

## Insight Highlights

# eSIM: consumer trends and enterprise demands, Q3 2024

DATE

October 2024

# GSMA

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The GSMA is a global organisation unifying the mobile ecosystem to discover, develop and deliver innovation foundational to positive business environments and societal change. Our vision is to unlock the full power of connectivity so that people, industry, and society thrive. Representing mobile operators and organisations across the mobile ecosystem and adjacent industries, the GSMA delivers for its members across three broad pillars: Connectivity for Good, Industry Services and Solutions, and Outreach. This activity includes advancing policy, tackling today's biggest societal challenges, underpinning the technology and interoperability that make mobile work, and providing the world's largest platform to convene the mobile ecosystem at the MWC and M360 series of events.

We invite you to find out more at [www.gsma.com](http://www.gsma.com)

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# GSMA Intelligence

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GSMA Intelligence is the definitive source of global mobile operator data, analysis and forecasts, and publisher of authoritative industry reports and research. Our data covers every operator group, network and MVNO in every country worldwide – from Afghanistan to Zimbabwe. It is the most accurate and complete set of industry metrics available, comprising tens of millions of individual data points, updated daily.

GSMA Intelligence is relied on by leading operators, vendors, regulators, financial institutions and third-party industry players, to support strategic decision-making and long-term investment planning. The data is used as an industry reference point and is frequently cited by the media and by the industry itself.

Our team of analysts and experts produce regular thought-leading research reports across a range of industry topics.

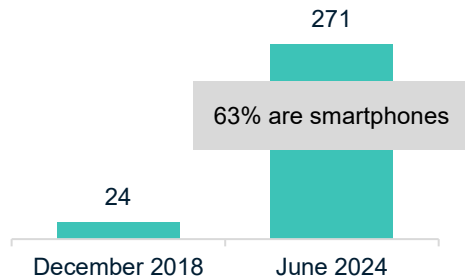
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# eSIM commercialisation in the consumer market: remarkable progress in the last five and a half years

## Number of consumer eSIM devices that have been launched

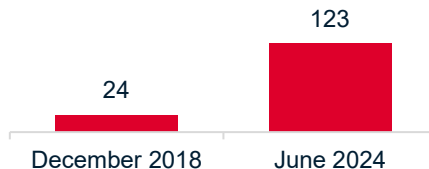
Sum of smartphones, tablets and smartwatches (cumulative)



- While eSIM is mainstream in flagship smartphones, there is limited availability of eSIM beyond flagships

## Number of countries that have launched eSIM service for smartphones

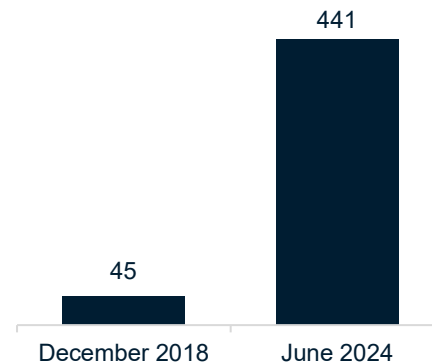
Excluding eSIM for international roaming



