

Roaming Services Market Forecasts to 2034 – Global Analysis By Service Type (Voice Roaming, Data Roaming, and SMS Roaming), Roaming Type (National Roaming and International Roaming), Subscriber Type, End User, and By Geography

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Abstracts

According to Statistics MRC, the Global Roaming Services Market is accounted for \$83.4 billion in 2026 and is expected to reach \$142.2 billion by 2034 growing at a CAGR of 6.9% during the forecast period. Roaming services enable mobile subscribers to use their mobile devices for voice, data, and messaging services while traveling outside their home network coverage area. These services involve agreements between telecom operators to provide connectivity to visiting subscribers, with associated billing and settlement processes. The market serves consumer, enterprise, and IoT/M2M subscribers, catering to telecom operators, enterprises, government entities, and individual travelers. Growing international travel, increasing data consumption, expanding IoT deployments, and rising demand for seamless connectivity are key drivers of market expansion across all regions.

Market Dynamics:

Driver:

Growing international travel and tourism industry

The steady growth of international travel and tourism is a primary driver for the roaming services market. Increasing numbers of travelers crossing borders for business, leisure, and education create sustained demand for mobile connectivity while abroad. Tourism industry expansion in emerging economies is driving roaming revenue growth. Business

travel recovery post-pandemic is contributing to roaming service adoption. The proliferation of connected devices and growing reliance on mobile data for navigation, communication, and information access during travel further supports roaming demand. As international travel continues its recovery and growth trajectory, roaming services are benefiting from increased subscriber activity across all regions.

Restraint:

High roaming charges and consumer resistance to bill shock

High roaming charges and consumer resistance to unexpected high bills represent significant restraints for the roaming services market. Perceived excessive costs for international roaming have led many consumers to limit usage or seek alternatives including local SIM cards and eSIM solutions. Regulatory interventions in various regions have capped roaming charges, affecting operator revenues. Consumer awareness of roaming costs creates usage caution, limiting potential service consumption. The rise of zero-rated roaming offerings in some regions has changed consumer expectations, pressuring operators to provide inclusive roaming packages that may compress margins. These cost concerns and consumer behavior patterns limit service revenue growth opportunities.

Opportunity:

5G roaming and IoT/M2M service expansion

The rollout of 5G networks and expanding IoT/M2M connectivity present significant opportunities for the roaming services market. 5G roaming enables higher data speeds, lower latency, and new use cases including enhanced mobile broadband, industrial IoT, and autonomous applications. IoT/M2M roaming is expanding with connected vehicles, asset tracking, smart meters, and industrial sensors requiring cross-border connectivity. The proliferation of connected devices creates new roaming revenue streams for operators. As 5G coverage expands globally and IoT deployments accelerate, demand for advanced roaming capabilities continues growing, opening new market opportunities and revenue sources for service providers.

Threat:

Competition from alternative connectivity solutions

Increasing competition from alternative connectivity solutions poses significant threats to traditional roaming services. Local SIM cards, eSIM solutions, and travel SIM offerings provide travelers with potentially lower-cost alternatives to operator roaming services. Wi-Fi calling and messaging applications enable communication without cellular roaming charges. Mobile virtual network operators and global connectivity providers are entering the roaming market with competitive offerings. Regulatory intervention including roaming rate caps affects operator pricing flexibility and profitability. These competitive pressures may erode roaming revenue and market share for traditional telecom operators.

Covid-19 Impact:

The COVID-19 pandemic severely disrupted the roaming services market due to international travel restrictions, border closures, and lockdowns. Roaming revenue for telecom operators declined sharply. Business and leisure travel reductions affected both consumer and enterprise roaming usage. However, IoT/M2M roaming demonstrated relative resilience with continued demand for connected devices. The pandemic accelerated digital transformation in the telecom sector, including roaming service modernization. Post-pandemic, international travel has steadily recovered, driving roaming revenue recovery. The crisis permanently changed travel patterns, with hybrid business models emerging and leisure travel rebounding strongly, creating a transformed but recovering roaming market environment.

The Consumer segment is expected to be the largest during the forecast period

The Consumer segment is expected to account for the largest market share during the forecast period, driven by the substantial volume of international leisure travelers and their continued demand for mobile connectivity while abroad. Consumer subscribers represent the majority of roaming users globally, with millions of travelers requiring voice, messaging, and data services across borders. The segment benefits from growing tourism and increasing consumer data consumption. Travelers use mobile services for navigation, social media, communication, and information access, driving sustained roaming usage. As international travel recovers and expands, the consumer segment maintains the largest subscriber and revenue share throughout the forecast period.

