



# eSIM Summit at MWC22

eSIM in 2022 and beyond: assessing new developments, market trends and consumer behaviour

**Theatre 3 - Hall 7**  
**Wednesday 2 March 2022**  
**10.30-12:30 (GMT+1)**



KEYNOTE SPEAKER

**Pablo Iacopino,**

Director of Ecosystem Research,  
GSMA



**eSIM Summit: eSIM Adoption and Global Market Trends**

# **eSIM in 2022 and beyond**

## **Assessing new developments, market trends and consumer behaviour**

DATE  
2 March 2022

**Pablo Iacopino**  
Head of Research and Commercial Content

## Good progress

- Proliferation of eSIM devices
- Launch of 5G devices with eSIM technology
- Commercialisation of eSIM service for smartphones and smartwatches
- eSIM for connected vehicles
- Work and alignment on global specifications (including ieUICC)
- eSIM for international roaming

## Slow progress

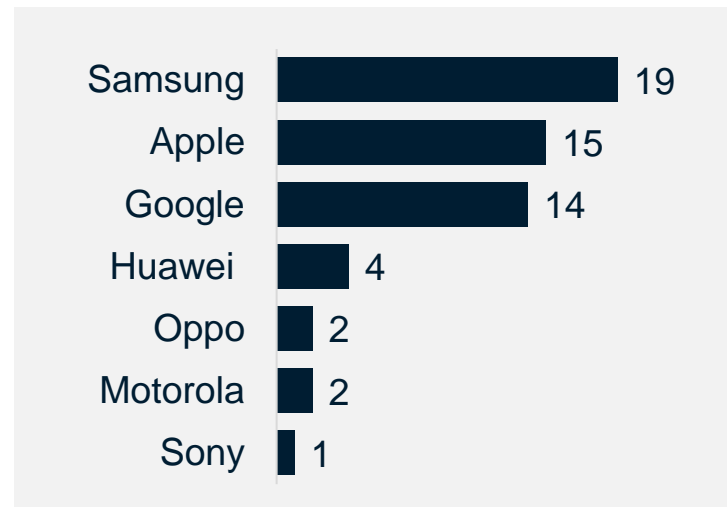
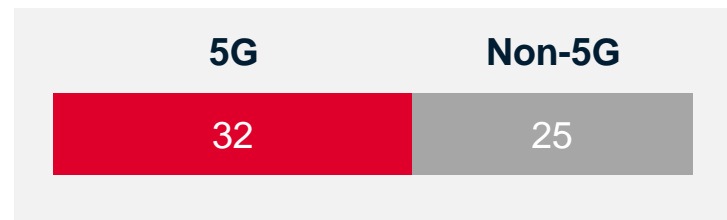
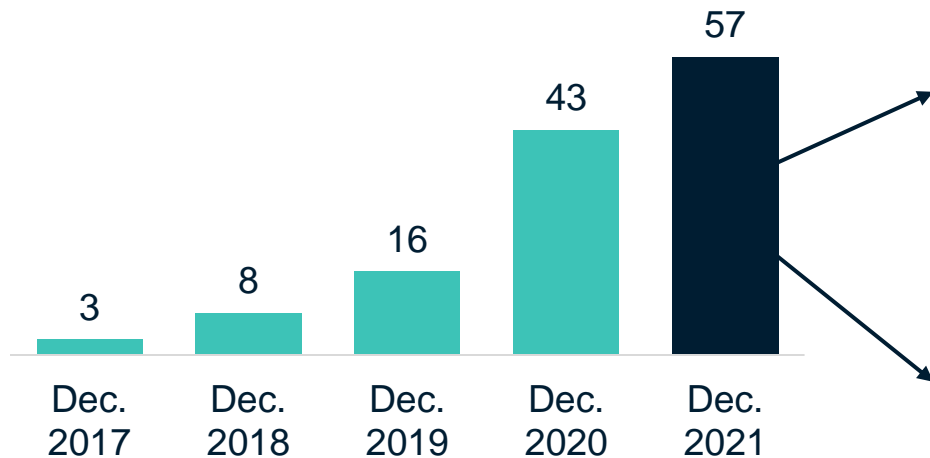
- Consumer awareness and adoption of eSIM
- eSIM 'democratisation' (for consumers) through cheaper devices
- eSIM promotion by OEMs and operators
- eSIM for IoT vertical sectors (beyond Automotive)
- eSIM for laptops

