

THE VISITOR'S NETWORK

What independent, user-side measurement reveals about the connection international visitors actually got across the three 2026 World Cup hosts: the United States, Mexico and Canada.



THE VISITOR'S NETWORK

When millions of international visitors arrived for the 2026 World Cup, hosted across the United States, Mexico and Canada, they did not experience the same mobile connectivity as their hosts. MedUX measured it from the device, independently and at scale, through two lenses that rarely meet: passive real-user data across hundreds of thousands of devices, and more than four million controlled active speed and video tests, nationwide in each market rather than only the host cities. In the US and Canada, visitors were observed connected to 5G materially less than residents, and their overall download speeds ran well below a local's. Mexico is the revealing case: nationally residents and all-roaming visitors are close to parity on 5G connection share, and overall visitor download speed is also close to resident levels. Only the same-area view reveals a lower 5G connection share for roaming visitors around venue areas, particularly stadiums. The size and direction of the gap varied sharply by host, with visitor origin, roaming conditions, the visited network and device characteristics all potentially contributing to the observed experience.

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THE TOURNAMENT AS A LIVE NETWORK EXPERIMENT

The 2026 World Cup was played across **three host countries, the United States, Mexico and Canada**, and for six weeks a wave of foreign SIMs moved through all three in step with a football calendar. That mobility is not the story. It is the **setup**. The tournament created an unusually large and concentrated wave of international mobility across three host countries, which makes it a rare chance to answer a question conventional benchmarks often miss: **what connection does a visitor actually get?**

This is the kind of question that independent, customer-side measurement is built to answer. Measuring from the device, at scale and independently, adds that perspective, and we did it in all three hosts.

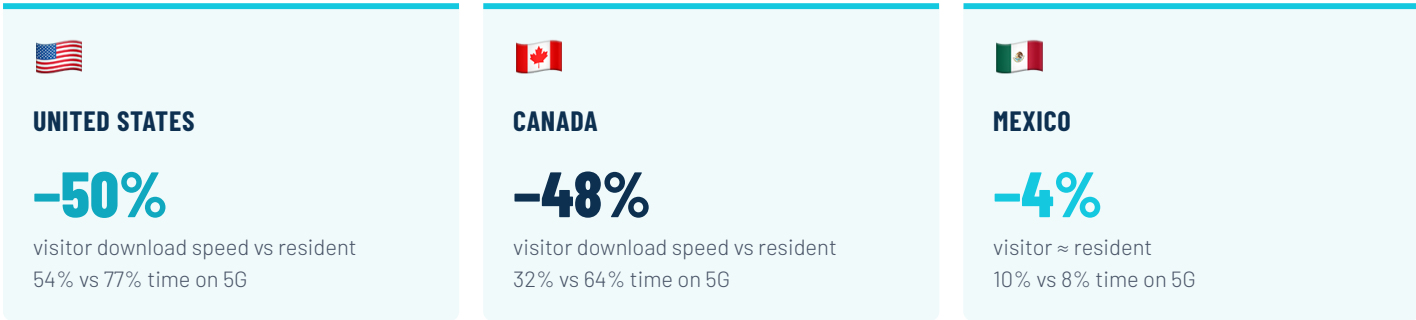
THE FINDING IN ONE LINE

Same tournament, three hosts, and **three very different outcomes** for the visitor.

In the US and Canada, visitors saw a materially worse connection than residents on the same networks. In Mexico the gap nearly closed. The contrast points to roaming conditions and visitor origin as important dimensions of the observed outcomes, within the broader context of the visited network and device environment.

SAME TOURNAMENT, THREE VERY DIFFERENT VISITOR OUTCOMES

Comparing the visitor against the resident on the same networks, in each host country, here is the picture at a glance:



Visitor vs resident on the same networks, by host. Big figure: median download gap (all visitors). Sub: time connected to 5G (roaming visitors vs residents). Nationwide.

The download detail, in absolute terms:

DOWNLOAD SPEED: VISITOR VS RESIDENT, BY HOST



Active-test median download speed (Mbps), resident vs visitor (all connection types), by host country. Nationwide panel medians.

