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Tourist e-SIM Online Purchase Journey 2024

ASEAN edition

Disclaimer

The information in this report is provided on an as-is basis. This document is produced by Twimbit per date of research and writing (March-April 2024) based in Singapore and is subject to change. It has been prepared solely for information purposes over a limited period to provide a perspective on the market. All the data is derived and estimated by Twimbit analysts via publicly available information and limited mystery shopping exercises. Projected information, analyses, and conclusions in this report should not be construed to guarantee future performance or results.

Table of content

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e-SIM availability for tourists in APAC

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Legend

Tourist e-sim available

No tourist e-sim

Australia / NZ	India	Indonesia	Malaysia
Telstra		XL axiata	yoodo
vodafone, Spark nz, OPTUS	Jio, airtel, Vi	im3, Telkomsel, 3	celcom, digi, U mobile

Philippines	Singapore	Thailand	Third-Party
Globe, Smart	STARHUB, Singtel	AIS, dtac	airalo
DITO TELECOMMUNITY	M1, SIMBA, CIRCLES.LIFE	true move	Holafly, yesim

Research methodology

Define the scope and the specification of the research

Market Scope
ASEAN Tourist e-SIM providers
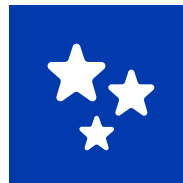
Process
Online purchase

Search Keywords
(country name) tourist e-sim

Period
1st – 10th April 2024

Device Used
iPhone 12

List down all the brand offering e-sim services

- Singtel (SG)
- Starhub (SG)
- Yoodo (MY)
- Globe (PH)
- AIS (TH)
- Airalo
- Ye-sim
- Holafly

- XL Axiata (MY)*
- Smart (PH)*
- DTAC (TH)*
- Telstra (AUS)*
*Excluded due to website malfunctions/inability to verify international passport

Journey framework and evaluation criteria

Journey
- Google Search
- Purchasing Process
- Payment Method
- Activation Instruction

Evaluation Criteria
- UX Details
- UI Elements
- Speed
- Steps
- Process
- Options
- Time Taken
- etc.

E-Sim purchasing process, iteration, and scoresheet

- Went through end-to-end journey of e-sim purchasing through the brand's website using a smartphone
- Screenshot every step, action, and page visited.
- Iterate and modify the evaluation criteria and scoring.
- Document the steps taken and actions into the scoresheet.
- Calculate evaluation criteria in score using a range of 1-5.

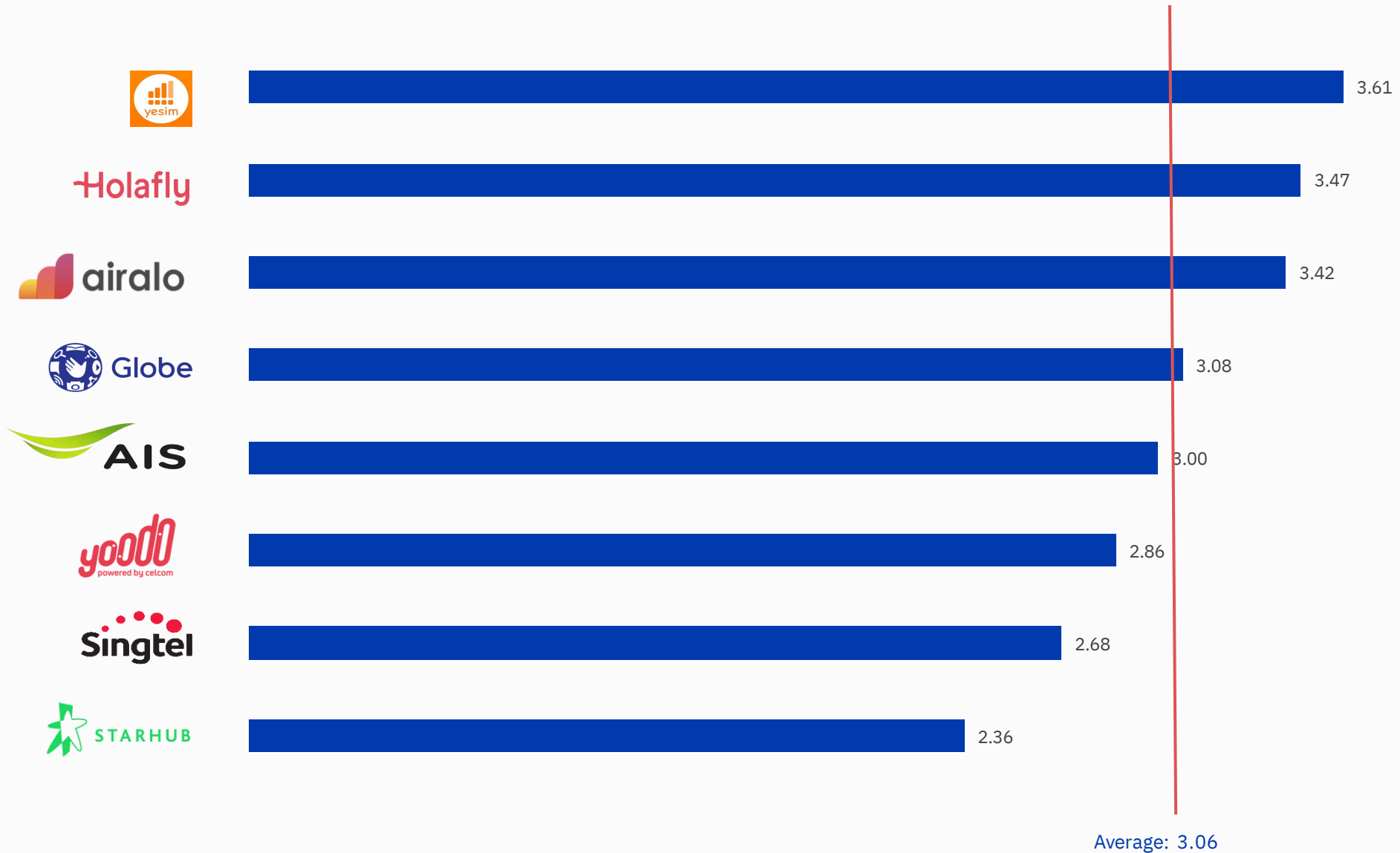## Analysis, report, recommendations, and presentation

- Weighted scores were given to identify the best e-sim purchasing experience.
- Identify friction points to improve upon.
- Create independent recommendations for telcos

Score Overview

Evaluation scope: 8 of 12 eSIM telcos assessed

Overall Score

Brand	Score
yesim	3.61
Holafly	3.47
airalo	3.42
Globe	3.08
AIS	3.00
yoodo powered by celcom	2.86
Singtel	2.68
STARHUB	2.36

Average: 3.06

1st Journey

Discovery process

(keywords = 'tourist e-sim')

Discovery process

Search	Starhub	Singtel	Yoodo	AIS	Globe	Airalo	Holafly	Ye-sim
Overall score	2.20	3.28	1.73	4.10	3.75	3.78	3.78	**4.43**

