Mobile devices: Trends shaping the device ecosystem in the 5G & IoT era
Future of mobile devices
Trends shaping the device ecosystem in the 5G & IoT era

Proliferation of connected devices
- A growing and diverse range of devices
- For consumer and enterprise use cases
- Spurring adoption of digital services and content

New device technologies and requirements
- 5G (SA and NSA)
- eSIM and iSIM
- AI capabilities
- VoLTE
- Satellite
- Security
- Identity

Changing customer behaviour
- Smartphone as a central platform
- Shift to digital and convergence of digital & real worlds
- Always connected
- Multi-device access
- Multi-subscription
- Bundling

Device identification and verification is more important than ever before
Global mobile connections
Billion, excluding IoT

Mobile connections growth never stops
5G is now a global trend. 1.5 billion 5G connections by the end of 2023

- 17% growth: 1.4 billion new mobile connections through to 2030 – this means new devices (on top of replacement)
- All eyes on 5G: more than 200 operators have launched 5G commercial services across more than 80 countries
- 5G road to mainstream: in the 5G pioneer markets 5G adoption will surpass 4G adoption in 2023-2024. Globally in 2029

Source: GSMA Intelligence
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
Importance of features when choosing the next smartphone
Percentage of respondents

- **Battery life**: 69% Very important, 23% Somewhat important
- **Durability**: 61% Very important, 30% Somewhat important
- **Security**: 64% Very important, 30% Somewhat important
- **Cost**: 55% Very important, 32% Somewhat important
- **Camera quality**: 49% Very important, 15% Somewhat important
- **Brand reputation**: 36% Very important, 36% Somewhat important
- **Visual appeal**: 33% Very important, 48% Somewhat important
- **Ability to connect to 5G**: 37% Very important, 30% Somewhat important
- **Larger screen size**: 28% Very important, 37% Somewhat important
- **eSIM compatibility**: 24% Very important, 31% Somewhat important
- **Foldable screen design**: 13% Very important, 17% Somewhat important

- **Core features driving choices**: consumers are still focusing on the fundamentals such as battery life, durability and camera quality.

- **Security ranks high – for all age groups**: growing importance of privacy, security and data protection as devices are used for the sharing of personal or sensitive data (e.g. health, financial information) or for connecting on social media, or for access to digital services.

*Base: Smartphone users who intend to replace their smartphone. Aggregate figures for the 10 countries analysed (Brazil, China, France, Germany, India, Italy, Japan, South Korea, UK, US). Source: GSMA Intelligence Consumers in Focus Survey*
Value for consumers shifts from hardware to services
That makes device identification and verification even more important

Digital services on smartphones: frequency of consumption and interest by age group

- Smartphones as a central platform: for other devices and for digital services
- 5G raises the bar: 5G brings higher consumer interest in digital services and bundling
- Segmentation is key: different lifestyles lead to different priorities for each age group

Source: GSMA Intelligence Consumers in Focus Survey
Looking for more insights? Check out our Reports

Smartphones and beyond: device innovation continues but incremental value lies in digital services

eSIM: market progress, consumer behaviour and adoption to 2030

IoT market update: assessing disruption and opportunities, forecasting connections to 2030
About GSMA Intelligence

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30+ analysts & industry experts

44K+ users worldwide

170 data metrics modelled and forecasted up to 2030

150+ reports published annually

50m data points updated daily

6K+ operator networks tracked

2k+ news items curated on our platform, updated quarterly
2023 Research Themes

- **Operator growth strategies in the digital era**
  - Together with connectivity and beyond connectivity

- **5G acceleration in the consumer market and for FWA**
  - Monetisation routes
  - Scaling adoption to 1.5 billion users

- **The next wave of telco network transformation**
  - Strategy and technology priorities
  - Balancing investments and returns

- **The rise of digital industries and the B2B opportunity**
  - The role of enabling technologies
  - The challenge of scaling deployments

- **The changing shape of digital entertainment**
  - Gaming is the new video
  - Immersive is the new end game

- **A new value story for devices**
  - Hardware innovation and digital services in support of incremental value

- **The emerging metaverse in practice**
  - From hype to reality
  - Preparing for the next big thing

- **Spectrum for growth and impact**
  - Optimising the use of spectrum to deliver its full potential

- **The unique value of mobile for socioeconomic development**
  - Reducing the internet usage gap
  - Driving social and economic impact

- **The sustainability imperative in full force**
  - Advancing network and device sustainability
  - The rise of the circular economy

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THANK YOU!

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