



Tourist E-SIM Online Purchase Journey 2025

APAC 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 (May-July 2025) 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

- 01 Research methodology
- 02 Executive score summary
- 03 Web discovery
- 04 E-sim purchase
- 05 Payment
- 06 Activation
- 07 Key takeaways & analyst recommendations



e-SIM availability for tourists in APAC

Legend

Tourist e-sim available

No tourist e-sim

Australia / NZ



India



Indonesia



Malaysia



Philippines



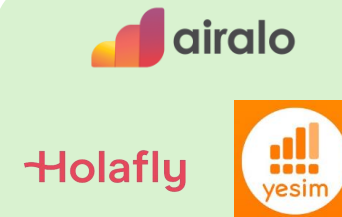
Singapore



Thailand



Third-Party



Research methodology



Define the scope and the specification of the research

Market Scope

APAC Tourist e-SIM providers

Process

Online purchase

Search Keywords

(country name) tourist e-sim

Period

May-July 2025

Device Used

iPhone 12



Shortlisted telcos offering tourist eSIM services

- Singtel (SG)
- Starhub (SG)
- Spark (NZ)
- Globe (PH)
- AIS (TH)
- Airalo
- Ye-sim
- Holafly
- Smatfren (ID)*
- im3 (ID)*
- Smart (PH)*
- DTAC (TH)*
- Skinny (NZ)*
- Optus (AU) *
- U Mobile (MY) *

*Excluded due to website malfunctions/inability to verify international passport



Journey framework and evaluation criteria

Journey

- Web discovery
- Purchase
- Payment
- Activation

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.
- Identified friction points to improve upon.
- Created independent recommendations for telcos.

Twimbit **framework** to evaluate tourist e-SIM purchase experience

Web discovery journey

Google Search
Call-to-action (CTA)
Steps taken to reach package options

Purchase journey (1 / 2)

Language options
Customer support
Promotions
e-SIM type options
Steps' view and duration
Number of steps view / Page change
Compatible device list
Auto-selected package
Package card details + visuals + layout + visibility
Choice of number

Purchase journey (2 / 2)

Transition between pages
Contact information
Email OTP Verification
T&C agreement
Overall steps taken for purchasing

Payment journey

Variety of payment methods
Variety of other payment methods
E-Wallet options

Activation journey

Instructions platform
Instructions visuals
Instructions device

Score overview

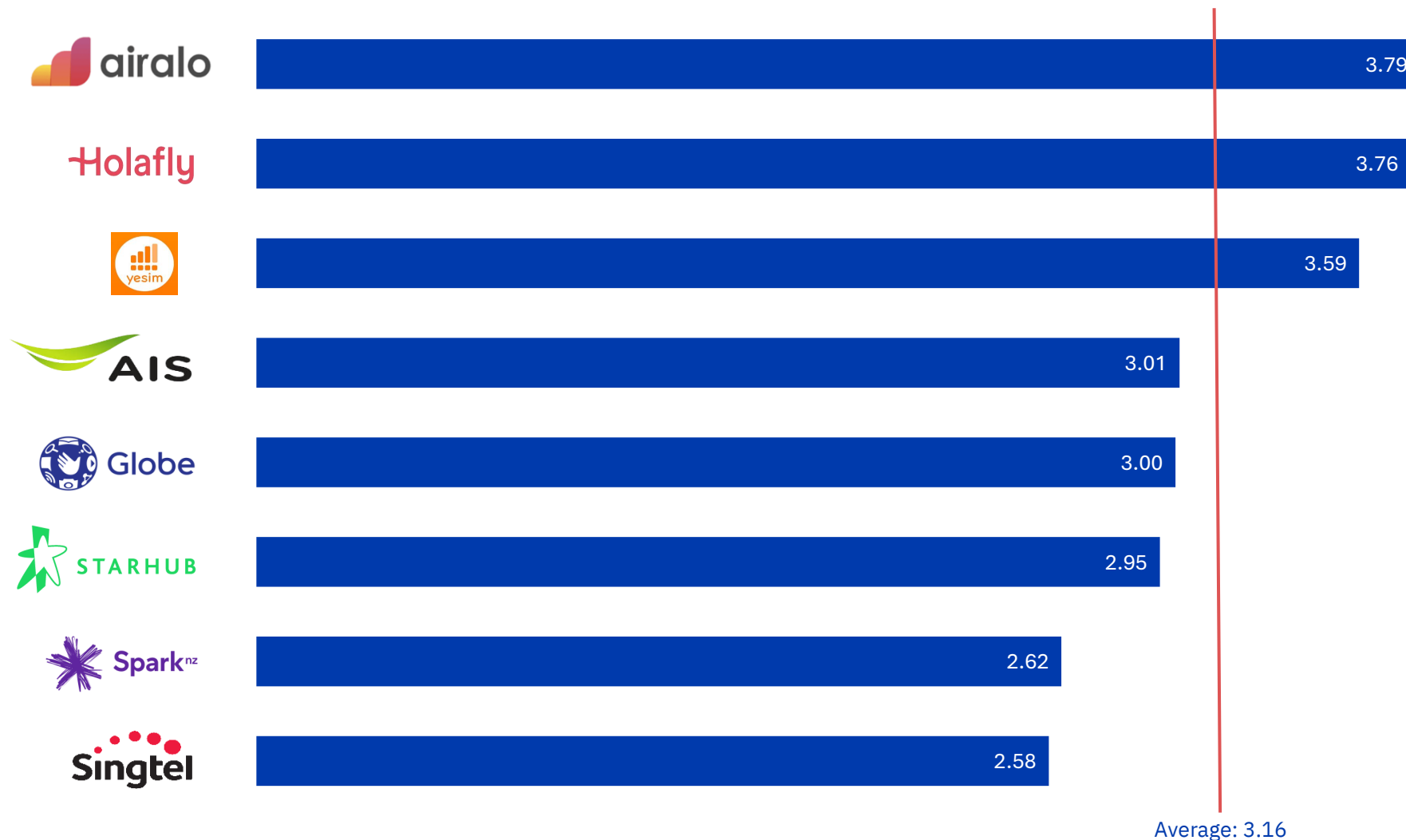
Evaluation scope: 8 of 17 eSIM telcos assessed



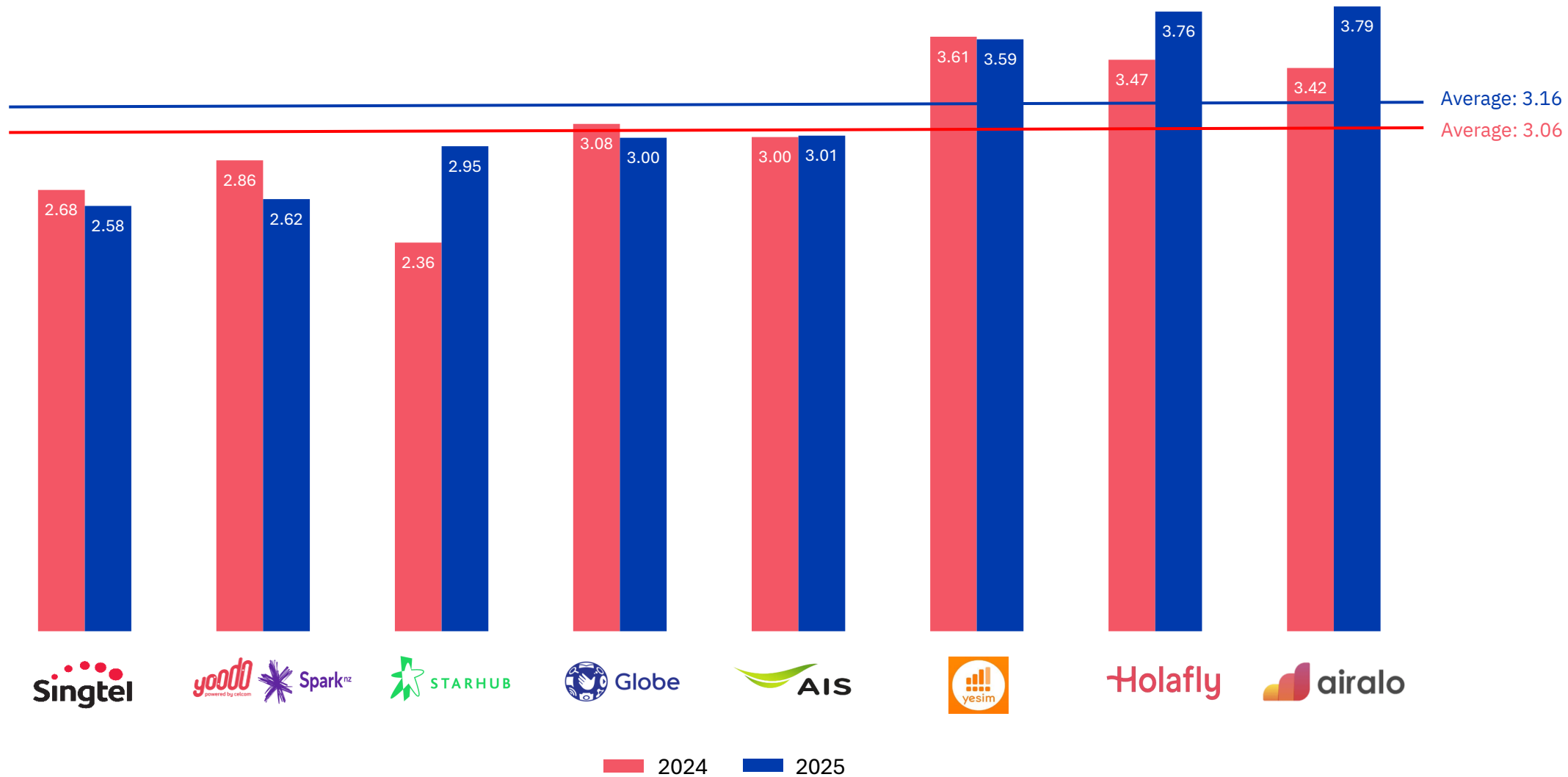
twimbit



Top 8 telcos ranked for tourist eSIM purchase experience



2024 vs 2025 scores



Note: Yodo bar represents 2024 score, while Spark bar represents 2025 score in the graph

Airalo leads eSIM market with innovation, scale, and global reach

First eSIM unicorn

Airalo secured USD 220 million in funding in July 2025, becoming the world's first eSIM unicorn with a valuation of over USD 1 billion.

20 million+ users

The platform is trusted by over 20 million travelers and supports seamless eSIM connectivity across more than 200 countries and regions through a strong digital first infrastructure.

USD 1 billion+ market opportunity

Positioned as the category leader in the USD 1 billion+ digital eSIM travel market, driven by strong organic growth and a highly scalable, digital-only distribution model.

Next-gen expansion

A wide range of new products is being introduced, including unlimited data bundles, voice and text packages, and a redesigned cross-platform app to enhance the overall user journey.

B2B & consumer play

Connectivity solutions have been extended to global enterprises, supporting both employee mobility and customer roaming through flexible, scalable, and easily integrated eSIM infrastructure.

Innovation focus

Customer experience is being improved through targeted investments in onboarding, customer support, and flexible plans that deliver faster, more intuitive mobile connectivity for travelers.