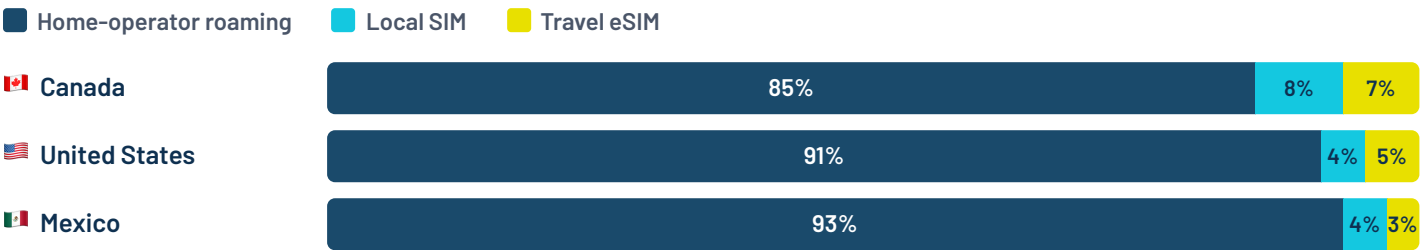
The two headline metrics tell different stories and should not be conflated. On **download**, the visitor gap is large in the US and Canada and close to parity in Mexico. On **time connected to 5G**, all-roaming visitors sit below residents in the US (**54% vs 77%**) and Canada (**32% vs 64%**), while in Mexico the two are close to parity (**10% vs 8%**). Two factors emerge prominently in the host differences: **who visits each host and the roaming conditions associated with those visitors**, within a broader network and device context.

Notice what does not line up. Mexico has the weakest local network of the three (15.8 Mbps), yet it hands the visitor the smallest gap of all (about 4%). The US has the fastest (53.8 Mbps) and the widest (about 50%). **Local network quality does not predict how a visitor is treated.**

HOW THE VISITOR CONNECTS: STILL MOSTLY ROAMING

Measured from the device, a visitor connects in one of three ways. **Home-operator roaming**: they keep their own SIM and plan, roaming on a host network. **A local SIM**: they pick up a prepaid SIM or eSIM from a local operator for the trip. **A travel eSIM**: they use an international travel eSIM (Airalo, Holafly and the like).

HOW THE VISITOR CONNECTS, BY HOST



How visitors connect, by host. The local-SIM and travel-eSIM shares are conservative floors.

Home-operator roaming dominates everywhere, but alternative connectivity adoption is highest in Canada (about 15% combined). So for the large majority, the visitor's connection **is** their home operator's roaming, and roaming conditions become an important part of the experience delivered to that visitor. Those conditions, in turn, vary by where the visitor came from, which is where the three hosts diverge.

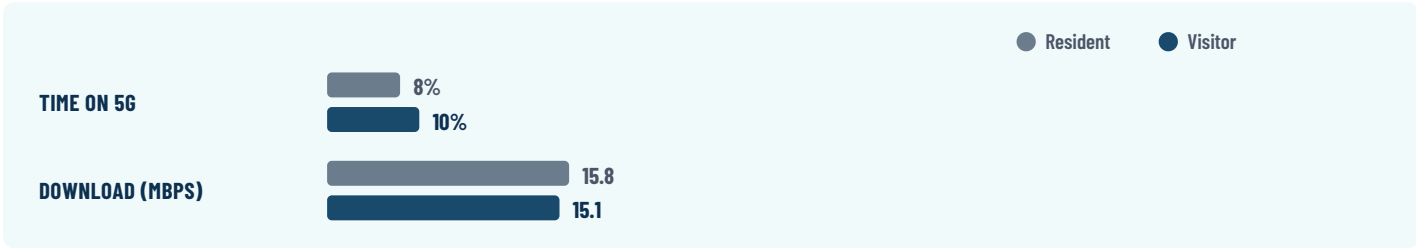
WHY THE HOSTS DIFFER: WHO ROAMS IN, AND THE CONDITIONS THEY CARRY

Each host draws a different crowd. Within the MedUX measurement panel, foreign SIMs roaming on a host network can be identified by origin, so the shares below describe who is observed roaming on each network in our panel rather than a tourism ranking. Break that mix down by origin and the host-level puzzle starts to resolve.

