

Scaling eSIM in 2022 and Beyond

DATE
22 June 2022

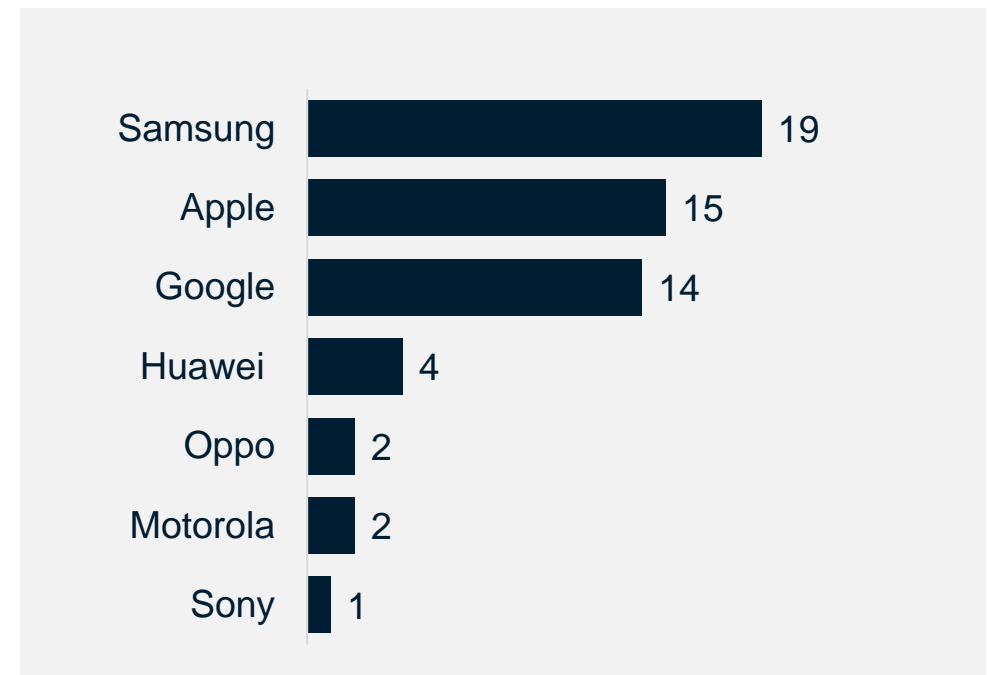
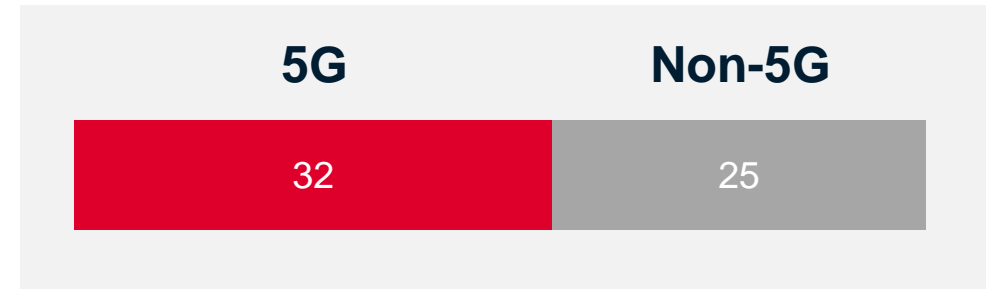
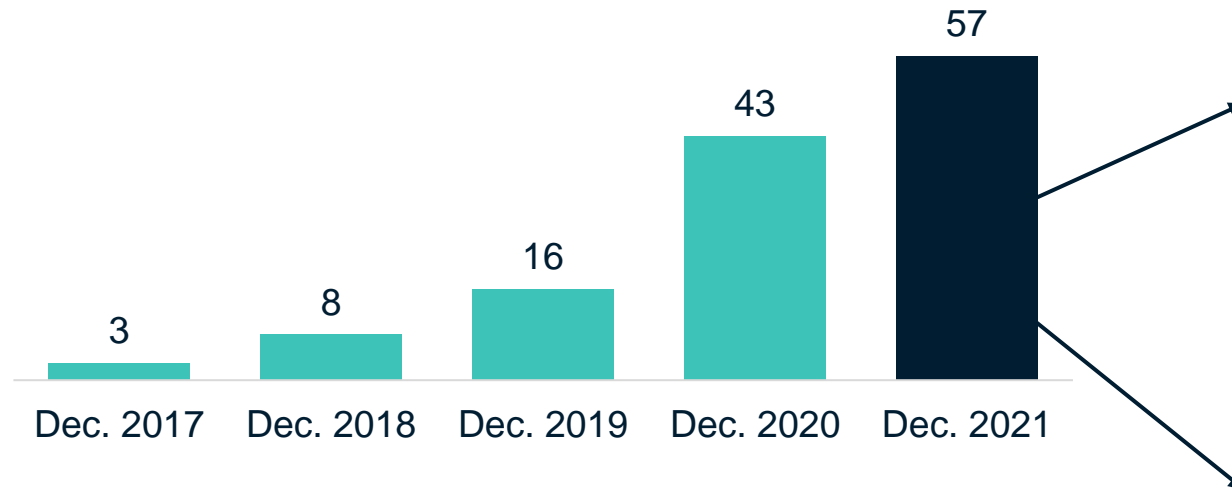
Pablo Iacopino
Head of Research and Commercial Content

