

GRÁFICOS, CIFRAS Y FRASES
DE LA QUINCENA VOL.113

Informe

Employment



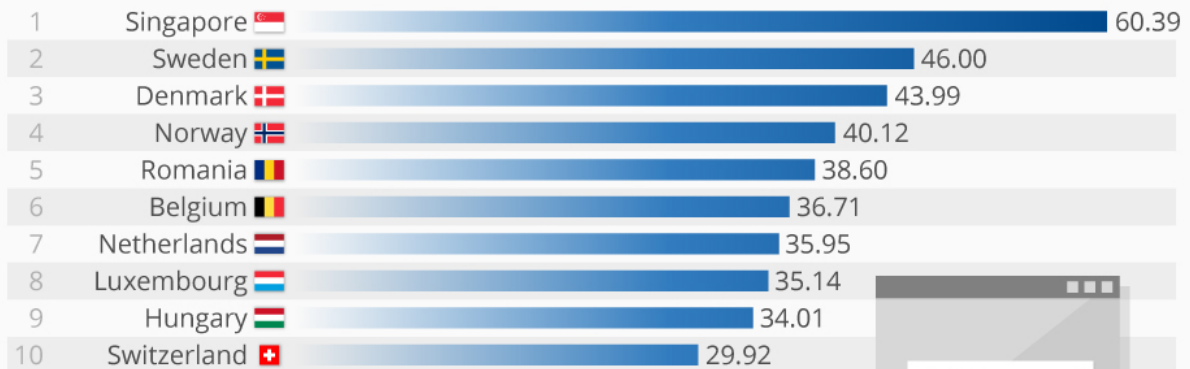
Employment supported
by the mobile ecosystem



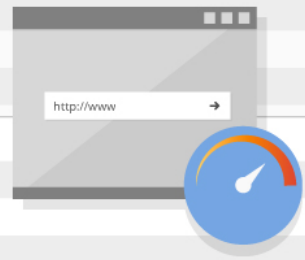
The Mobile Economy Europe 2018

The Countries with the Fastest Internet

Mean download speed in Megabits per second* (in Mbps)



Selected other countries

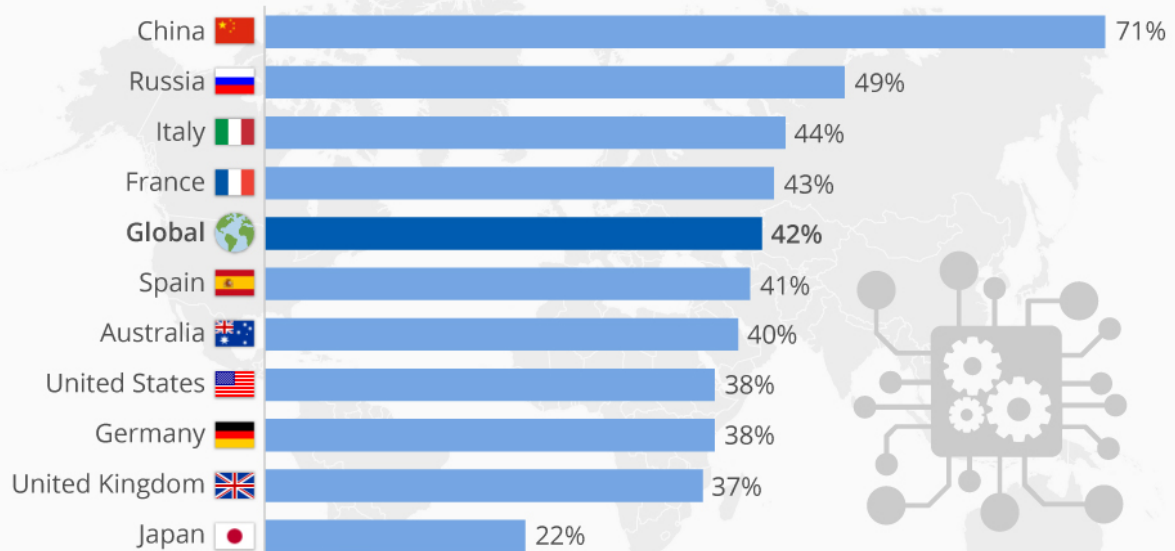


* Download speed test data collected by M-Lab from June 2017 to May 2018.

