GSMA Intelligence

eSIM Summit

eSIM Everywhere, eSIM Without Borders

eSIM: the time is right to push adoption

DATE

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Backed by the GSMA, GSMA Intelligence delivers trusted data, forecasts and research through a 360° platform supporting strategic decisions across the global mobile industry.

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AI	eSIM and IoT	Digital economy
Emerging technologies	Consumer devices and services	Spectrum
Security	Digital home	Sustainability

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Consumer eSIM: two key milestones reached in late 2025; both are important catalysts for consumer adoption of eSIM

September 2025

Apple launched eSIM-only smartphones worldwide (the new iPhone Air)

And expanded the list of eSIM-only countries to 12 markets (mostly in Northern America and the Middle East)

October 2025

China's three leading mobile operators launched commercial trials for eSIM smartphone services, after receiving regulatory approval

Ranking of factors that could accelerate eSIM adoption in the smartphone market

1. MNOs and MVNOs doing more to promote eSIM to their customers
2. OEMs pushing eSIM more, including eSIM-only phones
3. A significant acceleration in travel eSIM adoption
4. China launching commercial eSIM service for smartphones
5. More MNOs launching eSIM consumer propositions (including digital brands) + new eSIM use cases
6. Enhanced user experience for eSIM activation/onboarding

Source: eSIM vendor survey

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MNOs: 3 in 4 have launched eSIM domestic service for smartphones, but commercial push is still work in progress

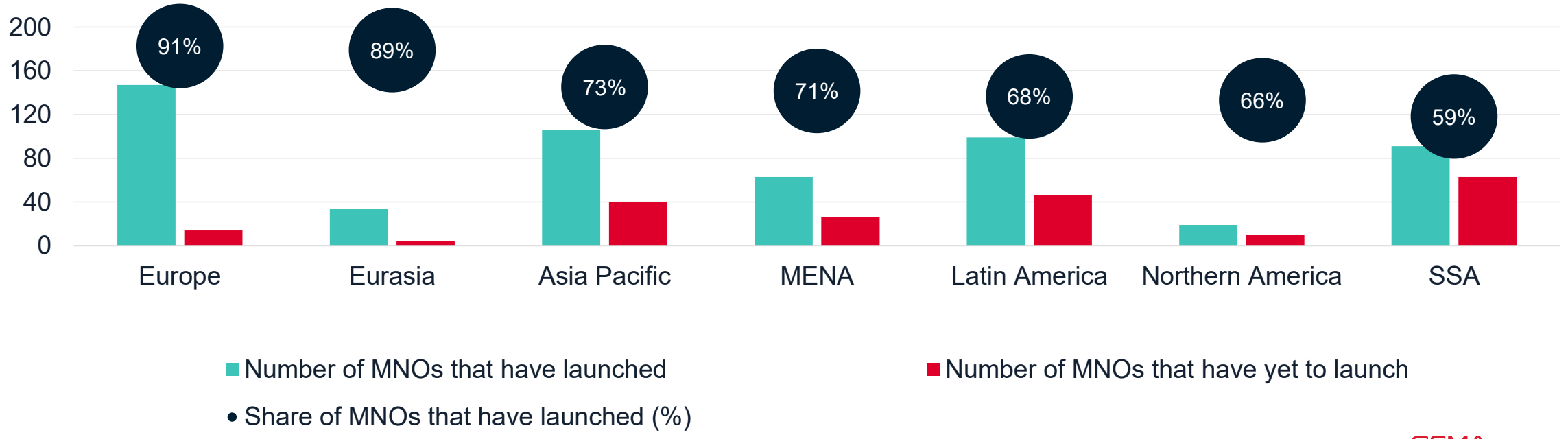
MNO eSIM commercialisation

73% 73% of MNOs have launched the service

MNO eSIM commercial push

8% Only 8% of eSIM-aware consumers have discovered eSIM via MNOs

eSIM domestic service for smartphone: launches (December 2025)



Source: GSMA Intelligence

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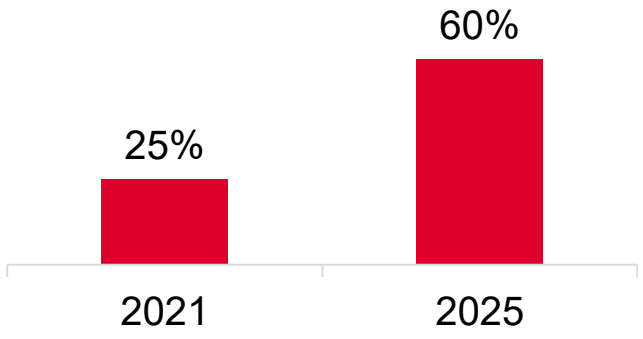
Consumer behaviour for eSIM: awareness and interest on the rise, but barriers still exist

