

## The value of device identification and verification

# Mobile devices: Trends shaping the device ecosystem in the 5G & IoT era

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# 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**

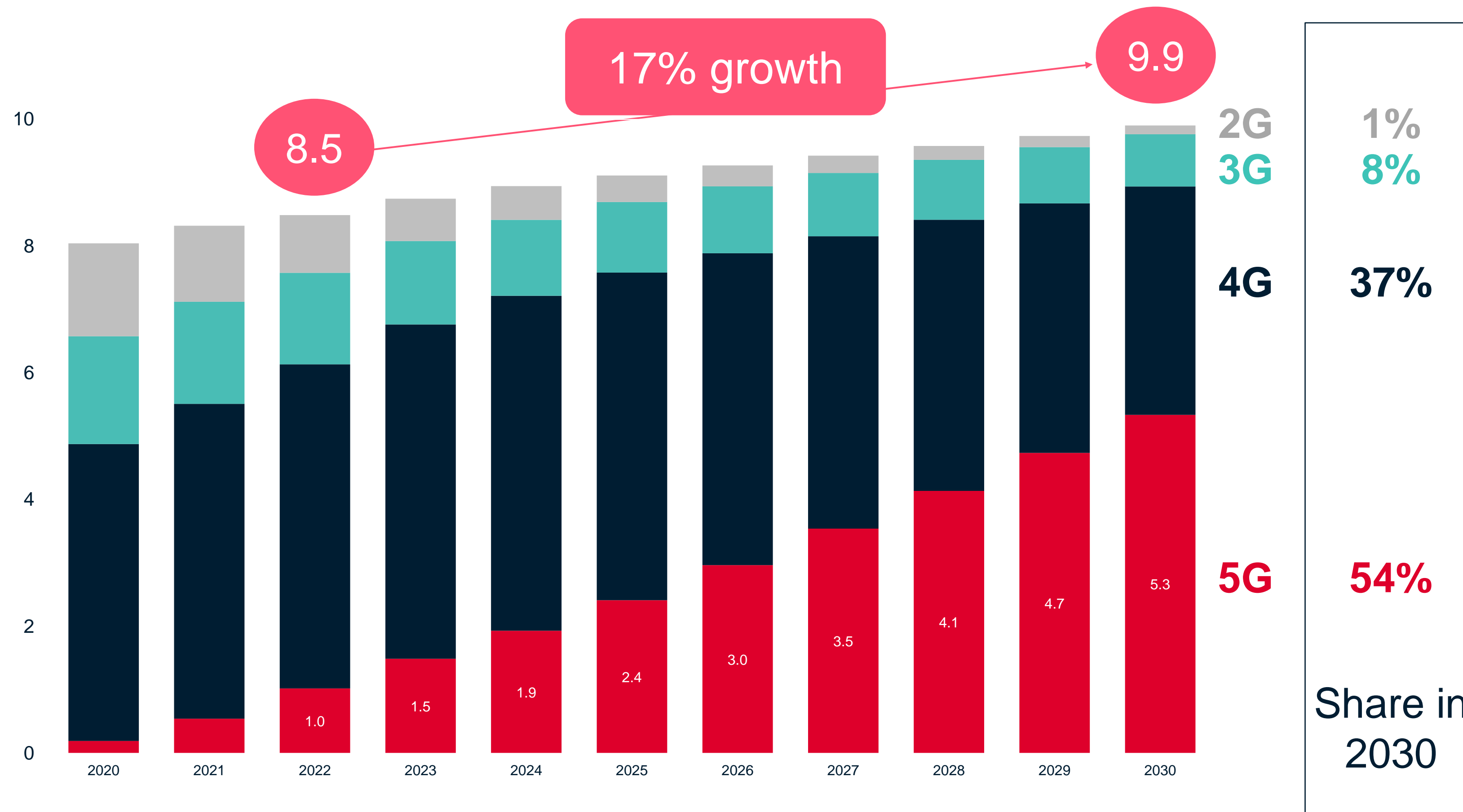


# Mobile connections growth never stops

*5G is now a global trend. 1.5 billion 5G connections by the end of 2023*