@StatistaCharts Source: cable.co.uk

Can Digital Technology Make the World a Better Place?

% agreeing that digital technology will help solve the world's most pressing challenges*



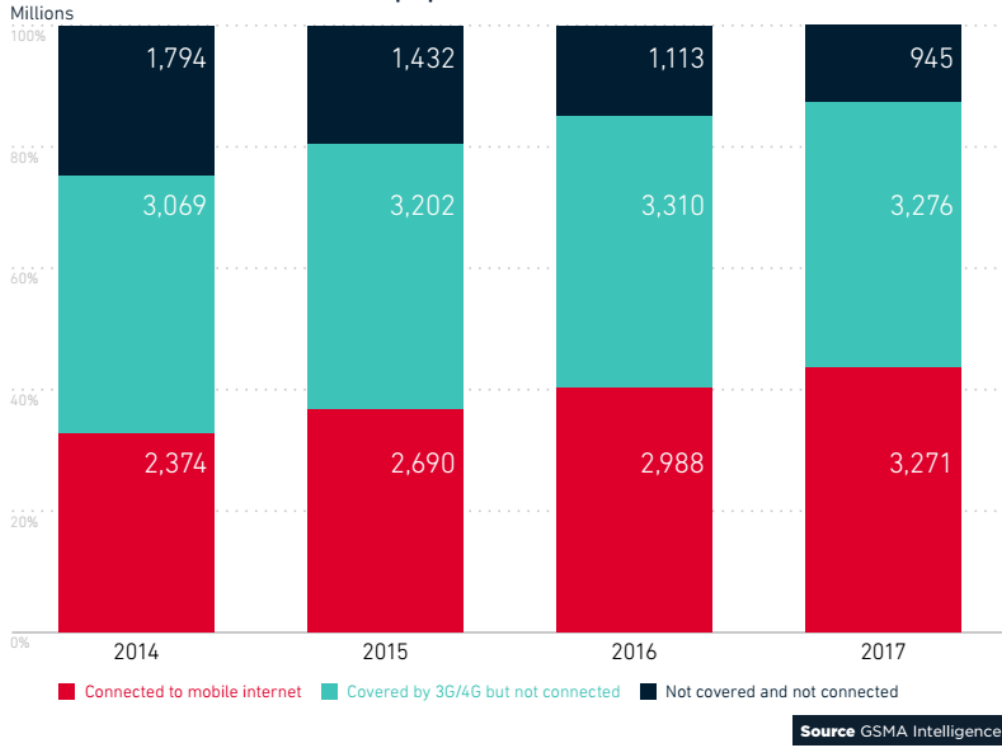
* e.g. poverty, health issues, environmental degradation

Based on a survey of 20,000 people from 10 countries conducted in the summer of 2017