# eSIM in the smartphone market

*Nearly 60 eSIM smartphone models – more than half have 5G technology*

## How many eSIM smartphones have been launched?

Cumulative figures



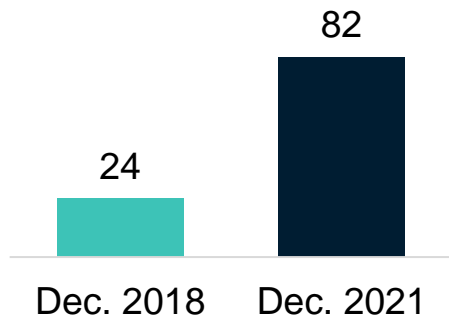
- Most flagship smartphones are now eSIM-enabled
- 5G and eSIM get together
- Various models have a retail price < USD500

# eSIM service is now global

*eSIM reaches more than 3 billion mobile subscribers*

## Commercial availability of eSIM service for smartphones

Number of countries



## Geographical reach



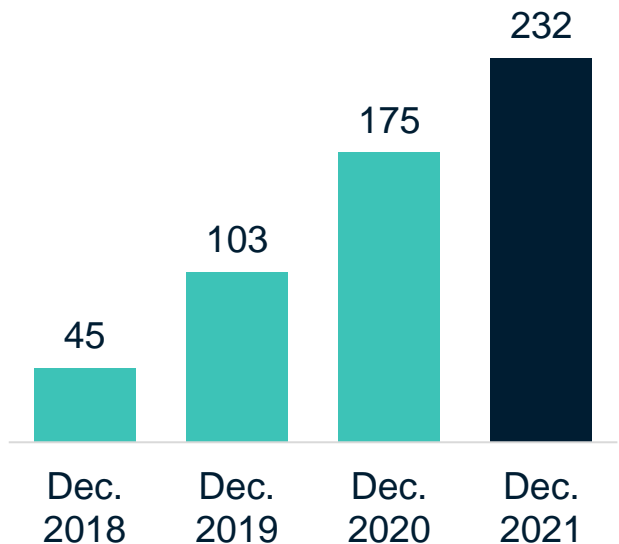
- Most major markets are on board. eSIM is nearly ubiquitous in major markets
- Africa is catching-up
- China still missing...but for how long?



# More than 230 operators offer commercial eSIM service

*Fivefold increase over the last 3 years*

## Number of mobile service providers offering commercial eSIM service for smartphones



- Discussions with eSIM vendors indicate that this figure is even higher
- eSIM is a group strategy
- MVNOs are driving eSIM for international roaming

