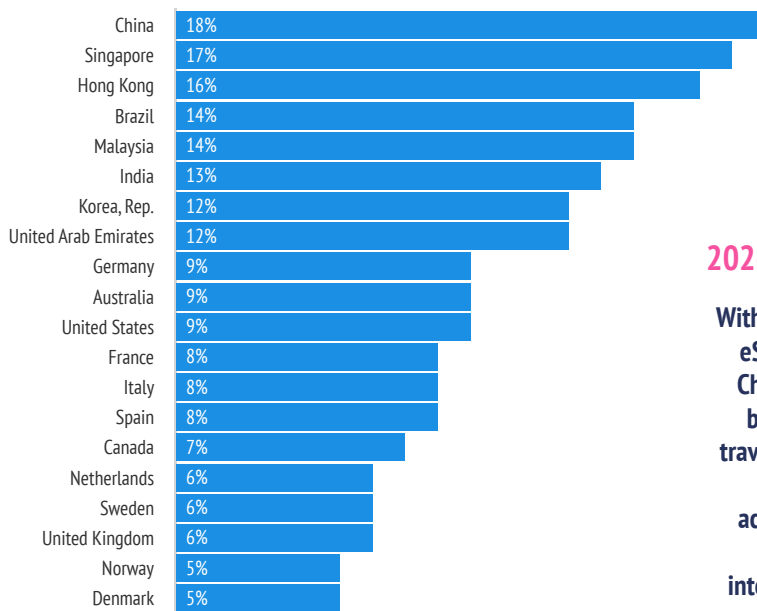
Current State of Travel eSIM Adoption

The global travel eSIM market continues to show growth, but adoption remains uneven across regions and user segments. While overall usage of roaming alternatives has not grown significantly year-over-year, there has been a notable internal shift within the alternative connectivity space: travel eSIM adoption is rising at the expense of physical travel SIMs. In several Asian markets, travel eSIMs still has the opportunity to reach silent roamers at scale and the potential for growth remains substantial. Kaleido's 2025 survey shows growth in several markets, with countries such as Brazil, India, China, UAE, Singapore, and Malaysia showing particularly high receptiveness. Meanwhile, only 22% of current users adopted eSIMs due to promotional activity, indicating that consumer education and marketing remain underdeveloped. Prepaid users are more likely than postpaid subscribers to adopt eSIMs, positioning MNO prepaid arms as key drivers of adoption, especially in emerging, price-sensitive markets.

Looking ahead, the standardisation of eSIM functionality in domestic smartphones in China and Hong Kong, expected in late 2025, is likely to drive substantial growth beyond 2025. This will align with the wider adoption of eSIMs in low-mid-tier Android models, expanding access to a broader user base and fuelling accelerated adoption globally. With rising device compatibility, growing consumer interest, and strong prepaid momentum, foundations are in place, but growth will depend on greater awareness, simplified activation, and stronger MNO engagement.

Travel eSIM Adoption in 2025

Proportion of Travellers with Subscription to Digital SIM-based (eSIM & Soft SIM) Travel Packages



2026 Growth Driver

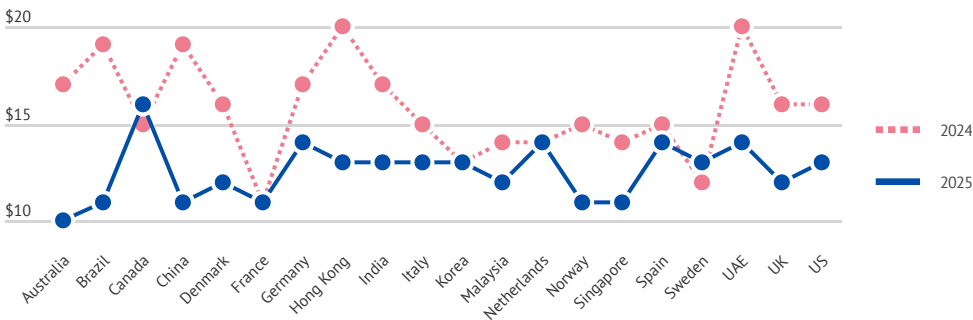
With MIIT set to enable eSIM use in domestic Chinese smartphones by end-2025, global travel eSIM adoption is poised for rapid acceleration - fuelled further by eSIM integration in mid-tier Android devices.