Consumer awareness of eSIM has more than doubled in the last few years



Travel eSIM an important driver: 71% awareness of eSIM among travellers

Consumer interest in using eSIM is on the rise

54%

Travel eSIM an important driver: 70% interest in eSIM among travellers

Barriers to consumer interest in eSIM still exist

I'm happy with the traditional/removable SIM	29%
I don't see the benefits of using eSIM	12%
I don't understand how eSIM works	11%

Customer education much needed

Average figures across 11 countries: Australia, France, Germany, Italy, Japan, Poland, South Korea, Spain, UAE, UK, US.

Source: GSMA Intelligence Consumers in Focus Research – Global Consumer Survey August 2025

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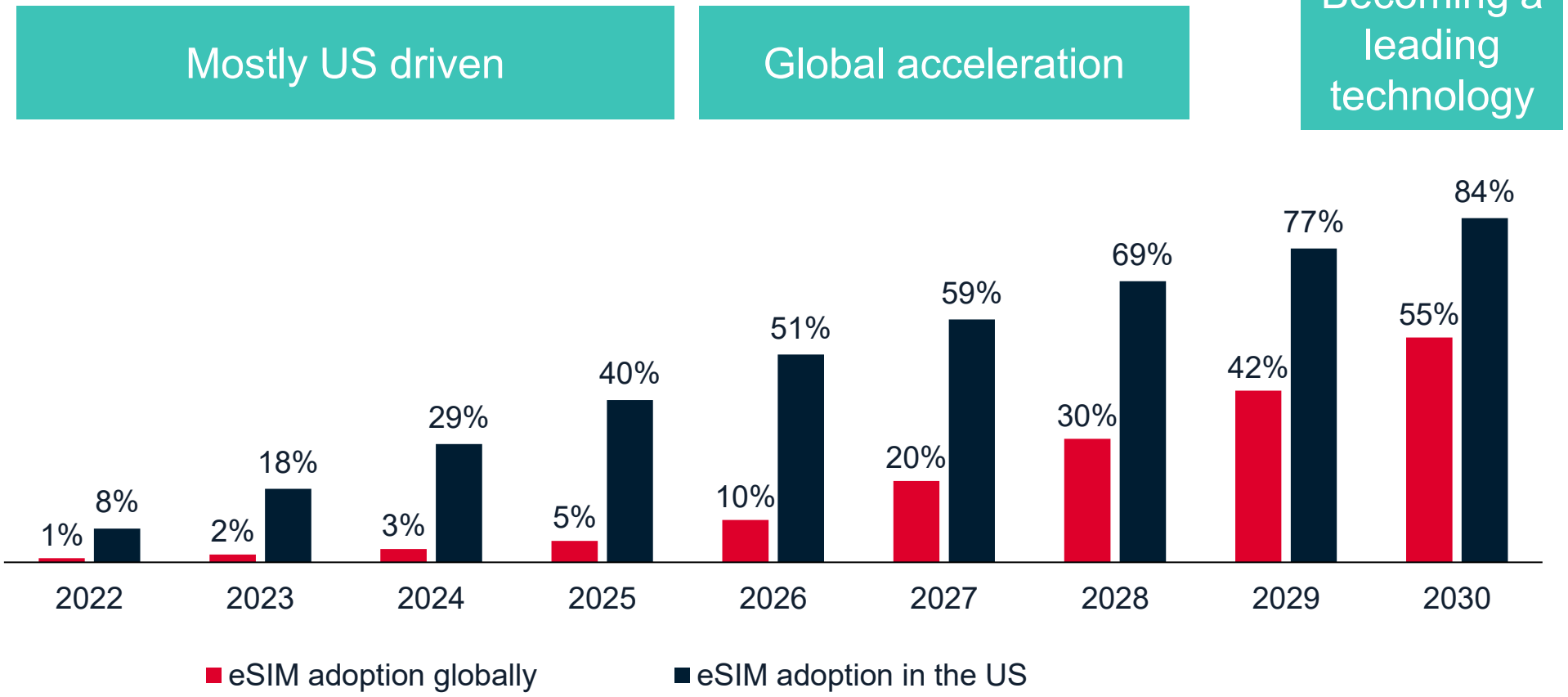
Consumer adoption of eSIM in the smartphone market: the US leads, but an acceleration globally is on its way

eSIM adoption in the smartphone market

eSIM connections as a percentage of total smartphone connections (installed base)