- China is still a notable exception
- Africa is catching up

## Number of operators that have launched eSIM service for smartphones

Sum of MNOs, MVNOs and global providers of international roaming services

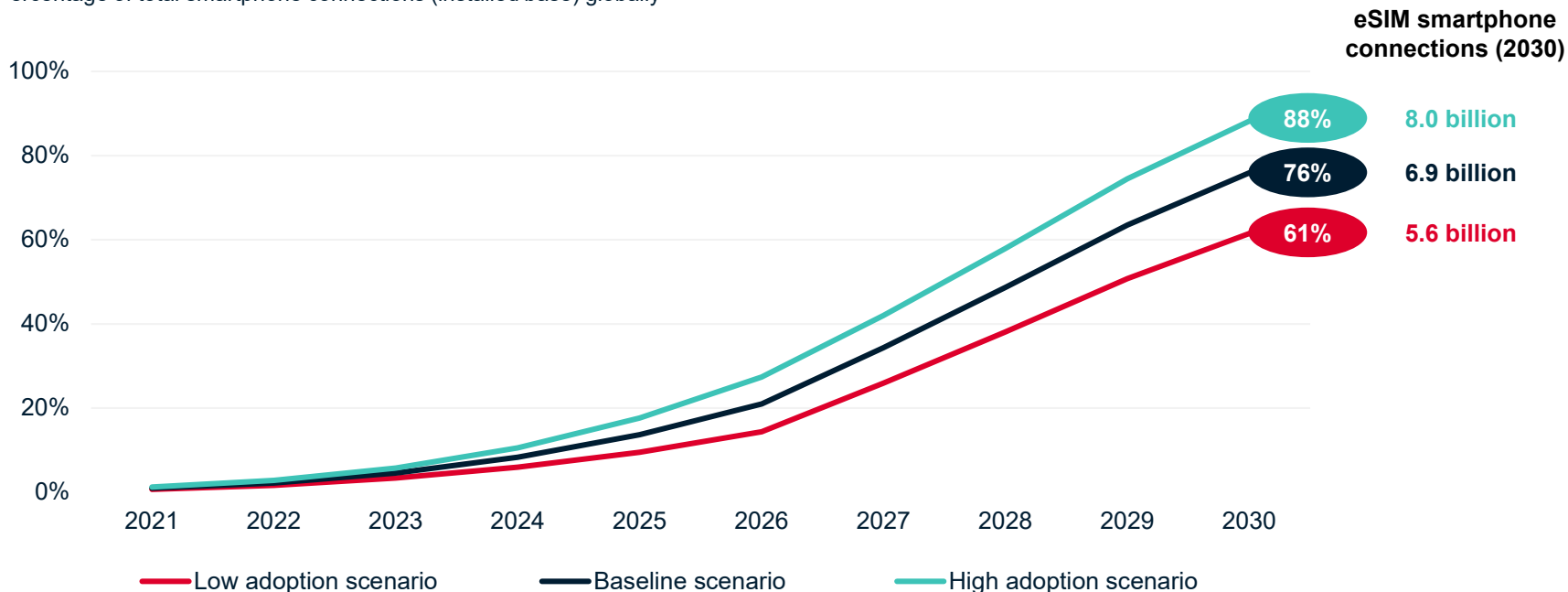


- The launch of eSIM-only iPhones in the US (in September 2022) has been a major catalyst
- MVNOs are driving eSIM for international roaming

# Outlook for eSIM adoption in the smartphone market: by 2028, half of smartphone connections will use eSIM

## eSIM adoption in smartphones to 2030

Percentage of total smartphone connections (installed base) globally



Source: GSMA Intelligence

# Consumer behaviour for eSIM: six numbers to note

**50%**

of consumers are aware of eSIM. This figure has doubled in the last three years.

**8%**

of eSIM-aware consumers have discovered the technology via operator channels (10% via OEM channels).

**11%**

of consumers who are not interested in using eSIM cited lack of understanding of how eSIM works as the reason for not being interested in using eSIM in smartphones

**18%**

of eSIM-aware consumers found out about the technology by reading an article, which continues to be the largest driver of awareness.

**54%**

of consumers are interested in using eSIM in smartphones. This rises to 63% among 5G users and 74% among owners of flagship smartphones.

**3%**

of eSIM-aware consumers have used an eSIM service provided by a global provider of international roaming services when travelling abroad.

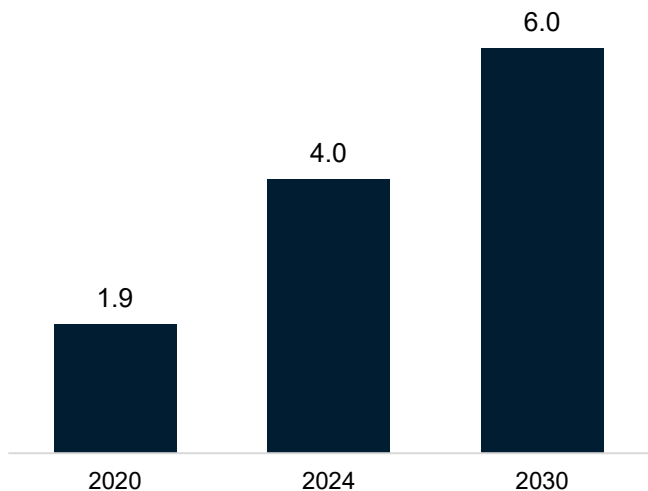
Note: Aggregate figures across 11 countries (Australia, France, Germany, Italy, Japan, Poland, South Korea, Spain, the UAE, the UK and the US)