Evaluating criteria	Starhub	Singtel	Yoodo	AIS	Globe	Airalo	Holafly	Ye-sim
Visibility of Google search results *(If e-sim options are visible upon first view after searching)*	Scroll >2 times	Scroll once but sponsored	Scroll many times	Scroll once	Scroll once	Scroll once but sponsored	Scroll once but sponsored	First view but sponsored
Search results title *(Has clear CTA, mentions benefits and target market)*	Unclear CTA and has chaotic link text	✅	Unclear CTA/target market/benefit, has chaotic link text	✅	Unclear CTA and has chaotic link text	✅	✅	✅
Steps taken before reaching package of choice	>6 steps	>6 steps	4-5 steps	2-3 steps	2-3 steps	2-3 steps	2-3 steps	2-3 steps

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|Yesim, Airalo, and Holafly have easily discernible site links with clear CTAs
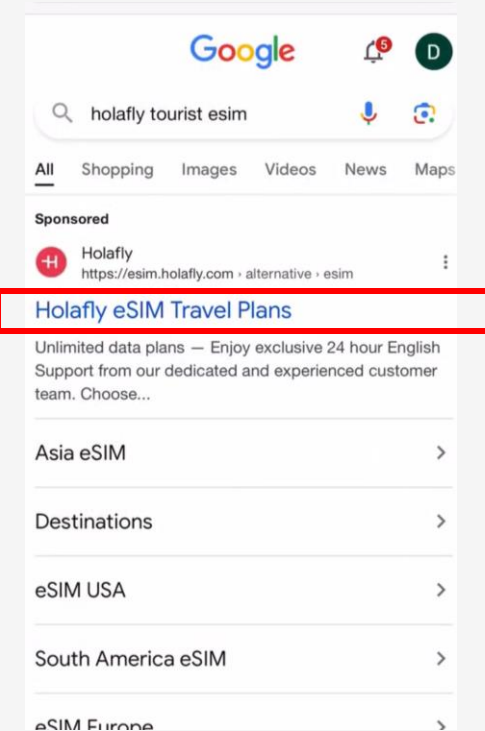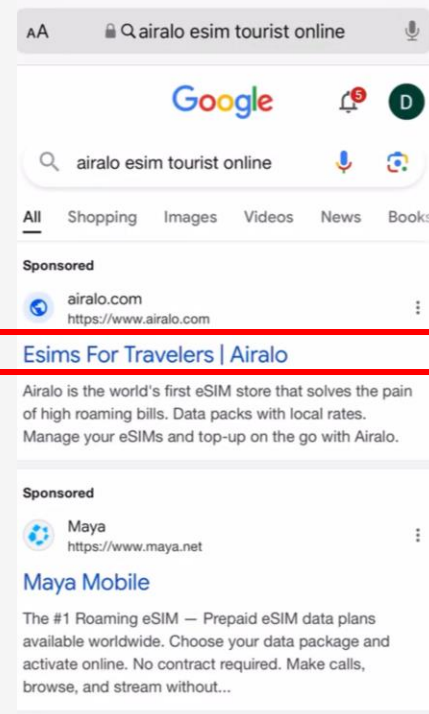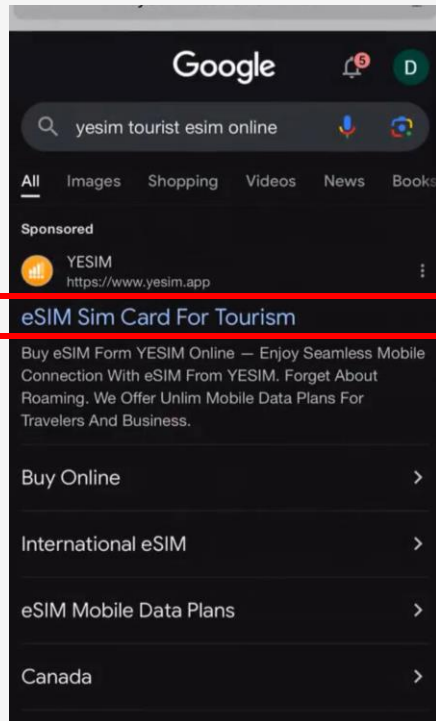
Clearly written links with strong headers, mention of "e-sim" to improve visibility

2nd Journey

Purchasing Process

Purchasing process (Part 1/3)

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Purchasing	Starhub	Singtel	Yoodo	AIS	Globe	Airalo	Holafly	Ye-sim
Overall score	2.62	2.84	**3.60**	2.82	3.42	3.32	3.35	3.18

Evaluating criteria	Starhub	Singtel	Yoodo	AIS	Globe	Airalo	Holafly	Ye-sim
Language options	No	✅	✅	✅	No	✅	✅	✅
Customer support (i.e., *FAQs, live chat/chatbot, WhatsApp/Telegram, Email, and Call available*)	Lacks livechat/ chatbot and social media	Lacks social media	Lacks hotline	Lacks hotline, livechat/chatbot, Whatsapp/ telegram social media	Lacks livechat/chatbot, Whatsapp/Telegram	Lacks hotline, Whatsapp/ Telegram, social media	✅	Lacks hotline, Whatsapp/ Telegram and social media
Promotions (i.e., *new user promotions, product recommendations, pop up ds/banners, and bundling/upselling*)	Lacks new user promo, product recommendation and bundles/ Upselling	No	Lacks pop-up ads/ banners	Lacks popup ads/banners and new user promo	Lacks new user promo	Lacks bundles/ upselling	Lacks bundles/ upselling	Lacks bundles/ upselling
E-sim types and options (*Prepaid/postpaid, upgrade or transfer e-SIM, others*)	Prepaid/postpaid and others*	Only prepaid/postpaid	✅	Only prepaid	Only prepaid and upgrade to e-SIM	Only prepaid	Only prepaid	Only prepaid
Displays step-by-step breakdown	Only shows current step, no mention of total steps	No	Clear number of steps from first to last	No	Clear number of steps from first to last	No	No	No

Purchasing process (Part 2/3)

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Purchasing	Starhub	Singtel	Yoodo	AIS	Globe	Airalo	Holafly	Ye-sim
Overall score	2.62	2.84	**3.60**	2.82	3.42	3.32	3.35	3.18

Evaluating criteria	Starhub	Singtel	Yoodo	AIS	Globe	Airalo	Holafly	Ye-sim
Purchase flow complexity *(1-2 steps being the simplest)*	5-6 steps	5-6 steps	✅	5-6 steps	✅	✅	✅	✅
eSIM compatibility view *(dropdown/pop up being the most convenient)*	On a new page	✅	✅	On a new page	✅	✅	On a new page	On a new page
Check for eSIM compatibility *(easiest being automatically detects)*	Able to view newest-oldest list	Able to view newest-oldest list	Able to view newest-oldest list	Filtering available	✅	Able to view newest-oldest list	Able to view newest-oldest list	Able to view newest-oldest list
Auto-selected package	No	No	No	✅	✅	No	No	No
View of package card details	On card	On card	On card	On card	On card	On card	On card	On card
Package card details visuals	Lacks icons	✅	✅	Lacks icons and benefits	✅	✅	✅	✅
Package card layout	✅	Layout in a column	✅	✅	✅	✅	✅	✅

Purchasing process (Part 3/3)

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Purchasing	Starhub	Singtel	Yoodo	AIS	Globe	Airalo	Holafly	Ye-sim
Overall score	2.62	2.84	**3.60**	2.82	3.42	3.32	3.35	3.18