MEXICO, THE SMALLEST VISITOR GAP, ON THE LOWEST RESIDENT 5G SHARE

83% OF ITS VISITORS CARRY US SIMS

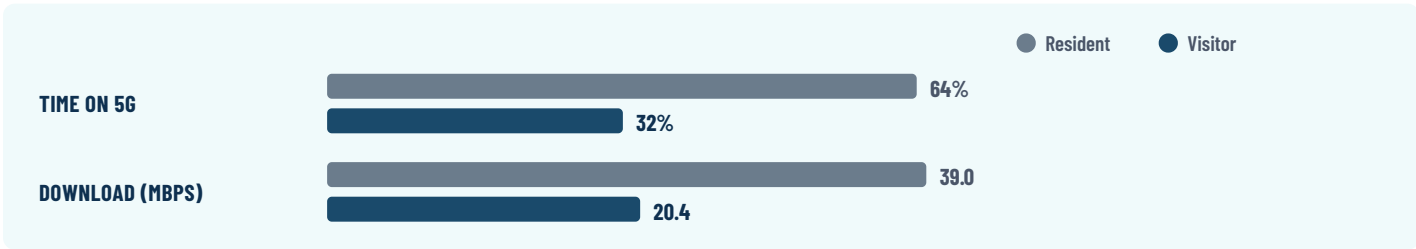
Mexico's inbound is overwhelmingly **US SIMs**, Americans whose T-Mobile, AT&T and Verizon plans bundle Mexico under North-American roaming, consistent with the United States being by far Mexico's largest inbound market (SECTUR). Because those US visitors overwhelmingly remain on their own SIM, they account for much of Mexico's 93% home-operator roaming share. And with local 5G still limited (about 8% of Mexican *residents'* time is on 5G), nationally residents and all-roaming visitors are close to parity on 5G connection share (about 8% vs 10%), unlike the wide gaps in the US and Canada. Within that, US-origin roaming visitors (the dominant inbound group) sit higher, at about 19%, a subgroup figure rather than the aggregate. The 1 km same-area analysis shows the national aggregate masks meaningful geographic effects: around the stadiums, roaming visitors are on 5G far less than co-located residents (about 8% vs 17%). The smallest visitor gap of the three coincides with the lowest resident 5G share, a pattern that may partly reflect who shows up.



CANADA, THE WIDEST VISITOR GAP, DESPITE A HIGH RESIDENT 5G SHARE

OBSERVED 5G SHARE VARIES BY VISITOR ORIGIN

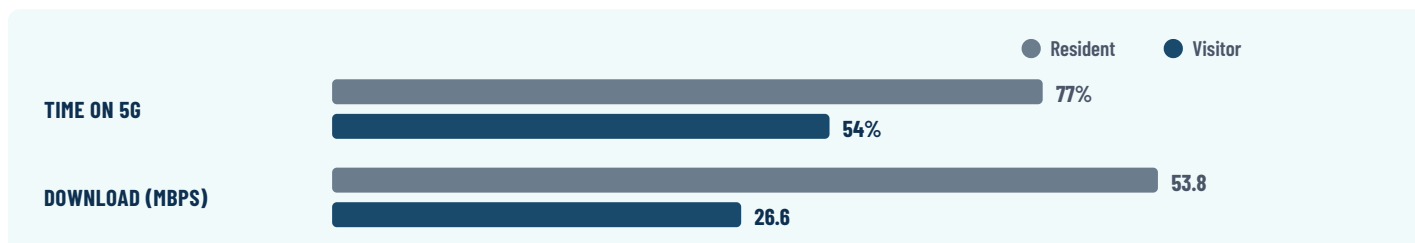
Canada's crowd is the mirror image. Most of its inbound is American (Statistics Canada), and those US SIMs were observed roaming in with 5G connection shares close to a resident's, so they are not where the gap shows. It shows in visitor groups observed with much lower 5G connection shares when roaming, Mexican visitors and long-haul markets like the Philippines and India, several of which were also observed at the lowest median visitor downloads in our data (around 9.5 Mbps). Although US visitors account for most of Canada's inbound travel, the lower observed performance among these long-haul and Latin American origin groups helps explain part of its wide *aggregate* visitor-resident gap. For some origin groups, observed 5G connection shares are relatively consistent across hosts: a Mexican SIM, for instance, was observed on 5G at a similar level in Canada and the US, which suggests visitor origin and roaming conditions may contribute to the pattern alongside host-network factors.