1st Journey

Web Discovery Journey

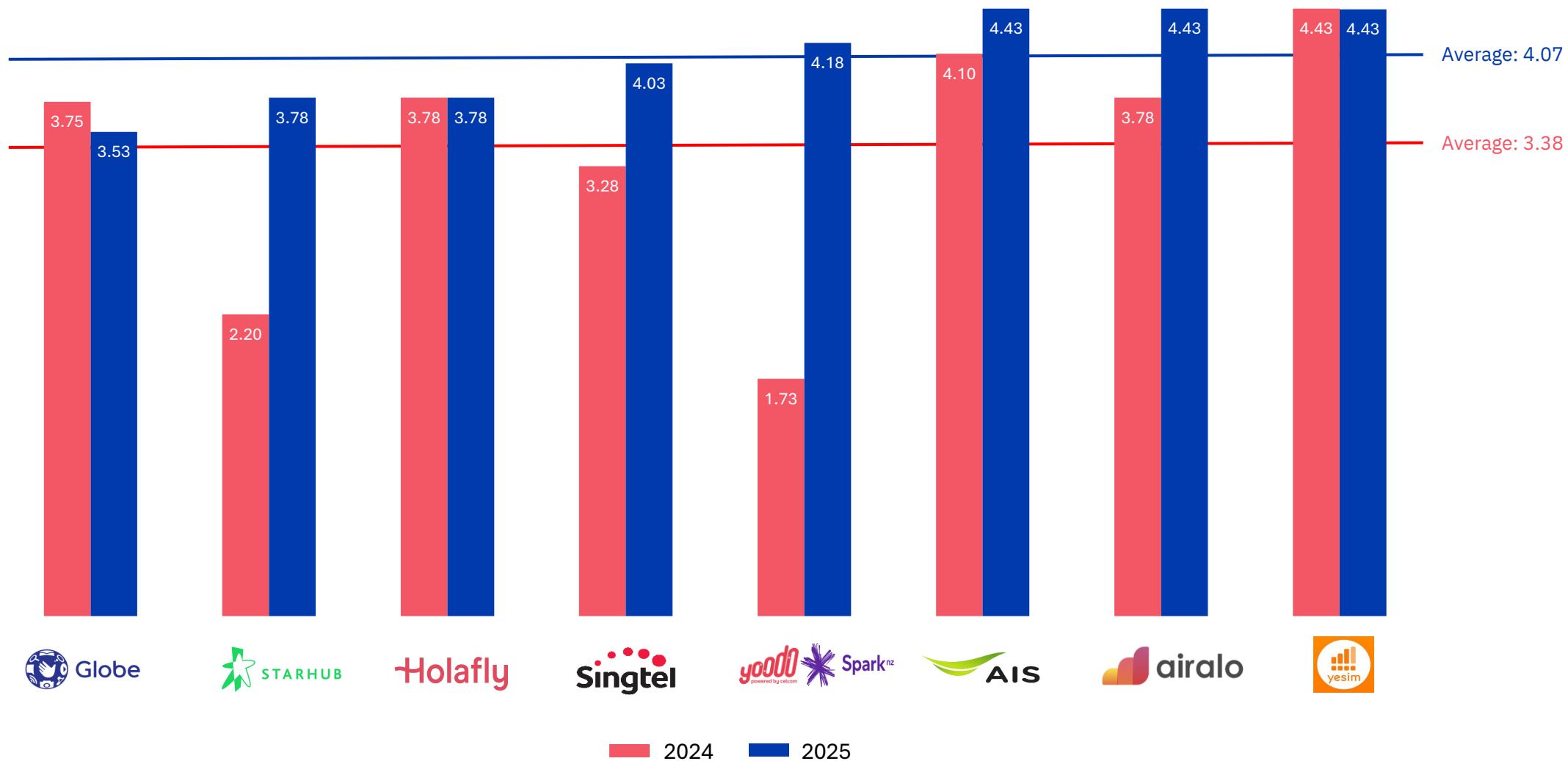
(keywords = 'tourist e-sim')

Web discovery journey

Search	Starhub	Singtel	Spark	AIS	Globe	Airalo	Holafly	Ye-sim
Overall score	3.78	4.03	4.18	4.43	3.53	4.43	3.78	4.43

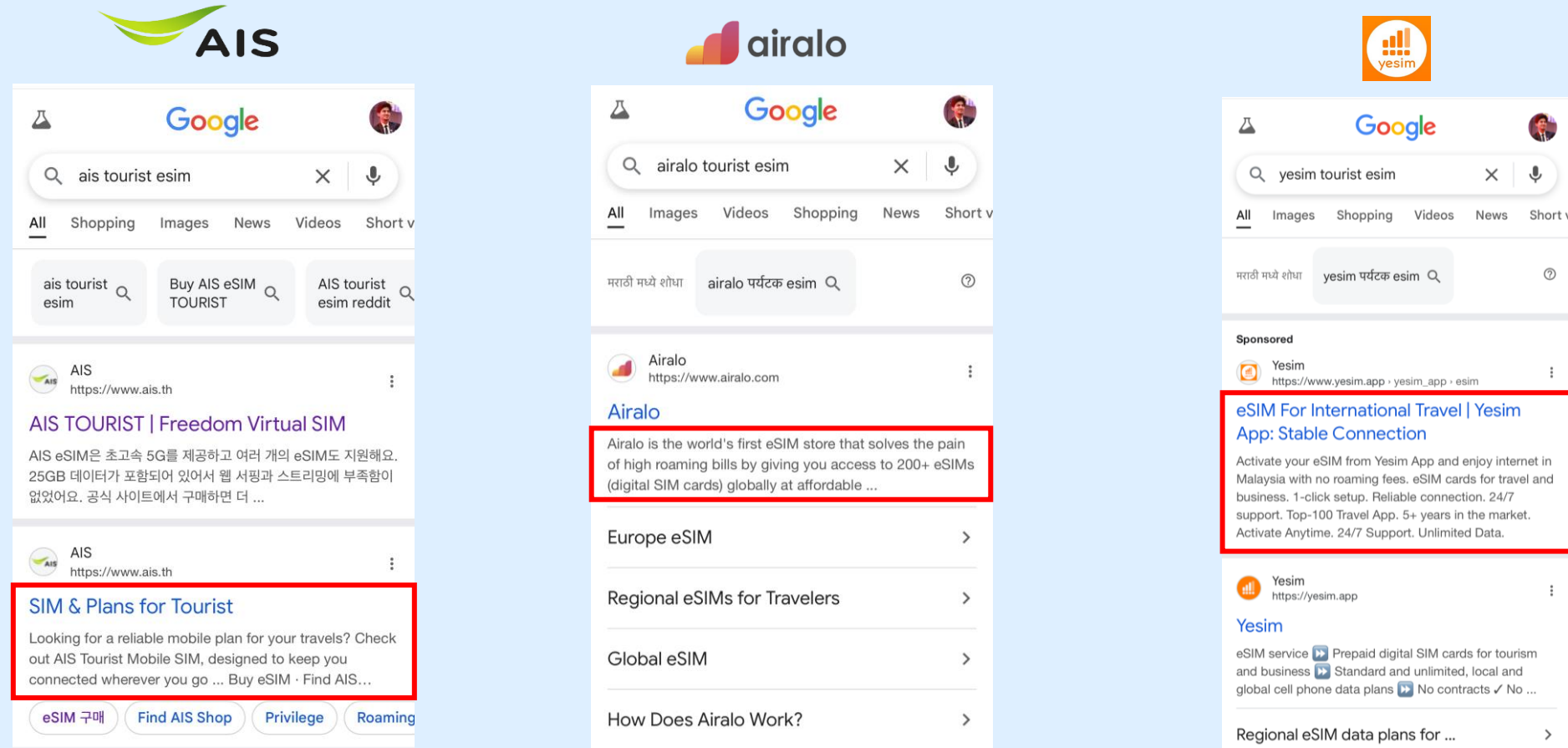
Evaluating criteria	Starhub	Singtel	Spark	AIS	Globe	Airalo	Holafly	Ye-sim
Visibility of Google search results <i>(If e-sim options are visible upon first view after searching)</i>	Scroll once but sponsored	Scroll once but sponsored	First view but sponsored	First view but sponsored	Scroll once but sponsored	First view but sponsored	Scroll once but sponsored	First view but sponsored
Search results title	Has clear CTA, mentions benefits and target market	Has clear CTA, mentions benefits and target market	Has clear CTA, mentions benefits and target market	Has clear CTA, mentions benefits and target market	Has clear CTA, mentions benefits and target market	Has clear CTA, mentions benefits and target market	Has clear CTA, mentions benefits and target market	Has clear CTA, mentions benefits and target market
Steps taken before reaching package of choice	2-3 steps	1	2-3 steps	2-3 steps	4-5 steps	2-3 steps	2-3 steps	2-3 steps

2024 vs 2025 scores



Note: Yoodo bar represents 2024 score, while Spark bar represents 2025 score in the graph

AIS, Airalo and Yesim have easily discernible site links with clear CTAs



Clearly written links with strong headers, mention of “e-sim” to improve visibility

Discovery journey improvements: easier eSIM discoverability in 2025 compared to 2024

In 2025, telcos significantly improved the discoverability of tourist eSIMs through better Google visibility, direct homepage access, and more intuitive site structure. There was a clear effort to reduce friction in the “search and find” stage.



2024: Multiple scrolls, unclear CTA, over six steps before package.

2025: One scroll, clear CTA with benefits, only two–three steps.

Score: 2.20 → 3.78



2024: One scroll (sponsored), package selection took two–three steps.

2025: First view visibility, direct access to package selection.

Score: 3.78 → 4.43



2024: One scroll (sponsored), package required more than six steps.

2025: One scroll, package selection available on first step.

Score: 3.28 → 4.03



2024: Search visibility appeared only after one Google scroll.

2025: First view visibility, immediate access for package choice.

Score: 4.10 → 4.43

2nd Journey

Purchase Journey



Purchase journey (Part 1/3)

Purchasing	Starhub	Singtel	Spark	AIS	Globe	Airalo	Holafly	Ye-sim
Overall score	3.00	3.24	3.41	3.29	3.41	3.61	3.44	3.76

Evaluating criteria	Starhub	Singtel	Spark	AIS	Globe	Airalo	Holafly	Ye-sim
Language options	No	Yes	Yes	Yes	No	Yes	Yes	Yes
Customer support (i.e., FAQs, live chat/chatbot, WhatsApp/Telegram, Email, and Call available)	FAQs, live chat, WhatsApp, Email, and Call available	FAQs, live chat, WhatsApp, Email, and Call available	FAQs, live chat, WhatsApp, Email, and Call available	FAQs, live chat, WhatsApp, email, and call available, but lacks chatbot	FAQs, live chat, WhatsApp, email, and call available, but lacks chatbot	FAQs, live chat, WhatsApp, Email, and Call available	FAQs, live chat, WhatsApp, Email, and Call available	FAQs, live chat, email, and call available, but lacks WhatsApp
Promotions (i.e., new user promotions, product recommendations, pop up ads/banners, and bundling/upselling)	Lacks new user promo, product recommendation and bundles/ Upselling	No	Lacks new user promos, product recommendations and pop-ups/banners	Lacks popup ads/banners and new user promo	No	Lacks new user promo, pop up ads/banners and bundles/ Upselling	No	No
E-sim types and options (Prepaid/postpaid, upgrade or transfer e-SIM, others)	Only prepaid	Only prepaid	Only prepaid	Only prepaid	Only prepaid and upgrade to e-SIM	Only prepaid	Only prepaid	Only prepaid
Displays step-by-step flow	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

Purchase journey (Part 2/3)

Purchasing	Starhub	Singtel	Spark	AIS	Globe	Airalo	Holaflly	Ye-sim
Overall score	3.00	3.24	3.41	3.29	3.41	3.61	3.44	3.76

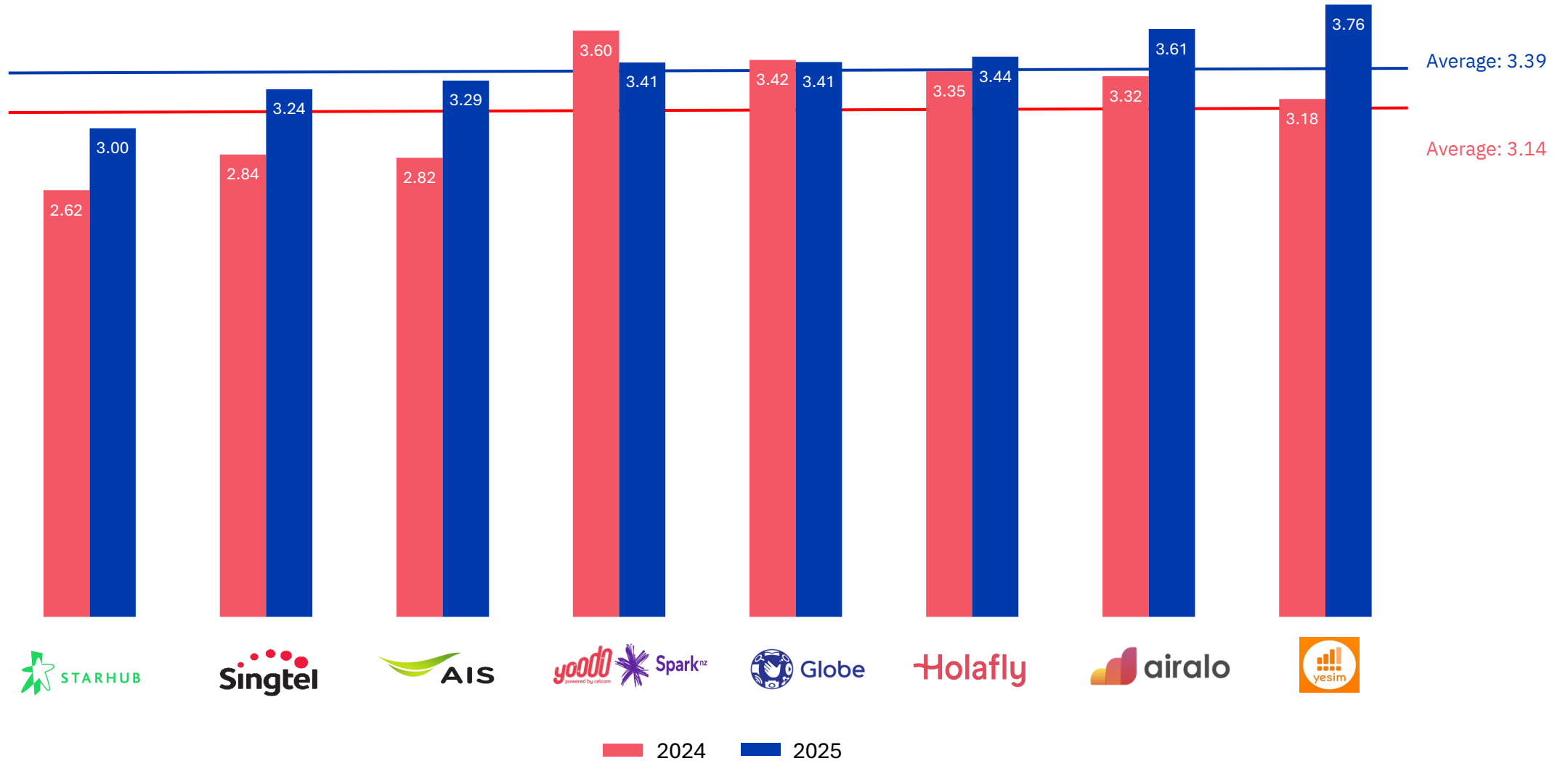
Evaluating criteria	Starhub	Singtel	Spark	AIS	Globe	Airalo	Holaflly	Ye-sim
eSIM compatibility view	On a new page	On a new page	On a new page	On a new page	Drop Down / Pop Up	Drop Down / Pop Up	On a new page	Drop Down / Pop Up
Check for eSIM compatibility <i>(easiest being automatically detects)</i>	Able to view newest-oldest list	Able to view newest-oldest list	Able to view oldest-newest list	Able to view oldest-newest list	Automatically detects	Able to view newest-oldest list	Able to view newest-oldest list	Able to view oldest-newest list
Auto-selected package	No	No	No	No	Yes	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	Upfront key benefit Icons with clear spacing and benefit list	Upfront key benefit Icons with clear spacing and benefit list	Upfront key benefit Icons with clear spacing and benefit list	Upfront key benefit Icons with clear spacing and benefit list	Upfront key benefit Icons with clear spacing and benefit list	Upfront key benefit Icons with clear spacing and benefit list	Upfront key benefit Icons with clear spacing and benefit list
Package card layout	List	Column	List	List	List	List	List	List

