



25/02/2025

REPORT

eSIM Exploration: No Borders, No Limits, Just Signal



AUDIENCE

Demographics

United Kingdom, Age 18 to 45

Category

Mobile Network Plan; Telecom

Custom Screening

Have you travelled abroad within the past two years?

Qualified: Yes

Unqualified: No

Custom Screening 2

When traveling abroad, how important is it for you to have mobile connectivity?

Qualified: Very important

Unqualified: Somewhat important, Not important

Custom Screening 3

When traveling abroad, how do you usually arrange mobile connectivity?

Qualified: I always purchase a mobile data plan or eSIM before or during my trip., I usually purchase mobile data, but I also rely on Wi-Fi when possible.

Unqualified: I rarely purchase mobile data, I usually rely on Wi-Fi., I don't use mobile data while traveling.



AUDIENCE

Demographics

United Kingdom, Age 18 to 45

Category

Mobile Network Plan; Telecom

Custom Screening

Have you travelled abroad within the past two years?

Custom Screening 2

When traveling abroad, how important is it for you to have mobile connectivity?

Custom Screening 3

When traveling abroad, how do you usually arrange mobile connectivity?

OBJECTIVE

To explore the decision-making criteria of UK travellers aged 18-45 when selecting between eSIM providers and traditional mobile network operators for international travel, examining the role of cost, convenience, coverage, data requirements, and brand loyalty, as well as the influence of personal travel habits and past experiences on their choices.

BURNING QUESTION

To what extent does the ease of obtaining and setting up an eSIM versus a traditional SIM card impact your decision-making process for connectivity options when abroad?



AUDIENCE

Demographics

United Kingdom, Age 18 to 45

Category

Mobile Network Plan; Telecom

Custom Screening

Have you travelled abroad within the past two years?

Custom Screening 2

When traveling abroad, how important is it for you to have mobile connectivity?

Custom Screening 3

When traveling abroad, how do you usually arrange mobile connectivity?

CHAT GUIDE

1. How do you typically stay connected to mobile data when traveling internationally?

2. Do you usually research mobile network options before arriving at your destination?

Answers: Yes, always, Sometimes, No, I figure out on arrival

3. Would you say your approach to mobile connectivity while traveling is planned, flexible or completely spontaneous?

4. Have you ever chosen your accommodation or transportation based on the availability of Wi-Fi or mobile coverage?

Answers: Yes, No, but I consider it, No, it doesn't matter to me

5. How does the length and purpose of your trip impact your choice of mobile data?

6. Do you prefer managing your mobile plan through an app, a website or in-store purchases?

7. What is your biggest concern when choosing a mobile plan for international travel?

Choices: Cost, Convenience, Network coverage, Brand trust



AUDIENCE

Demographics

United Kingdom, Age 18 to 45

Category

Mobile Network Plan; Telecom

Custom Screening

Have you travelled abroad within the past two years?

Custom Screening 2

When traveling abroad, how important is it for you to have mobile connectivity?

Custom Screening 3

When traveling abroad, how do you usually arrange mobile connectivity?

CHAT GUIDE

8. Do you tend to stick with the same mobile solution for every trip or do you explore different options based on circumstances? Why?

9. How do your mobile data needs differ when traveling solo vs. with others?

10. Before your most recent trip, were you aware of eSIM options for international travel?

11. How did you first hear about eSIMs?

12. Have you ever used an eSIM for travel?

13. Do you feel more secure using an eSIM compared to inserting a new physical SIM card? Why or why not?

14. When planning an international trip, how do you budget for mobile data? Do you set a specific amount or do you adjust based on available options?

15. Have you ever been surprised by the cost of mobile data while traveling? If so, what happened and how did it affect your future choices?

16. Can you describe a positive or negative experience you've had with a mobile data provider while traveling? How did it affect your future choices?

17. If you had to choose between an eSIM and a traditional SIM for your next trip, what would be your deciding factor?



AUDIENCE

Demographics

United Kingdom, Age 18 to 45

Category

Mobile Network Plan; Telecom

Custom Screening

Have you travelled abroad within the past two years?