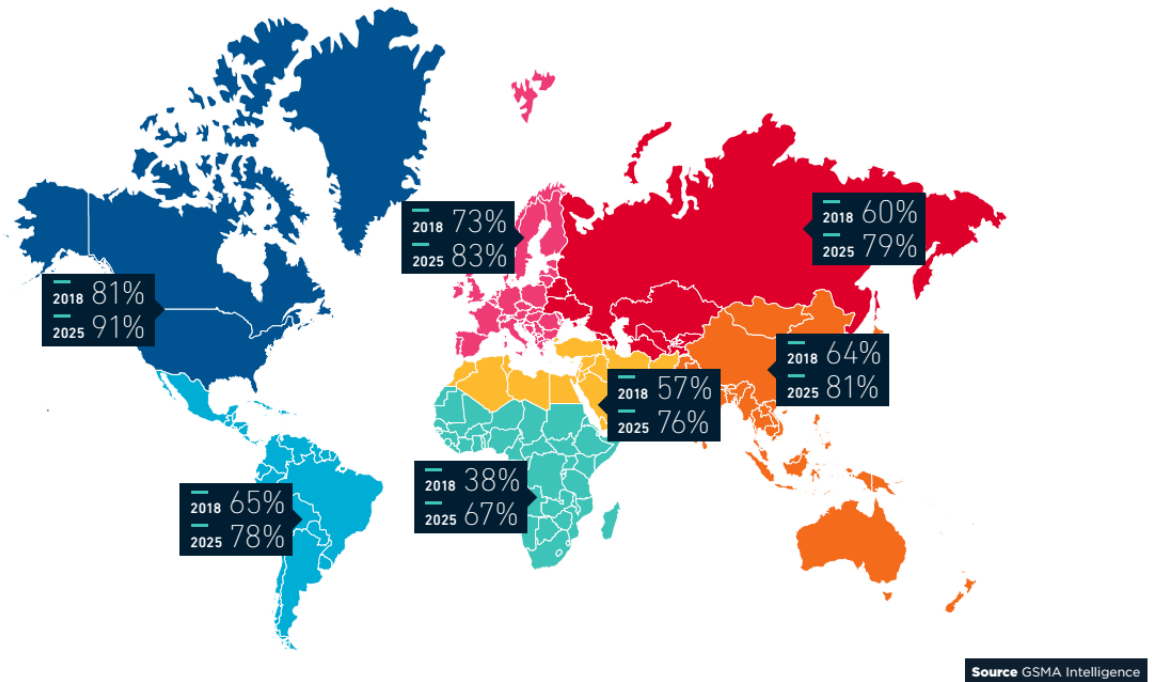
@StatistaCharts Source: Dentsu Aegis Network

Connected and unconnected population



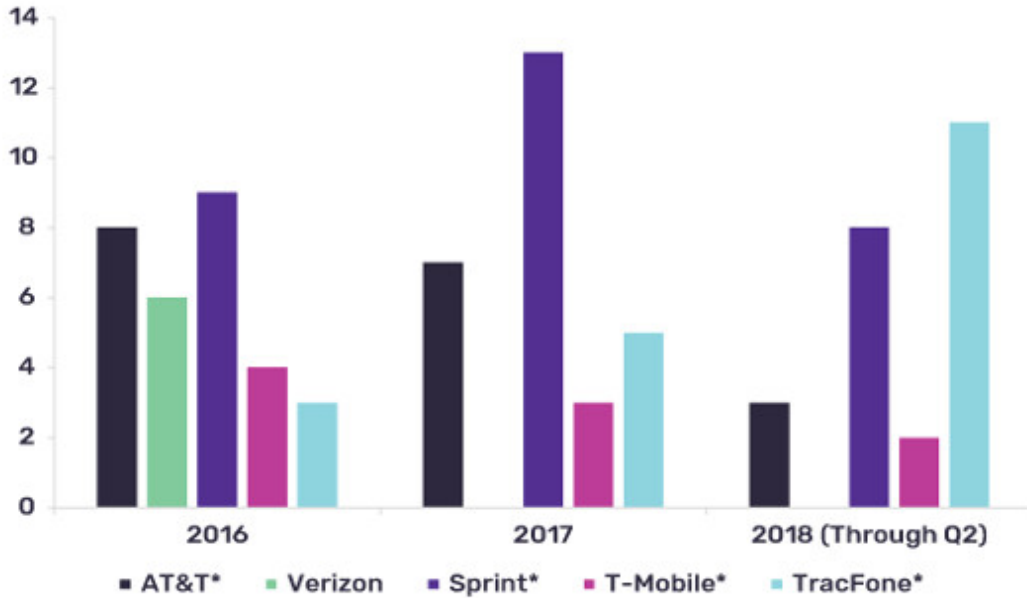
Global smartphone adoption will reach 80% by 2025