Evaluating criteria	Starhub	Singtel	Yoodo	AIS	Globe	Airalo	Holafly	Ye-sim
Visibility of >3 package cards in one screen	Only 2 packages visible without scrolling	Only 2 packages visible without scrolling but details are incomplete	✅	✅	Only 1 package visible	✅	✅	✅
Promo tags on package card	No	Only favourite/ best-seller	Only favourite/ best-seller	Only favourite/ best-seller	No	No	No	No
Number choices	Auto-selected	Auto-selected	Custom number and search bar available	Auto-selected	Auto-selected	Auto-selected	Auto-selected	Auto-selected
Transition duration between pages	Website lags	Wait for a while	✅	Wait for a while	✅	✅	✅	Wait for a while
Requires minimal contact information *(Name + email only)*	✅	Name, Email, Number + Re-type email	Name, Email, Number, Re-type email	✅	✅	✅	✅	✅
Fast and easy sign up	Requires email OTP verification	✅	Requires email OTP verification	Requires email OTP verification	✅	✅	✅	✅
Display of Terms and Conditions	✅	✅	✅	✅	✅	Pop-up agreement	No	No
Overall steps taken for purchasing	>11	8-10	>11	8-10	✅	✅	✅	✅

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# |Yoodo and Holafly provide a variety of round-the-clock customer assistance
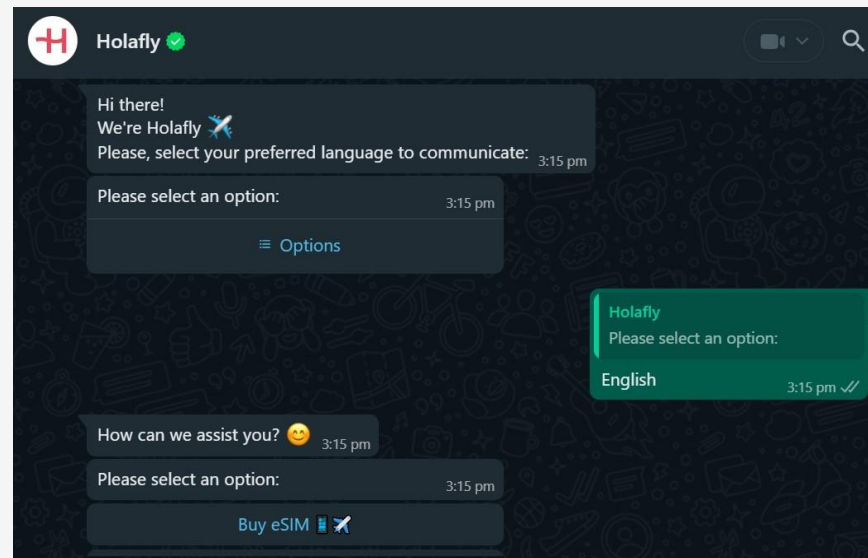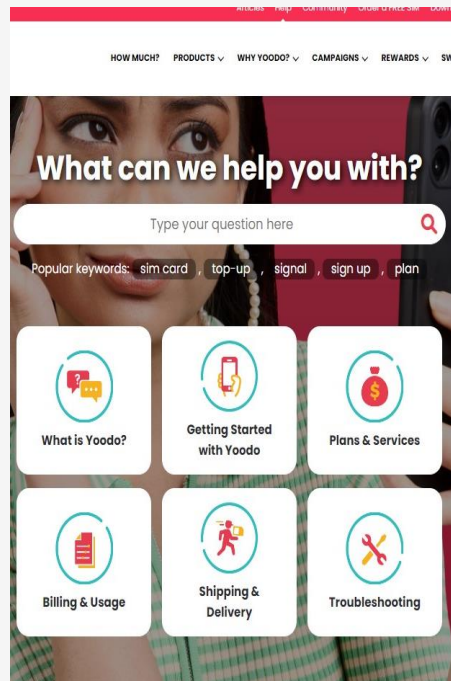
Holafly and Yoodo have 24/7 live chatbots and Whatsapp services for instant support, ensuring users have instant access to help whenever they need it
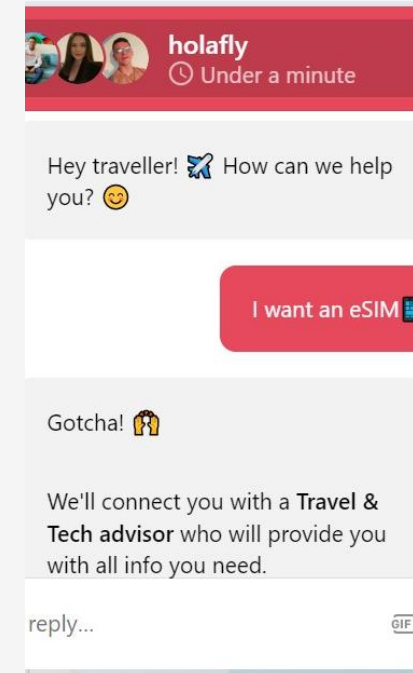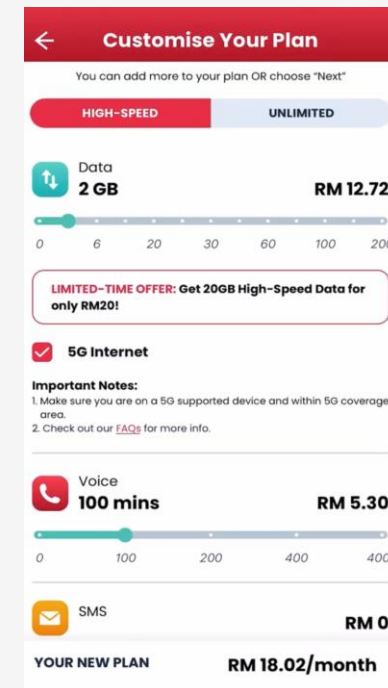
|Yoodo simplifies plan selection with a guided process, empowering customers to find their perfect fit
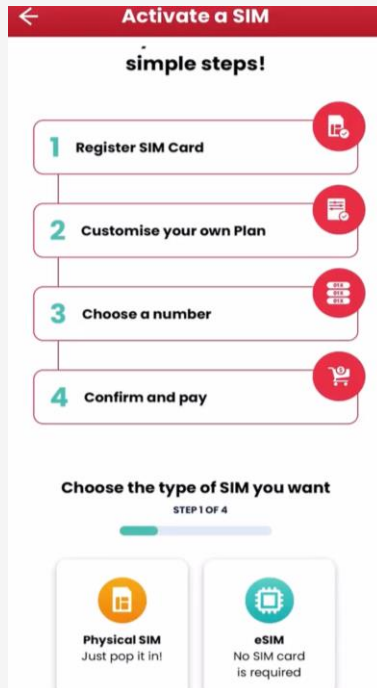
Steps for purchasing the e-sim are laid out clearly
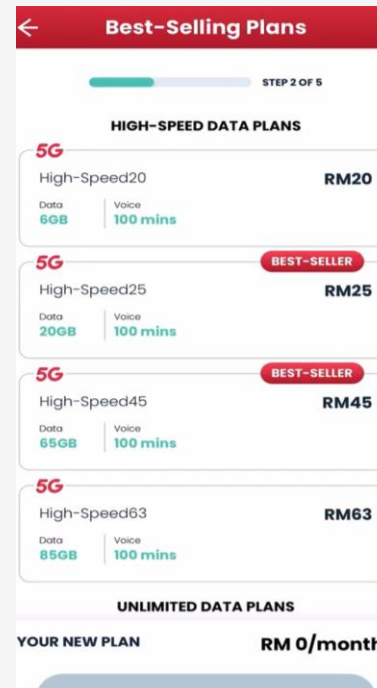
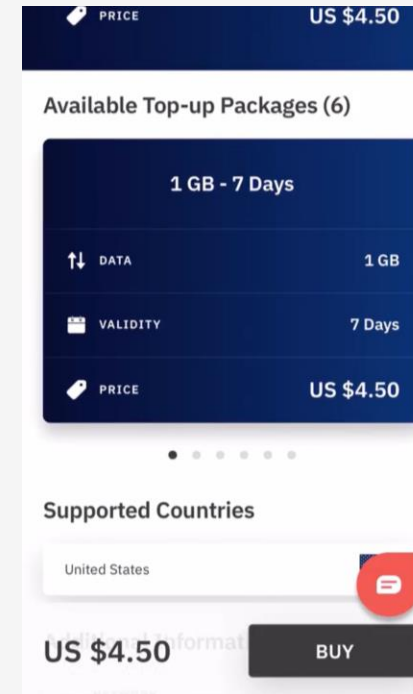Best-selling and recommended plans are easily viewed, with additions/top-ups