Purchase journey (Part 3/3)

Purchasing	Starhub	Singtel	Spark	AIS	Globe	Airalo	Holaflly	Ye-sim
Overall score	3.00	3.24	3.41	3.29	3.41	3.61	3.44	3.76

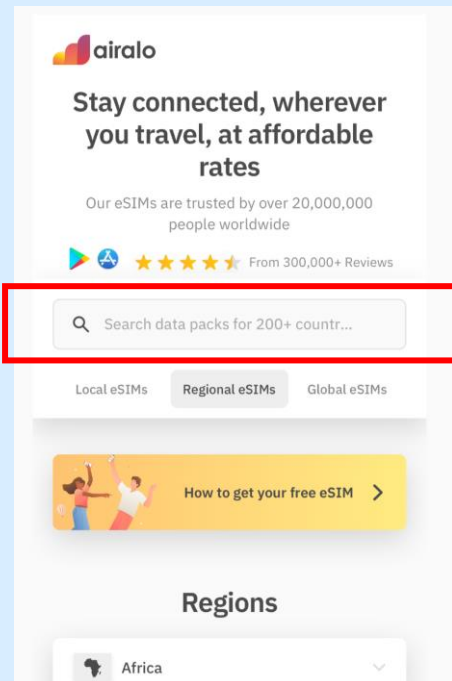
Evaluating criteria	Starhub	Singtel	Spark	AIS	Globe	Airalo	Holaflly	Ye-sim
Package Card Visibility in One Screen <i>(without scrolling)</i>	3	3	3	3	1	>3	>3	>3
Promo tags on package card	No	Only favourite/ best-seller	No	Only favourite/ best-seller	Only food voucher	Only favourite/ best-seller	No	Discount and Cashback
Number choices	Auto-selected	Auto-selected	Auto-selected	Auto-selected	Auto-selected	Auto-selected	Auto-selected	Auto-selected
Transition duration between pages	Instant	Instant	Instant	Instant	Instant	Instant	Instant	Instant
Contact Information	Name + email only	Name + email only	Name + email only	Requires name, email, and phone number	Requires name, email, and phone number	Name + email only	Name + email only	Name + email only
Email OTP Verification	Requires email OTP verification	No	Requires email OTP verification	Requires email OTP verification	No	No	No	No
Display of Terms and Conditions	Direct Check	Pop-up agreement	Direct Check	Direct Check	Pop-up agreement	Pop-up agreement	Direct Check	Direct Check
Overall steps taken for purchasing	>11	5-7	5-7	8-10	5-7	5-7	5-7	5-7

2024 vs 2025 scores

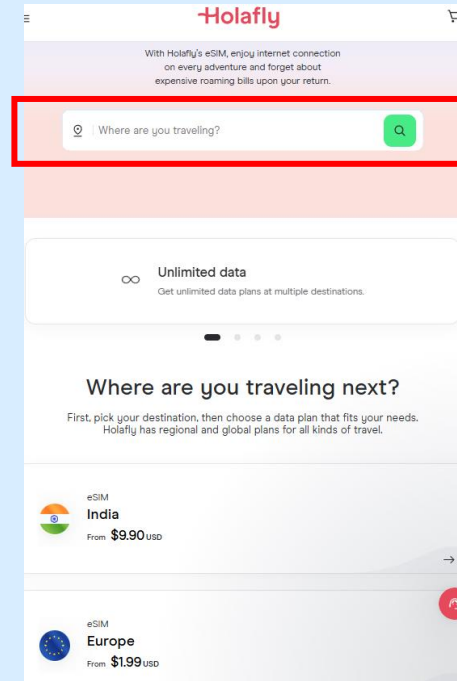


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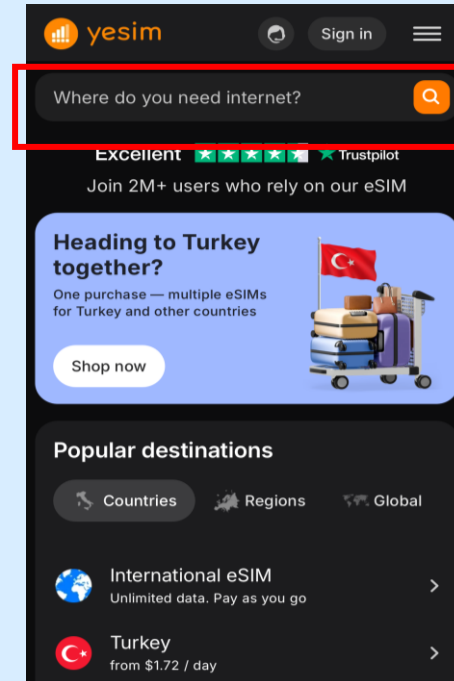
Airalo, Holafly, Yesim and AIS offer intuitive search bars guiding travelers seamlessly



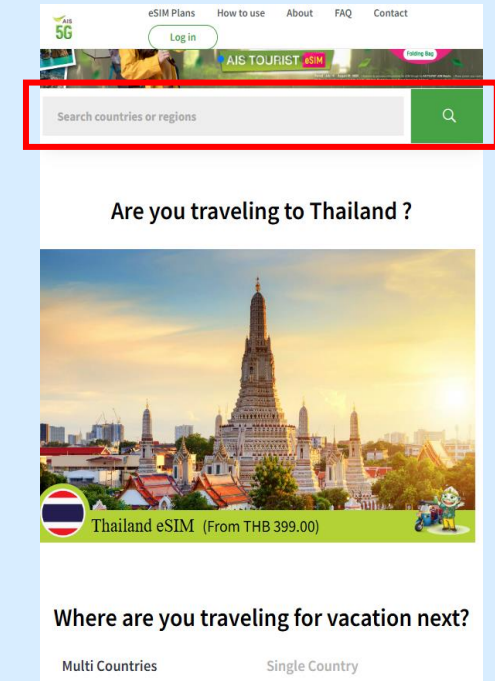
Airalo offers country, regional and global destination search and seamless checkout across 200+ destinations.



Holafly provides a homepage destination search field to enter country or region, enabling access to unlimited-data plans in 190+ countries.

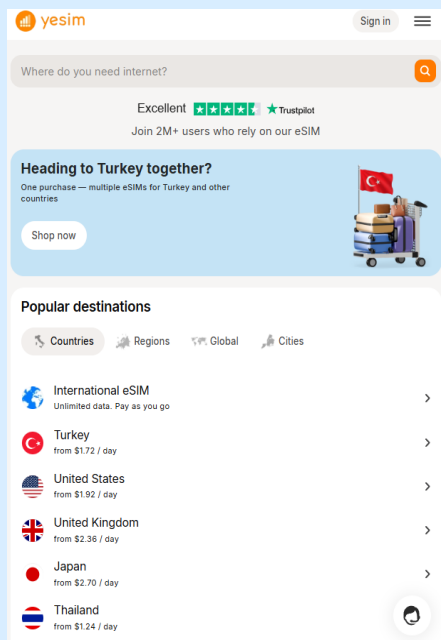


Yesim provides a unified destination search flow for selecting plans across 200+ countries with one-click installation.



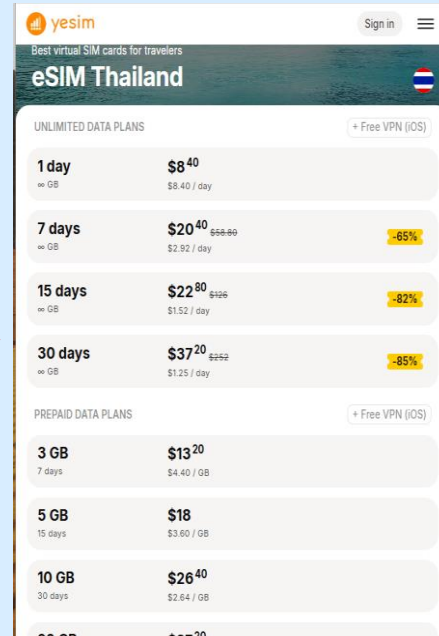
AIS provides a destination search bar on its tourist eSIM page, along with dropdowns and banners for single- or multi-country plans.

Yesim sets the benchmark for effortless tourist eSIM onboarding



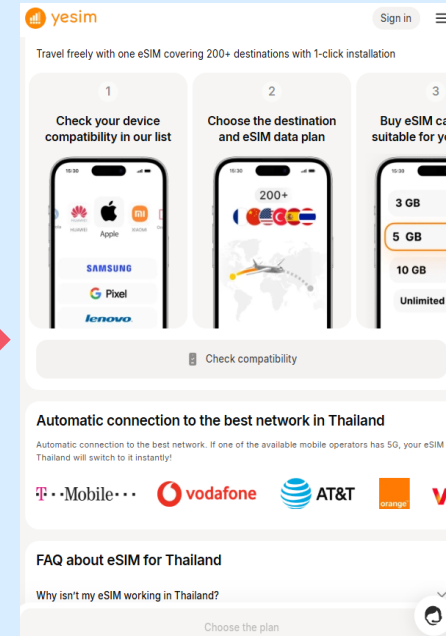
Destination Selection

On the main page, a destination/country selection interface is displayed for users to pick their travel location.



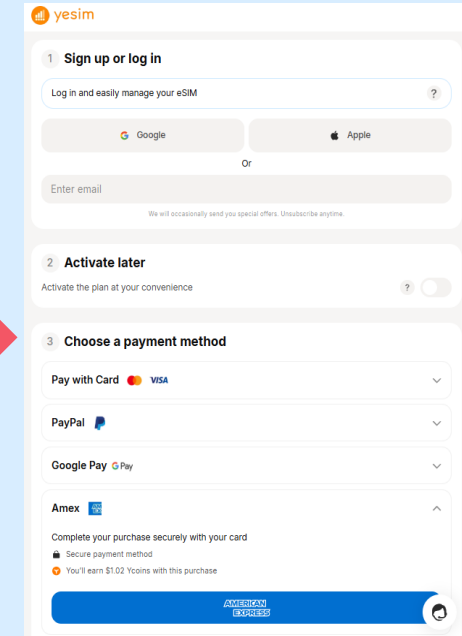
Package Options

After a country is selected, available packages are shown—some with promotional discounts. Duration and data tiers are selectable.



Device Compatibility Check

A device compatibility tool is provided on the plan selection page to ensure user's device supports the chosen eSIM.



Checkout Process

The payment flow is structured in three steps: signing up or logging in, choosing “activate later” if desired, and selecting a payment method to complete the purchase.

Singtel, AIS, and Airalo highlight their best-selling plans to help customers choose the most popular options

Singtel

SINGAPORE'S NO. 1 CHOICE

Singtel eSIM Instant activation

UNLIMITED* 5G DATA
No speed reduction

Valid for **28 days**

10GB roaming data

\$50

FASTEST ISLANDWIDE 5G COVERAGE WITH NO SPEED REDUCTION!