🇺🇸 UNITED STATES, HIGHEST RESIDENT 5G AND SPEED, STILL A WIDE VISITOR GAP

A MIX OF NEIGHBOURS AND LONG-HAUL

The US records the highest resident 5G connection share and median download speed among the three hosts in this study (77% on 5G, 53.8 Mbps). Its visitor mix combines Mexico (31%) and Canada (11%), which showed relatively higher observed roaming performance, with Colombia, the UK, India and other origins showing lower observed 5G connection shares. Despite recording the highest absolute visitor download speed of the three hosts (26.6 Mbps), the visitor median remained about 50% below the resident level.



WHO BUYS A LOCAL SIM OR TRAVEL ESIM, AND HOW IT VARIES BY ORIGIN

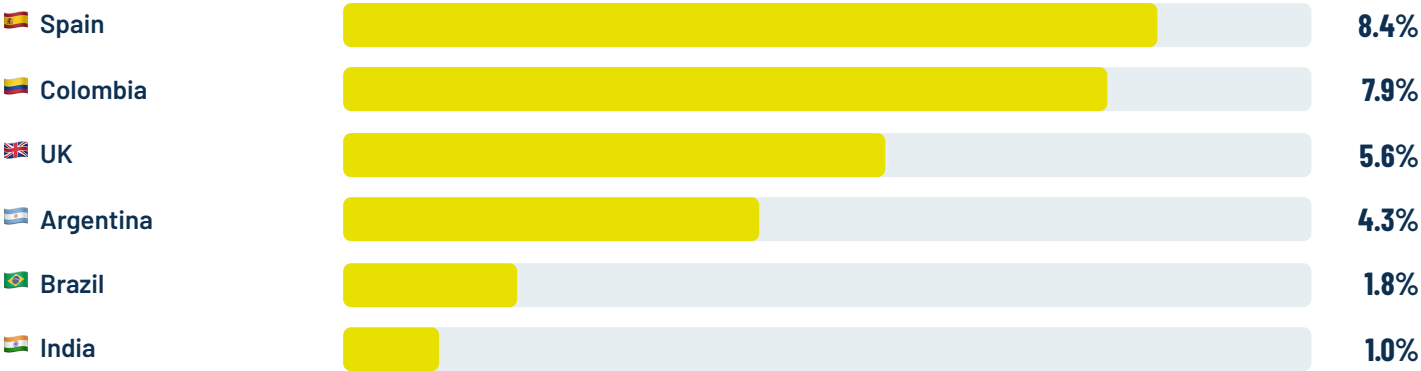
Break the small group who don't roam down by where the visitor comes from and the switch rate varies far more with the visitor's origin than with the host. Visitors from within North America, where roaming is often bundled into domestic plans, switch far less often. Visitors from outside the region switch far more: India, Colombia and Jamaica into Canada (23 to 26%), and Spain into Mexico (28%). Each cell is the share of that origin's visitors who also carried a host-country SIM.