## What lies ahead?

**88%**

of surveyed operators plan to offer eSIM service by 2023

**98%**

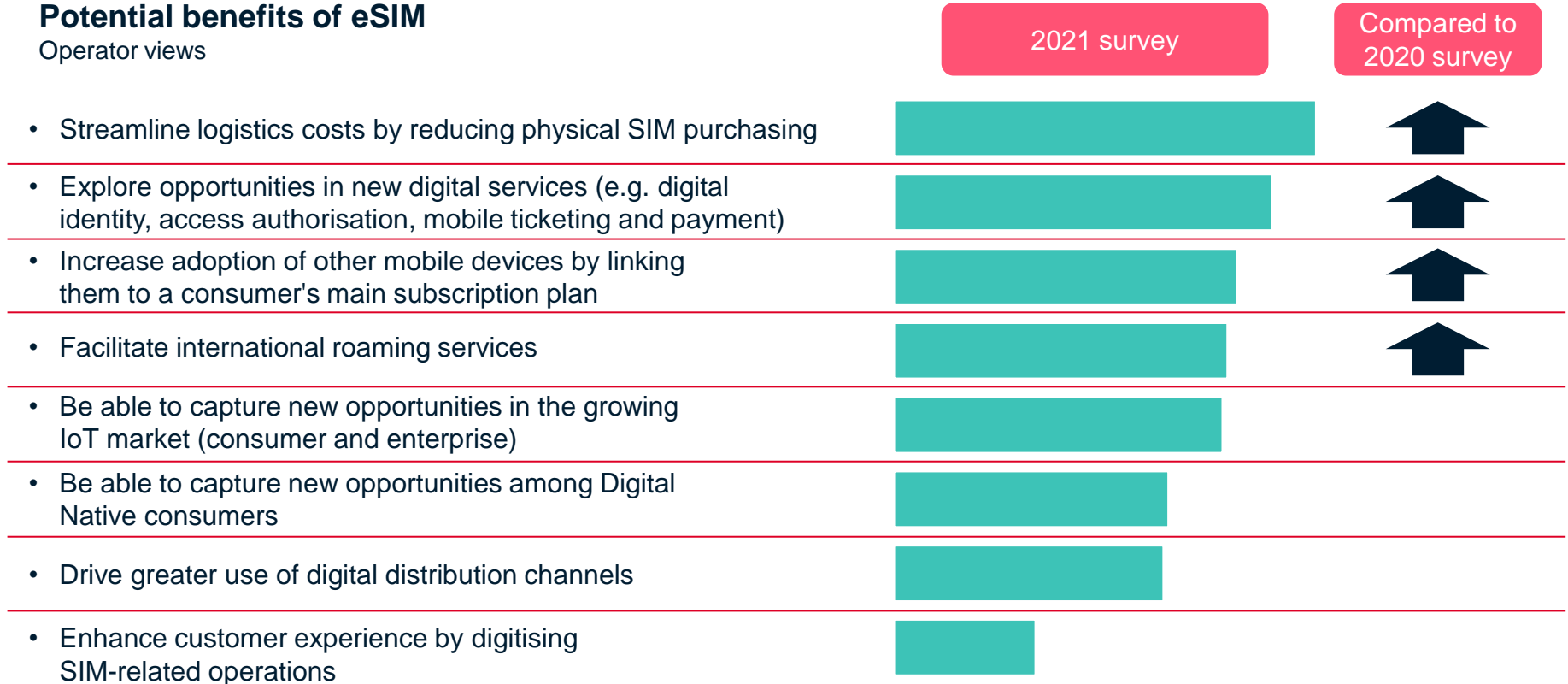
by 2025

# Potential benefits of eSIM: what do operators think?

*Incremental revenues and opex savings – it's all about further digitisation*

## Potential benefits of eSIM

Operator views



# IoT is a promising market for eSIM

*However, eSIM adoption is still low relative to its long-term potential*

## TODAY

### Automotive

eSIM is already mainstream in connected vehicles

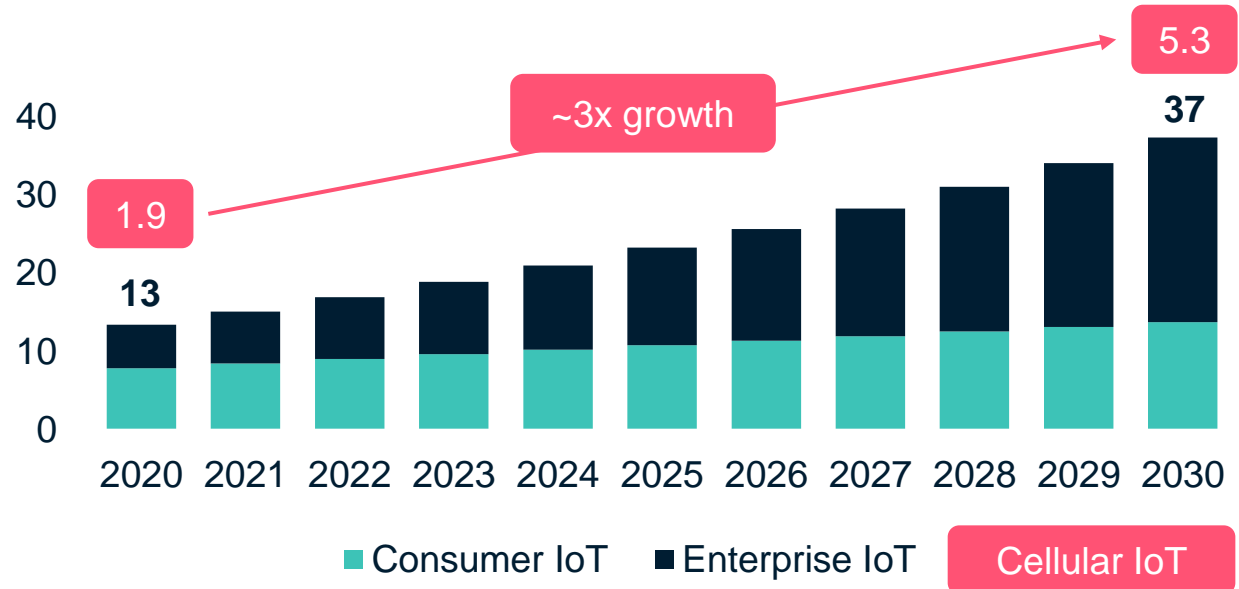
### Beyond Automotive

Single initiatives rather than sector-wide deployments

## FUTURE

### Global IoT connections – billion

The addressable market for eSIM and iSIM is significant  
eSIM and iSIM are targeting a share of the cellular market





# eSIM for IoT: there is untapped demand

*Enterprises are accelerating their digital transformation*

## IoT deployments drive digitisation

Enterprises speak; % of respondents  
IoT deployments are:

IoT deployments are largely part of a wider digital transformation agenda

63%



Part of a wider digital transformation agenda

37%



Standalone initiative

## Importance of eSIM in future IoT deployments

Enterprises speak; % of respondents

eSIM for IoT is  
eSIM for digitisation

40%



Very important

44%



Somewhat important

10%



Not at all important

4%



I don't know

2%



I am not familiar with eSIM

- Awareness of eSIM is high
- 40% of enterprises see eSIM as very important to a successful IoT deployment
- Security and remote update of large volumes of devices are seen as the top eSIM benefits

eSIM

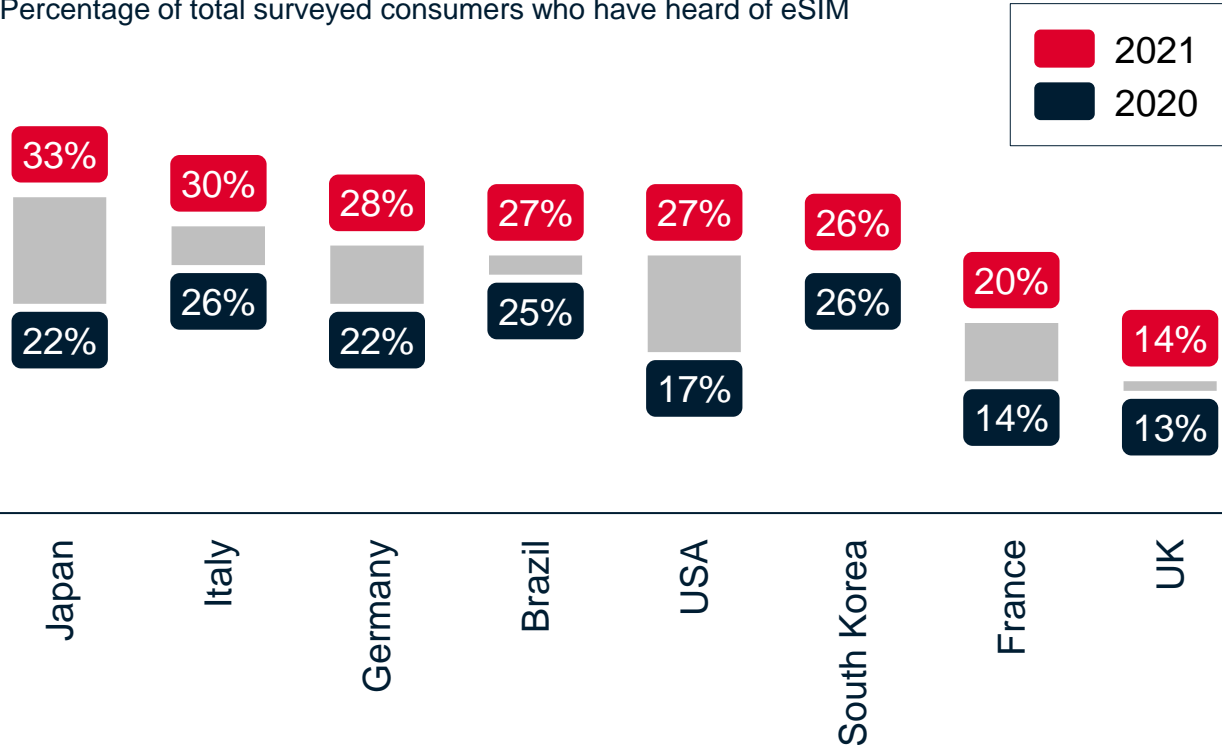
Assessing consumer  
behaviour

# Consumers: do they know what eSIM is?

*Consumer awareness of eSIM is still low*