Custom Screening 2

When traveling abroad, how important is it for you to have mobile connectivity?

Custom Screening 3

When traveling abroad, how do you usually arrange mobile connectivity?

AI SUMMARY

The ease of obtaining and setting up an eSIM versus a traditional SIM card plays a significant role in the decision-making process for UK travelers aged 18-45 when selecting mobile connectivity options abroad. Many respondents prioritize convenience, with a preference for managing their mobile plans through apps due to efficiency and real-time information. Cost is a major concern, with travelers seeking the best deals and often purchasing data add-ons or roaming packages from their current providers to avoid high charges. Network coverage is crucial, as a lack of coverage renders any plan useless. Brand trust is also important, with some travelers sticking to familiar providers for peace of mind and loyalty rewards, while others are open to exploring different options based on varying network and Wi-Fi coverage in their destinations.

Travelers who plan their connectivity options tend to do so to avoid wasting time upon arrival and to enjoy their trips with a relaxed mind. The length and purpose of the trip influence the choice of mobile data, with longer or business trips necessitating more comprehensive plans. Those traveling with others may opt for larger data packages due to increased usage. While some travelers have not used eSIMs, citing a lack of familiarity or trust in new providers, others find eSIMs secure and convenient, particularly because there is no physical SIM to lose or have stolen. The potential for eSIMs to offer immediate connectivity and hassle-free management is appealing, but the need for established trust and the perceived effort in setting up eSIMs are barriers. Overall, the decision between eSIMs and traditional SIMs is influenced by a combination of cost, convenience, coverage, data requirements, and personal experiences, with many travelers expressing interest in eSIMs if they offer clear advantages in these areas.





AUDIENCE

Demographics

United Kingdom, Age 18 to 45

Category

Mobile Network Plan; Telecom

Custom Screening

Have you travelled abroad within the past two years?

Custom Screening 2

When traveling abroad, how important is it for you to have mobile connectivity?

Custom Screening 3

When traveling abroad, how do you usually arrange mobile connectivity?

KEY INSIGHTS

Preference for Familiarity and Trust Over Cost

- Many participants expressed a preference for sticking with their current mobile providers due to established trust and familiarity, even when aware of eSIM options.
- Brand loyalty and trust seem to outweigh cost considerations for several respondents, indicating that a sense of security and reliability is paramount when choosing mobile connectivity solutions abroad.

Quotes:

"I have the same package normally but the number of days differ. For example I have been on a 3 day plan for a short trip but if it's longer I will pay for a longer days package. Normally a 7 day plan for longer trips "

Age 40, Male

"Holidays cost alot as it is, alot of plans used to include minutes and Internet abroad and no longer do so I feel annoyed that I have to pay for ir. I feel like a brand is a brand and I don't know brands other than UK so I doubt I would trust any of them fully."

Age 30, Female

"I tend to stick with the same providers as you can collect rewards and points to exchange for a cheaper package next time you travel "

Age 34, Male

"You collect rewards and points which you can turn into discounts with provider which means you'll get your package at cheaper prices the next time you purchase with them"

Age 34, Male





AUDIENCE

Demographics

United Kingdom, Age 18 to 45

Category

Mobile Network Plan; Telecom

Custom Screening

Have you travelled abroad within the past two years?

Custom Screening 2

When traveling abroad, how important is it for you to have mobile connectivity?

Custom Screening 3

When traveling abroad, how do you usually arrange mobile connectivity?

KEY INSIGHTS

The Importance of Network Coverage and Data Availability

- Network coverage is a primary concern for travelers, with many prioritizing the ability to stay connected consistently over the cost of the mobile plan.
- Participants often plan their mobile connectivity in advance, seeking out data packages that offer sufficient coverage and data allowances to meet their needs throughout their trip.