Offers flexible add-on plans for individual needs

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|Airalo prioritises a simple website, making it user-friendly for first-time customers

Packages for different countries available are easily accessed from the first page

Package details are clear and easy to read with clear CTA icons to guide users

|AIS highlights its best-sellers to help customers make better decisions

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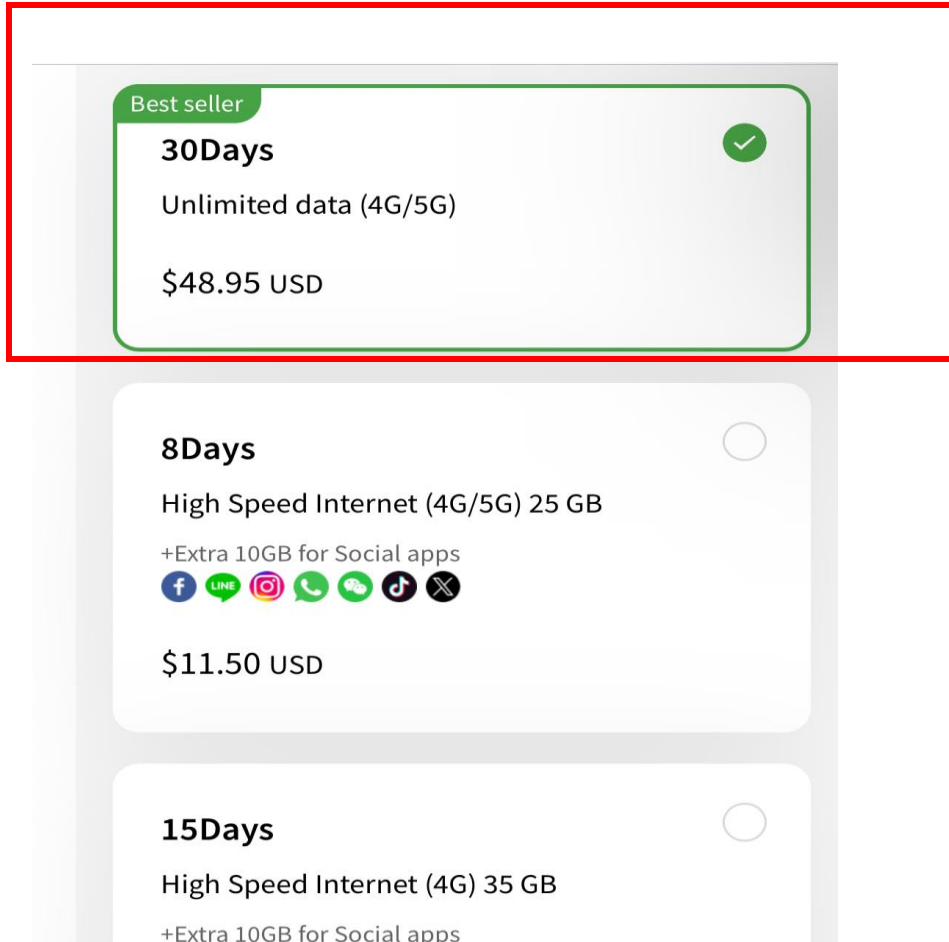
AIS labels its best seller and guides users to consider it as their package option, helping them make a more informed decision

Automatic device compatibility detection on Globe's app simplifies setup process
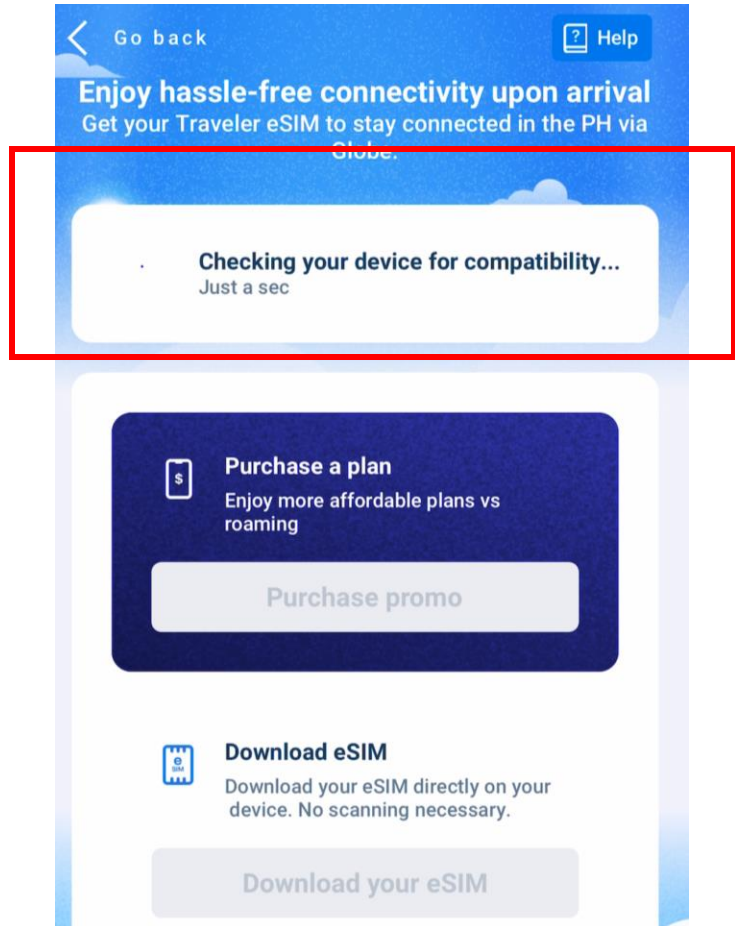
Skips manual compatibility checks by automatically detecting the device upon app activation for a seamless process
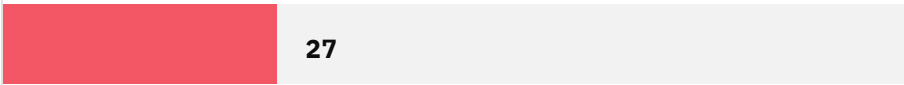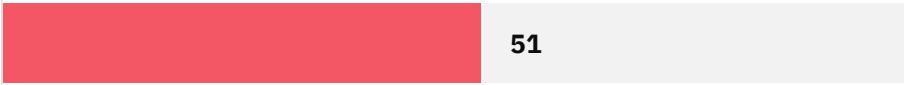
Website performance