\$50 5G+ Tourist eSIM

- > Unlimited* 5G data for 28 days
- > 10GB roaming data to Australia, Indonesia, Malaysia and Thailand

Buy now

AIS

THAILAND TOURIST SIM 游客卡

15 Days (Best seller)

699 Baht

- 5G Unlimited Data, Max Speed **5G | 4G**
- Free call within AIS Network
- Get **100 Baht Bonus** for all networks in Thailand and international calls via 0030
- AIS Super WiFi **Unlimited**
- Contact AIS Call Center at 1175 **Free**

airalo

Most popular

Discover

COVERAGE 137 COUNTRIES

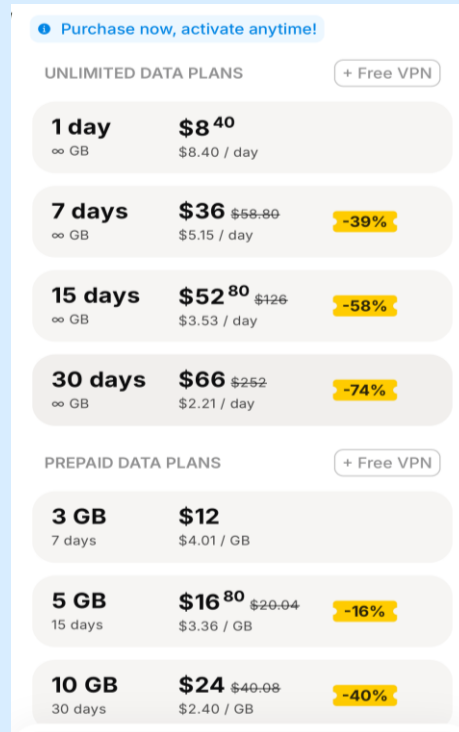
DATA 20 GB

VALIDITY 365 Days

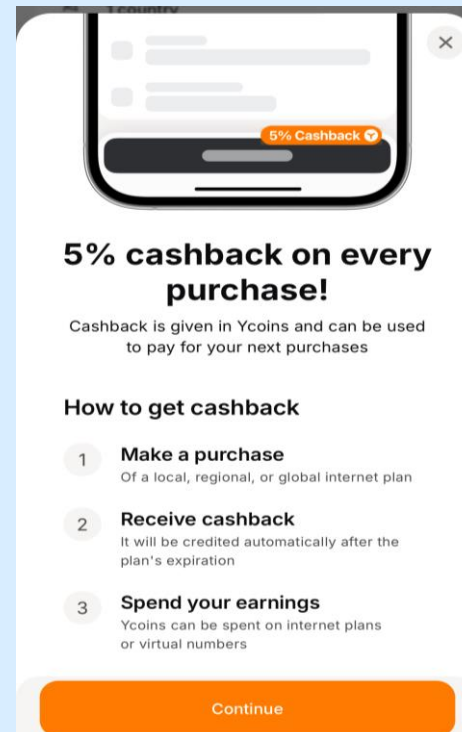
PRICE **\$69.00 USD**

BUY NOW

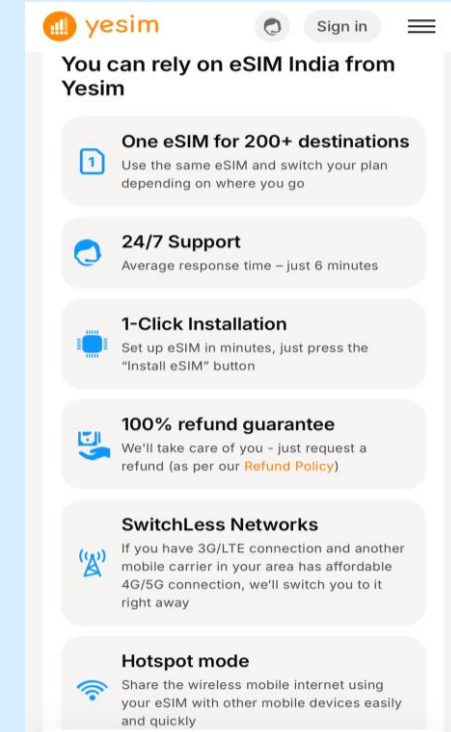
Yesim offers the best deals with easy setup and customer rewards



Shows major discounts on unlimited and prepaid plans.

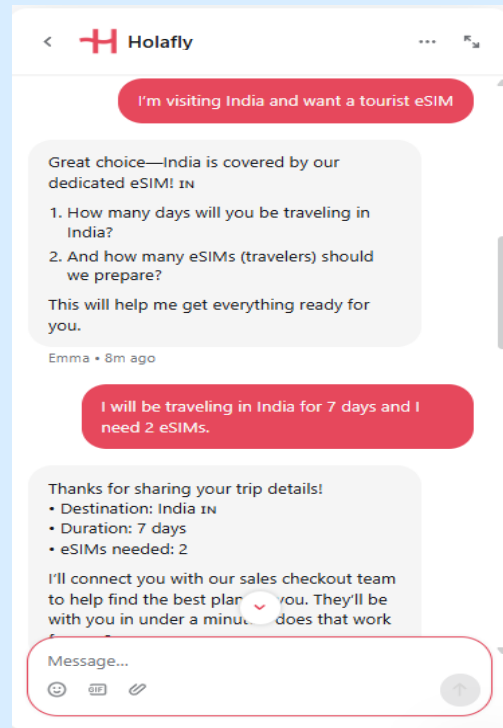


Gives 5% cashback in Ycoins after every plan purchase.

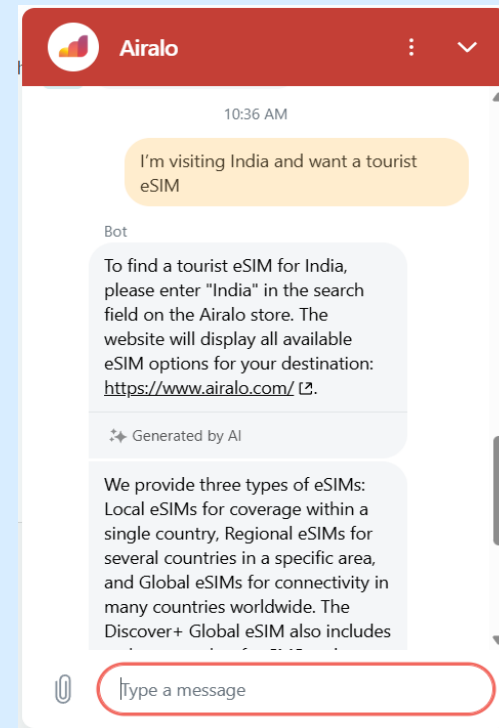


Provides quick setup, support, refunds, network switching, and hotspot use.

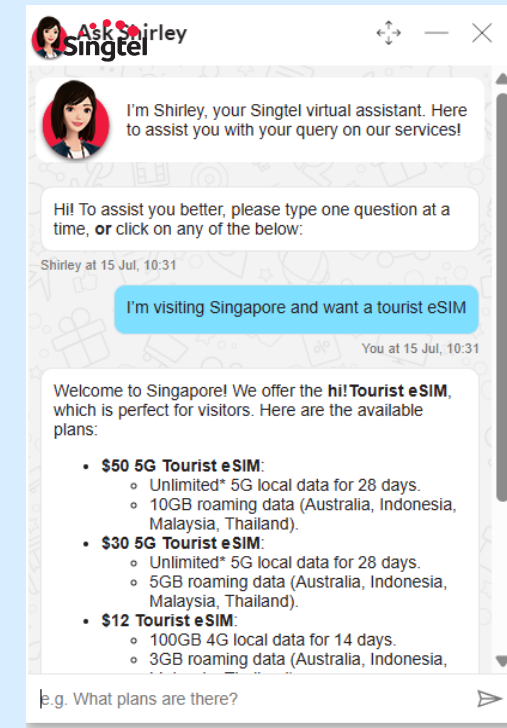
Holafly, Airalo, and Singtel deliver the best round-the-clock live chat and virtual help for eSIM users



Empathetic and conversational response from the chatbot, asking follow-up questions about trip duration and travelers. Clearly understands tourist context and offers instant human support for checkout.

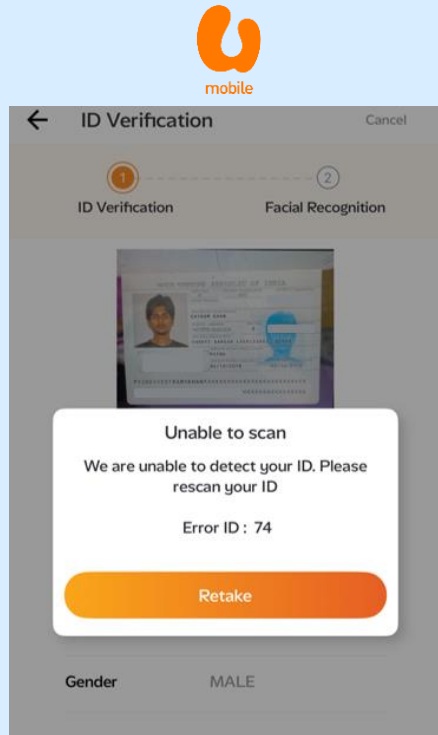


AI-powered bot provides instant plan discovery instructions with relevant links. Clearly explains the types of eSIMs available, showing smart contextual awareness and global coverage clarity.

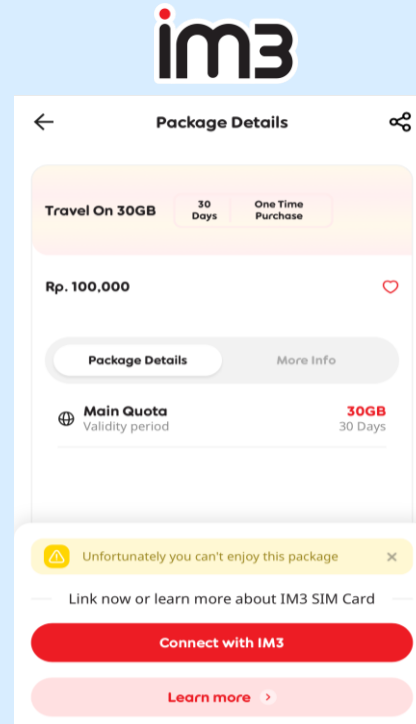


Delivers warm location-aware recommendations through AI assistant Shirley with tourist-specific plan details including pricing roaming coverage and validity enabling fast informed decisions for travelers.

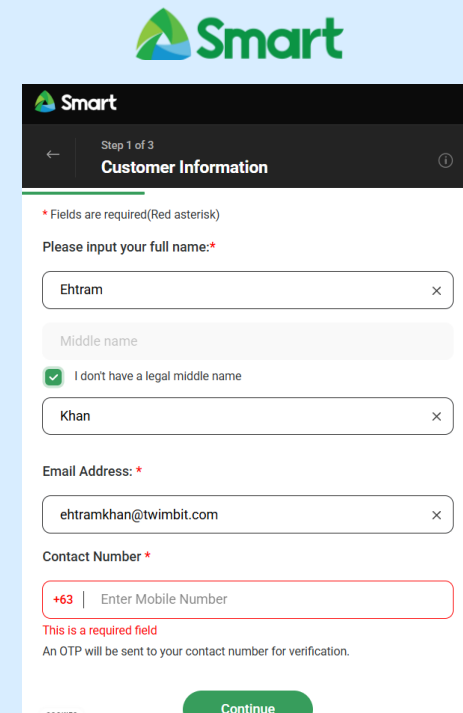
Challenges faced in tourist eSIM due to website failures, passport verification, and address restrictions



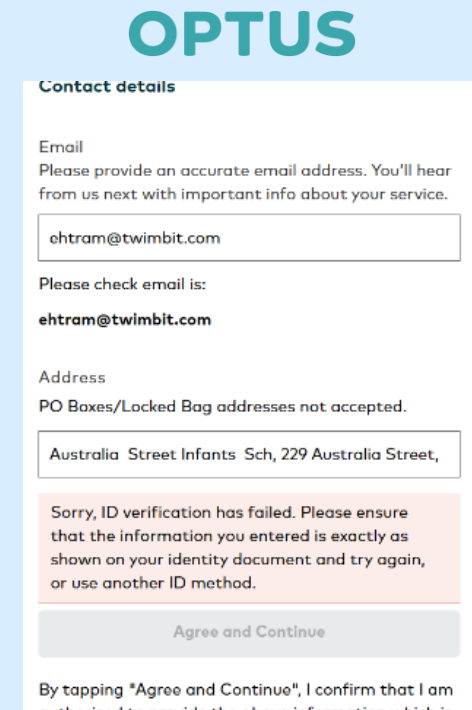
U Mobile required ID and facial recognition; repeated scan errors with Indian passport blocked eSIM activation from India.



IM3 travel eSIM package could not be purchased, after travel plan selection message showed you can't enjoy this package without detailed explanation.



Smart and DTAC required a local mobile number for OTP, blocking eSIM purchase as Indian number was not accepted.



Optus and True required a valid local address for ID verification, restricting eSIM purchase from abroad due to regulatory compliance.

From complex to seamless: Better purchase flows observed in 2025 vs 2024

2025 offered major upgrades in the buying process: fewer steps, more intuitive plan selection, and reduced login friction. The experience shifted toward being mobile-first, quicker, and more informative.



2024: No WhatsApp/Telegram support, basic device filter, slow pages.

2025: Social media and email support, advanced filter, instant pages.

Score: 3.18 → 3.76



2024: No WhatsApp/Telegram support, no promotions or promo tags.

2025: WhatsApp and social media added, promos and tags live.