Smartphone connections as a percentage of total mobile connections



- ➡ *“INTERNET USED WEEKLY BY 89% OF UK ADULTS”, ONS.*
- ➡ *“BANGLADESH SE ACERCA A LOS 89 MILLONES DE SUSCRIPTORES DE INTERNET EN JULIO”, BTRC.*
- ➡ *“INTERNET GROWS TO 339.8 MLN DOMAIN NAME REGISTRATIONS IN Q2”, VERISIGN.*
- ➡ *“MÁS DE DOS TERCIOS DE LOS HOGARES DE EE. UU. TIENEN UN SERVICIO SVOD”, LEITCHMAN RESEARCH.*
- ➡ *“ONE THIRD OF GERMANS SAY ESPORTS ARE 'NORMAL' SPORTS”, BITKOM.*
- ➡ *“EN 2021, EL 20% DE TODAS LAS ACTIVIDADES EN LAS QUE UN INDIVIDUO SE INVOLUCRA DIARIAMENTE, IMPLICARÁN AL MENOS EL USO DE UNO DE LOS GIGANTES DIGITALES”, GARTNER.*
- ➡ *“UK ADVERTISED BROADBAND SPEEDS DROP UP TO 40% AFTER NEW RULES”, COMMITTEES OF ADVERTISING PRACTICE.*
- ➡ *“INTERNET NO ES UN SERVICIO, ES PARTE DEL ESTILO DE VIDA DE LOS ESPAÑOLES”, NIELSEN.*
- ➡ *“INTERNET GROWS TO 339.8 MLN DOMAIN NAME REGISTRATIONS IN Q2”, VERISIGN.*
- ➡ *“MÁS DE DOS TERCIOS DE LOS HOGARES DE EE. UU. TIENEN UN SERVICIO SVOD”, LEITCHMAN RESEARCH.*
- ➡ *“CHINA REACHES 802 MLN INTERNET USERS AT END OF JUNE”, XINHUANET.*
- ➡ *“CASI EL 80% DE LOS CANADIENSES COMPRA O USA PRODUCTOS DIGITALES EN LÍNEA”, CANADIAN STATISTICS BUREAU.*
- ➡ *“SOLO UNO DE CADA 10 LATINOAMERICANOS TIENE ACCESO A BANDA ANCHA FIJA”, LA NACIÓN.*
- ➡ *“US OTT SUBSCRIBERS UP 868,000 TO 6.7 MILLION IN Q2”, STRATEGY ANALYTICS.*
- ➡ *“SIX MILLION SWISS PEOPLE OVER 14 YEARS OLD ARE ONLINE”, NET METRIX BASE.*
- ➡ *“OVER 80 PERCENT OF AUSTRIANS USED MOBILE INTERNET IN Q1”, OWA.*
- ➡ *“WORLDWIDE OTT TV REVENUES TO HIT USD 129 BLN BY 2023”, DIGITAL TV RESEARCH.*
- ➡ *“AROUND 4.3 MILLION ITALIANS, EQUIVALENT TO 17.8 PERCENT OF THE POPULATION, HAVE NO ACCESS WHATSOEVER TO THE INTERNET”, CORRIERE DELLE COMUNICAZIONI.*
- ➡ *“VIETNAM PASSES 126 MILLION TELEPHONE SUBSCRIBERS MILESTONE”, GENERAL STATISTICS OFFICE OF VIET NAM.*
- ➡ *“INDIA ADDS NEARLY 10 MLN TELEPHONE SUBSCRIBERS IN AUGUST”, TRAI.*