Source: Kaleido Intelligence Travel Survey Q2 2025

Travel eSIM Spend & Purchase Channels

Average travel eSIM spend declined between 2024 and 2025, driven by heightened competition as many new providers entered the market offering data at prices 50–60% lower per GB than established brands. While this has broadened access and appealed to price-sensitive travellers, the focus on aggressive pricing over value-added features and other differentiators has contributed to reduced average transaction values and increasing margin pressure across the market. Kaleido’s 2025 travel survey finds that the average travel eSIM spend per trip is just over \$12, down from \$16 in 2024.

Travel eSIM Average Spend Per Trip, Country Markets in USD



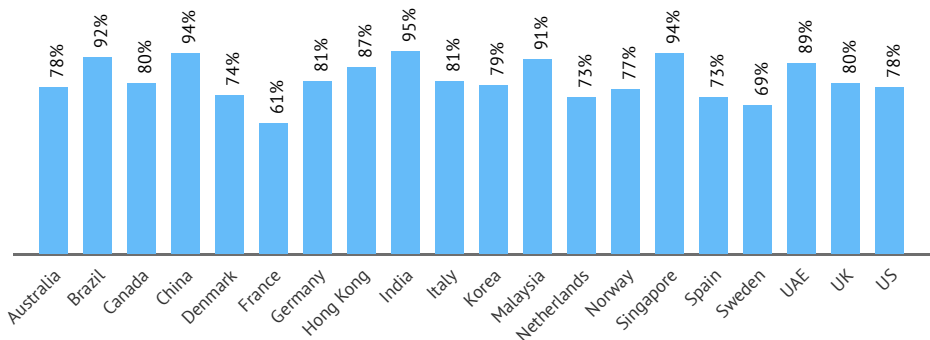
Source: Kaleido Intelligence Travel Survey Q2 2025

In stark contrast, traditional roaming spend now averages \$46 per trip outside RLAH markets, nearly four times higher. This spending gap highlights a key issue: while travel eSIMs offer value, monetisation remains a challenge in a market where cost is the primary battleground. Yet, the potential remains strong, with nearly 80% of non-users across surveyed countries saying they would be very or quite likely to use eSIM plans if available.

Silent Roamer Travel eSIM Purchase Likelihood

How likely are you to use an eSIM plan for your international travel in the future, if you were able to?

Proportion reporting very/quite likely to use an eSIM plan if they could



Source: Kaleido Intelligence Travel Survey Q2 2025

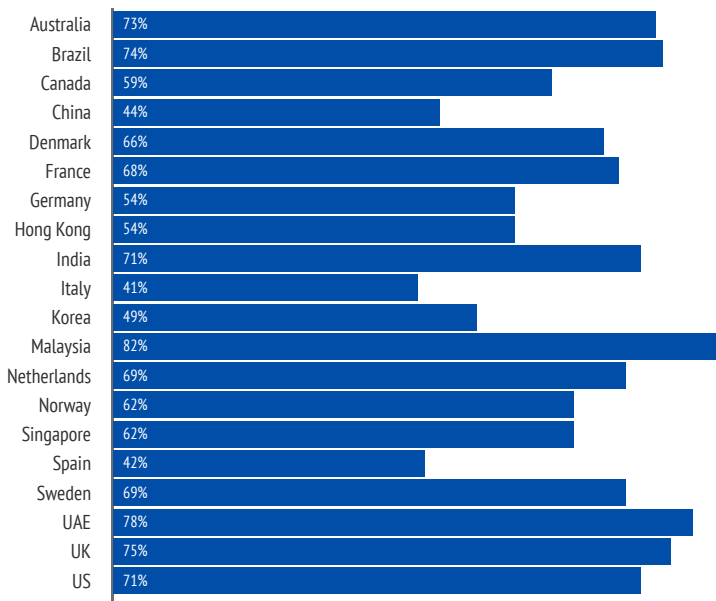
From Purchase to Portability: Demand for Multi-Destination eSIM Solutions

As international travel becomes more frequent and regionally interconnected, travellers increasingly seek simpler, more flexible connectivity. Instead of downloading a separate eSIM profile for each country, most users now prefer a single eSIM or IMSI that works seamlessly across multiple destinations, almost mirroring how traditional roaming with a home operator functions (barring access to home content etc).