Quotes:

"It is important for us to be connected all the time as one of my children have health issues"

Age 35, Male

"Heavy data package with a proper network coverage "

Age 28, Female

"I like to know the range my network covers because when I travel I move around a lot and price is the least of my worries if the network is good"

Age 36, Female

"When going abroad I look at what accommodation is closest to the city centre and look st their description of their network and wifi coverage and connectivity very carefully before choosing my accommodation "

Age 34, Male





AUDIENCE

Demographics

United Kingdom, Age 18 to 45

Category

Mobile Network Plan; Telecom

Custom Screening

Have you travelled abroad within the past two years?

Custom Screening 2

When traveling abroad, how important is it for you to have mobile connectivity?

Custom Screening 3

When traveling abroad, how do you usually arrange mobile connectivity?

KEY INSIGHTS

eSIM Awareness and Security Perceptions

- While some participants are aware of eSIMs and find them convenient, there is still a lack of widespread knowledge and trust in eSIM technology compared to traditional SIM cards.
- Security is a notable factor in the decision-making process, with some respondents feeling that eSIMs offer a more secure option as they eliminate the risk of physical SIM card loss or theft.

Quotes:

"I don't really know much about it"

Age 36, Female

"An eSIM feels more secure"

Age 37, Male

"I would have to stick with a traditional sim as thats all i know. Im not against an e sim. I would certainly try this idea out. Im guessing an e sim will be the norm in the near future."

Age 35, Male





AUDIENCE

Demographics

United Kingdom, Age 18 to 45

Category

Mobile Network Plan; Telecom

Custom Screening

Have you travelled abroad within the past two years?

Custom Screening 2

When traveling abroad, how important is it for you to have mobile connectivity?

Custom Screening 3

When traveling abroad, how do you usually arrange mobile connectivity?

KEY INSIGHTS

Cost Management and Data Plan Adaptability

- Cost management is a significant concern for travelers, with many seeking out the best deals and relying on their providers to offer cost-effective solutions for international travel.
- Travelers exhibit adaptability in their data plan choices, often adjusting their plans based on the length of the trip, the company they keep (solo vs. group travel), and the specific connectivity needs of their destination.

Quotes:

"When travelling solo I always take out a data package. However if I'm travelling with friends I usually pay by the day as I spend less time needing to be online and use data with friends "

Age 40, Male

"I adjust based on available options, number of GB available, cost of the overall package and network coverage "

Age 28, Female

"I budget by looking at the available options and working out which would be the cheapest option "

Age 40, Male



AUDIENCE

Demographics

United Kingdom, Age 18 to 45

Category

Mobile Network Plan; Telecom

Custom Screening

Have you travelled abroad within the past two years?

Custom Screening 2

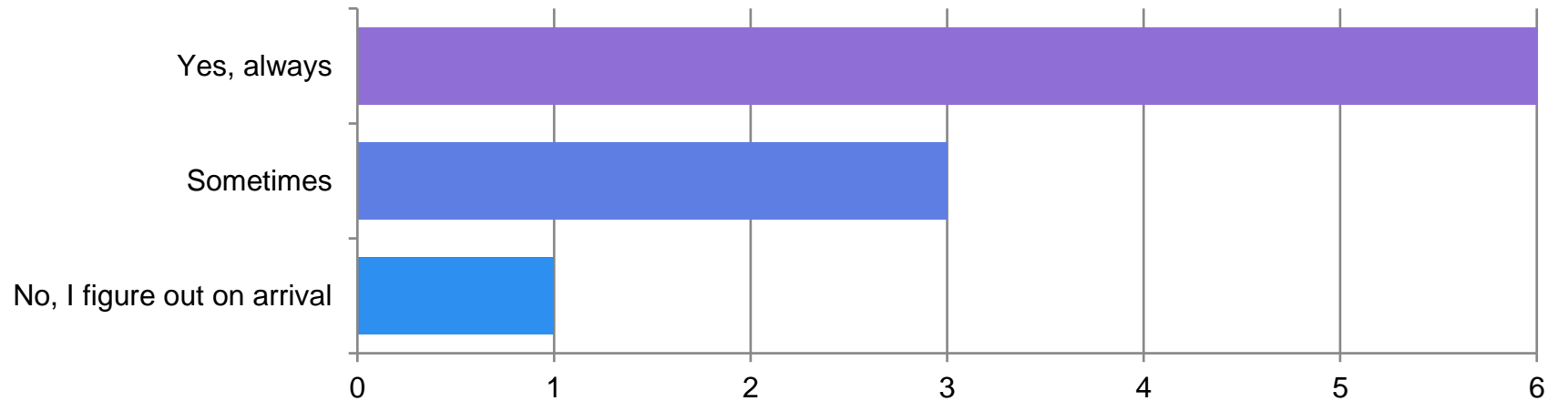
When traveling abroad, how important is it for you to have mobile connectivity?