Through Google's PageSpeed Insights, we analysed how quickly e-SIM purchases load on telco websites. This score (0-100) reflects user experience, with higher scores indicating faster loading times and a smoother purchase journey.
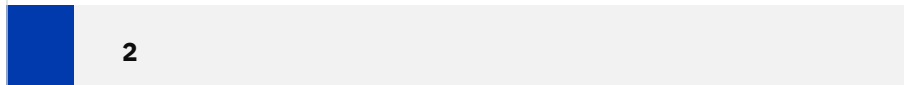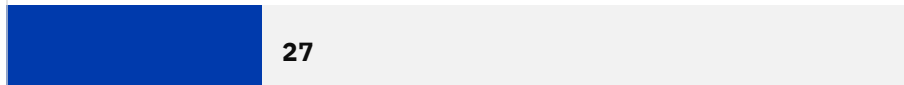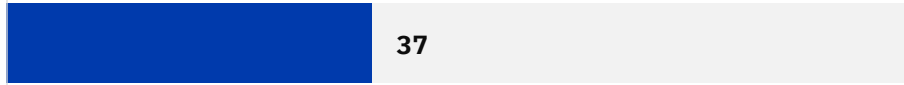
Page speed analysis

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📱 Mobile Speed

Provider	Speed
AIS	64
Holafly	51
yoodo	41
airalo	33
Globe	27
yesim	25
STARHUB	24
Singtel	1

🖥 Desktop Speed

Provider	Speed
AIS	86
Holafly	74
yoodo	71
airalo	61
Globe	41
yesim	37
STARHUB	27
Singtel	2
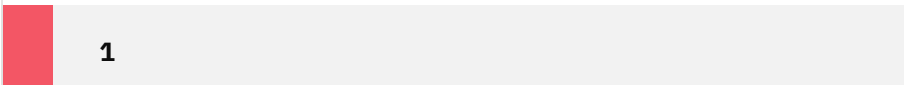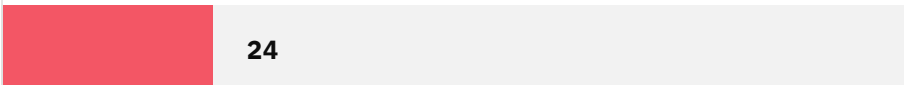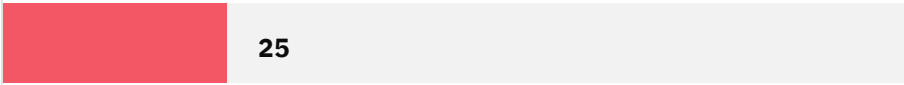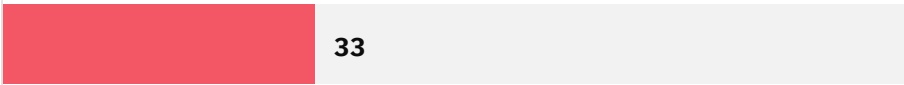
Additional Insight

e-KYC Process

Telcos with mandatory e-KYC

KYC (Know Your Customer) protocols verify customer identities to comply with safety regulations in various countries.

e-KYC required

Screenshots of AIS' eKYC process

Selfie, IC/passport scanning required as part of the verification process

eKYC required (Location-specific)

Verification can only be done when connected to Changi airport Wi-Fi

Verification can only be done when connected to Globe network in Philippines

Third-party solutions bypassing e-KYC

No KYC required

airalo Holafly yesim

Our analysis found providers like Holafly (Spain), Airalo (Singapore), and Yesim (Netherlands) didn't require identity verification during a purchase attempt in Singapore.

Notably, these providers offer **data-only plans** and don't provide a mobile number.

However, eSIM regulations vary by region.

1. **e-KYC requirements:** In specific countries, telcos are mandated to implement e-KYC processes to prevent fraud, enhance security, and ensure compliance with anti-money laundering (AML) and counter-terrorism financing (CTF) laws.

2. **Stricter regulations in India:** In addition to e-KYC, offering eSIM services in India requires a No Objection Certificate (NoC) from the Department of Telecommunications (DoT) and sales can only happen through authorized dealers. This highlights a stricter regulatory environment compared to other regions. Notably, Airalo and Holafly have been banned in India for failing to comply with these regulations.

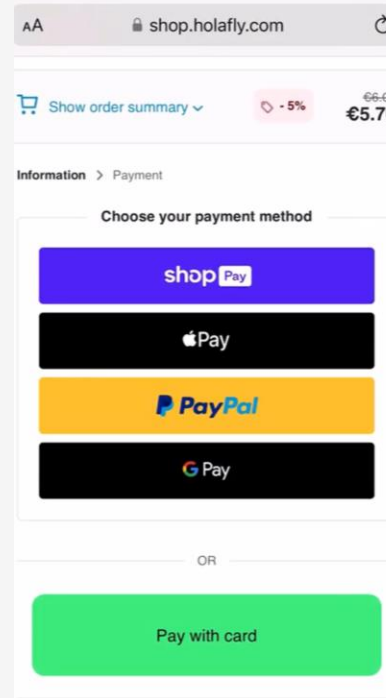4th Journey

Payment Methods

Payment Methods

Payment journey	Starhub	Singtel	Yoodo	AIS	Globe	Airalo	Holafly	Ye-sim
Overall score	1.75	1.75	2.35	2.20	1.75	2.65	3.53	**3.91**

| Evaluating criteria	Starhub	Singtel	Yoodo	AIS	Globe	Airalo	Holafly	Ye-sim
Variety of primary payment methods *(e-wallet, online banking, debit/credit card, others)*	Debit and credit card	Debit and credit card	Debit and credit card	E-Wallet and credit card	Debit and credit card	Debit and credit card, and E-wallet	Debit and credit card, E-wallet and Online banking	✅
e-Wallet options *(Grabpay, Applepay, Alipay, Googlepay, Paypal, others)*	No	No	Grabpay, Paypal and others	Alipay and others	No	Apple, Google, Alipay, Paypal and others	Apple, Google, Paypal and others	Apple, Google, Alipay, Paypal and others

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|Ye-sim, Holafly, and Airalo offers multiple payment options for convenience
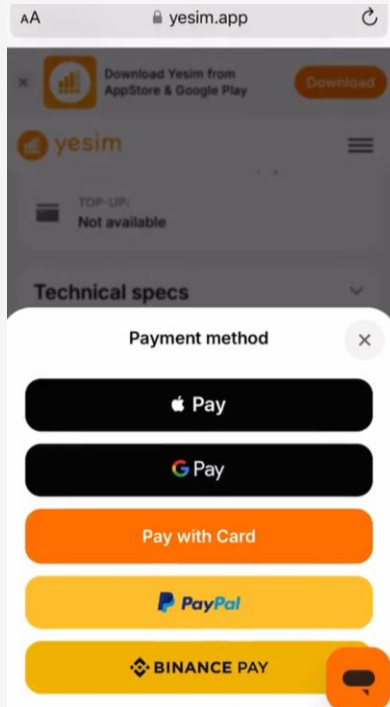
Ye-sim has Gpay and Apple Pay as the first two options, plus unique options like Binance Pay