## Global mobile connections

Billion, excluding IoT



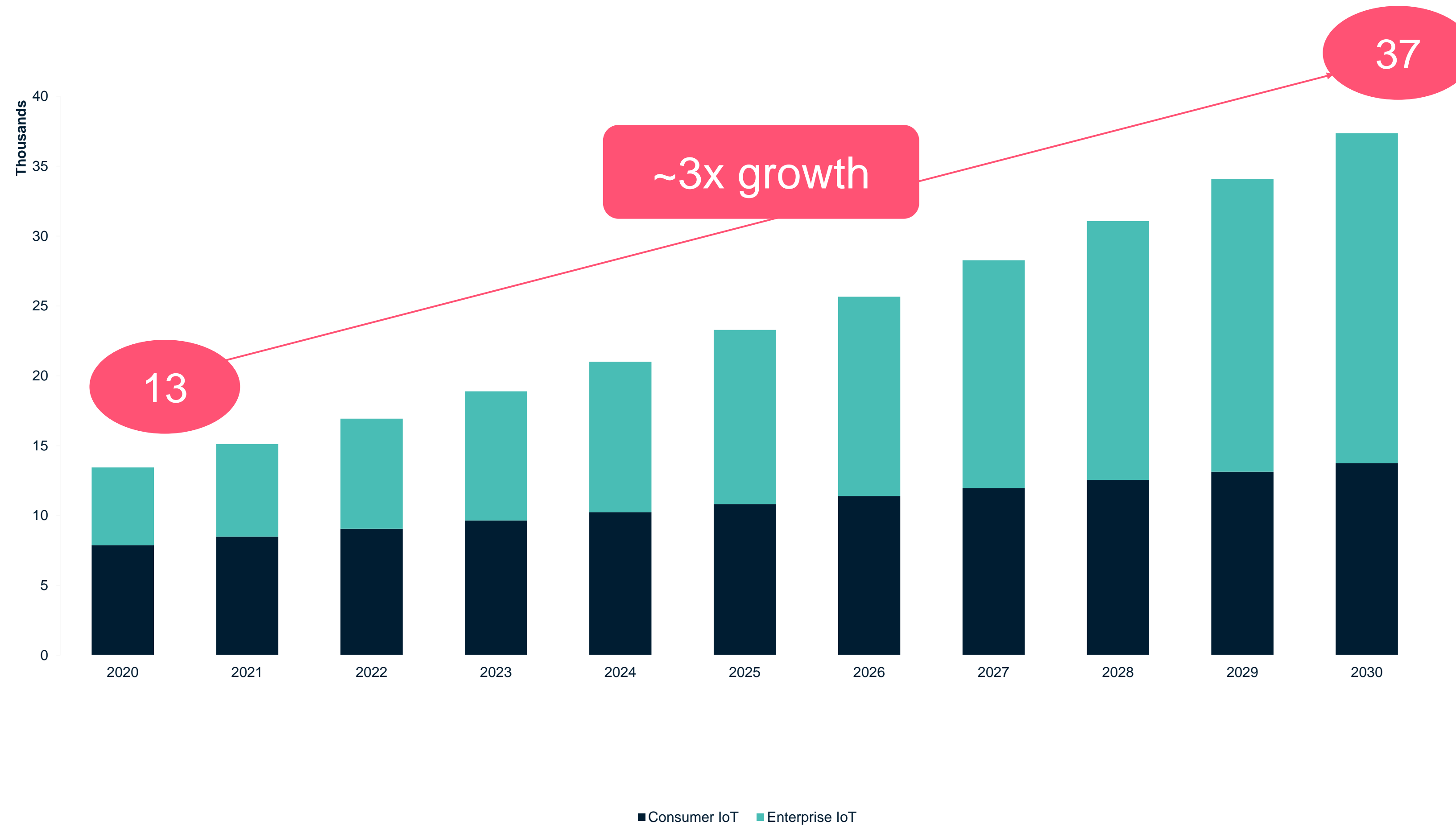
- **17% growth:** 1.4 billion new mobile connections through to 2030 – this means new devices (on top of replacement)
- **All eyes on 5G:** more than 200 operators have launched 5G commercial services across more than 80 countries
- **5G road to mainstream:** in the 5G pioneer markets 5G adoption will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