Custom Screening 3

When traveling abroad, how do you usually arrange mobile connectivity?

METRICS

Do you usually research mobile network options before arriving at your destination?



AUDIENCE

Demographics
United Kingdom, Age 18 to 45

Category
Mobile Network Plan; Telecom

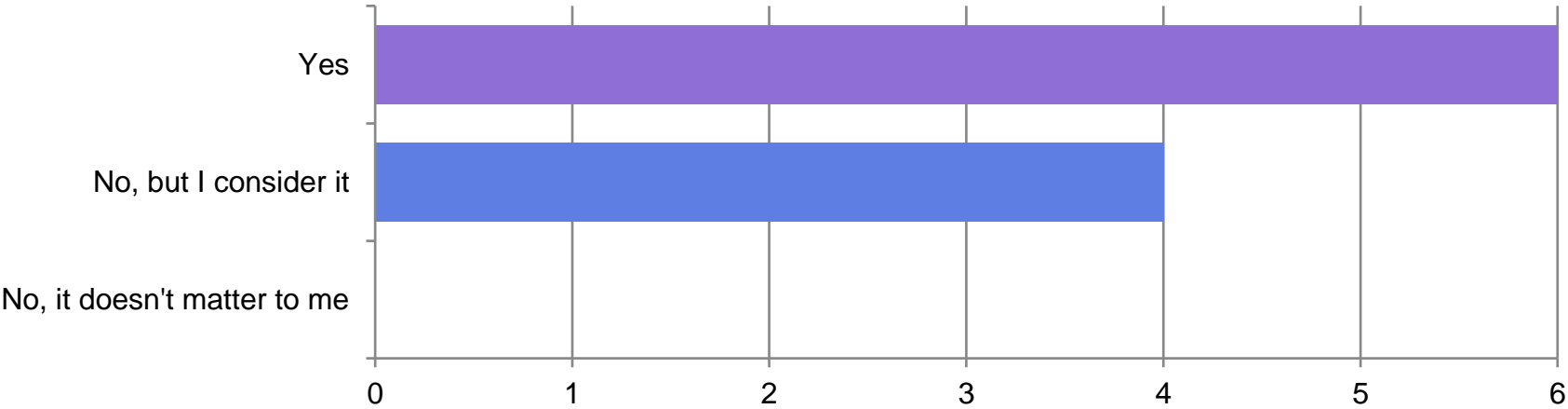
Custom Screening
Have you travelled abroad within the past two years?

Custom Screening 2
When traveling abroad, how important is it for you to have mobile connectivity?

Custom Screening 3
When traveling abroad, how do you usually arrange mobile connectivity?

METRICS

Have you ever chosen your accommodation or transportation based on the availability of Wi-Fi or mobile coverage?