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



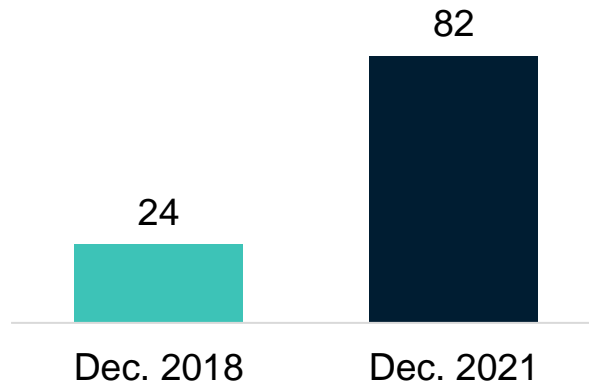
- Most flagship smartphones are now eSIM-enabled
- 5G and eSIM get together
- Various models have a retail price < USD500
- Transition to eSIM-only phones will be a game changer

eSIM service is now global

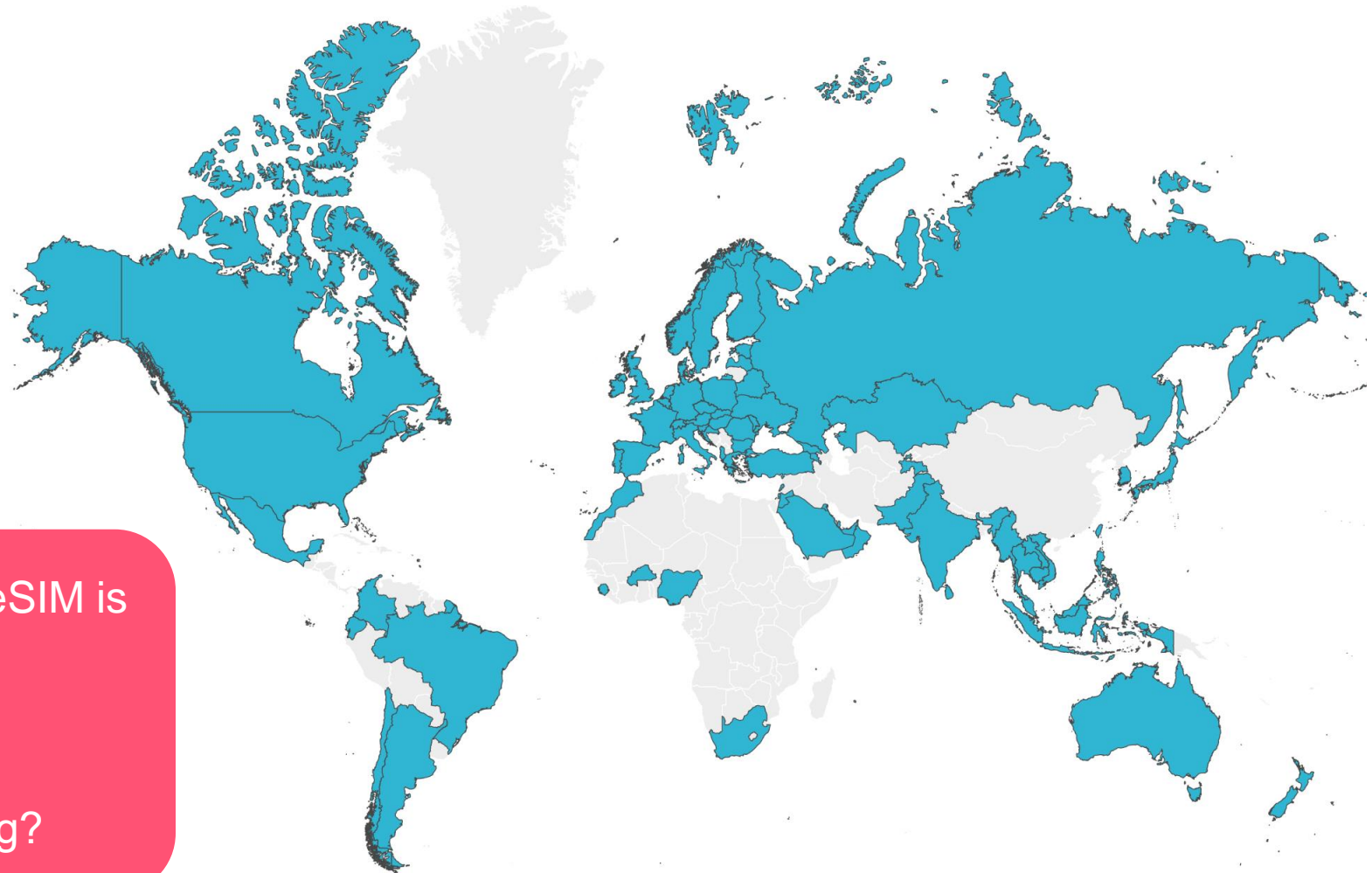
eSIM reaches more than 3 billion mobile subscribers