VISITOR ORIGIN	🇺🇸 IN THE US	🇲🇪 IN MEXICO	🇨🇦 IN CANADA
🇲🇪 Mexico	5%	-	11%
🇨🇦 Canada	1%	6%	-
🇺🇸 United States	-	4%	4%
🇨🇴 Colombia	6%	15%	23%
🇦🇷 Argentina	4%	4%	-
🇧🇷 Brazil	3%	8%	14%
🇪🇸 Spain	7%	28%	20%
🇬🇧 UK	4%	4%	6%
🇩🇪 Germany	6%	-	6%
🇮🇳 India	9%	-	26%
🇯🇲 Jamaica	9%	-	25%

Share of each origin's visitors who also carried a host-country SIM, by host. - = not a significant inbound flow, or the host itself. A strict floor: it counts only devices seen on both their home and a host SIM.

These cells count only visitors seen on both their home and a host SIM, a strict floor for **local-SIM** use. A second, independent view, following visitors from their home market, isolates **travel eSIM** specifically. The two alternatives are not mutually exclusive at market level. Colombia stands out in both: local-SIM use reaches 23% among Colombian visitors to Canada, while Colombia also records the second-highest travel-eSIM adoption across the three hosts (7.9%), behind Spain (8.4%). India and Jamaica stand out more strongly on local-SIM use in Canada, while Spain leads travel-eSIM adoption overall:

TRAVEL-ESIM ADOPTION BY HOME MARKET, ACROSS THE THREE HOSTS



Share of each market's visitors who used an international travel eSIM, across the three host countries (origins we can trace from home).

These results show where alternative connectivity is more common. They do not attribute individual connectivity choices to a single cause.

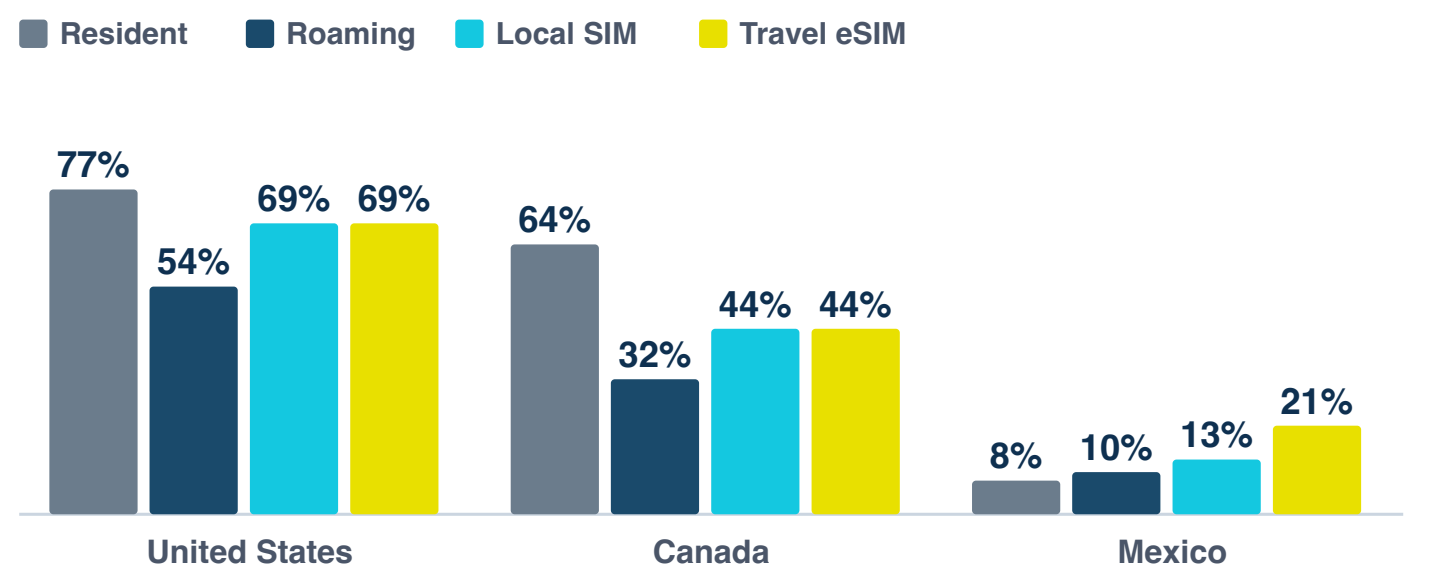
And because all three hosts sit in North America, the visitors with the smallest gap are the region's own. A tournament hosted elsewhere could reshuffle which visitor groups see the largest gaps, without changing the underlying importance of origin and connection type.