# IoT market: explosion of connections and devices

*~3x growth through to 2030*

## Global IoT connections

Billion, globally



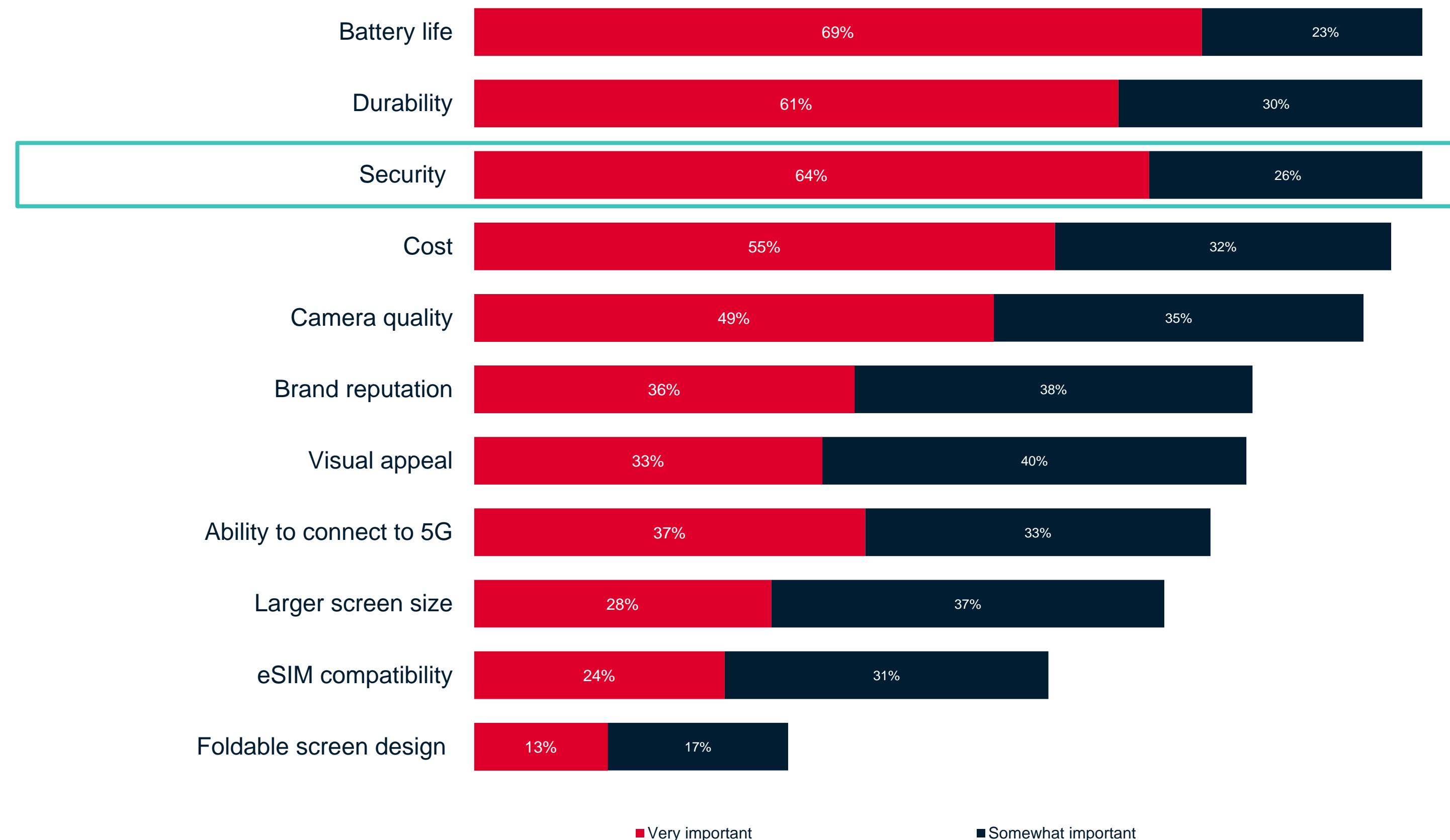
- **Enterprise driving IoT growth:** ~70% of IoT connections growth will come from enterprise use cases in 2022
- **Consumer trends:** smart home drives growth. Smartwatches overtaking fitness trackers
- **Cellular on the rise:** more than 5 billion licensed cellular IoT connections in 2030