Commercial availability of eSIM service for smartphones

Number of countries



Geographical reach

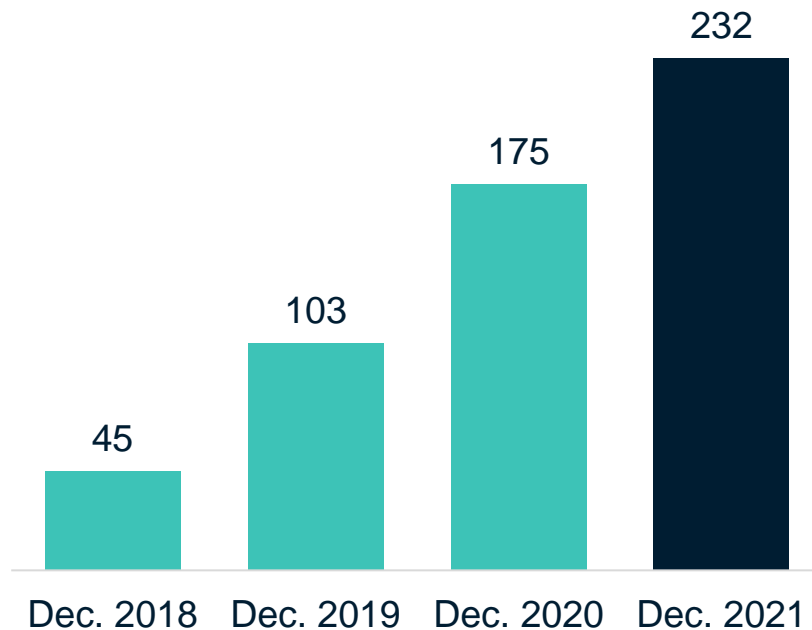


- Most major markets are on board. eSIM is nearly ubiquitous in major markets
- Africa is catching-up
- China still missing...but for how long?

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 for multi-country operators
- MVNOs are driving eSIM for international roaming

What lies ahead?