Kaleido's survey shows that 64% of current travel eSIM users prefer a multi-destination eSIM, a number that climbs even higher in markets like Malaysia (82%), UAE (78%), UK (75%), and India (71%). This aligns with user behaviour: only 24% globally delete their eSIMs after a trip, suggesting a desire for reusability, continuity, and minimal setup between trips.

Travel eSIM Buying Behaviour

For future trips, which option would you prefer when purchasing travel eSIMs? Proportion of travellers who prefer one eSIM that works across multiple destinations.



User Habits

64% of travel eSIM users prefer a multi-destination eSIM. This aligns with user behaviour, as only 24% of global travel eSIM users report deleting their eSIMs after a trip.

Source: Kaleido Intelligence Travel Survey Q2 2025

This demand reflects a fundamental expectation: mobile connectivity should be seamless and borderless, with the convenience, price transparency, and digital simplicity that eSIMs enable. Users no longer distinguish between domestic and international connectivity, they expect the freedom to switch providers and plans based on real-time needs. For travel eSIM providers, delivering this level of digital experience and product simplicity not only improves the user journey but also builds stronger loyalty and ongoing usage, especially in an increasingly competitive market where pricing pressure is high and differentiation is essential.

Targeting the Right Moment: Trigger-Based Travel eSIM Strategy

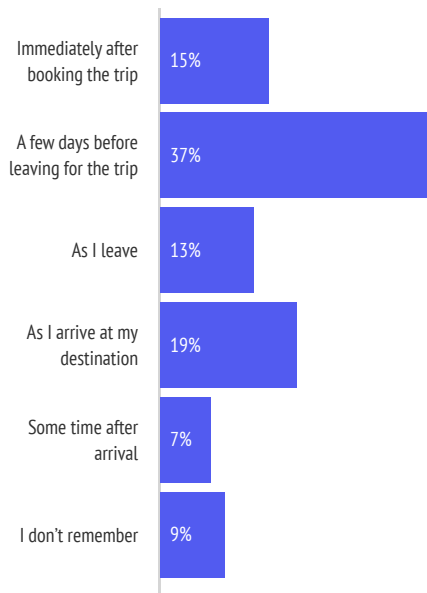
To convert more users to travel eSIMs and increase long-term engagement, timing is everything. Kaleido's 2025 survey reveals that most travellers secure their travel connectivity before they even reach their destination, with 37% purchasing a few days before departure and another 15% immediately after booking. Only 19% wait until arrival, and just 7% buy connectivity some time after arriving.

This behaviour is even more pronounced among eSIM users, the majority of whom arrange their connectivity before travel, making eSIMs a strong opportunity for home market mobile operators to engage users early, well before they begin their trip. With 41% of travellers still purchasing connectivity from their primary mobile operator, there's a clear window for telcos to upsell or cross-sell travel eSIM plans as part of the pre-departure journey.

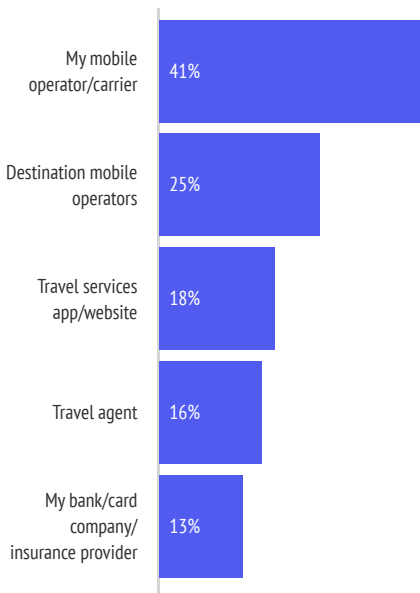
Trigger-based strategies, such as presenting offers immediately after flight or accommodation bookings, sending reminders a few days before travel, or embedding travel plans within operator apps, can ensure travel eSIM plans or offers land at the right moment during a customer's travel journey. Partnering with travel agents (16%) and travel service platforms (18%) can further help operators intercept purchase intent and reinforce brand presence before third-party providers step in. In the current landscape, winning the traveller's attention at the right moment and through the right channel and sustaining them can be the difference between churn and conversion.

Travel eSIM Purchase Trigger Points

When do you buy your travel connectivity?



Where do you buy your travel connectivity from? Top 5



Source: Kaleido Intelligence Travel Survey Q2 2025

Travel eSIMs for MNOs: Value-Add or Roaming Replacement?