Holafly provides both Apple and Google Pay similar to Ye-sim
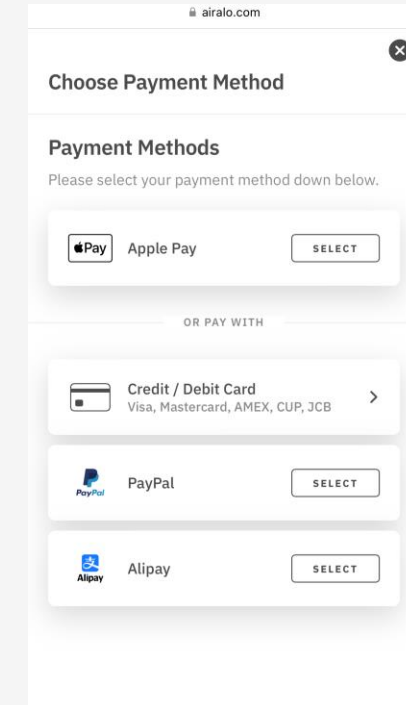
Airalo places Apple Pay as the first option to prompt iPhone users to opt for the most convenient method of purchase

5th Journey

Activation Instructions

Activation Instructions

Activation Instructions	Starhub	Singtel	Yoodo	AIS	Globe	Airalo	Holafly	Ye-sim
Overall score	2.75	2.38	2.75	2.30	3.05	**5.00**	3.20	3.20

Evaluating criteria	Starhub	Singtel	Yoodo	AIS	Globe	Airalo	Holafly	Ye-sim
Instructions availability *(via purchase confirmation page, email, website)*	Only email	Only email	Only email and website (app)	Only email and website	Only purchase confirmation page	✅	Only email and website	Only email and website
Instructions visuals	Lacks visual guide	Lacks step-by-step instructions	Lacks visual guide and clear space between lines	Lacks visual guide	Directly prompts device to install e-SIM	✅	Lacks visual guide	Lacks visual guide
Device-specific instructions	Generic	Generic	✅	Generic	✅	✅	✅	✅

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|Airalo provides a video tutorial and infographic for simple e-sim activation
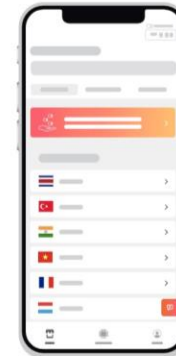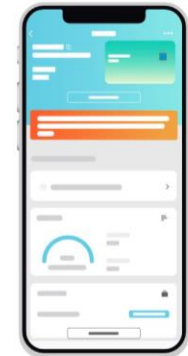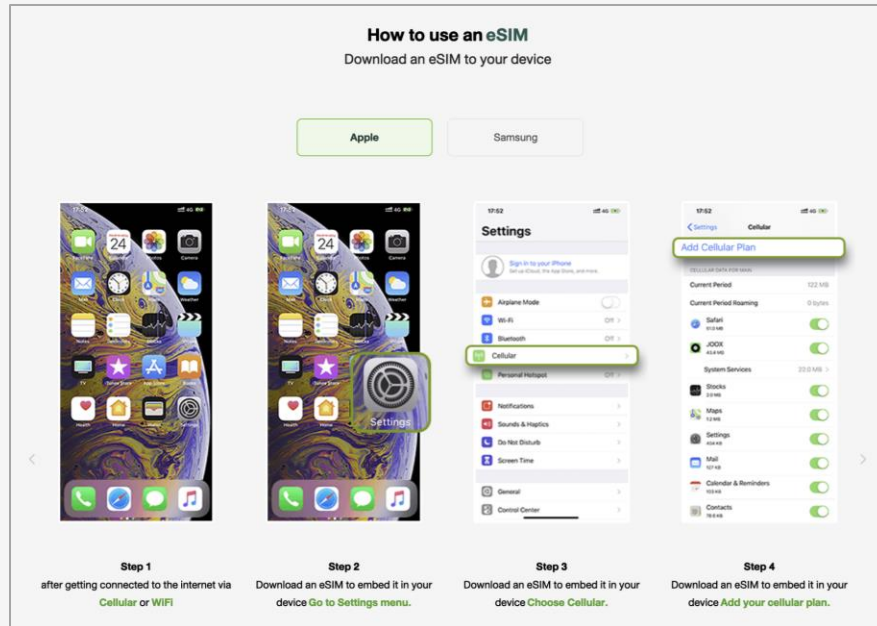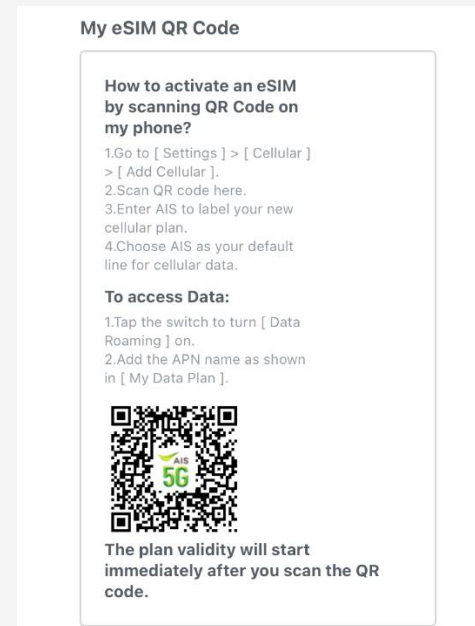

Confirmation email comes with an attached YouTube video with step-by-step activation instructions

|AIS provides simple visual activation instructions in different formats
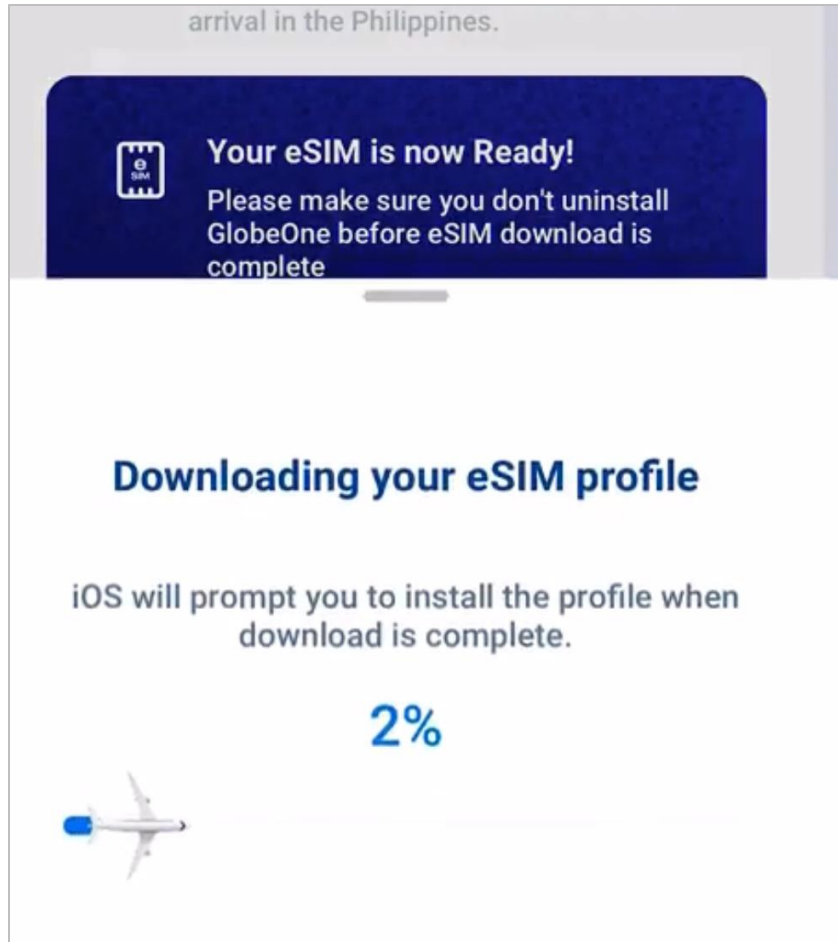

Step-by-step activation steps on the website with visual guides

Straightforward instructions for e-sim activation via email

|Globe's automatic and effortless e-sim activation without QR codes

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Globe automatically downloads the eSIM profile, eliminating the need for QR codes

Key takeaways:

Analyst's Recommendations

Effortless Onboarding

1

a

Simplified discovery

- Include keywords like target market/benefits/brand name in titles.