Number of Prepaid Service Promotions by US Carrier 2016 - Q2 2018

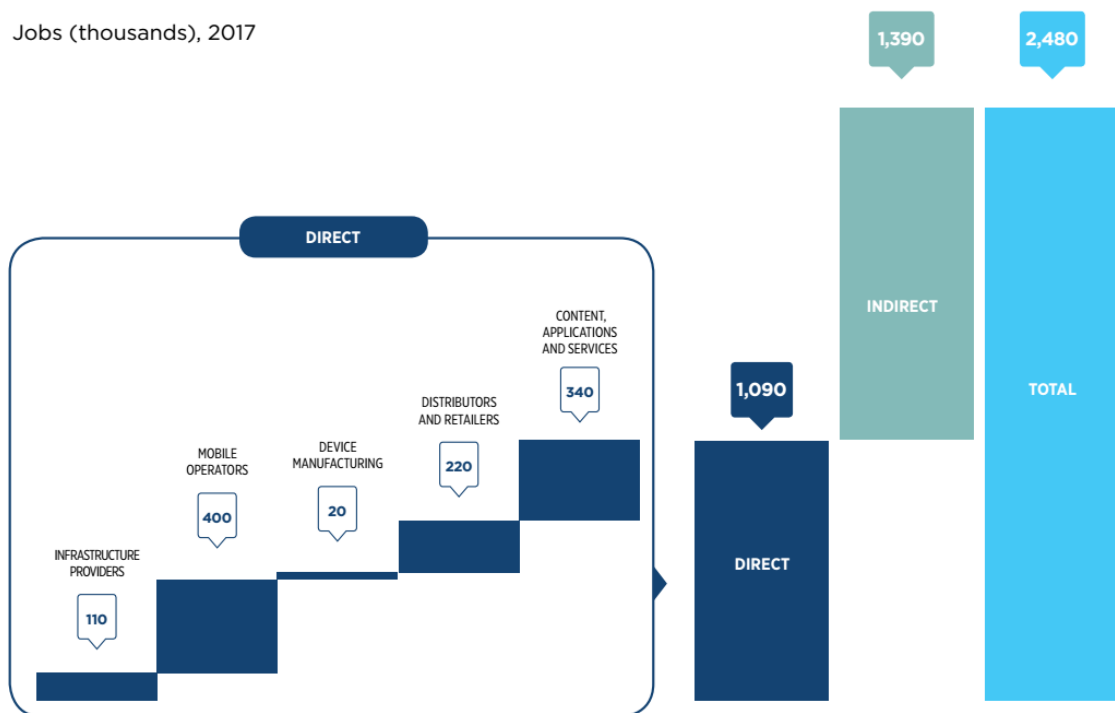



*AT&T includes AT&T PREPAID (formerly GoPhone) and Cricket; Sprint includes Boost, Virgin and Sprint Prepaid; T-Mobile includes Simply Prepaid, MetroPCS (and GoSmart until 9/2016); TracFone includes Tracfone, Net10, Straight Talk, Simple Mobile, Page Plus and GoSmart Mobile (as of September 2016 - formerly under T-Mobile) Copyright 2018 Global Data