Source: GSMA Intelligence Consumers in Focus: Global Consumer Survey August 2024

# eSIM in the enterprise IoT market: targeting a growing piece of a fast-growing IoT cellular market

## IoT cellular connections globally

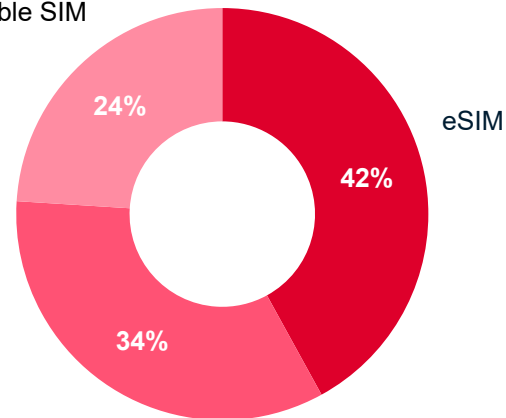
Number of connections across all SIM form factors (billion)



Source: GSMA Intelligence

## Market shares by SIM form factors globally, 2030

Traditional, removable SIM



Integrated SIM (iSIM)

Source: GSMA Intelligence Enterprise in Focus: Global Digital Transformation Survey 2024

# Access GSMA Intelligence content on eSIM

GSMA Intelligence regularly analyses the key trends and developments shaping the eSIM ecosystem across two main areas:

- **eSIM in the consumer market:** The content is part of the GSMA Intelligence Digital Consumer module, which provides exclusive data and research on the transformation of consumer technologies and evolution of consumer behaviour in the digital era. The module covers important areas, including eSIM, 5G, devices, gaming, extended reality (XR), consumer AI and the metaverse.
- **eSIM in the enterprise IoT market:** The content is part of the GSMA Intelligence IoT & Enterprise module, which provides exclusive data and research on the evolution of IoT markets and the wider digital transformation of enterprises. The module covers important areas, including IoT, eSIM, enterprise 5G, private networks, the digital transformation of vertical sectors, enterprise AI and telco revenue beyond connectivity.

## Data

- **eSIM in the consumer market**
  - Commercialisation of SIM consumer devices (smartphones, smartwatches and tablets): by brand and launch date
  - Tracker of operators that have launched commercial eSIM services (operators, countries and regions)
  - eSIM smartphone connections and penetration: historical data and forecast through to 2030
  - Consumer behaviour for eSIM (survey data and insights for 11 major developed countries)
- **eSIM in the enterprise IoT market**
  - IoT cellular connections: historical data and forecast through to 2030
  - Enterprise demand for eSIM-enabled solutions: vertical sectors and countries (survey data and insights)
  - Challenges faced by enterprises when deploying eSIM for IoT (survey data and insights)
  - Enterprise views on the benefits of eSIM (survey data and insights)
  - Operator views and expectations on eSIM vertical sectors demands, future adoption and eSIM benefits

## Research

- [Large-scale adoption of eSIM in the US has had no impact on consumer churn so far](#)
- [eSIM in the consumer market: tracking devices and services launches, forecasting adoption through to 2030](#)
- [Consumers in Focus: eSIM Consumer Behaviour Survey Dashboard 2024](#)
- [Scaling eSIM in IoT markets: new tech and market developments should help accelerate adoption](#)
- [Accelerating eSIM globally: state of the consumer market, user behaviour and adoption growth scenarios](#)
- [eSIM vendors in focus: exploring views and expectations on eSIM in smartphones](#)
- [AT&T: Streamlining IoT deployments through eSIM while surpassing 100 million IoT connected devices](#)

### How to gain access

The GSMA Intelligence Digital Consumer and IoT & Enterprise modules are two of the five available to customers. If you already subscribe to the modules, you can access a range of data and reports on eSIM.

If you don't have a subscription, or if you cannot access some of the content, please contact our account managers to learn more.

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