AUDIENCE

Demographics
United Kingdom, Age 18 to 45

Category
Mobile Network Plan; Telecom

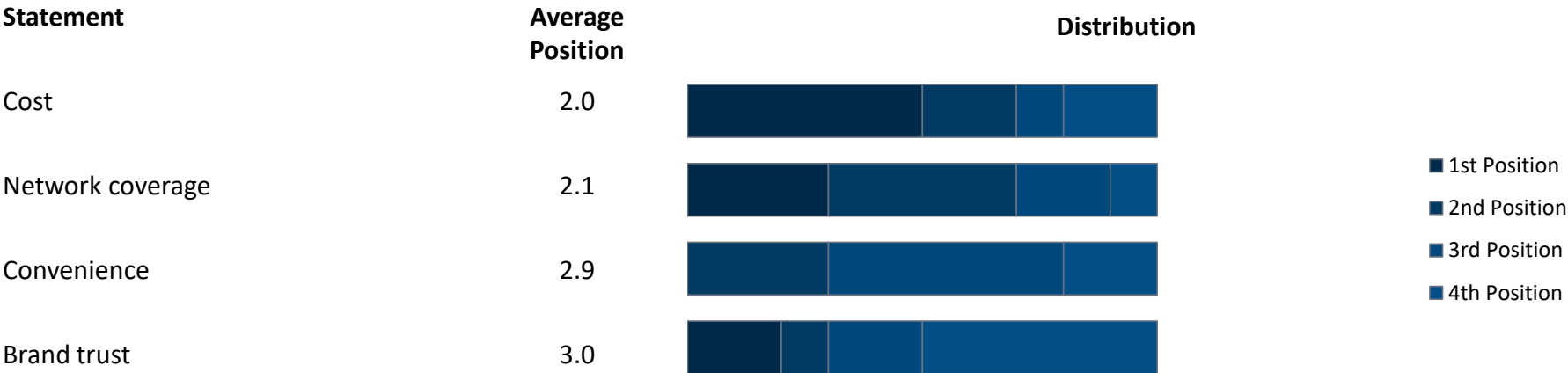
Custom Screening
Have you travelled abroad within the past two years?

Custom Screening 2
When traveling abroad, how important is it for you to have mobile connectivity?

Custom Screening 3
When traveling abroad, how do you usually arrange mobile connectivity?

METRICS

What is your biggest concern when choosing a mobile plan for international travel?





AUDIENCE

Demographics
United Kingdom, Age 18 to 45

Category
Mobile Network Plan; Telecom

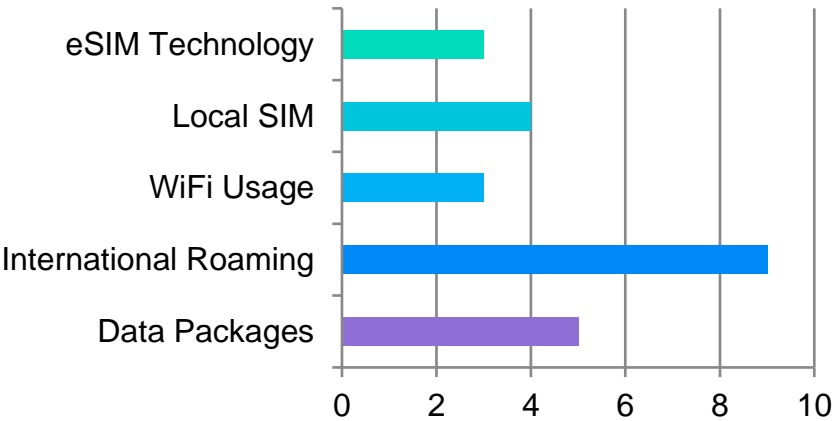
Custom Screening
Have you travelled abroad within the past two years?

Custom Screening 2
When traveling abroad, how important is it for you to have mobile connectivity?

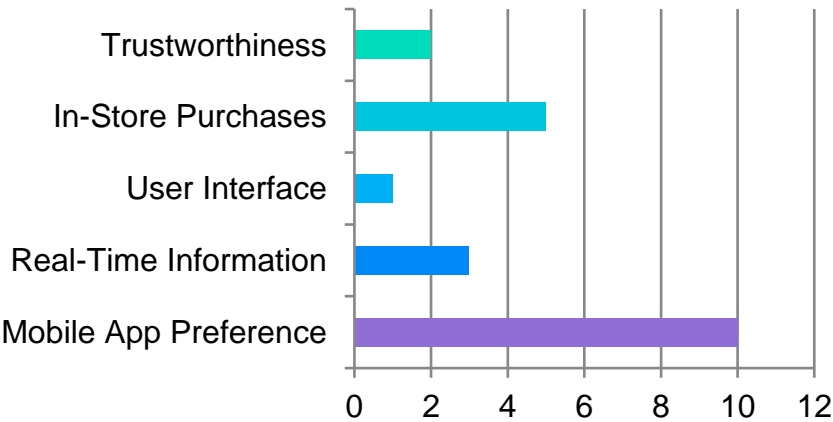
Custom Screening 3
When traveling abroad, how do you usually arrange mobile connectivity?