## Consumer awareness of eSIM

Percentage of total surveyed consumers who have heard of eSIM



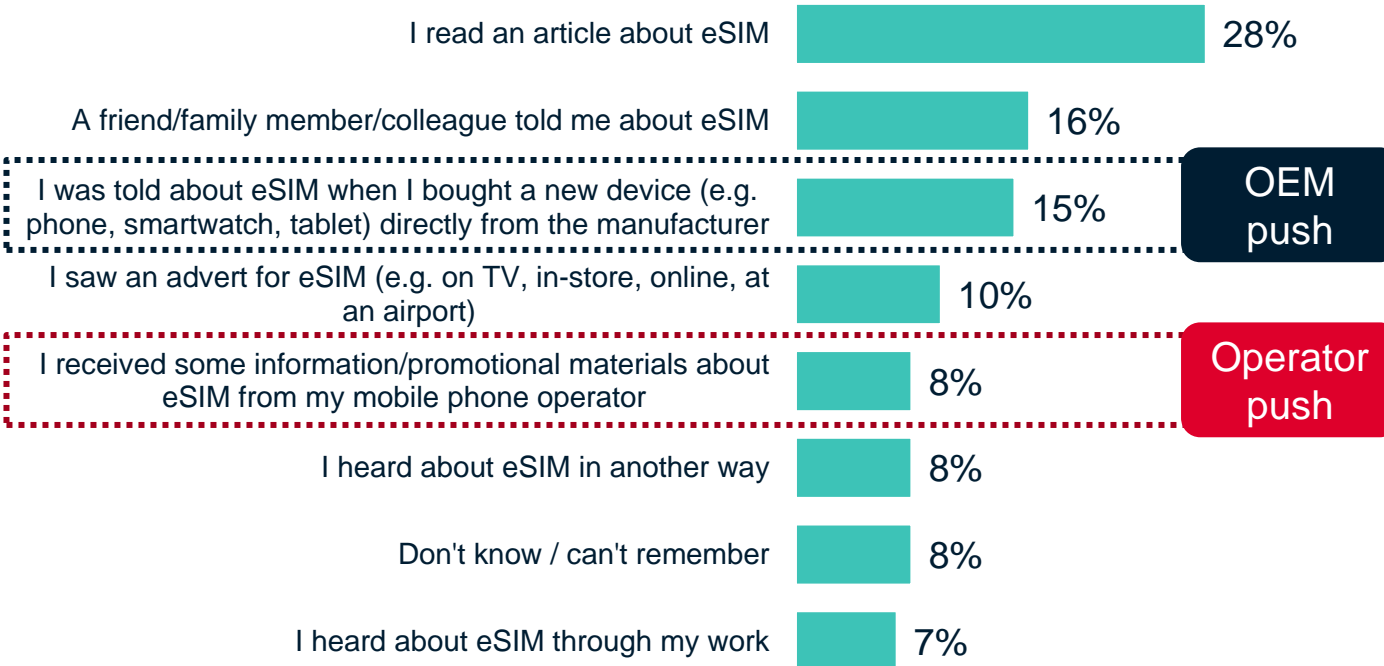
- Less than 30% of consumers are aware of eSIM (average)
- 5pp increase compared to 2020 (average)
- Significant variations by country...but no correlation with eSIM service availability
- More work is needed by operators and OEMs

# How do consumers first find out about eSIM?

*Slow push by OEMs and operators*

## Finding out about eSIM

Among surveyed consumers who have heard of eSIM (aggregate, 8 countries)



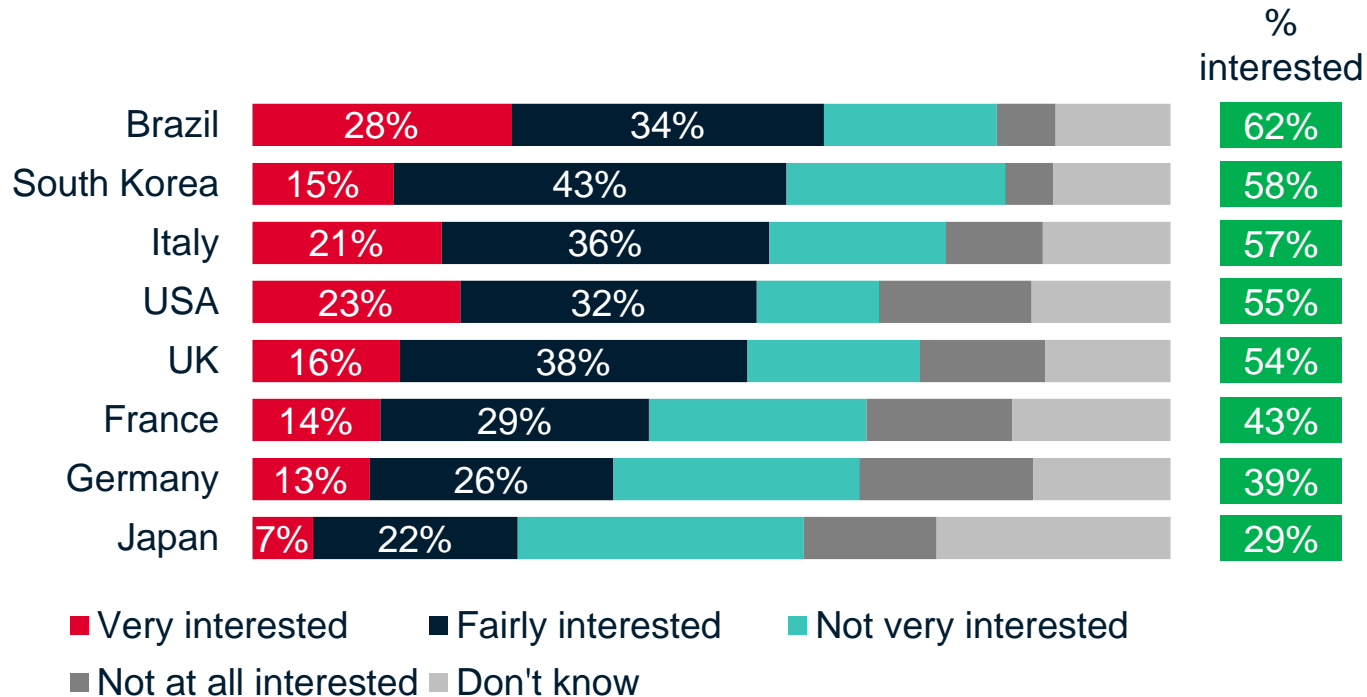
- Operators and OEMs don't talk much about eSIM to their customers
- OEMs talk more than operators, especially in the USA, Japan and South Korea