A PERSISTENT 5G CONNECTION-SHARE GAP

The clearest signal is 5G connection share, and it splits by host: in the US and Canada, all-roaming visitors were observed connected to 5G markedly less than residents, while in Mexico residents and all-roaming visitors are close to parity (about 8% vs 10%). (US-origin roaming visitors, the dominant inbound group, sit higher at about 19%, a subgroup figure, not the aggregate.) As the 1 km same-area analysis later in the report shows, that national aggregate masks meaningful geographic effects, particularly around stadiums. This metric should not be read as a direct measure of 5G coverage. It reflects how often devices were observed connected to 5G, which may be influenced by roaming conditions as well as network, device and service factors.

That roaming figure pools visitors from all foreign origins. In the US and Canada, traditional roaming shows the largest observed gap to the resident benchmark, while local-SIM and travel-eSIM connections sit closer to resident 5G connection shares. Mexico follows a different pattern, with every visitor connection type observed at or above the nationwide resident 5G share.

5G CONNECTION SHARE BY CONNECTION TYPE



5G connection share by connection type, by host. In the US and Canada, traditional roaming shows the largest gap to the resident benchmark, while local SIM and travel eSIM recover part or most of it. In Mexico, where the resident 5G share is itself low, all visitor connection types sit close to or above it.

Within roaming, the observed 5G connection share varied more with the visitor's origin than with the host. A Mexican SIM was observed on 5G about a third of the time whether it roamed into the US (30%) or Canada (37%), while a US SIM was observed around 60% in both. This consistency suggests visitor origin and roaming conditions are important dimensions, within a broader network and device context. It is consistent with the visitor-origin mix contributing to Canada's wide aggregate gap.

Mexico is the near-parity case, and it comes with a caveat. Nationally, residents and all-roaming visitors are close on 5G connection share (about 8% vs 10%), while the dominant US-origin roaming subgroup sits higher, at about 19%. The 1 km same-area analysis shows the national aggregate masks meaningful geographic effects: around the stadiums, roaming visitors are on 5G far less than co-located residents (about 8% vs 17%). Network and device characteristics may also play a part.

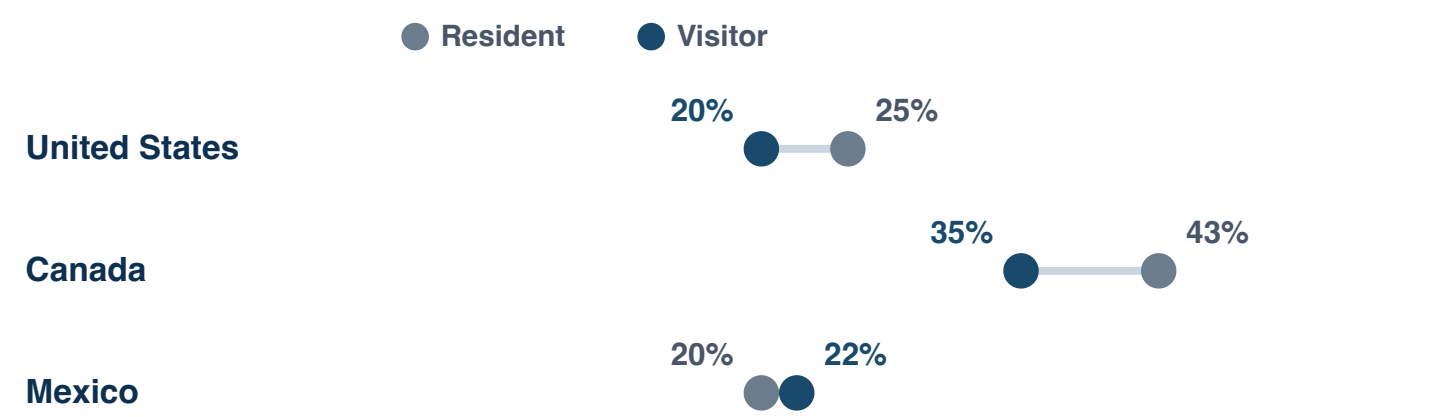
Device mix is a second factor, and we can measure it. On the passive measurement panel, roaming visitors ran a higher share of 4G-only handsets than residents in the US, while in Mexico it is residents who carry more 4G-only devices. Restricting the comparison to 5G-capable devices changes the picture. In the US the visitor-resident gap narrows from