TOPICS

How do you typically stay connected to mobile data when traveling internationally?



Do you prefer managing your mobile plan through an app, a website or in-store purchases?





AUDIENCE

Demographics
United Kingdom, Age 18 to 45

Category
Mobile Network Plan; Telecom

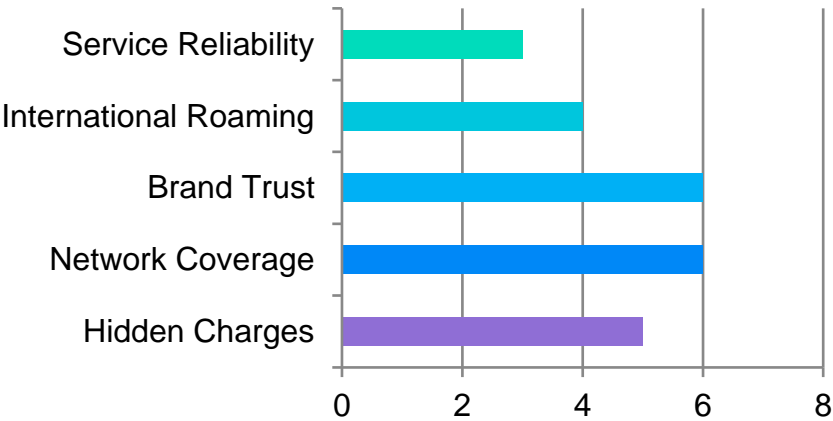
Custom Screening
Have you travelled abroad within the past two years?

Custom Screening 2
When traveling abroad, how important is it for you to have mobile connectivity?

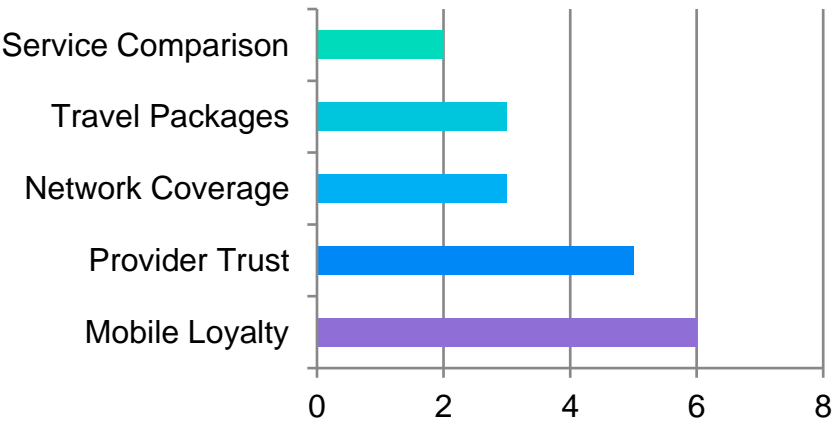
Custom Screening 3
When traveling abroad, how do you usually arrange mobile connectivity?

TOPICS

What is your biggest concern when choosing a mobile plan for international travel?



Do you tend to stick with the same mobile solution for every trip or do you explore different options based on circumstances? Why?