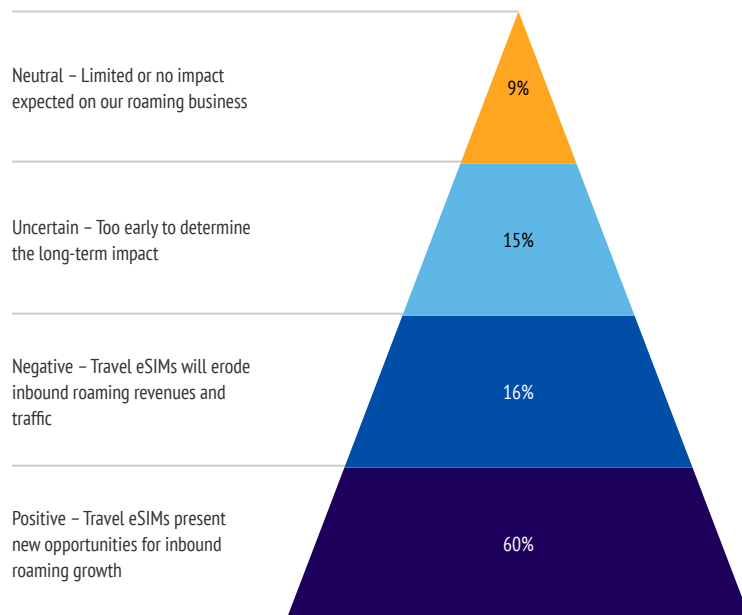
Travel eSIM Adoption and Its Implications for Wholesale Roaming Business Units

For the mobile operators, the narrative around travel eSIMs is evolving. While early market responses from mobile network operators were extremely hesitant and cautious, viewing eSIMs primarily as a threat to traditional roaming, recent data shows a growing shift toward seeing eSIMs as a strategic opportunity rather than a disruptive force. This shift is especially from a wholesale roaming perspective.

According to Kaleido's latest travel eSIM MNO survey* of nearly 75 unique operators, 60% of respondents now view travel eSIMs positively, identifying them as a new opportunity for inbound roaming growth. Meanwhile, the proportion viewing eSIMs negatively has dropped from 30% in 2024 to just 16% in 2025, suggesting a growing recognition that travel eSIMs can be integrated into a broader roaming strategy rather than replace it outright. This changing perception reflects a strategic inflection point for MNOs. Rather than resisting the shift, operators are increasingly exploring how to monetise eSIM adoption, either by launching their own travel eSIM products, entering wholesale partnerships, or embedding eSIM offerings into existing digital channels.

MNO Survey Feedback

What is your overall sentiment on the impact of roaming alternatives like travel eSIMs on inbound roaming traffic and wholesale revenues?



Changing MNO Perception

Wholesale business unit sentiment is evolving, with 60% of MNOs now viewing travel eSIMs as a strategic opportunity, marking a major mindset shift from 2024.

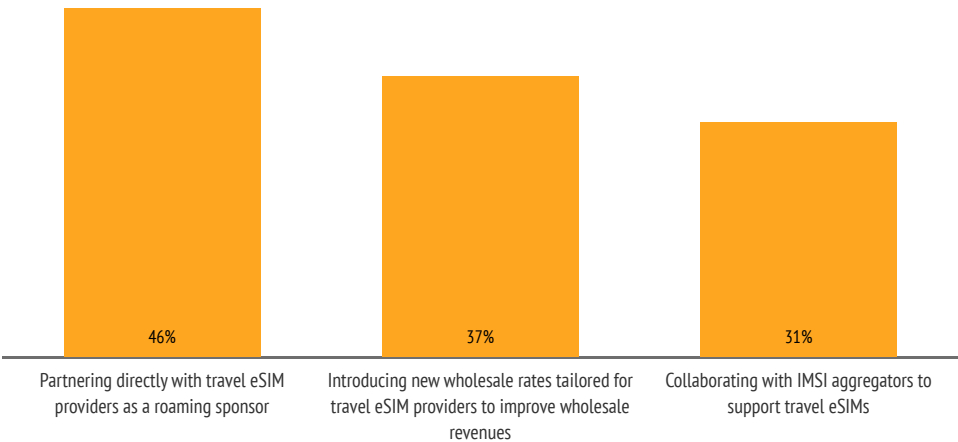
Source: Kaleido Intelligence Travel eSIM MNO Survey Q2 2025