# Are consumers interested in using eSIM?

50-50: half of consumers are interested (average)

## Consumer interest in using eSIM on a mobile phone at some point in the future

Percentage of total surveyed consumers who own/use a mobile phone



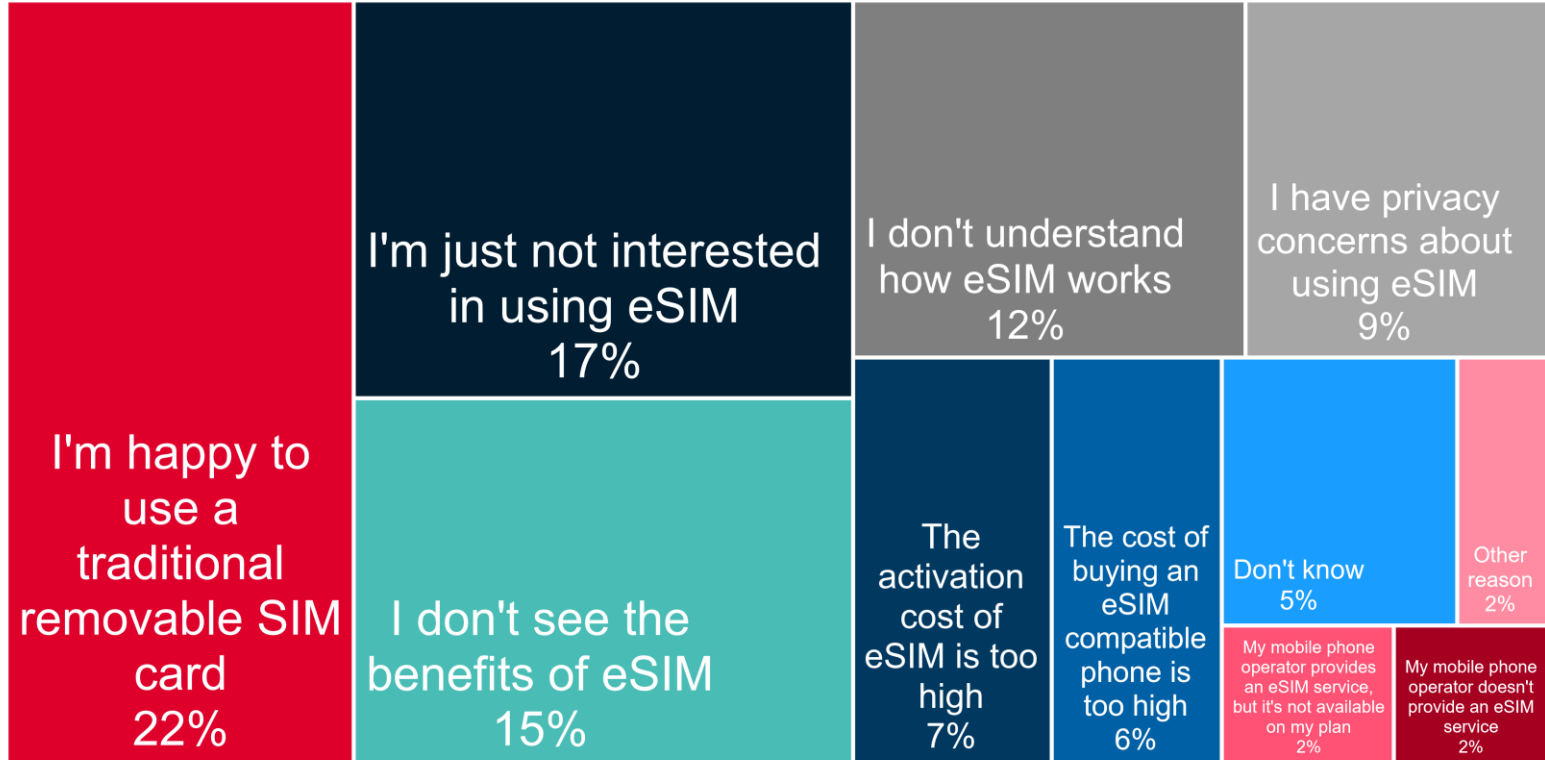
- Significant variations by country...
- ...but (again) no correlation with eSIM service availability
- 16% don't know (average)...fairly high share
- No major differences by smartphone brand