about 23 points to about 11, so roughly half of it reflects device mix and about half a genuine roaming effect. In Mexico the visitor's apparent edge disappears, with residents slightly ahead on like-for-like 5G-capable devices, consistent with the venue-level relegation. (Device capability was assigned per handset model on the Android panel, and iOS devices sit outside it.)

THE APP EXPERIENCE SPLITS BY HOST TOO

Streaming shows the same pattern: YouTube plays in 4K less often, and starts slower, for visitors in the US and Canada, while in Mexico it is barely different from a local's.

VIDEO: SESSIONS PLAYED IN 4K, RESIDENT VS VISITOR



YouTube sessions played in 4K, resident ● vs visitor ● (all connection types), by host. Video also starts slower for visitors, about +25% (US) and +27% (Canada), and slightly faster in Mexico.

SAME PLACE, A DIFFERENT 5G EXPERIENCE

The sharpest version of the question: how does a roaming visitor compare with a resident within the same venue area? Using a finer dataset at 1 km resolution (weekly) for **all three hosts**, we compare inbound visitors (roaming devices) and residents within the same 1 km area, roughly a venue and its surroundings, not just the same country. This substantially reduces the geographic difference between the two populations.

Two things stand out. First, **we do not observe a higher service-drop rate among visitors than among nearby residents** (tested at US venues): visitors were not cut off or dropped any more often than co-located residents. Second, **the 5G connection share differs, most clearly at the stadiums**: in the same 1 km area, roaming visitors were observed on 5G less than residents, sharply so at stadium areas in all three hosts, and by smaller, varying margins at airports and downtown.

SAME 1 KM AREA: 5G CONNECTION SHARE, RESIDENT → VISITOR

SAME 1 KM AREA (RESIDENT → VISITOR, 5G)	 US	 CANADA	 MEXICO
Stadiums	82% → 40%	65% → 32%	17% → 8%
Airports	82% → 70%	74% → 50%	19% → 16%
Downtown	70% → 65%	66% → 40%	19% → 18%

5G connection share in the same 1 km area, resident then visitor, by venue type and host. Venue cells are each host city's stadium, airport and downtown plus immediate surroundings. The geographic method is identical across hosts. Temporal coverage differs by data availability (US 4 weeks, about 29 June to 20 July, and Canada and Mexico 9 weeks, about 18 May to 13 July).

When residents and roaming visitors are compared within the same venue areas, stadiums show a clear visitor 5G connection-share gap in all three hosts (US 82 to 40, Canada 65 to 32, Mexico 17 to 8), while the difference is smaller and varies across airports and downtown. Mexico is the instructive case: nationally residents and all-roaming visitors are close to parity (about 8% vs 10%), but the same-area comparison shows the national aggregate masks meaningful geographic effects, particularly around the stadiums (about 17% resident vs 8% visitor). The same-area comparison strengthens the geographic like-for-like view, while the observed outcome should still be interpreted in the context of the network, roaming and device environment.

THE CLEANEST EVIDENCE IN THE ANALYSIS

At the stadium areas, roaming visitors were observed on 5G far less than co-located residents, in all three hosts.

At US venues, we do not observe a higher drop rate among visitors than among nearby residents. Across all three hosts, however, stadium-area visitors were more often observed on 4G rather than 5G than co-located residents. The gap is smaller and varies at airports and downtown. (An earlier, coarser view hinted at more service drops for visitors, but finer co-located measurement does not support that, and we set the drop-rate claim aside.)