Score: 3.32 → 3.61



2024: Two package cards visible, slow transitions, 8–10 clicks.

2025: Three+ package cards visible, instant transitions, 5–7 clicks.

Score: 2.84 → 3.24



2024: No social media support, auto-selected package, slow pages.

2025: Social media support added, no auto-selection, instant pages.

Score: 2.82 → 3.29

3rd Journey

Payment Journey

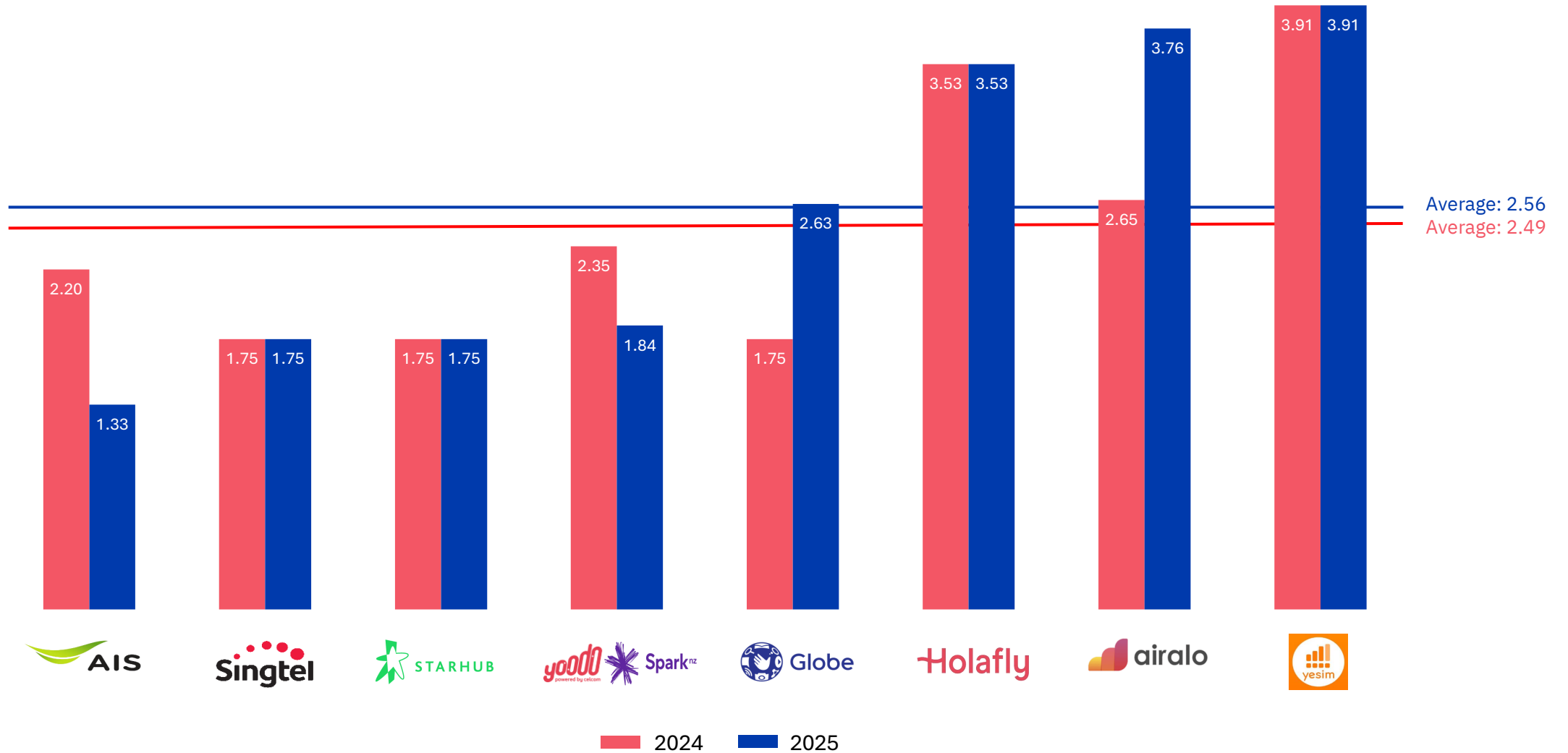


Payment journey

Payment journey	Starhub	Singtel	Spark	AIS	Globe	Airalo	Holafly	Ye-sim
Overall score	1.75	1.75	1.84	1.33	2.63	3.76	3.53	3.91

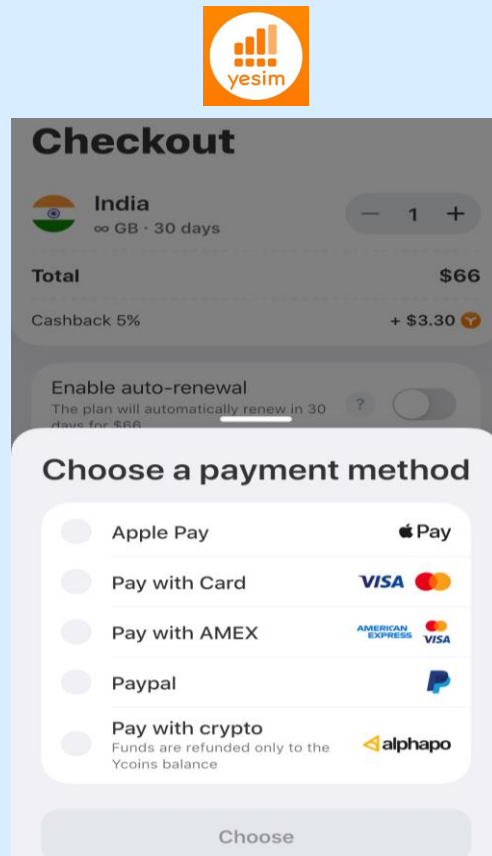
Evaluating criteria	Starhub	Singtel	Spark	AIS	Globe	Airalo	Holafly	Ye-sim
Variety of primary payment methods <i>(e-wallet, online banking, debit/credit card, others)</i>	Debit and credit card	Debit and credit card	Debit and credit card, and Gift card	Credit card	Debit and credit card, and E-wallet	Debit and credit card, E-wallet and Airmoney	Debit and credit card, and E-wallet	Debit and credit card, E-wallet and Ycoins
e-Wallet options <i>(Grabpay, Applepay, Alipay, Googlepay, Paypal, others)</i>	No	No	No	Alipay and others	No	ApplePay, Alipay, Google Pay and PayPal	ApplePay, Google Pay, PayPal and others	ApplePay, Alipay, Google Pay, PayPal and others

2024 vs 2025 scores

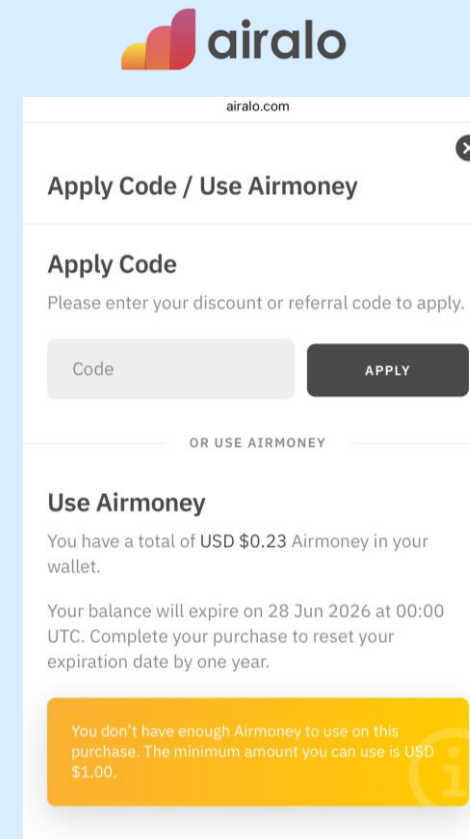


Note: Yodo bar represents 2024 score, while Spark bar represents 2025 score in the graph

Ye-sim and Airalo offers multiple payment options for convenience



Yesim allows payment via Apple Pay, credit or debit cards, AMEX, PayPal, along with crypto, which refunds to the Ycoins wallet.



Airalo accepts PayPal, Alipay, and credit or debit cards, and also lets users pay with Airmoney, its own wallet.

Smarter, smoother payments in 2025: Telcos expanded options & reduced friction

Most telcos supported regional wallets, showed price in local currency, and improved payment stability. Many addressed gateway issues and made checkout feel more trustworthy.



2024: Payments via cards and e-wallets (Apple, Google, PayPal).

2025: Cards and e-wallets with Airmoney; added Alipay option.

Score: 2.65 → 3.76



2024: Payments limited to debit and credit cards only.

2025: : Cards plus e-wallet support introduced for travelers.

Score: 1.75 → 2.65



2024: Cards and e-wallets supported (ApplePay, Alipay, Google, PayPal).

2025: Same payment methods retained.

Score: No change



2024: Cards and e-wallets supported with Ycoins; ApplePay, Alipay, Google Pay and PayPal.

2025: Same payment methods retained.

Score: No change

4th Journey

Activation Journey

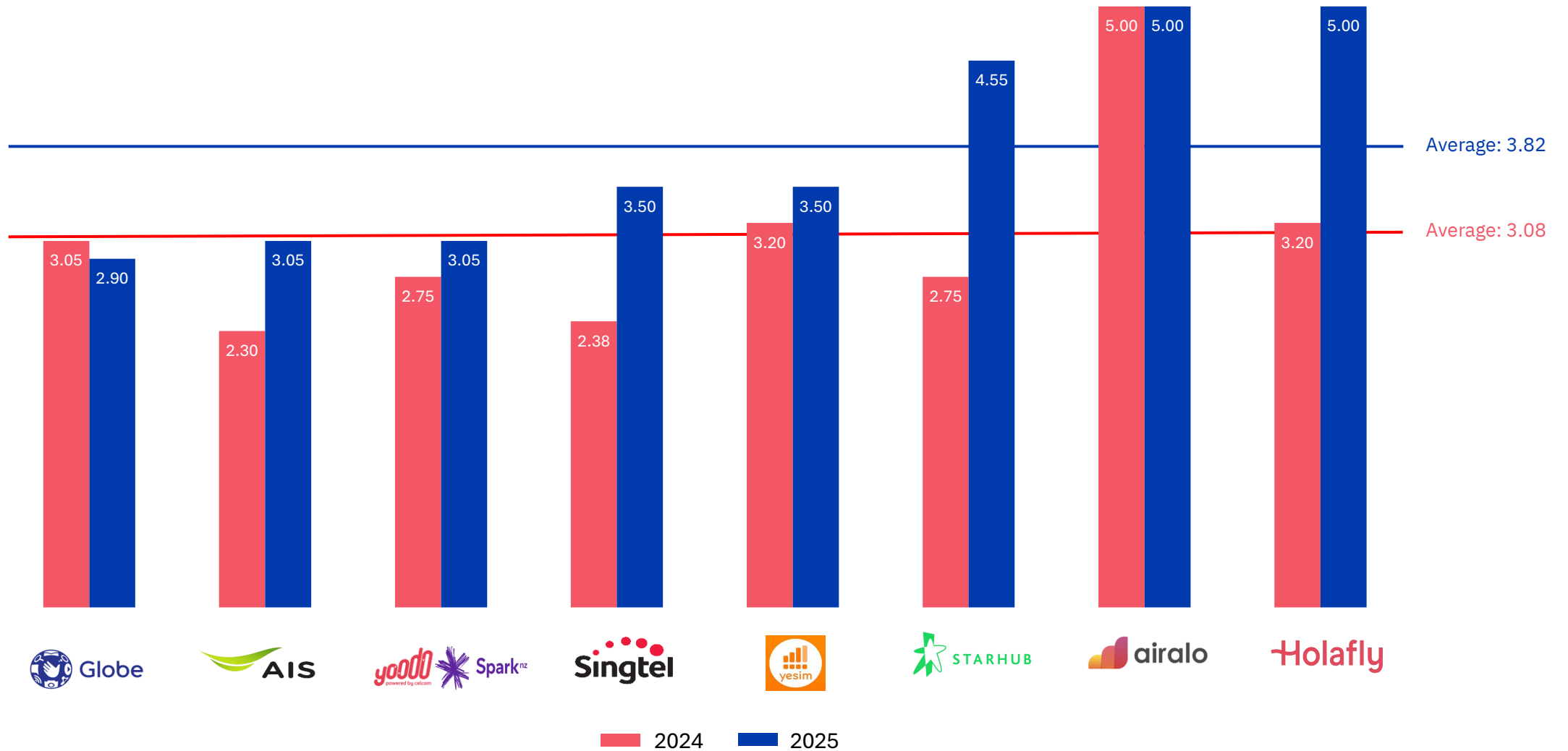


Activation journey

Activation Instructions	Starhub	Singtel	Spark	AIS	Globe	Airalo	Holaflly	Ye-sim
Overall score	4.55	3.50	3.05	3.05	2.90	5.00	5.00	3.50