Key milestones globally:

- **2026:** the market will double – 10% of smartphone connections will use eSIM
- **2030**: eSIM will surpass the traditional removable eSIM

Source: GSMA Intelligence

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Travel eSIM: a clear and successful use case bringing disruption to telco roaming

1 Competition is heating up

- **Operators**: either through a global travel eSIM offering (Vodafone, Orange, Telefónica and others) or through enhanced traditional roaming offers
- **Non-telco companies**
  - **Global providers of travel eSIM services** (Airalo and Holafly the top two) – **roaming is their core business**
  - **Vertical companies** (especially fintech, including Revolut, but also airlines) – **roaming is not their core business, it's a customer loyalty play**

Investors see potential 2

- Since 2022, eSIM has captured deals worth almost $700 million
- 2025 the strongest year ever (travel eSIM and IoT driving deals)

Consumers show interest/adoption 3

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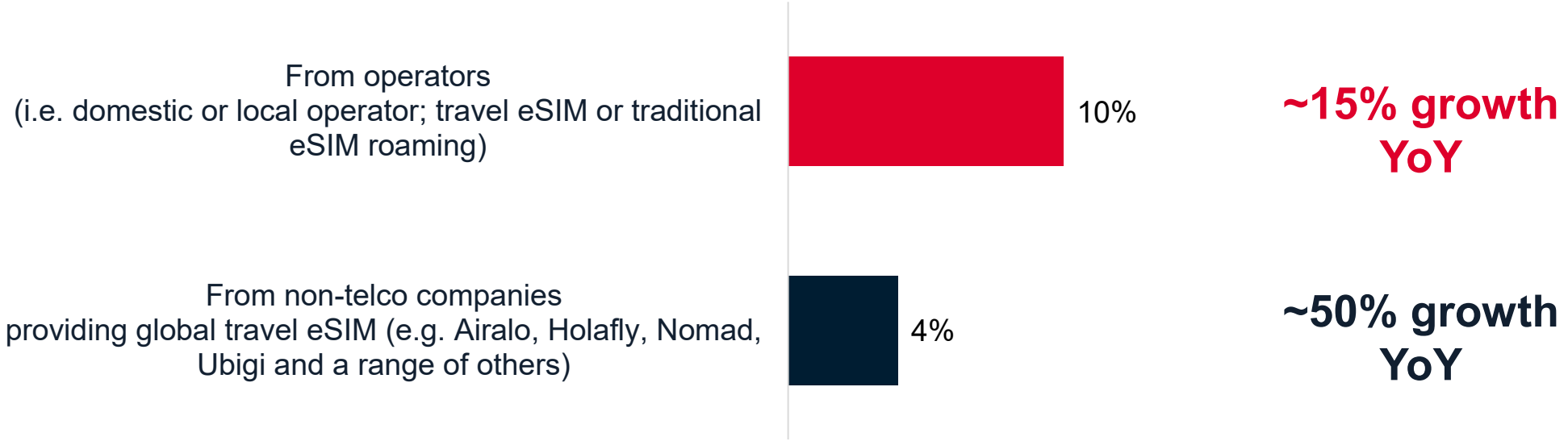
Travel eSIM: only a smaller share of travellers use eSIM from non-telcos, but growth is outpacing telco eSIM roaming

1) How many travellers use eSIM service?

12%

2) Which eSIM service do consumers use while travelling abroad?



Average figures across 11 countries: Australia, France, Germany, Italy, Japan, Poland, South Korea, Spain, UAE, UK, US.

