GSMA Services Showcase Live

Device information in a 5G world

Future of Devices: Trends shaping the device ecosystem in the 5G era

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Pablo lacopino

Head of Research and Commercial Content

Future of Devices

Trends shaping the device ecosystem in the 5G era

Proliferation of connected devices

New device technologies and network requirements

Changing customer behaviour

- A growing and diverse range of devices
- For consumer and enterprise use cases
- Spurring new services and business models

- 5G
- eSIM and iSIM
- Al capabilities
- Volte
- Security
- Identity
- Data analytics

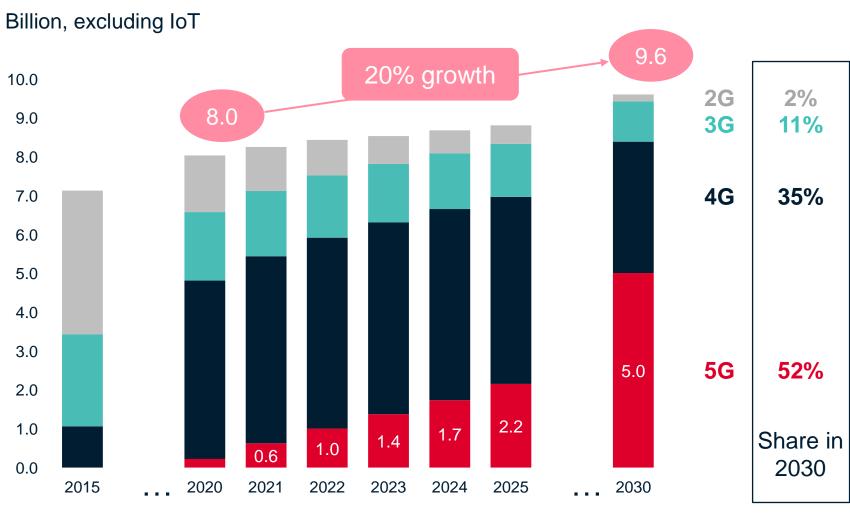
- Shift to digital
- Always connected
- Multi-device access
- Multi-subscription
- Bundling
- Convergence of digital
 & real worlds

Device information is more important (and complex) than ever before

Still room for mobile connections growth

5G is now a global trend. Five billion 5G connections by 2030

Global mobile connections



- 20% growth: 1.6 billion new mobile connections through to 2030
- All eyes on 5G: 184
 operators have launched
 5G commercial services
 across 72 countries (end
 of 2021)
- 5G road to mainstream:

 in the 5G pioneer markets
 5G adoption will surpass
 4G adoption in 2023

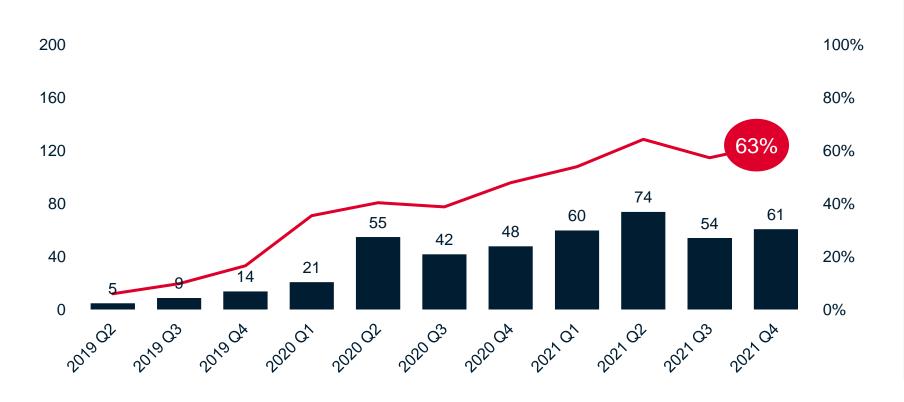
 2024. Globally in 2029

Source: GSMA Intelligence gsma.com/services

5G dominates smartphones launches

Consumer intent to upgrade to 5G soars

5G-capable smartphone launches



- 5G is mainstream in new phones: attention now turns from device availability to prices
- Cost barrier should become less relevant in 2022: today, the cost of 5G (device rather than service) is the second-largest barrier to 5G adoption

Number of 5G models launched

5G models as % of total models launched

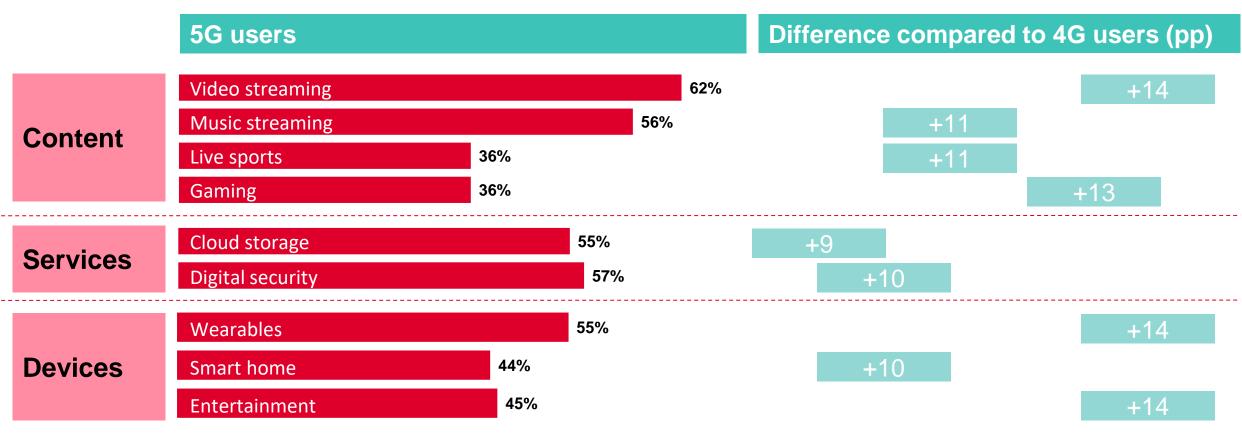
Source: GSMA Intelligence gsma.com/services