The MNO Wholesale Strategy

Further, Kaleido's MNO survey revealed that operators (especially tier 1 and group operators) are actively evolving their wholesale strategies to adapt to the eSIM market. Notably, 46% of operators now report partnering directly with travel eSIM providers as roaming sponsors, while 37% are introducing new wholesale rates tailored specifically to these providers. This indicates a clear recognition that eSIMs, when integrated into the wholesale roaming model, can open new revenue channels rather than merely disrupt existing bilaterals. A further 31% are collaborating with IMSI aggregators while several reported investing in analytics to better identify and manage inbound travel eSIM traffic. These efforts demonstrate a shift from defensive tactics to proactive engagement, aiming to maintain visibility, control, and competitive relevance in a rapidly shifting connectivity landscape.

MNO Survey Feedback

What is your immediate wholesale roaming business strategy regarding roaming alternative providers, such as travel eSIM providers? Top 3 Strategies



Source: Kaleido Intelligence Travel eSIM MNO Survey Q2 2025

A growing majority of MNOs now see travel eSIMs as a value-add, offering opportunities to boost wholesale revenues by partnering with digital players and expanding inbound traffic. As roaming becomes more fragmented and competitive, operators must reposition themselves within the eSIM ecosystem, focusing on service quality, coverage, and smart pricing. Those that have adapted early will be best placed to capture new value and thrive in an increasingly digital, borderless travel connectivity market.

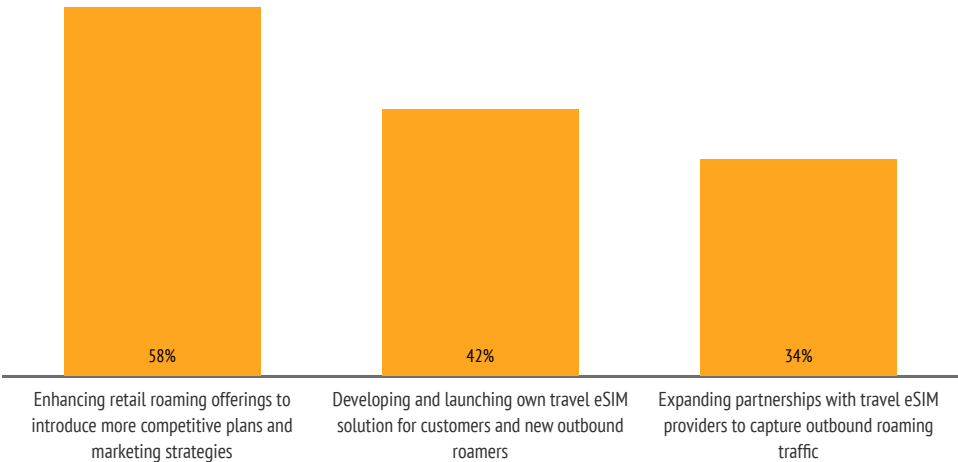
The MNO Retail Strategy: Retain, Monetise, Compete

In comparison, as travel eSIM adoption rises and roaming alternatives grow in appeal, mobile operators face increasing pressure to rethink their retail strategies. While price remains the primary driver behind the shift to alternatives, Kaleido's research shows a clear opportunity for MNOs to retain customers back, if the offer is competitive. In fact, a majority of respondents stated they would return to using roaming from their usual provider if pricing was better than that of travel eSIMs or SIM-based alternatives.

Engaging on price is essential, but long-term competitiveness requires more than just cost-cutting. MNOs must embrace a multi-layered retail strategy. This includes introducing new roaming bundle tiers, particularly lower-data options that reduce sticker shock and cater to light data users, such as silent roamers. These roamers are often pushed to alternatives not by preference, but by the lack of flexible, affordable options from their home provider.

MNO Survey Feedback

What is your immediate retail roaming strategy in response to the rise of travel eSIMs and alternative roaming providers? Top 3 Strategies



Source: Kaleido Intelligence Travel eSIM MNO Survey Q2 2025

More importantly, operators must embrace eSIM technology: not just as a defensive play, but as a means to own the customer experience. Launching digitally branded, regional, or country-specific travel eSIM offerings can help operators retain existing or acquire new outbound roamers and enter the travel eSIM space on their own terms. Further, partnering with global brands, travel platforms, airlines, and smartphone manufacturers will expand reach and drive relevance in the broader travel ecosystem. Equally important is investing in digital transformation, ensuring seamless onboarding, instant activation, and in-app management for eSIMs.