# Smartphone purchasing criteria

## *Security in the top 3*

### Importance of features when choosing the next smartphone

Percentage of respondents



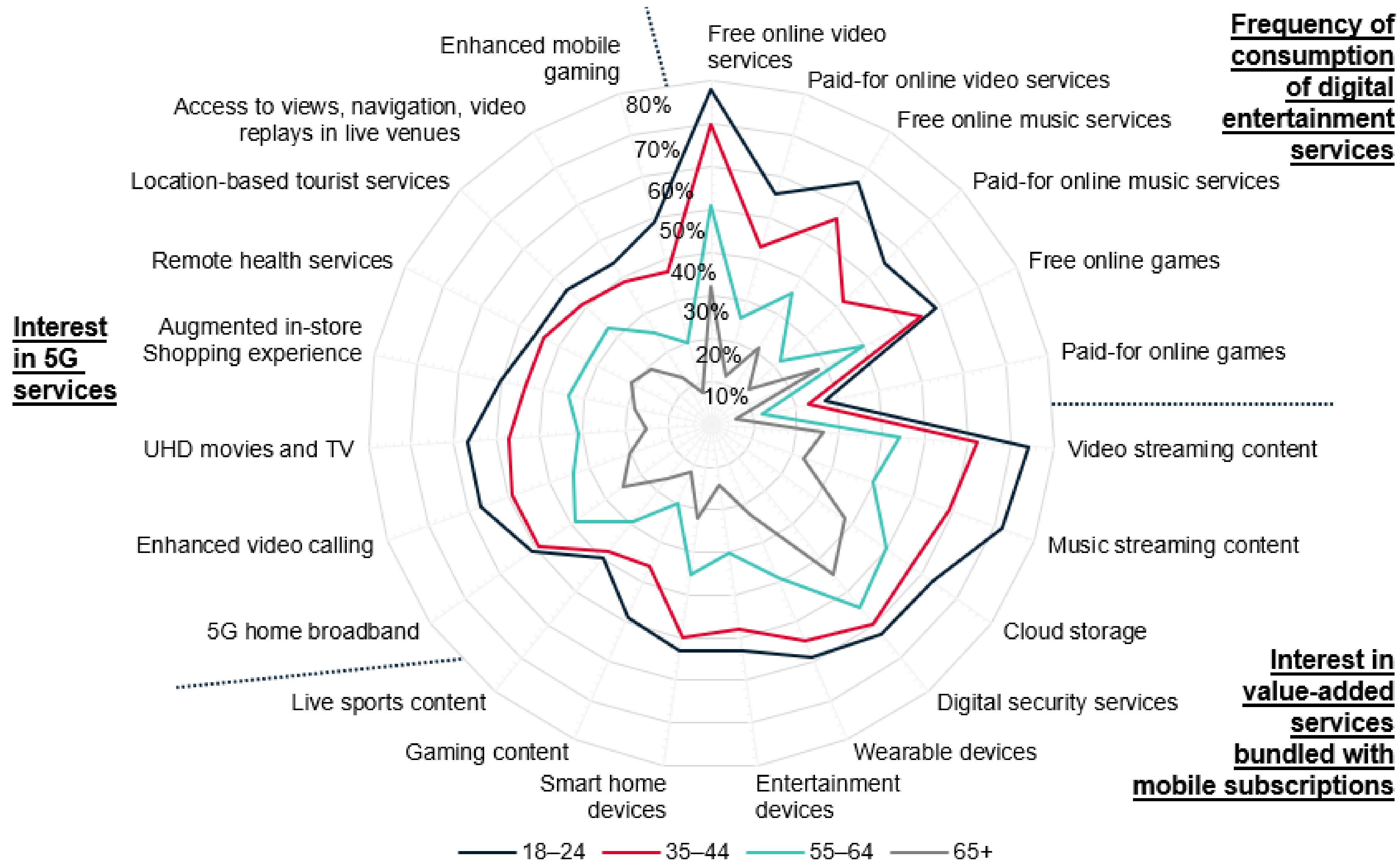
Base: Smartphone users who intend to replace their smartphone. Aggregate figures for the 10 countries analysed (Brazil, China, France, Germany, India, Italy, Japan, South Korea, UK, US).