88%

Surveyed operators plan to offer eSIM service by 2023

98%

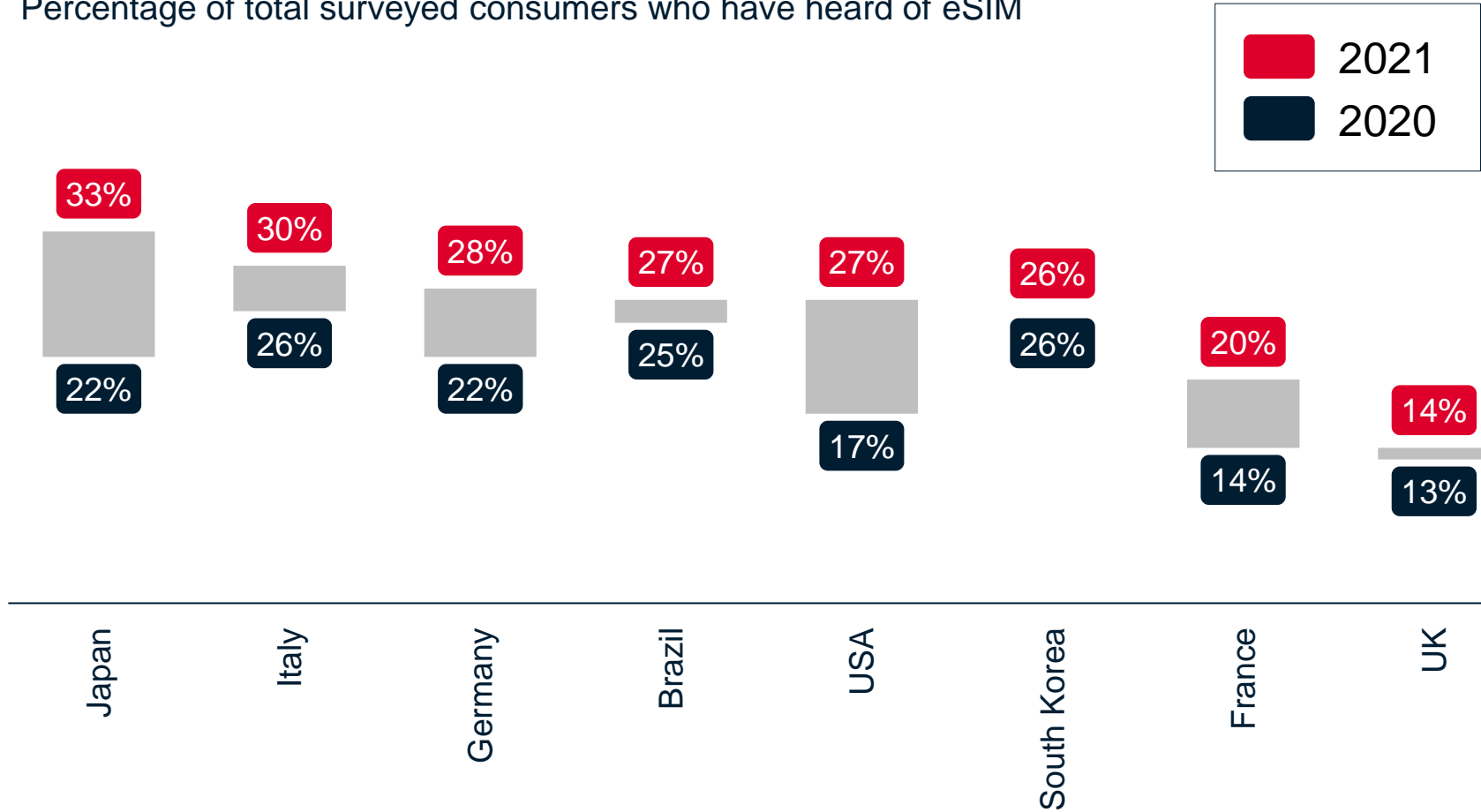
by 2025

Consumers: do they know what eSIM is?