Case Study: Powering a Disruptive Travel eSIM Brand in Asia with Telna Connect



Background:

A leading mobile network operator in Asia faced a significant challenge: millions of prepaid users and silent roamers were avoiding international roaming due to concerns over unpredictable costs. To tap into this overlooked market and extend its global footprint, the MNO launched a fully digital travel eSIM brand, separate from its core identity, focused on transparency, affordability, and traveler-centric design. Powered by Telna's Connect platform, the MNO successfully overcame internal limitations and quickly brought this disruptive brand to market. The result was a redefined roaming strategy built for the modern digital traveler, with global reach and seamless integration.

Challenges:

- **High Roaming Anxiety:** A significant base of prepaid users and silent roamers are hesitant to use traditional roaming due to fears of bill shock.
- **Internal IT Limitations:** The MNO's in-house tech and IT stack lacked the agility to quickly build and launch a travel eSIM solution.
- **Urgent Time-to-Market:** A fast rollout was crucial to meet upcoming holiday travel demand.
- **Prepaid Business Model:** The MNO needed a prepaid-first platform with full control over spend and top-ups.
- **Limited Roaming Reach:** The MNO had gaps in global coverage and needed a solution to offer competitive pricing in markets beyond its existing footprint.
- **Compliance Complexity:** Ensuring compliance with KYC and regulatory mandates presented a significant barrier.
- **Lack of Travel Ecosystem Integration:** The MNO had no existing tools or APIs to connect with key travel partners (e.g., hotels, airlines, airports) or 3rd Party Apps (e.g., WhatsApp, Shopify).

Solution:

Telna's Travel eSIM Enablement Platform

Telna delivered an out-of-the-box solution that empowered the MNO to go to market rapidly with a fully branded travel eSIM offering:

Rapid Launch of a New Digital Brand:

- Creation of a separate, disruptive travel eSIM brand with full digital presence (app, webstore, APIs).
- Provided backend infrastructure and management tools, allowing the MNO to remain focused on brand and distribution.
- Included branded webstores and mobile apps for seamless user onboarding.
- Enabled eSIM provisioning in minutes via QR codes or in-app activation, offering a truly instant connectivity experience.

Case Study: Transparent Roaming Monetization with Telna



Prepaid Platform: Delivered a prepaid-first platform supporting top-ups and usage control tailored for cost-conscious users.

Global Cost-effective Coverage: Telna integrated the MNO's IMSI to maintain traffic flow through its existing roaming agreements, and complemented it, enabling extended coverage in 50+ countries via Telna's global roaming hub, where the MNO lacked cost-effective bilateral deals.

One Global eSIM: Enabled a single download global eSIM with automatic switching of IMSIs based on user location for optimal cost and network performance.

Built-In Compliance & Operational Control: Integrated KYC and usage monitoring to meet regulatory demands.

Third-Party Integration Modules: Offered partner-ready APIs for hotels, airlines, airport retailers, and digital platforms. Transparent Roaming

Key Outcomes

- Fast Deployment: Launched the travel eSIM brand in weeks, not months.
- Strong Customer Adoption: Over 800,000 eSIM activations are processed primarily by silent roamers and prepaid customers.
- Revenue Uplift: Delivered a 35% increase in roaming revenue post-launch without impacting the existing user base.
- Superior User Experience: Users have already enjoyed instant activation and reliable coverage in over 130 countries.
- Expanded Distribution: Partnered with travel ecosystem players for growth beyond traditional telco channels.

Why Telna?

- Speed & Agility: Full platform launch within a compressed timeframe.
- Global Coverage: Monetize connectivity even where the MNO lacked direct reach.
- End-to-End Control: From compliance to branding to distribution.
- Future-Proofed: Travel-ready APIs and integration support for ongoing growth.

"Telna helped us move faster than we thought possible. Their turnkey platform allowed us to create a fully independent travel eSIM brand, connect with global travelers, and launch meaningful partnerships across the travel industry. We've turned an under-monetized segment into a growth engine."