# Why are some consumers not using/interested in eSIM?

*Various reasons – it means multiple challenges*

## Reasons for not using eSIM or not being interested in eSIM

Percentage of surveyed consumers who are not using eSIM or are not interested in using eSIM (aggregate, 8 countries)



- Happiness with traditional SIM leads, especially in Europe
- 15% don't see the benefits of eSIM
- 12% don't understand how eSIM works

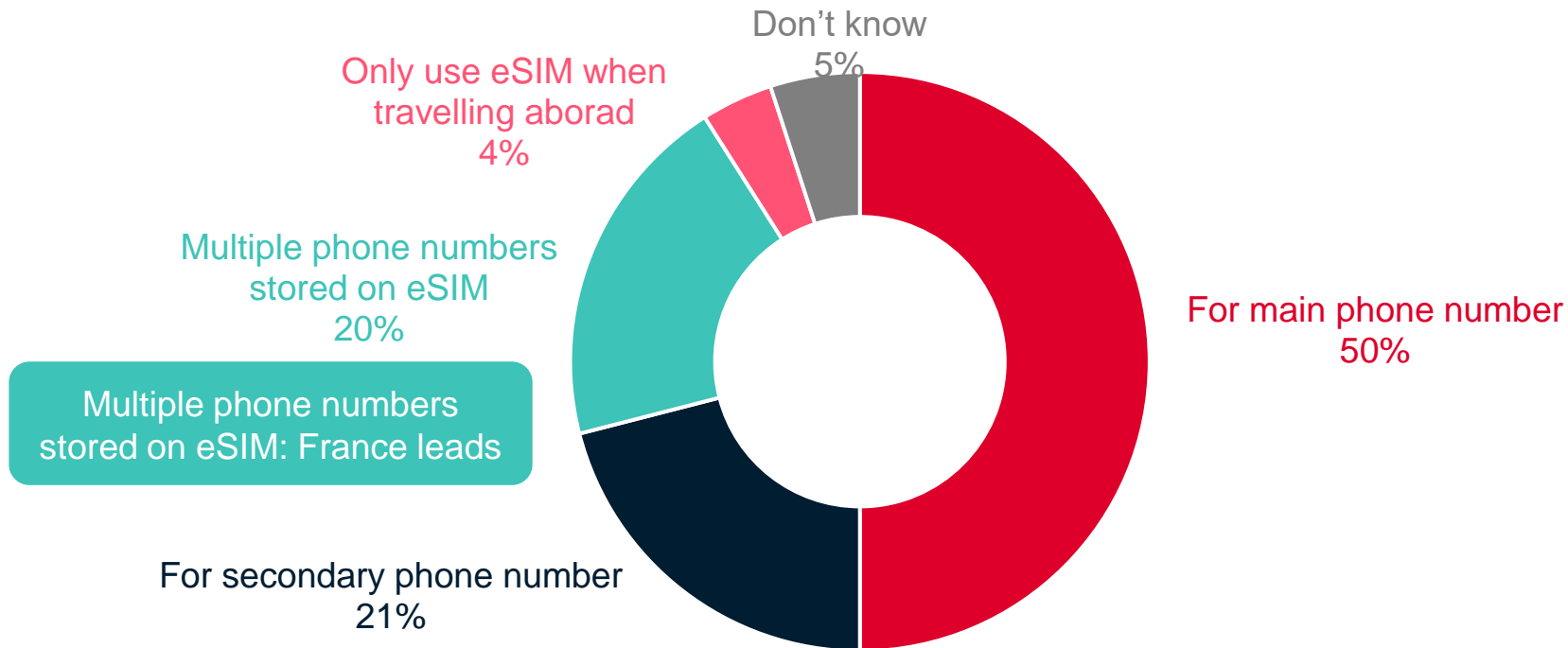


# How do consumers use eSIM?

*For main phone number*

## Use of eSIM in mobile phones

Percentage of surveyed consumers who use eSIM (aggregate, 8 countries)