Source: GlobalData Technology Intelligence Centre

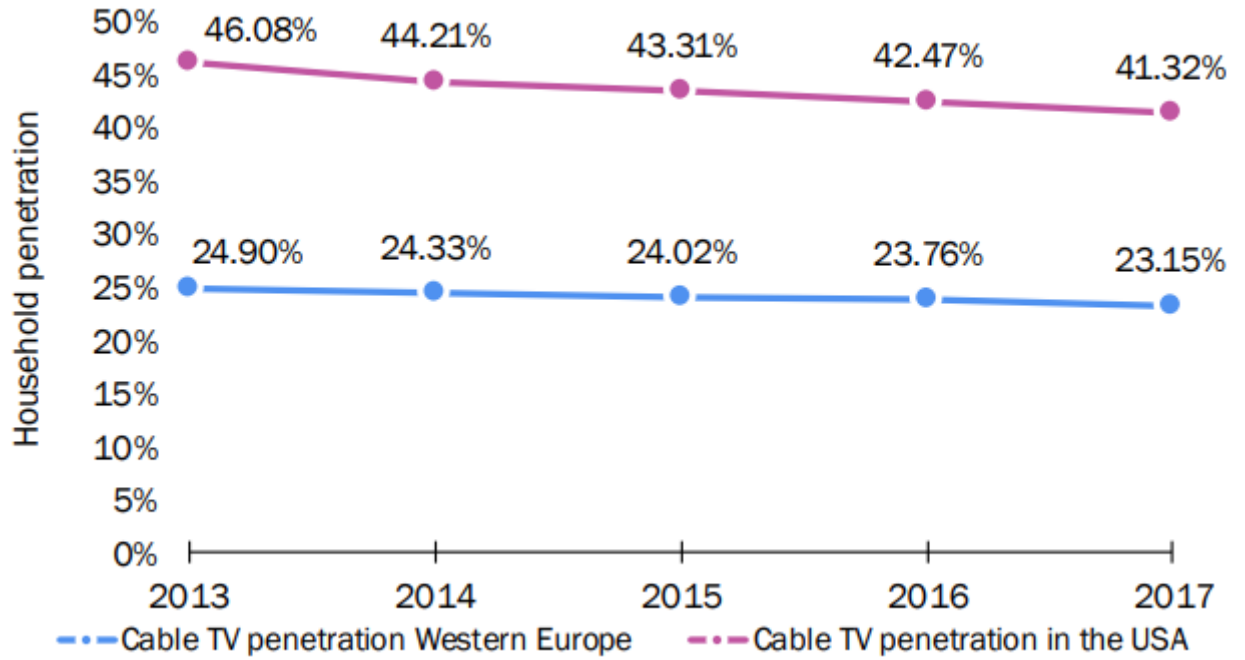
Employment impact

Jobs (thousands), 2017

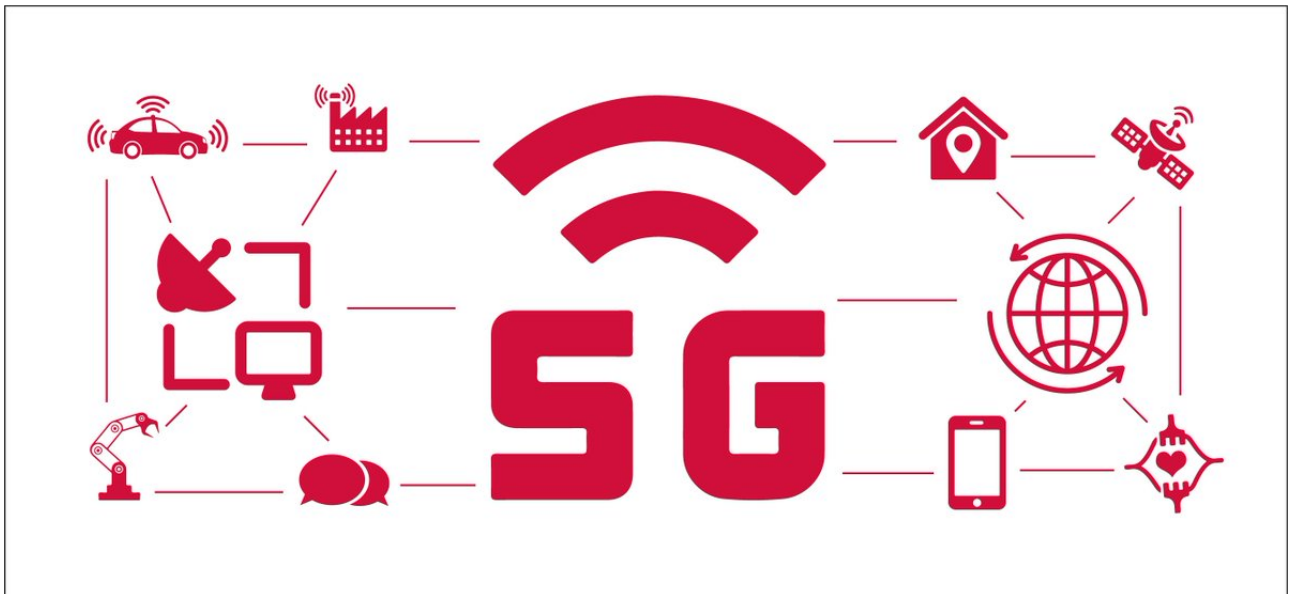


Source: GSMA Intelligence analysis

Figure 1: Cable TV household penetration, 2013–2017



Source: Analysys Mason



PANEL HOGARES CNMC: SATISFACCIÓN CON LOS SERVICIOS

 **CNMC**
COMISIÓN NACIONAL DE LOS
MERCADOS Y LA COMPETENCIA

- Datos segundo trimestre 2018 -

Porcentaje de poco/nada satisfechos

*** LA TELE DE PAGO ES EL SERVICIO
PEOR VALORADO**



18,6%



*** BANDA ANCHA FIJA / * ELECTRICIDAD**



17,3%



*** TELEFONÍA FIJA / * GAS NATURAL**



14,9%



*** INTERNET MÓVIL**



11,6%

*** TELEFONÍA MÓVIL**



10,9%

MOTIVOS DE INSATISFACCIÓN:

**** PRECIO ELEVADO**

sobre todo en las eléctricas/gas

**** FALTA DE CALIDAD DEL
SERVICIO**

**** MALA ATENCIÓN AL CLIENTE**

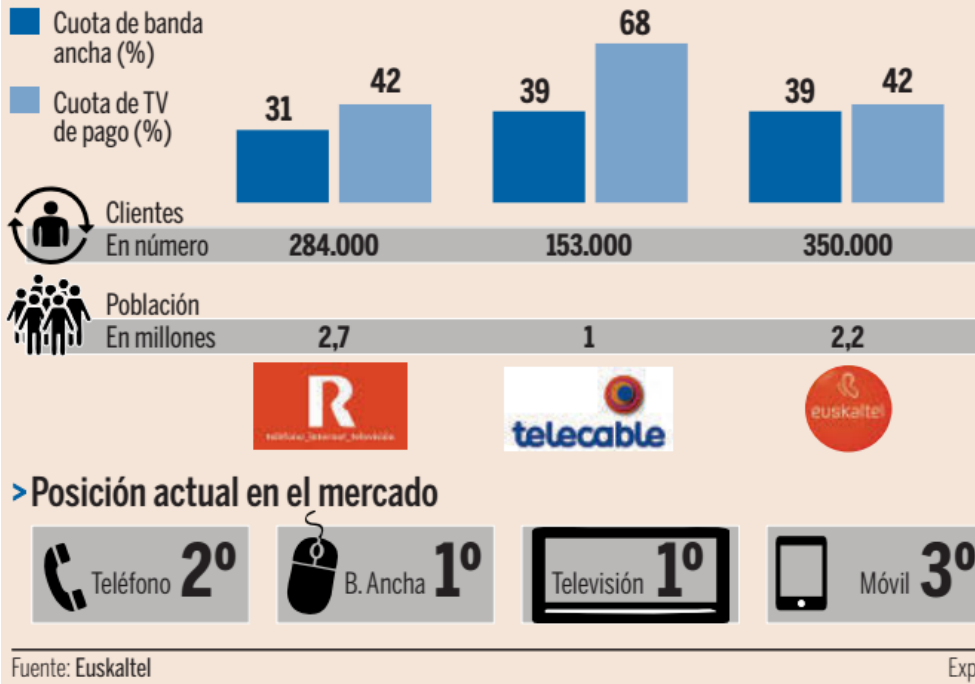
sobre todo en las telecos

FUENTE: CNMCDATA 2018

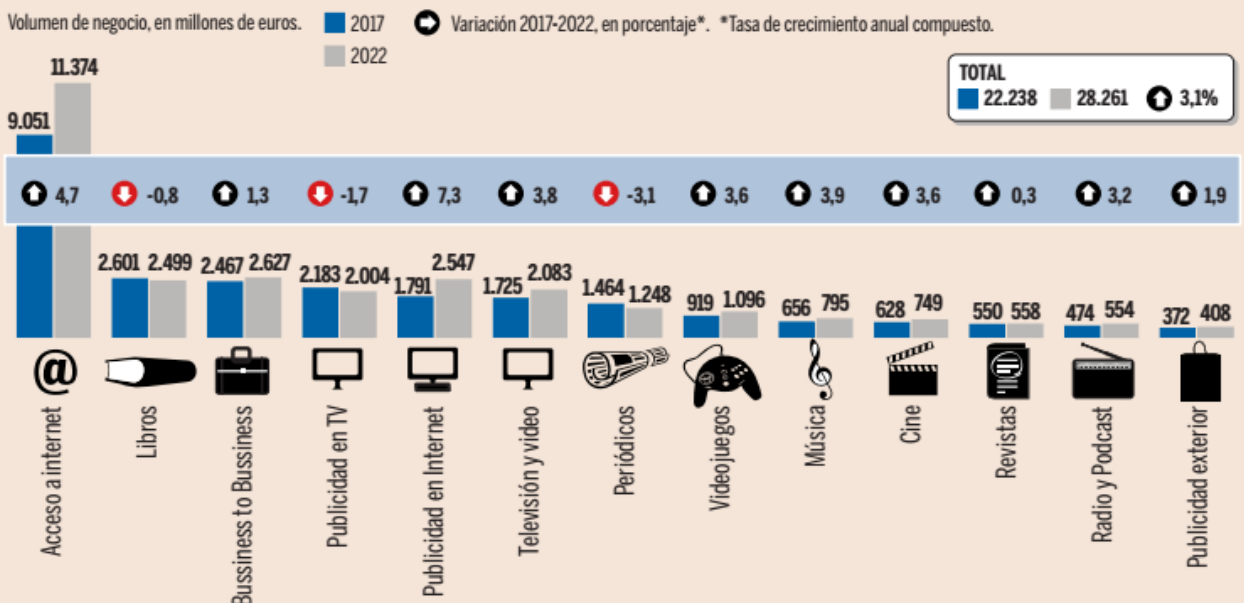
	MOVISTAR	VODAFONE	JAZZTEL	ONO	ORANGE	EUSKALTEL	R	TELECABLE
CALIDAD FIJO - MÓVIL	8,51	6,11	6,77	5,93	5,62	8,62	6,55	6,44
CALIDAD INTERNET	7,53	5,34	5,77	7,98	5,72	7,73	6,60	6,03
PRECIOS	8,65	5,86	8,52	6,61	7,23	8,26	7,23	7,52
GLOBAL	8,23	5,77	7,02	6,84	6,19	8,20	6,79	6,66