Source: GSMA Intelligence Consumers in Focus Research – Global Consumer Survey August 2025

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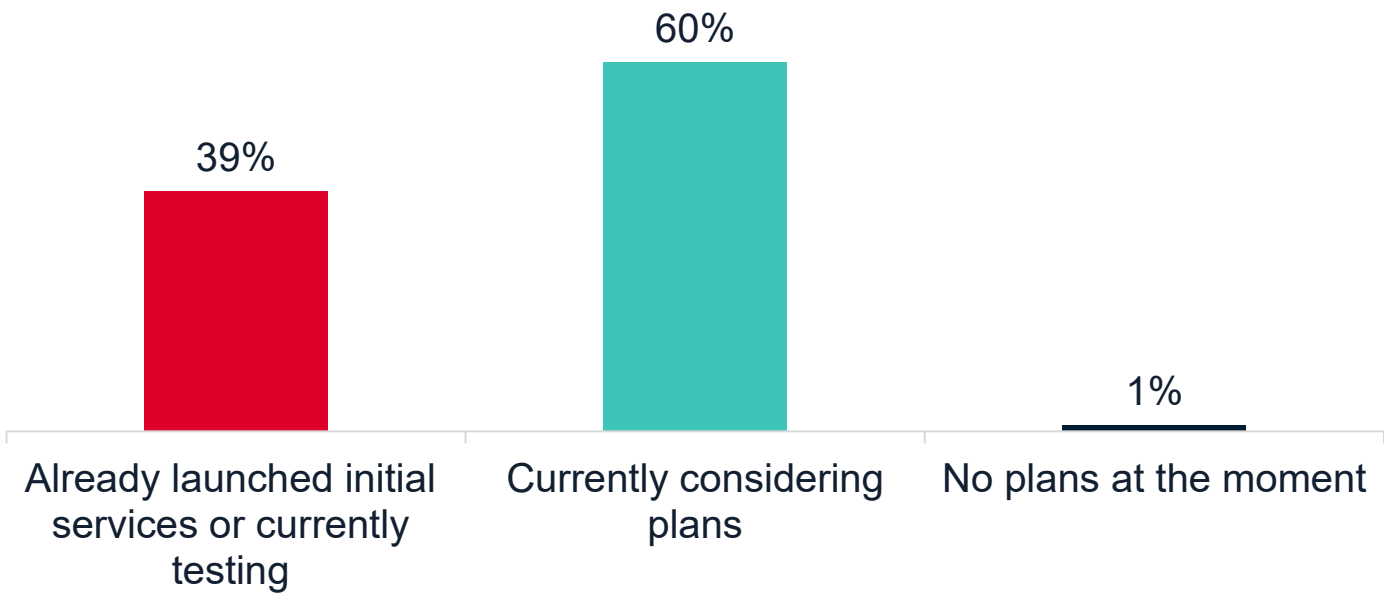
eSIM for IoT and vertical sectors: operators are making inroads in SGP.32 showing eagerness to leverage it

Operators' current approach to commercialising IoT services that use the new GSMA eSIM SGP.32 specifications

Percentage of respondents



- **Operators are keen.** Only a few operators have launched initial IoT services that leverage SGP.32, but this grows to around 40% when including testing – a promising sign for future deployments.
- **Bigger operators lead the way.** 56% have either launched or are currently testing IoT services that leverage SGP.32

Source: GSMA Intelligence Operator Survey (December 2025)

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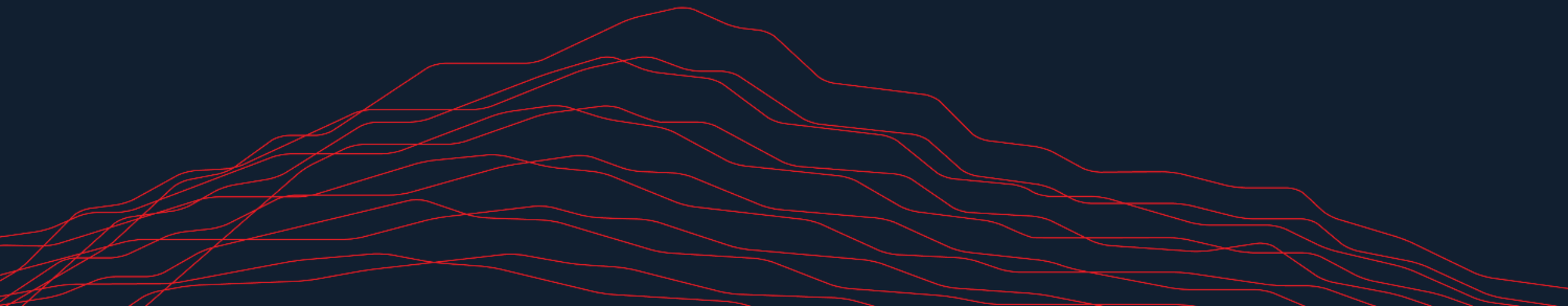
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