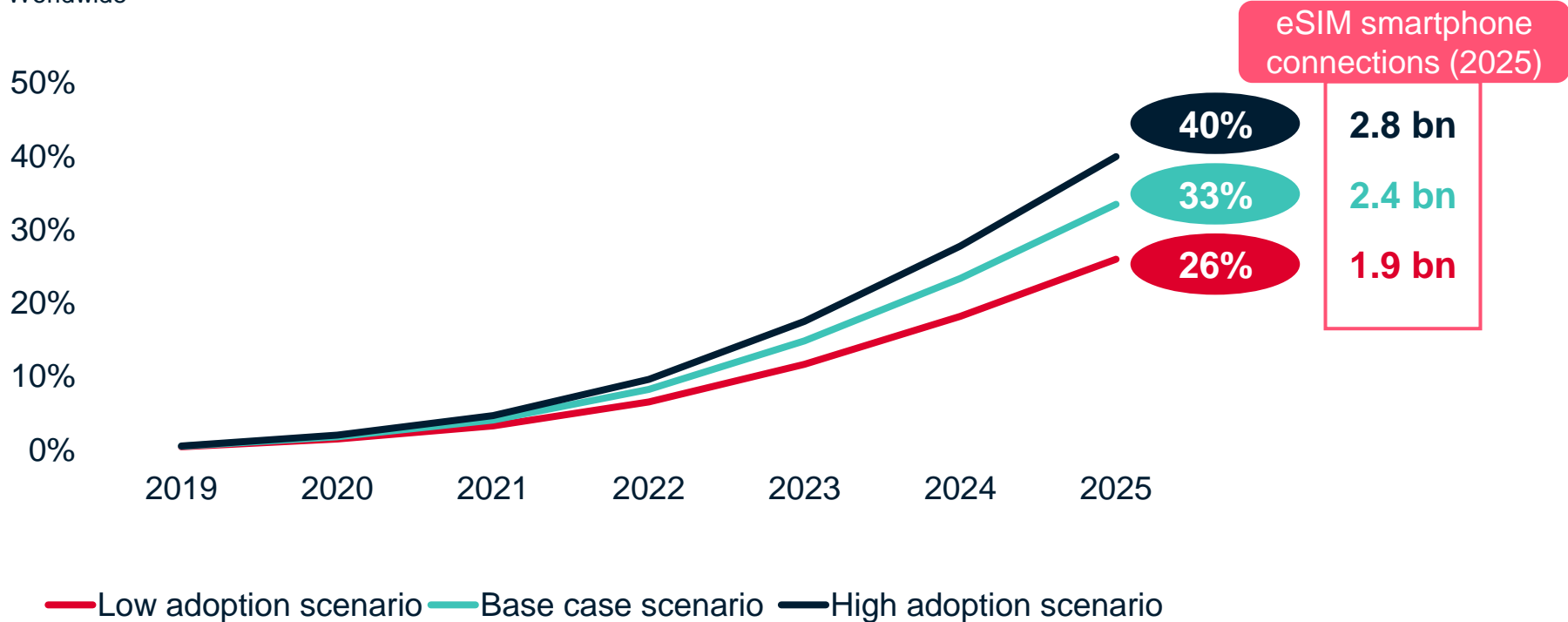


# Charting the future: eSIM adoption in smartphones

*The march towards mainstream – Acceleration from 2023 onwards*

## eSIM smartphone connections as % of total smartphone connections (installed base)

Worldwide



# eSIM

**Future outlook: what could  
accelerate eSIM adoption?**

### eSIM in the Consumer Market

- OEMs and operators raising consumer awareness of eSIM and promoting its benefits
- Enhancing user experience for eSIM activation and service management
- Full launch by all OEMs
- Transition to eSIM-only smartphones
- China launching commercial eSIM service for smartphones
- Migration to 5G: opportunity to push the transition to eSIM

### eSIM in the Enterprise Market

- Adoption of global standards/specifications (as opposed to proprietary solutions)
- 5G adding momentum to the use of cellular connectivity for IoT – hence pushing eSIM
- The combined effect of eSIM- and iSIM-based solutions
- eSIM helping address key IoT deployments challenges (integration with existing technologies, cost of implementation and security)
- IoT companies having a clear eSIM strategy alongside their main IoT proposition



**MWC**<sup>TM</sup>  
Barcelona

# eSIM Summit: eSIM Adoption and Global Market Trends

GSMA eSIM Consumer



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<p><b>Data</b></p>	 <p><b>1,400</b> Mobile operators</p>	 <p><b>80</b> Operators groups</p>	 <p><b>5,000</b> Networks</p>	 <p><b>30M</b> Data points updated daily</p>
<p><b>Research</b></p>	 <p><b>130+</b> Reports annually</p>	 <p><b>1M</b> Report downloads in 2019</p>	 <p><b>100+</b> Global, Regional &amp; Topical Research, Deep Dives &amp; Analysis</p>	
 <p><b>Pinpoint accuracy</b></p> <p>Five-year forecast consistently accurate within +/- 2.5% of reported data, updated quarterly</p>	 <p><b>50+ Analysts &amp; industry experts</b></p> <p>Supporting the business strategy of our subscribers and the wider ecosystem</p>			

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# THANK YOU!

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