- **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

# 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

# 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**





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**30+**

analysts &  
industry experts



**350**

data metrics  
tracked



**44K+**

users  
worldwide



**170**

data metrics modelled  
and forecasted up to  
2030



**150+**

reports published  
annually



**2k+**

news items curated  
on our platform,  
updated quarterly



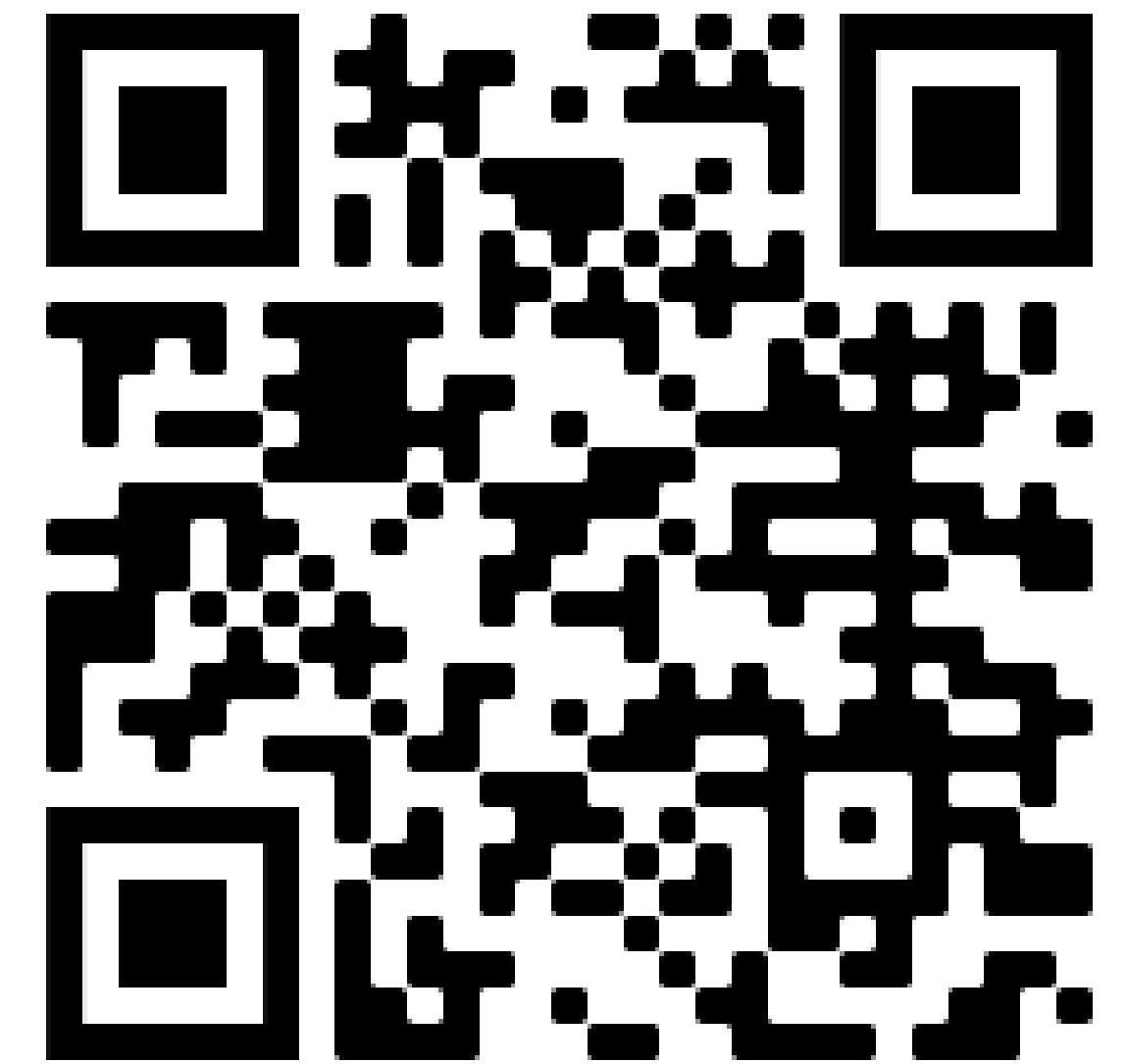
**50m**

data points  
updated daily



**6K+**

operator  
networks  
tracked





# 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





# THANK YOU!

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