- Use actionable CTAs for easy Google search.

- Avoid chaotic links and unclear language.

b

Informative first page

- Provide a comprehensive dashboard displaying all plans, bundles, e-sim info (features, perks) clearly to encourage an informed decision.

- Offer new user promotions, pop-up banners, and ads to showcase plan benefits and drive adoption.

- Auto-suggest plans based on location & cost-efficiency.

2

Intuitive purchasing experience

a

Personalised plan comparison

- Avoid long lists of information, instead allow customers to customise which plans they want to compare.

b

Frictionless purchase

- Clearly show total purchase steps with a navigation guide.

- Ensure the purchase process with less than 5 steps.

- Highlight best-seller plans for easier choice.

- Enable in-page device compatibility check. Auto-detect compatibility if possible.

- Avoid cluttered plan information.

c

Flexible checkout

- Allow plan changes and add-ons during checkout.

- Provide multiple convenient international payment methods.

Self-service management and support

3

a

Convenient delivery

- Provide instant payment confirmation

- Consolidate emails with order details and clear activation instructions via QR code

b

Seamless activation

- Present activation steps with easy-to-understand visuals.

- Provide separate and clear activation instructions for iPhone and Android devices.

d

c

Multi-channel accessibility

- Ensure customer service accessibility across various channel: email, hotline, social, live chat and conversational AI with natural language understanding.