Consumer awareness of eSIM is still low – but growing

Consumer awareness of eSIM

Percentage of total surveyed consumers who have heard of eSIM



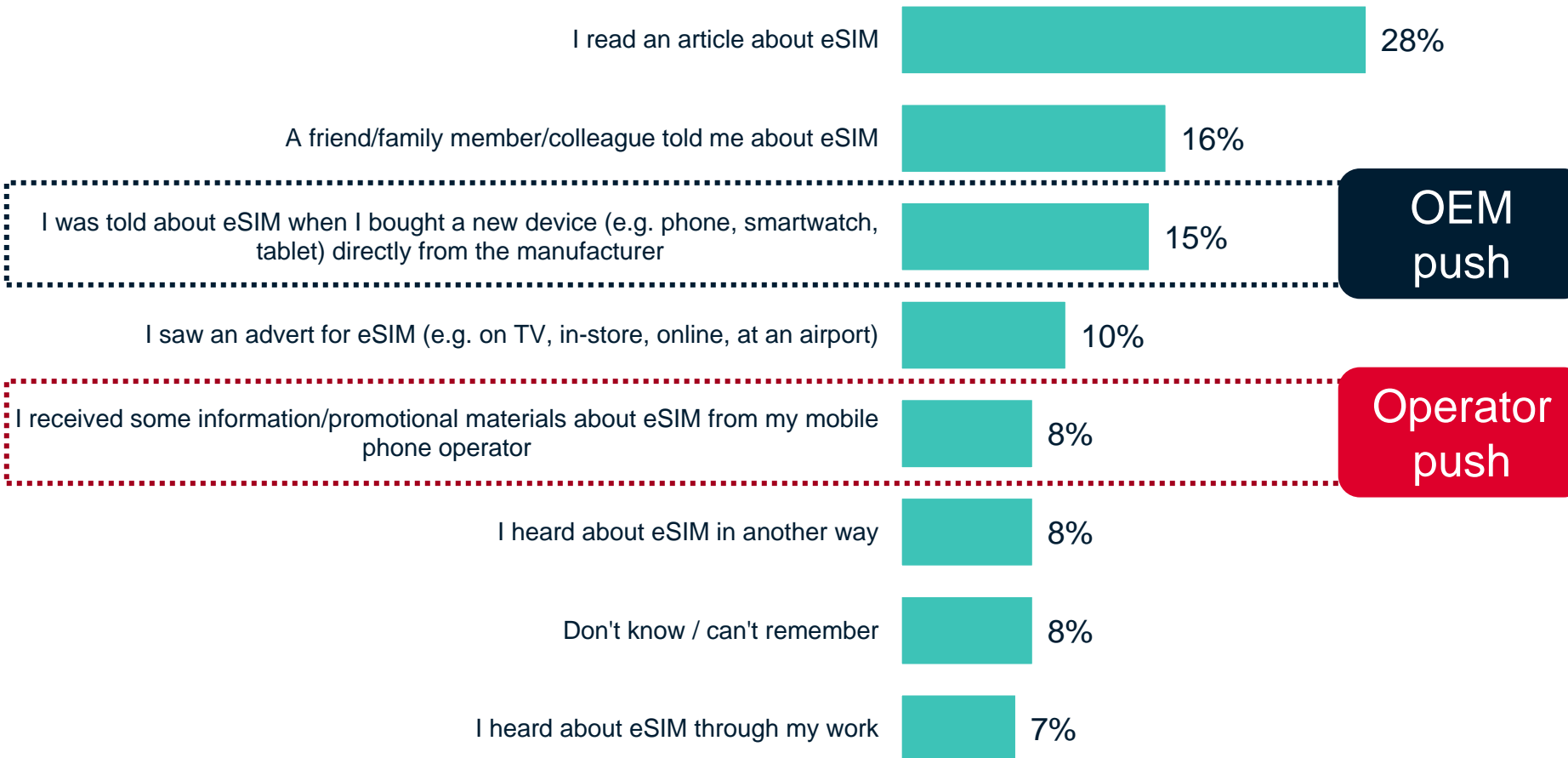
- Less than 30% of consumers are aware of eSIM (average)
- 5pp increase compared to 2020 (average)
- Significant variations by country...but no correlation with eSIM service availability
- **23% of those aware of eSIM don't know whether their smartphone has eSIM functionality**

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
- BUT...OEMs talk more than operators, especially in the USA, Japan and South Korea

eSIM in IoT is eSIM for digital transformation

But what do enterprises think of eSIM?