AUDIENCE

Demographics
United Kingdom, Age 18 to 45

Category
Mobile Network Plan; Telecom

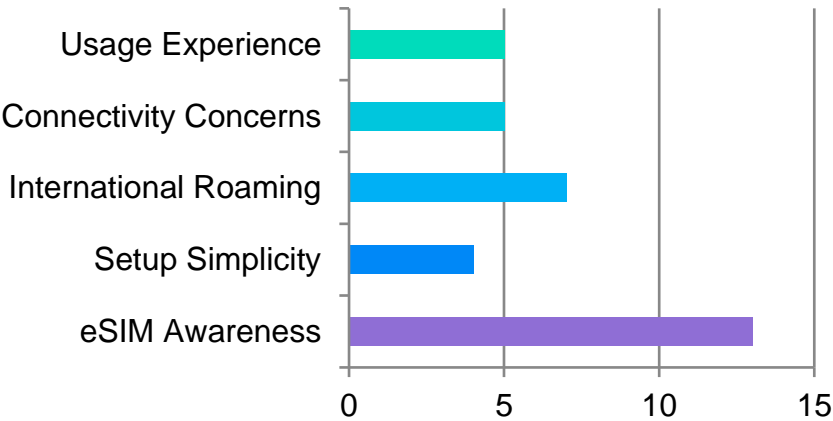
Custom Screening
Have you travelled abroad within the past two years?

Custom Screening 2
When traveling abroad, how important is it for you to have mobile connectivity?

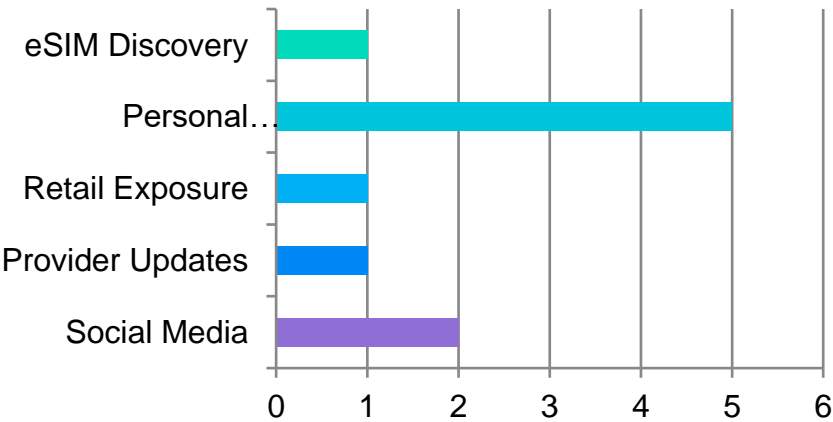
Custom Screening 3
When traveling abroad, how do you usually arrange mobile connectivity?

TOPICS

Before your most recent trip, were you aware of eSIM options for international travel?



How did you first hear about eSIMs?





AUDIENCE

Demographics
United Kingdom, Age 18 to 45

Category
Mobile Network Plan; Telecom

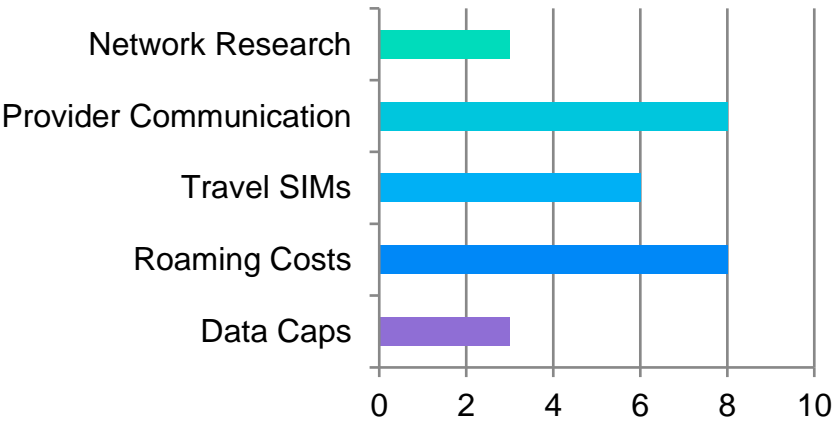
Custom Screening
Have you travelled abroad within the past two years?

Custom Screening 2
When traveling abroad, how important is it for you to have mobile connectivity?