THE OTHER SIDE OF THE LEDGER, AND WHAT IT MEANS

Home-carrier roaming generates wholesale traffic for the visited network and contributes to the inbound-roaming value chain, a large one: global wholesale roaming revenue is projected to grow from around \$9bn in 2024 to around \$20bn by 2028 (Juniper Research, 2025). A mega-event concentrates that demand into a few weeks: one US host network reported carrying about 500 TB across the stadiums (29.2 TB in the final alone). Canadian operators also reported multimillion-dollar network upgrades across Toronto and Vancouver, including temporary capacity deployments around major venues (operator figures, trade press, 2026).

Here is the tension independent measurement exposes: the capacity story is real and the volumes enormous, yet, in the stadium areas, roaming visitors still spent materially less time on 5G than residents. Headline petabytes and per-visitor quality are not the same thing, and independent, user-side measurement is well placed to see the second. Meanwhile the ledger is being redrawn, and alternative connectivity changes where value is captured. A travel eSIM can shift the retail relationship toward an aggregator or MVNO while still generating wholesale traffic on the visited network. A local SIM may instead move the visitor directly into a host operator's retail base. The retail price gap can be large: CCS Insight offers an illustrative example, with one analyst paying about £15 for a 10 GB travel eSIM on a US trip and estimating that their UK provider's roaming would have cost around £100 more (CCS Insight, 2025). Kaleido Intelligence estimates travel-eSIM retail spend at around \$3.8bn in 2025, approaching \$5bn in 2026, with average spend per trip up about 133% to \$28 while roaming spend per trip fell about 9% to \$42 (Kaleido Intelligence, 2026). The differences in travel-eSIM adoption by home market are consistent with cost and experience potentially influencing the attractiveness of alternative connectivity, although this study observes adoption rather than purchase motivation. Our own local-line and travel-eSIM numbers show the same variation by origin from the host-inbound side.

1 For operators: roaming QoE is now a visible, measurable dimension

Persistent roaming-QoE gaps can raise the competitive relevance of alternative connectivity, making the visitor's experience a factor in customer retention, roaming-partner strategy and value capture.

2 For regulators and public stakeholders: the inbound visitor is easily overlooked

Their quality of experience is not routinely captured in operator reporting or conventional drive testing, yet it shapes how a country is judged by millions of guests during its most visible moments.

3 For the industry: it takes customer-side measurement to see it

The inbound-visitor experience is hard to see consistently from network-side indicators alone. Independent, user-side, methodology-backed measurement is what reveals the connection the visitor actually gets, which is precisely the gap MedUX exists to close.

TWO INDEPENDENT LENSES AGREE

Passive real-user data and more than 4 million active tests point the same way.

The behavioural findings (5G access, local-line and travel-eSIM adoption) come from passive measurement. The speed and video findings come from a separate controlled active-testing dataset across the US, Mexico and Canada. Reported speeds are panel medians, providing a robust measure of typical observed performance. Roaming is derived from the SIM's home country versus the country of measurement, and travel eSIM by comparing the operator a device shows abroad with the one it uses natively at home. All on consented, anonymised devices, in aggregate, no individual identified or tracked. Independent QoE benchmarking, measured from the customer's side.

WORK WITH MEDUX

Want to understand the connection your customers get when they roam, or what inbound visitors get on **your network?**

MedUX helps operators, regulators and industry stakeholders measure and benchmark real Quality of Experience from the customer side, across roaming, networks, locations and digital services.

Discover how MedUX can support roaming QoE assurance, partner benchmarking and customer-experience monitoring.

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ABOUT MEDUX

MedUX is a global leader in Quality of Experience testing and monitoring, helping telecom operators, regulators, governments and digital enterprises understand how users actually experience fixed, mobile and Wi-Fi networks.

Through a multi-platform measurement ecosystem, including mobile and fixed probes, apps, SDKs, crowdsourcing and advanced analytics, MedUX provides end-to-end visibility into network and service performance, supporting benchmarking, optimization, regulatory compliance and customer experience improvement across markets worldwide.