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

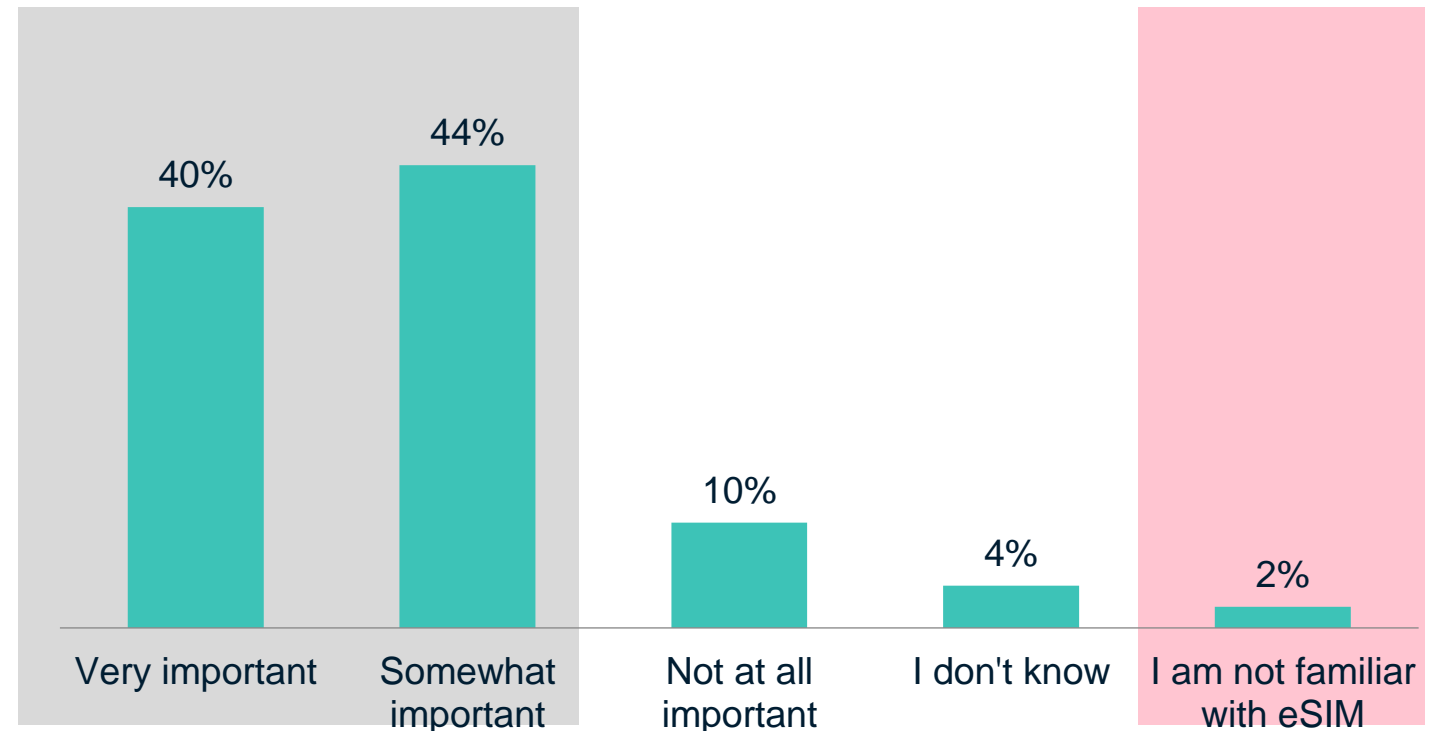
37%



Standalone initiative

Importance of eSIM in future IoT deployments

Enterprises speak; % of respondents

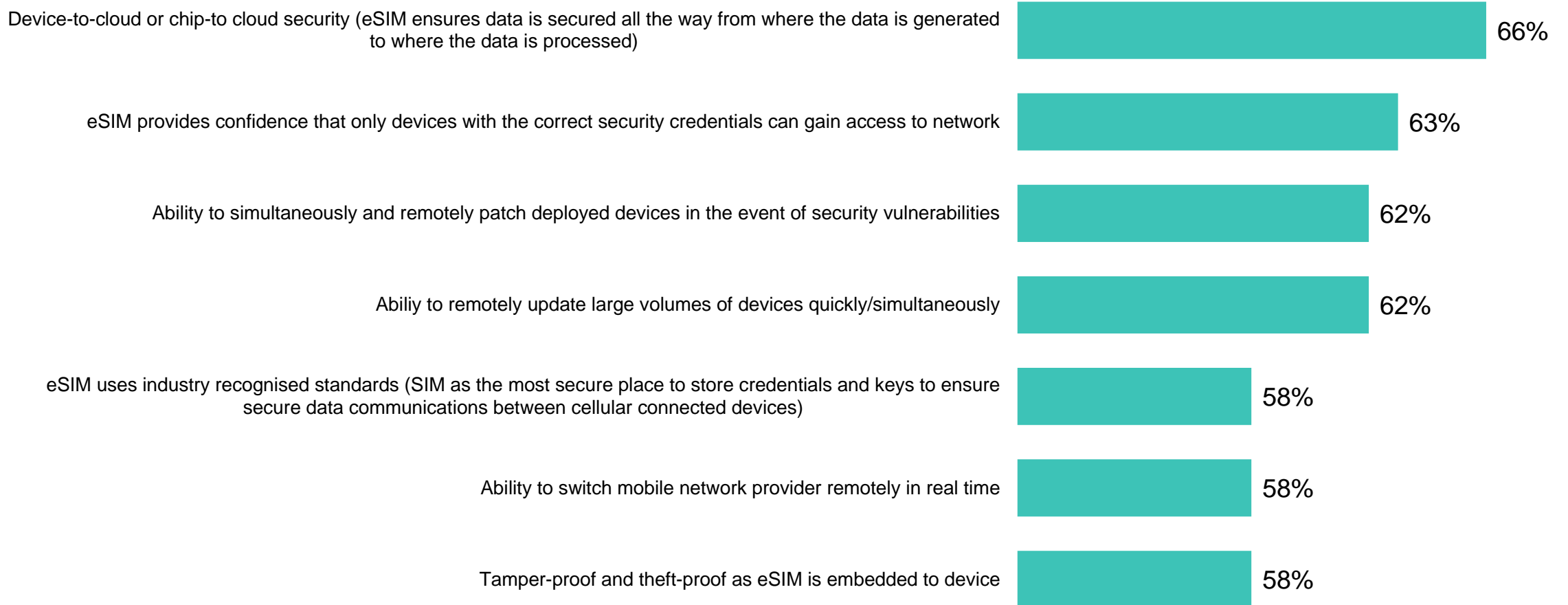


Why eSIM?

Enterprises see best-in-class security & scalability as the top eSIM benefits

Importance of eSIM benefits to the success of enterprise IoT deployments

Enterprises speak; % of respondents



What's next

New GSMA Intelligence report on its way

All the eSIM market intelligence and insights

New GSMA
Intelligence
report on
**eSIM in the
Consumer
Market**
(early July 2022)

Commercialisation of eSIM devices

Commercialisation of eSIM services






Further granularity on consumer awareness and behaviour

eSIM consumer adoption and forecast to 2030

What could accelerate eSIM adoption

Vendor
Survey

About GSMA Intelligence

<p>GSMA[™] Intelligence</p>  <p>Serves 800 organisations</p>	 <p>40,000 users worldwide</p>			
<p>Data</p>	 <p>1,400 Mobile operators</p>	 <p>80 Operators groups</p>	 <p>5,000 Networks</p>	 <p>30M Data points updated daily</p>
<p>Research</p>	 <p>130+ Reports annually</p>	 <p>1M Report downloads in 2019</p>	 <p>100+ Global, Regional & Topical Research, Deep Dives & Analysis</p>	
 <p>Pinpoint accuracy</p> <p>Five-year forecast consistently accurate within +/- 2.5% of reported data, updated quarterly</p>	 <p>50+ Analysts & industry experts</p> <p>Supporting the business strategy of our subscribers and the wider ecosystem</p>			

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THANK YOU!

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