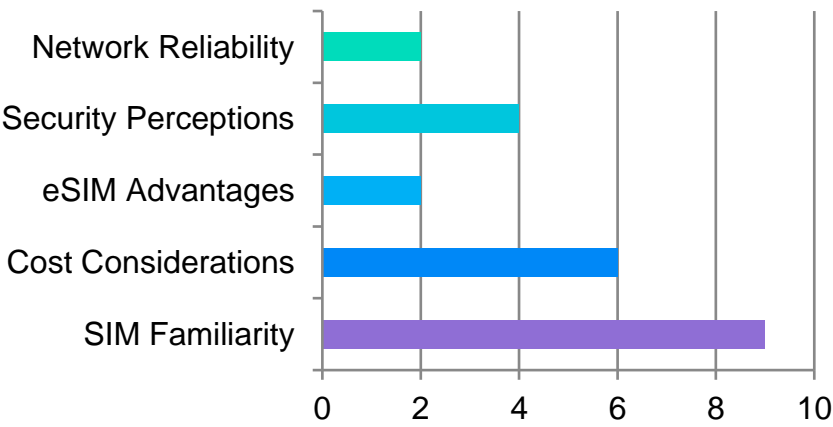
Custom Screening 3
When traveling abroad, how do you usually arrange mobile connectivity?

TOPICS

Can you describe a positive or negative experience you’ve had with a mobile data provider while traveling? How did it affect your future choices?



If you had to choose between an eSIM and a traditional SIM for your next trip, what would be your deciding factor?



AUDIENCE

Demographics

United Kingdom, Age 18 to 45

Category

Mobile Network Plan; Telecom

Custom Screening

Have you travelled abroad within the past two years?

Custom Screening 2

When traveling abroad, how important is it for you to have mobile connectivity?

Custom Screening 3

When traveling abroad, how do you usually arrange mobile connectivity?



The Practical Planner

Description:

- Aged between 30-40, often travels for both business and leisure, and prefers to have a mobile data plan arranged before the trip.
- Values network coverage and cost-effectiveness, often relying on roaming add-ons from their current provider due to established trust and convenience.
- Prefers managing mobile plans through an app for efficiency and is open to eSIMs but prioritizes security and ease of setup.

Insights:

- This persona is likely to stick with familiar solutions that have proven reliable in the past, but is not opposed to new technology if it offers clear benefits.
- They are very cost-conscious and would need to see significant savings or added convenience to switch from their current provider.
- Security is a key concern, and they perceive eSIMs as potentially more secure due to the lack of a physical SIM that could be lost or stolen.

The Flexible Jetsetter

Description:

- In their late 20s to early 30s, this single, tech-savvy traveler is always connected, whether traveling solo or with friends.
- They are spontaneous but do their research on mobile data options, often relying on Wi-Fi but also purchasing data plans as needed.
- Brand trust is important, and they have had positive experiences with customer service, leading to brand loyalty.

Insights:

- This persona values flexibility and is willing to pay for convenience and peace of mind, ensuring they are always connected.
- They are influenced by past positive experiences and are likely to stick with a brand that offers good customer service and rewards.
- While they are aware of eSIMs and find them interesting, they need more information and assurance on their ease of use before fully embracing them.

The Cost-Conscious Explorer

Description:

- Aged 20-25, this young traveler is very price-sensitive and looks for the most affordable mobile data options when traveling.
- They are not very familiar with eSIM technology but are open to trying new solutions if they are cost-effective and easy to use.
- They prefer to manage their mobile plan online and are less concerned with brand loyalty, focusing more on getting the best deal.

Insights:

- This persona is likely to be influenced by special offers and discounts and may switch providers to take advantage of the best prices.
- They are a prime candidate for eSIM adoption if it can be demonstrated that eSIMs offer a more affordable and convenient solution.
- Ease of use and clear, upfront pricing are key factors in their decision-making process for mobile connectivity solutions.





**REACH OUT TO US IF YOU HAVE
FURTHER QUESTIONS ABOUT THIS
REPORT**

chat@boltinsight.com

ESOMAR
[member](#)



www.boltchatai.com

linkedin.com/company/boltinsight