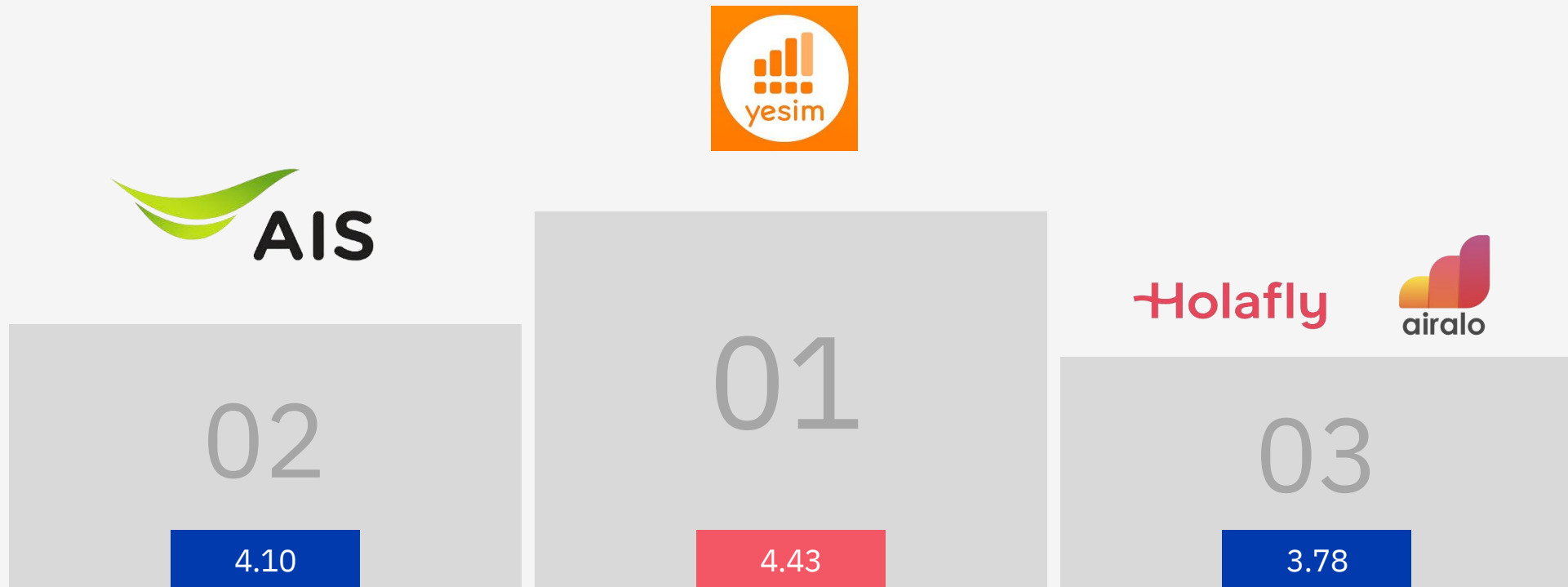**Effortless identity verification**

- Enable personal verification (under 1 minute) using phone number or email via a secure OTP.
- Enable passport/ID verification within the hour with email notification.
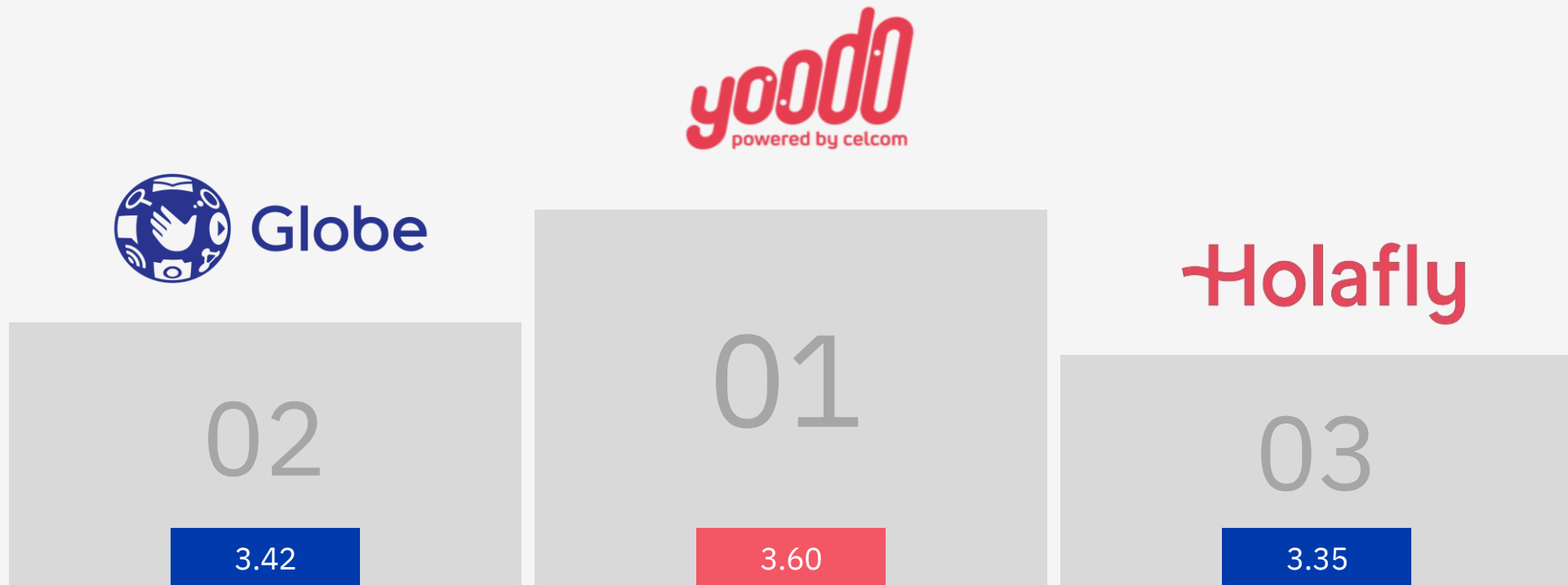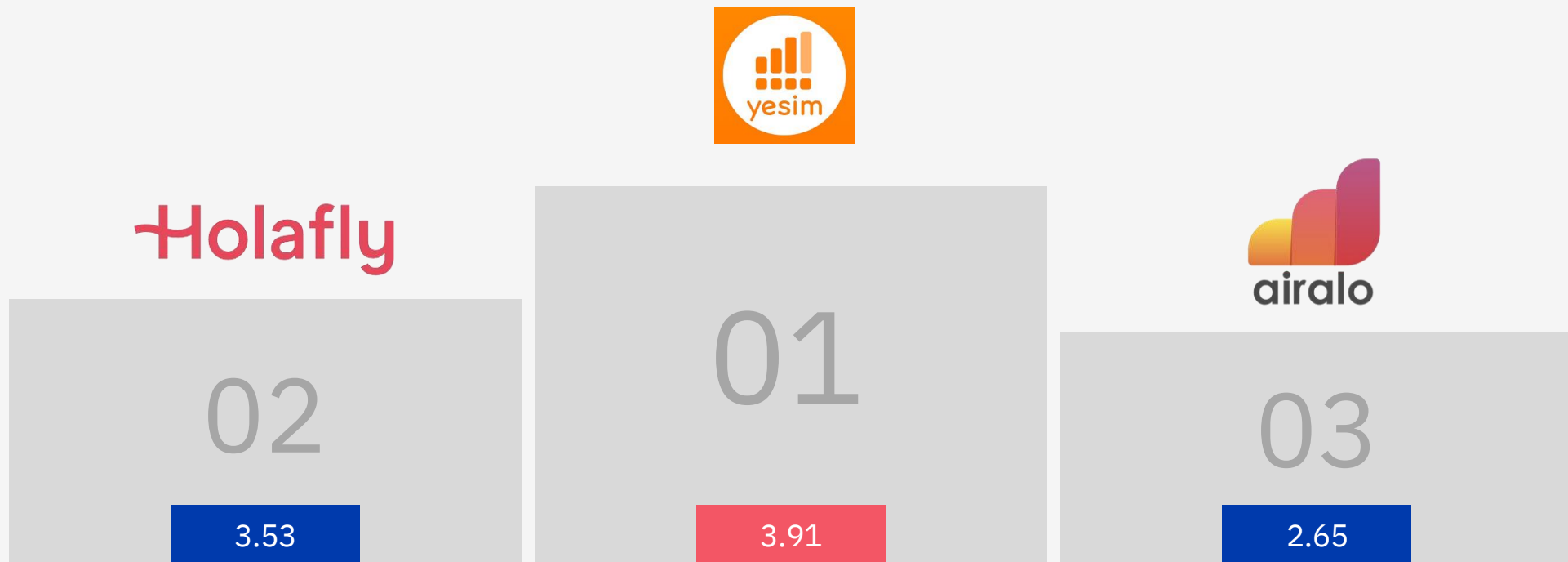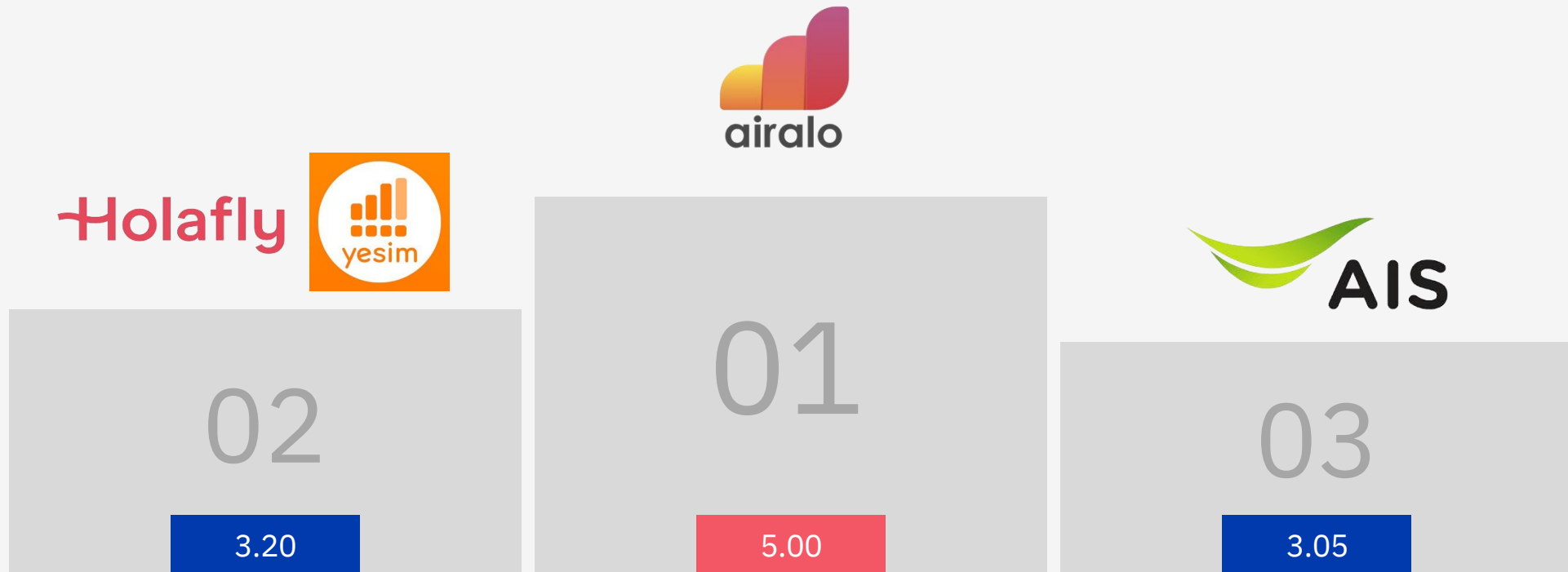
Overall

Tourist e-SIM CX Stars

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Best e-SIM Discovery

yesim

AIS

Holafly

airalo

02
01
03

4.10
4.43
3.78

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Best e-SIM Purchase Process

02	01	03
3.42	3.60	3.35

Globe — 02 — 3.42
yoodo powered by celcom — 01 — 3.60
Holafly — 03 — 3.35

Best e-SIM Payment

02	**01**	**03**
3.53	3.91	2.65

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Best e-SIM Activation

02
3.20

01
5.00

03
3.05

twimbit

Innovate to deliver
exceptional experiences