For more information, visit telna.com

Growth Outlook & Action Plan

Unlocking the Silent Roamer Opportunity

The travel eSIM market represents a pivotal opportunity not just for travel eSIM providers and brands, but for operators to redefine their role in the evolving travel connectivity landscape. With retail travel eSIM spend projected to exceed \$3 billion in 2025, the combined market potential of travel SIMs (including physical and digital eSIMs) and roaming is expected to approach \$20 billion by the end of 2025. MNOs are increasingly recognising eSIMs as a value-added opportunity, not a threat. Importantly, many travel eSIM providers rely on sponsored roaming agreements, meaning MNOs still benefit from inbound traffic, even when the connectivity is delivered by a third party.

However, the travel eSIM market is also becoming increasingly crowded, with providers competing primarily on price. This intense competition has led to shrinking margins and short-term models that may prove unsustainable. Rather than a concern, this is a signal of market maturation. As the price war intensifies, we can expect to see consolidation, with leading digital SIM/eSIM players being acquired or exiting the space, while MNOs double down on integrated, retail roaming strategies that combine their network strength with customer trust and reach.

Looking ahead, the travel eSIM landscape will move beyond generic, low-cost roaming replacements toward brand-driven and use case-specific offerings. Adoption will increasingly align with lifestyle and community-driven behaviours, targeting segments such as digital nomads, remote workers, influencers on tour, athletes, or fans attending international sporting or art events. These niche audiences will drive demand for targeted, local and international eSIM-based connectivity plans integrated into wider ecosystems, from travel platforms to entertainment apps.

Importantly, consumer education must be prioritised. Kaleido's research shows that only 22% of eSIM users adopted the technology through promotional activity, highlighting the need for improved awareness via digital marketing, in-app experiences, and OEM collaborations. Additionally, while the average eSIM spend per trip is currently around \$12, the opportunity lies in sustainable differentiation, not substantial price drop. By focusing on service quality, digital experience, brand trust, and contextual relevance, MNOs can grow revenue while building long-term engagement.

As global travel continues to grow and traveller expectations evolve, eSIMs are not just an alternative, they are the future of mobile connectivity. For mobile operator and service providers that embrace this shift with agility, the path forward is rich with opportunity, from stabilising retail roaming to opening new revenue streams through niche, digital-first offerings.

About Telna

Telna is a global leader in eSIM connectivity. It offers a robust platform enabling Mobile Network Operators (MNOs), Mobile Virtual Network Operators (MVNOs), and Connectivity Service Providers (CSPs) to distribute eSIMs with connectivity using an API. Telna continues leading the way in roaming technology, virtualizing mobile core networks with direct access to all networks. Telna offers a fully managed plug-and-play solution for providers who want to sell eSIM.

For more information, visit www.telna.com/contact

About Kaleido Intelligence

Kaleido Intelligence is a specialist consulting and market research firm with a proven track record delivering telecom research at the highest level. Kaleido Intelligence is the only research company addressing mobile roaming in its entirety. Our Mobile Roaming & Connectivity research service covers industry leading market intelligence and publications on International Travel, Wholesale & Retail Roaming, Travel eSIMs, 5G Roaming, IPX, Private Networks, Signalling, IoT MVNOs, IoT Roaming, Satellite, Maritime & Inflight Roaming, and Roaming Analytics & Fraud. Research is led by expert analysts, each with significant experience delivering roaming insights that matter.

*Survey References:

- Kaleido conducted a survey to better understand the roaming and alternative travel eSIM/SIM usage and purchasing habits of international leisure and business travellers. The study included 5,000 respondents across 20 country markets, with 250 participants per market. Respondents were selected based on having travelled internationally with their smartphones. The questionnaire included sections for both business and leisure travellers. For further demographic details, such as travel type, domestic operator, age, and gender, and to access the full list of questions and survey findings, please contact the Kaleido team.
- Kaleido's Q2 2025 Travel eSIM MNO Survey gathered insights from nearly 75 unique operators across tier-1 and tier-2 MNOs globally, exploring silent roamers, sentiment and outlook on travel eSIM growth and adoption, as well as retail and wholesale business strategies. Respondents were based in Europe (45%), Asia-Pacific (27%), the Americas (12%), and Africa–Middle East (16%).

For more information on this market study and the surveys or if you have further requirements, please contact:

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Publication Date: June 2025

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