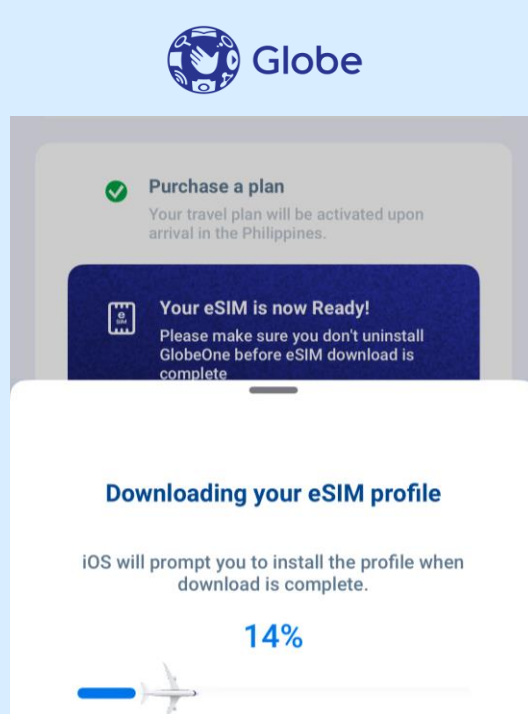
Evaluating criteria	Starhub	Singtel	Spark	AIS	Globe	Airalo	Holaflly	Ye-sim
Instructions availability (via purchase confirmation page, email, website)	Purchase confirmation page and email	Only email and website	Only email and website	Only email and website	Only email	Purchase confirmation page, email and website	Purchase confirmation page, email and website	Only email and website
Instructions visuals	Step-by-step flow, clear spacing between steps, and visual guidance	Step-by-step flow, clear spacing between steps, and visual guidance	Step-by-step flow and clear spacing between steps, but lacks visual guidance	Step-by-step flow and clear spacing between steps, but lacks visual guidance	Step-by-step flow and clear spacing between steps, but lacks visual guidance	Step-by-step flow, clear spacing between steps, and visual guidance	Step-by-step flow, clear spacing between steps, and visual guidance	Step-by-step flow, clear spacing between steps, and visual guidance
Device-specific instructions	Generic	Android / iPhone	Generic	Generic	Android / iPhone	Android / iPhone	Android / iPhone	Android / iPhone

2024 vs 2025 scores

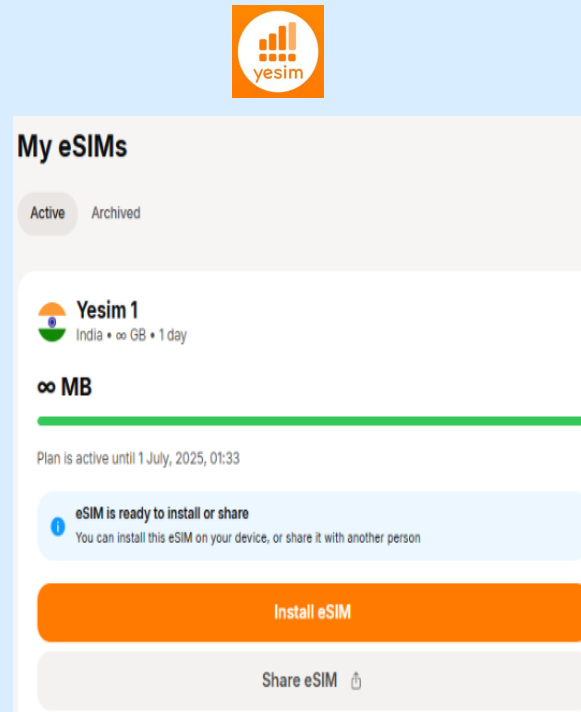


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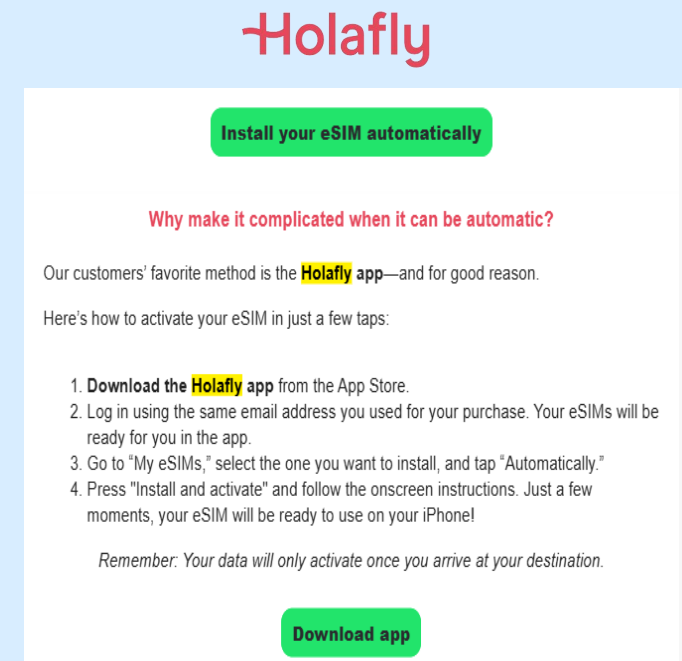
Globe, Yesim and Holafly allow automatic eSIM activation directly through their apps



Globe automatically downloads the eSIM profile

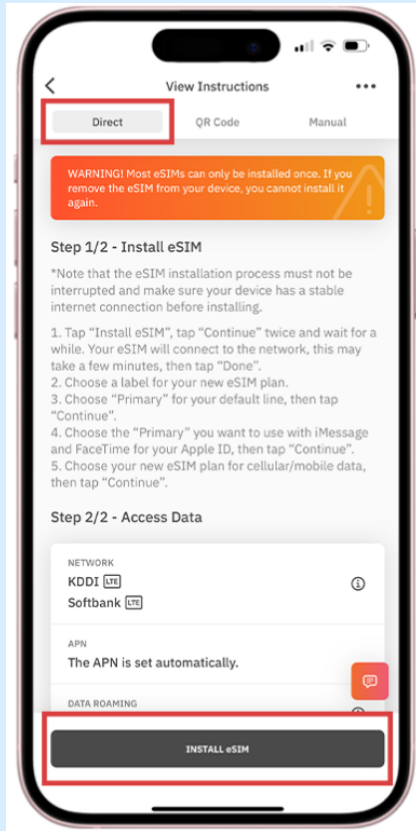


Yesim lets users tap 'Install eSIM' in the app to activate it automatically.

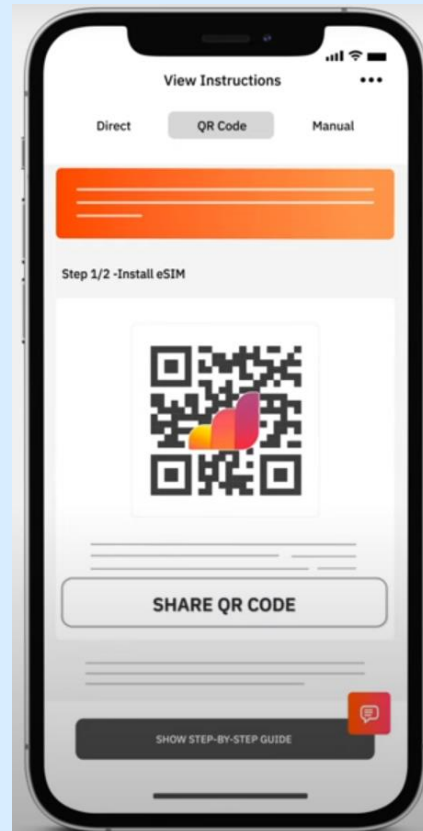


Holafly encourages activation through its app, highlighting that automatic in-app activation is the preferred method among customers.

Airalo provides the best eSIM activation experience with videos, infographics, and clear installation steps



Direct Method



QR Code Method

Airalo provides three easy ways to activate an eSIM on iOS for a smooth setup.

Direct Method: Follows step-by-step prompts in the Airalo app for installation.

QR Code Method: Uses a QR code that is scanned to begin installation.

Manual Method: Requires entering eSIM details manually in the device's Settings.

From manual to automated: eSIM activation became app-first in 2025

Activation saw the most transformation. 2025 marked a shift toward **app-based auto-installation**, reducing reliance on QR codes and manual input. Instructions also became more visual and user-friendly.



2024: Instructions via email only; clear step by step guide.

2025: Instructions on confirmation page and email; added visuals.

Score: 2.75 → 4.55



2024: Instructions on email and website; no visual guide.

2025: Instructions on confirmation page, email, website; visuals added.

Score: 3.20 → 5.00



2024: Instructions via email; step guide with visual clarity.

2025: Instructions on email and website; full step visuals included.

Score: 2.38 → 3.50



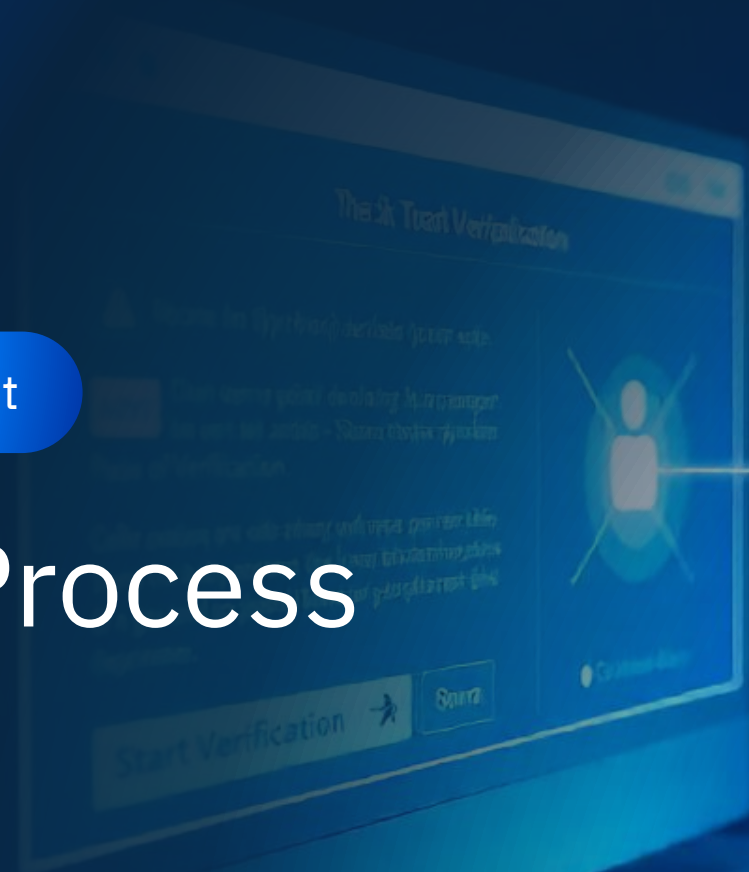
2024: Activation instructions lacked visual guide for clarity.

2025: Visual guide introduced to improve activation clarity.