5G brings higher consumer interest in bundling

Customer segmentation is crucial to driving higher uptake of 5G bundles

Non-connectivity offerings consumers want packaged with their mobile subscription contracts



5G effect. 5G users are more interested than 4G users in adding services/content to their mobile contracts

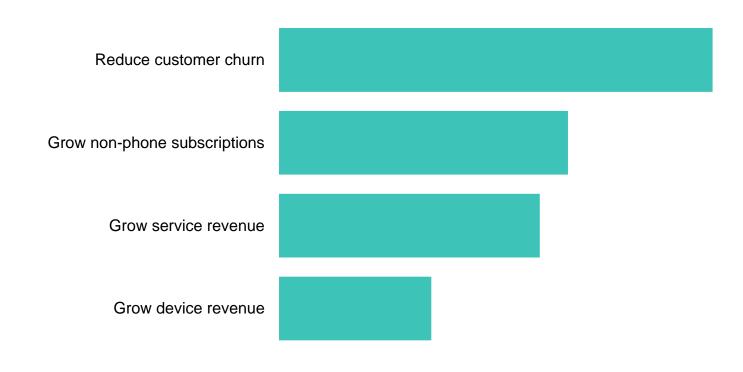


Beyond mobile phones: a growing/dynamic ecosystem

Operators are a key distribution channel and enabler of device integration

Strategic reasons for the sale of non-phone devices

Operators speak – ranking



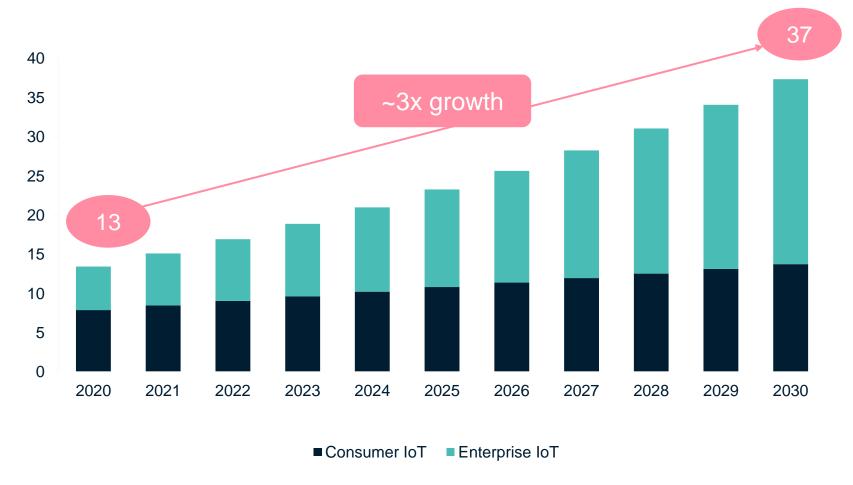
- 75:25 split: phones vs. nonphones operator sales (volumes)
- A churn factor...but also new revenues
- The role of 5G and eSIM: helping drive adoption of non-phone devices
- Customer needs: easy set up, integration, multi-device access and multisubscription

IoT market: explosion of connections and devices

~3x growth through to 2030

Global IoT connections

Billion, globally



- Enterprise driving IoT growth: ~70% of IoT connections growth will come from enterprise use cases in 2022
- Consumer trends: smart home drives growth. Smartwatches overtaking fitness trackers
- Cellular on the rise: more than 5 billion licensed cellular IoT connections in 2030

Source: GSMA Intelligence gsma.com/services

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Digital consumer: five trends to watch in 2022

Analysing the behaviour of early 5G users: 10 things to know when planning consumer 5G strategies

loT market update: assessing disruption and opportunities, forecasting connections to 2030







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Supporting the business strategy of our subscribers and the wider ecosystem



2022 Research Themes

Topics shaping the industry and driving our focus

The changing telco

Reshaping connectivity to accelerate growth in digital services

Building a sustainable industry

Green networks, energy efficiency, devices and beyond

Scaling and monetising 5G

What success looks like across consumer, household and enterprise use cases Mobile
Operators &
Networks

IoT & Enterprise

Fixed, TV & Convergence

Digital Consumer

Spectrum

Maximising the impact of mobile

Tackling the internet usage gap, driving social and economic development

Reshaping telco networks

How networks will look at the end of 2022, and how to balance priorities versus investments

Spectrum in the digital era

Maximising resources and impact, navigating new assignment models

Monetising the digital transformation of industries

The interplay of IoT, 5G, edge, private networks and security

The digital consumer post Covid-19

Resetting B2C strategies for customer engagement, distribution, devices and content

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