The Travelers segment is expected to have the highest CAGR during the forecast period

Over the forecast period, the Travelers segment is predicted to witness the highest growth rate, fueled by the direct relationship between international travel growth and roaming service consumption. Travelers are the primary end users of roaming services, generating traffic through voice calls, data usage, and messaging while abroad. The segment benefits from increasing global travel, rising disposable incomes enabling more travel, and growing reliance on mobile connectivity during journeys. Data-intensive applications including navigation, social media, streaming, and communication drive per-user roaming consumption. As international travel continues recovering and expanding, the travelers segment delivers the fastest roaming services market growth.

Region with largest share:

During the forecast period, the North America region is expected to hold the largest market share, supported by high-value roaming subscribers, extensive international travel patterns, and advanced telecom infrastructure. The United States and Canada generate substantial outbound roaming traffic. Strong business travel and tourism sectors drive roaming demand. Established roaming agreements between operators facilitate service availability. High disposable incomes enable increased travel and roaming spending. With developed telecom infrastructure and significant travel volumes, North America maintains its dominant market position throughout the forecast period.

Region with highest CAGR:

Over the forecast period, the Asia-Pacific region is anticipated to exhibit the highest CAGR, driven by expanding outbound tourism, increasing middle-class populations, and growing mobile connectivity adoption across countries including China, India, Australia, and Southeast Asia. Rising disposable incomes and growing travel aspirations are increasing international travel volumes. Expanding air connectivity and tourism infrastructure support market growth. Telecom operators are investing in roaming partnerships to capture growing traffic. As the region's international travel sector continues expanding and mobile penetration deepens, Asia Pacific delivers the fastest roaming services market growth globally.

Key players in the market

Some of the key players in Roaming Services Market include Telefonaktiebolaget LM Ericsson, Nokia Corporation, Cisco Systems, Inc., Amdocs Limited, Comviva Technologies Limited, Syniverse Technologies LLC, BICS SA, Comfone AG, Tata Communications Limited, Orange S.A., Deutsche Telekom AG, Vodafone Group Plc,

Telefonica, S.A., BT Group plc, China Mobile Limited, Telenor ASA, and AT&T Inc.

Key Developments:

In June 2026, Comfone finalized the expansion of its Key2roam Hub software suite, deploying automated billing reconciliation tools tailored for Tier-2 mobile network operators transitioning from legacy clearing to modern GSMA standards.

In March 2026, BICS announced a major structural modernization program with Netcracker to upgrade its entire Digital OSS platform, stabilizing and future-proofing the core database systems that power its global wholesale roaming, 5G IP Exchange (IPX), and international IoT data capacity.

In March 2026, Amdocs launched its 'Global eSIM Traveler Solution' at MWC 2026, leveraging the Amdocs eSIM Cloud ecosystem to allow communications service providers to offer instant, branded data plans directly to international travelers and reclaim roaming market share from digital aggregators.

In February 2026, Syniverse announced a deep strategic partnership with BICS to accelerate global 5G Standalone (SA) roaming, deploying advanced Billing and Charging Evolution (BCE) clearing tools alongside Secure Edge Protection Proxy (SEPP) network architectures to capture next-generation wholesale traffic.

Service Types Covered:

Voice Roaming

Data Roaming

SMS Roaming

Roaming Types Covered:

National Roaming

International Roaming

Subscriber Types Covered:

Consumer

Enterprise

IoT/M2M

End Users Covered:

Telecom Operators

Enterprises

Government

Travelers

Regions Covered:

North America

United States

Canada

Mexico

Europe

United Kingdom

Germany

France

Italy

Spain

Netherlands

Belgium

Sweden

Switzerland

Poland

Rest of Europe

Asia Pacific

China

Japan

India

South Korea

Australia

Indonesia

Thailand

Malaysia

Singapore

Vietnam

Rest of Asia Pacific

South America

Brazil

Argentina

Colombia

Chile

Peru

Rest of South America

Rest of the World (RoW)

Middle East

Saudi Arabia

United Arab Emirates

Qatar

Israel

Rest of Middle East

Africa

South Africa

Egypt

Morocco

Rest of Africa

What our report offers:

Market share assessments for the regional and country-level segments

Strategic recommendations for the new entrants

Covers Market data for the years 2023, 2024, 2025, 2026, 2027, 2028, 2030, 2032 and 2034

Market Trends (Drivers, Constraints, Opportunities, Threats, Challenges, Investment Opportunities, and recommendations)

Strategic recommendations in key business segments based on the market estimations

Competitive landscaping mapping the key common trends

Company profiling with detailed strategies, financials, and recent developments

Supply chain trends mapping the latest technological advancements

Free Customization Offerings:

All the customers of this report will be entitled to receive one of the following free customization options:

Company Profiling

Comprehensive profiling of additional market players (up to 3)

SWOT Analysis of key players (up to 3)

Regional Segmentation

Market estimations, Forecasts and CAGR of any prominent country as per the client's interest (Note: Depends on feasibility check)

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