Score: 3.20 → 3.50

Additional Insight

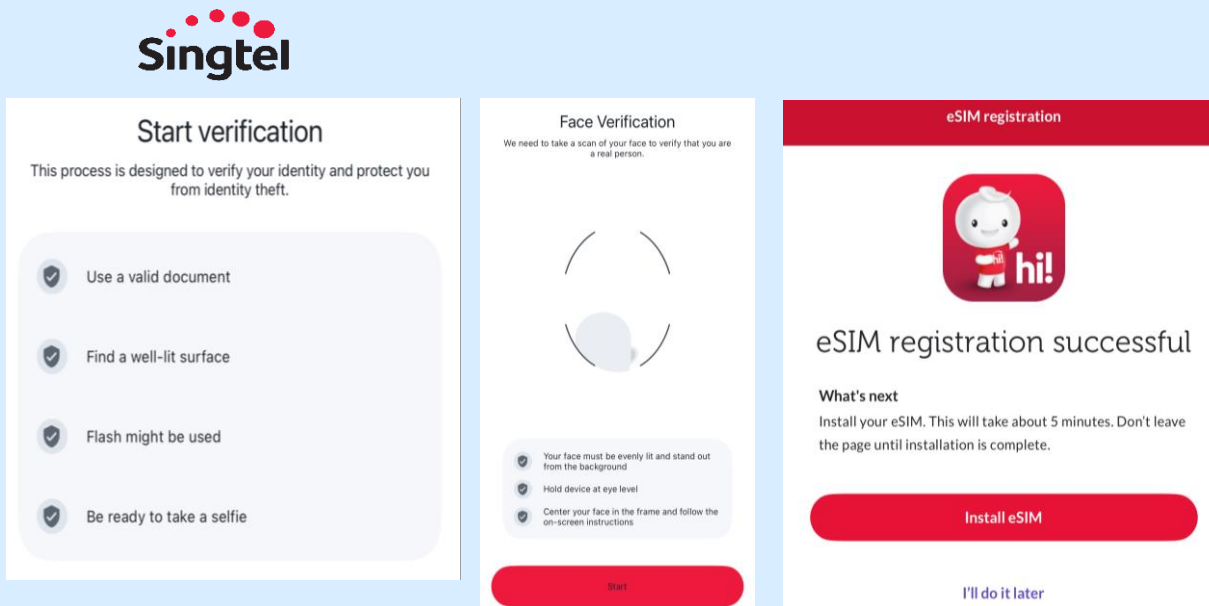
e-KYC Process



Telcos with mandatory e-KYC

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

e-KYC required



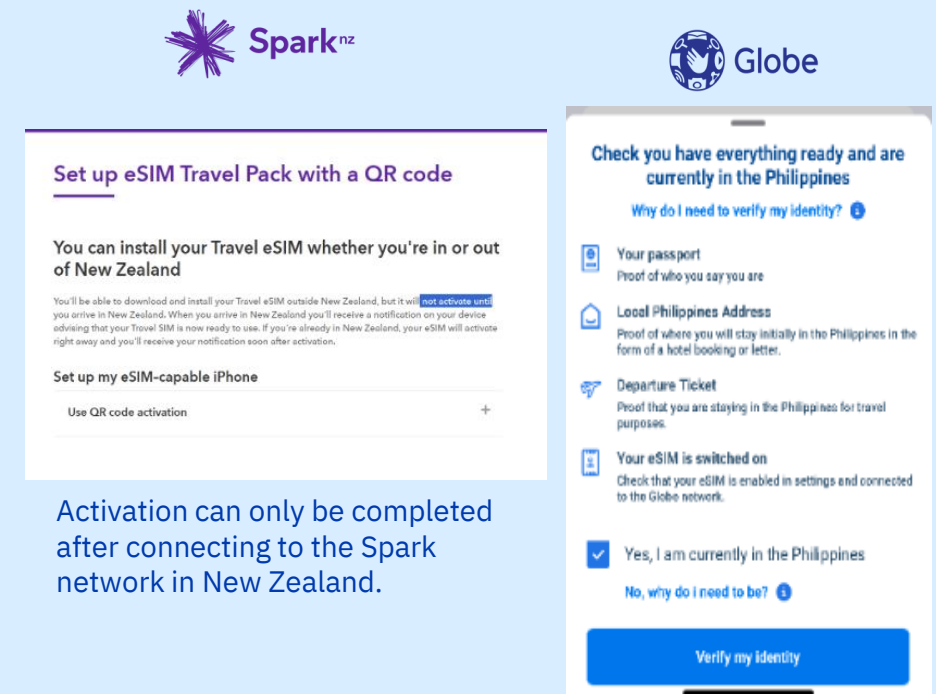
The Singtel eKYC process consists of three main steps:

- Start verification:** A screen titled "Start verification" with the text "This process is designed to verify your identity and protect you from identity theft." Below this are four checklist items, each with a checkmark icon:
 - Use a valid document
 - Find a well-lit surface
 - Flash might be used
 - Be ready to take a selfie
- Face Verification:** A screen titled "Face Verification" with the text "We need to take a scan of your face to verify that you are a real person." It features a circular frame with a camera icon in the center. Below the frame are three instructions, each with a checkmark icon:
 - Your face must be evenly lit and stand out from the background
 - Hold device at eye level
 - Center your face in the frame and follow the on-screen instructionsA red "Start" button is at the bottom.
- eSIM registration:** A screen titled "eSIM registration" with a "hi!" character icon. It says "eSIM registration successful". Below this is a section "What's next" with the text "Install your eSIM. This will take about 5 minutes. Don't leave the page until installation is complete." A red "Install eSIM" button is at the bottom, and a link "I'll do it later" is at the very bottom.

Screenshots of Singtel's eKYC process

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

eKYC required (Location-specific)



The eKYC processes for Spark and Globe are as follows:

- Spark:** A screen titled "Set up eSIM Travel Pack with a QR code" with the Spark logo. It says "You can install your Travel eSIM whether you're in or out of New Zealand". Below this is a note: "You'll be able to download and install your Travel eSIM outside New Zealand, but it will not activate until you arrive in New Zealand. When you arrive in New Zealand you'll receive a notification on your device advising that your Travel eSIM is now ready to use. If you're already in New Zealand, your eSIM will activate right away and you'll receive your notification soon after activation." There is a section "Set up my eSIM-capable iPhone" with a "Use QR code activation" button and a "+" icon.
- Globe:** A screen titled "Check you have everything ready and are currently in the Philippines" with the Globe logo. It says "Why do I need to verify my identity?". Below this is a list of requirements, each with an icon:
 - Your passport: Proof of who you say you are
 - Local Philippines Address: Proof of where you will stay initially in the Philippines in the form of a hotel booking or letter.
 - Departure Ticket: Proof that you are staying in the Philippines for travel purposes.
 - Your eSIM is switched on: Check that your eSIM is enabled in settings and connected to the Globe network.There is a checkbox "Yes, I am currently in the Philippines" which is checked. Below this is a link "No, why do I need to be?". A blue "Verify my identity" button is at the bottom.

Activation can only be completed after connecting to the Spark network in New Zealand.

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

No e-KYC required for data-only eSIMs

No e-KYC required



Global eSIM providers such as Holafly, Airalo, and Yesim do not require identity verification.

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. eSIM Access in India:**
 - International providers (e.g., Yesim, Airalo) offer tourist-friendly options without requiring eKYC, paperwork, or local documentation—just buy online, scan a QR code, and activate on arrival.
 - Local carriers (Airtel, Jio, Vi) require strict verification: Indian ID, local address proof, and in-person activation at authorized stores; setup can take 24–48 hours.

Additional Insight

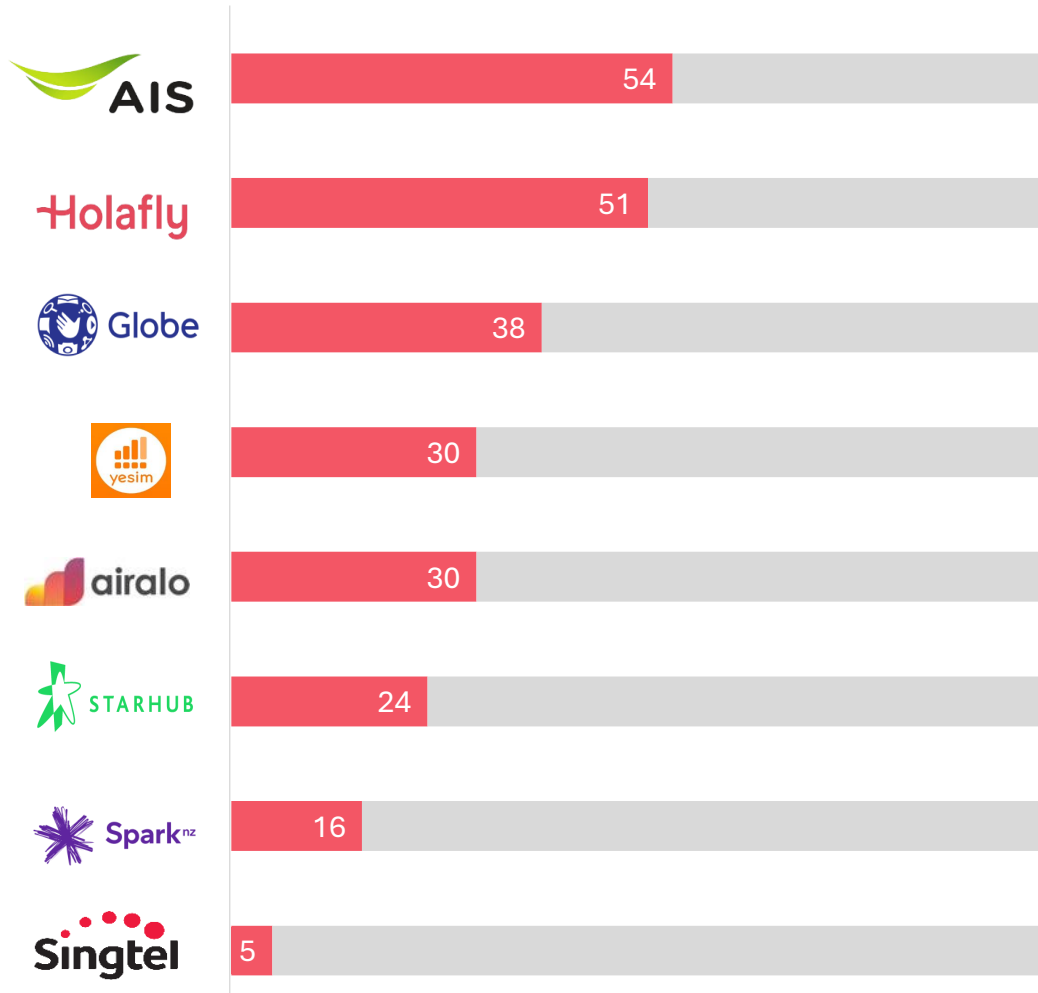
Website Performance

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

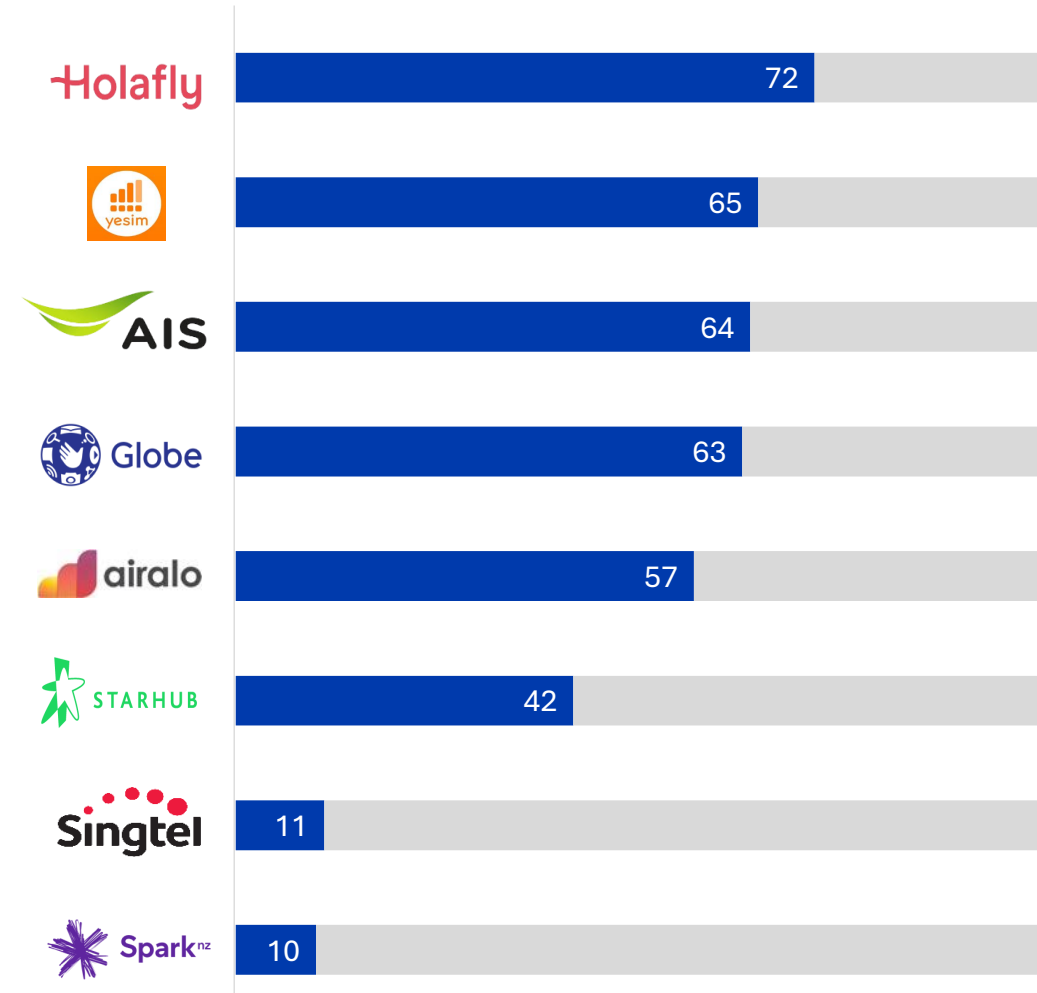


Page speed analysis

Mobile Speed



Desktop Speed



Key Takeaways:

Analyst Recommendations



1. Effortless discovery and purchase experience

Streamlined google discovery

- Ensure official links are always among the top 3 results for better visibility.
- Include clear titles with eSIM, benefits, and destination-specific keywords.
- Avoid cluttered or ad-dominated pages that distract users from the main site.



First-view optimization

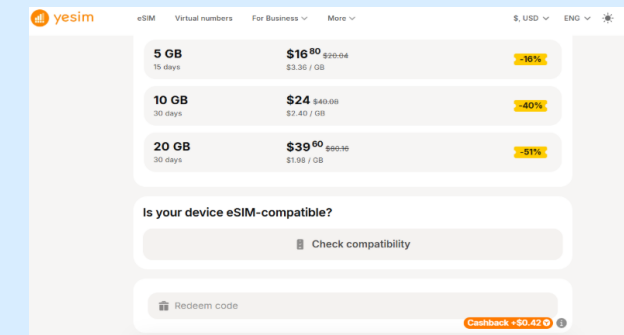
- Present pricing, plan categories, and installation options directly on the landing page.
- Use banners to showcase tourist-friendly features and top plans.
- Provide an intuitive layout that reduces the need for scrolls or clicks.

Singtel highlights tourist eSIM with clear pricing, validity, roaming, and instant activation on first view.

Yesim offers a “Check compatibility” option before checkout to verify eSIM device support.

Simplified purchase flow

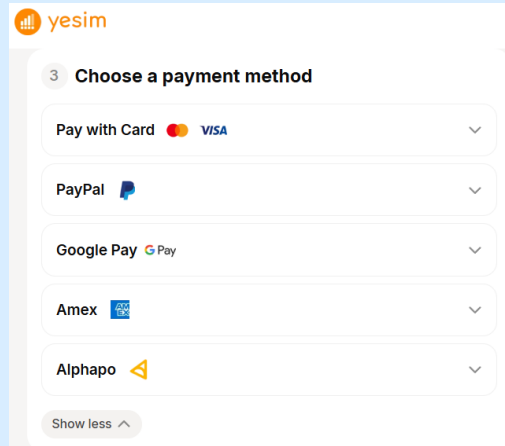
- Structure the buying process into less than 5 steps, clearly displayed on the interface.
- Provide device compatibility checks and guide users if their device supports eSIM.
- Allow plan customization or add-ons during purchase to improve flexibility.



2. Seamless payment and identity verification

Flexible payment options

- Offer multiple international-friendly payment methods (e.g., PayPal, international cards).
- Auto-calculate and display taxes or currency conversions upfront for transparency.
- Avoid redirect-based payment flows to improve trust and reduce failures.



Frictionless eKYC

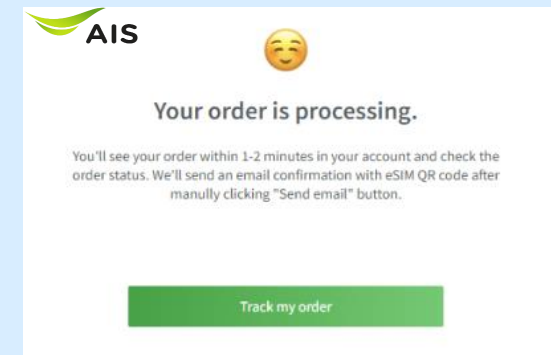
- Provide multiple verification options (passport, national ID, phone OTP).
- Ensure eKYC completion in under 5 minutes, with real-time feedback or confirmation.
- Use secure forms with status tracking (e.g., "submitted", "under review", "verified").

Supportive checkout experience

- Allow editing of plans or details during checkout.
- Clearly communicate refund/cancellation policies before payment.
- Bundle order summary and payment breakdown in final step before pay.

Yesim provides multiple global payment options, including Visa, Mastercard, PayPal, and Google Pay.

AIS displays order processing status with a tracking option for post-purchase visibility.



3. Activation, support, and post-purchase ease

Easy activation journey

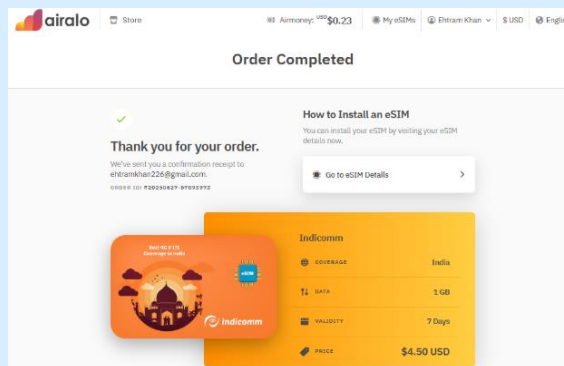
- Present clear, step-by-step activation instructions for both Android and iOS users.
- Use visuals or animations to explain activation in under 1 minute.
- Provide auto-install options or QR-code-based activation with backup links.

Instant order confirmation

- Combine eSIM QR code, plan details, and support link in one confirmation email.
- Confirm successful payment and order instantly with in-app pop-ups or SMS.
- Highlight installation validity period or expiry, if applicable.

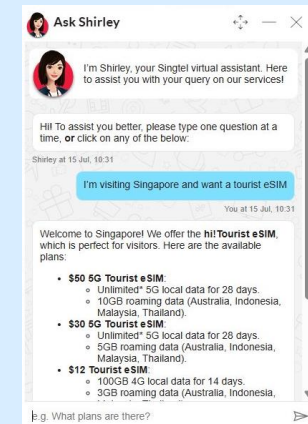
Always-on customer support

- Offer support across channels: email, social media, live chat, and WhatsApp.
- Use AI-powered chatbots to answer FAQs and guide users in real time.
- Provide proactive support prompts during activation and after payment confirmation.



Airalo provides instant order confirmation with eSIM details and installation guide, including coverage, validity, and price.

Singtel's AI assistant Shirley replies with tourist plans, pricing, coverage, and validity.



Overall

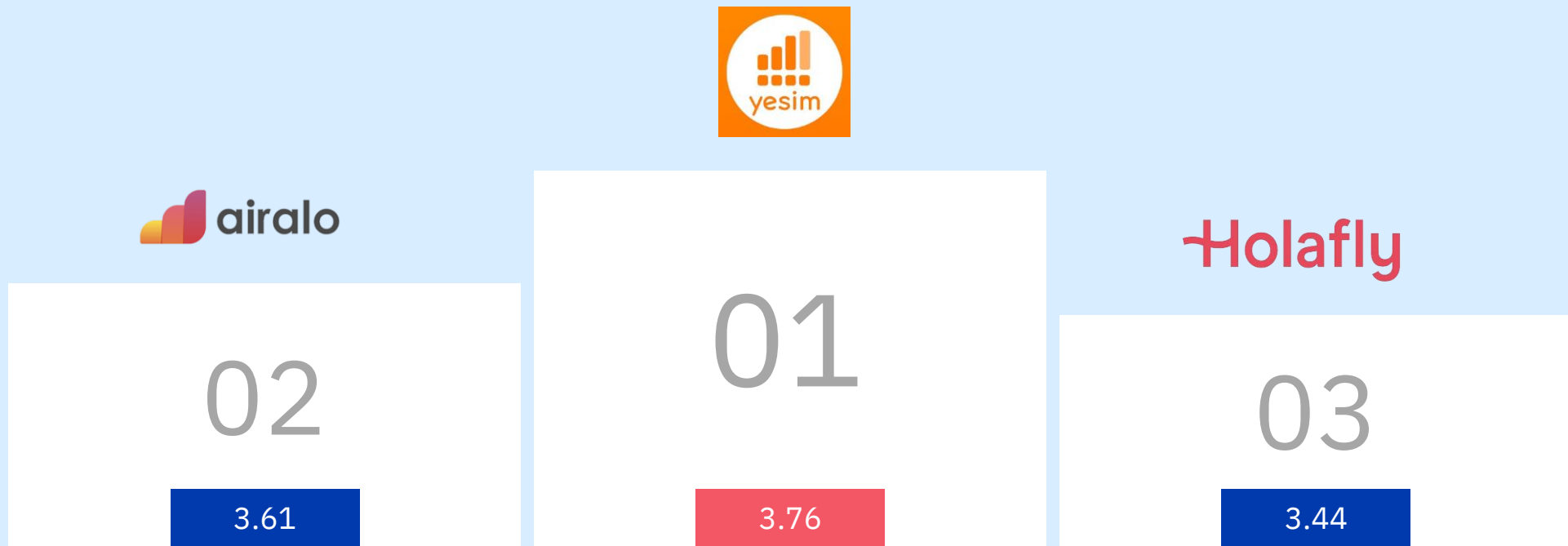
Tourist e-SIM CX Stars



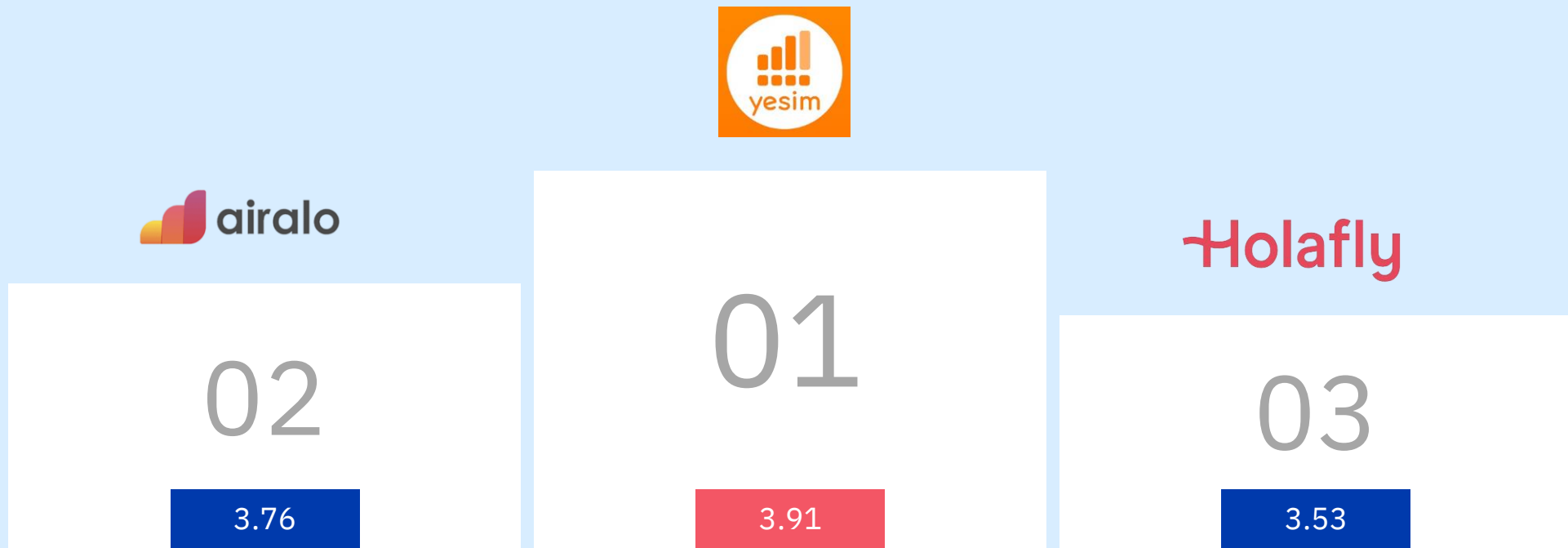
Best e-SIM web discovery journey



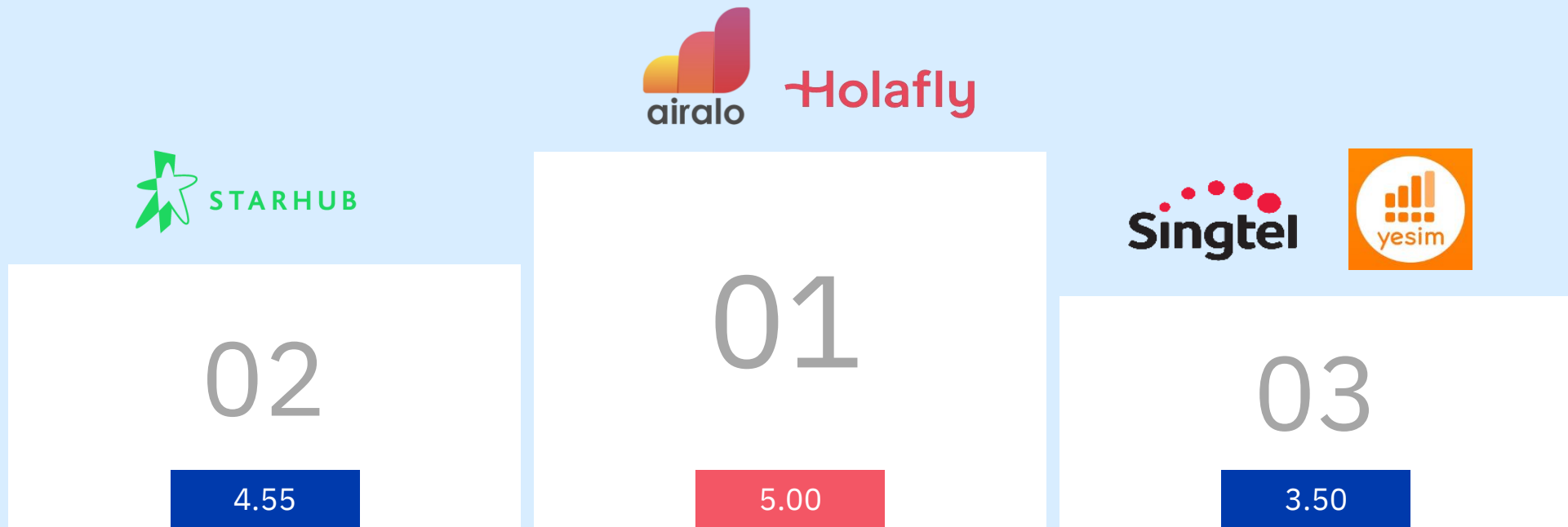
Best e-SIM purchase journey



Best e-SIM payment journey



Best e-SIM activation journey



Innovating experiences