Fuente: Unión de Consumidores de Extremadura

LA SITUACIÓN DE EUSKALTEL EN SUS MERCADOS

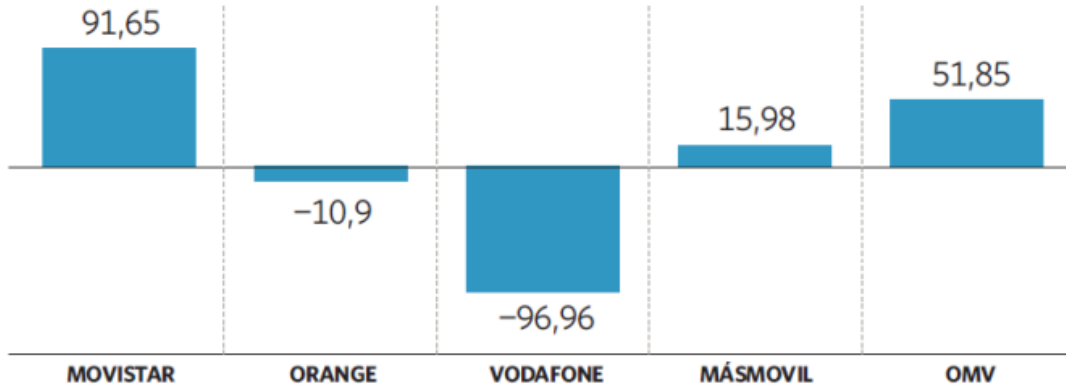


LA INDUSTRIA ESPAÑOLA DE ENTRETENIMIENTO Y MEDIOS EN CIFRAS

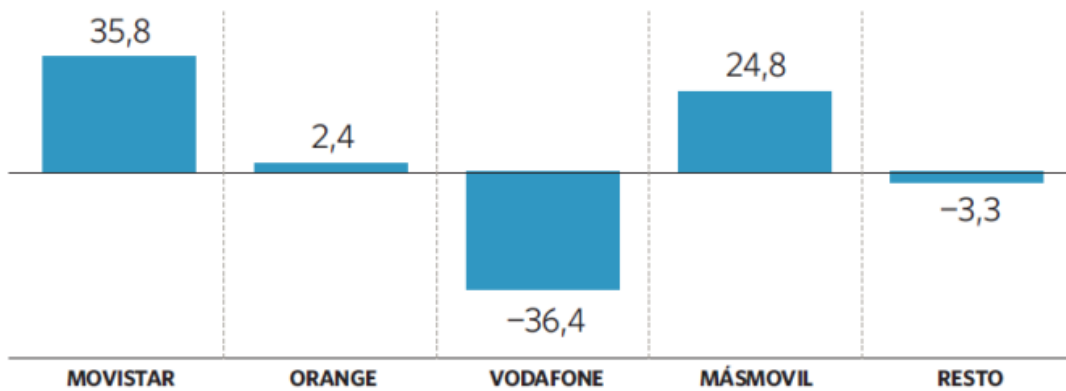


Radiografía del sector

Ganancia neta mensual líneas móviles agosto 2018 (miles)



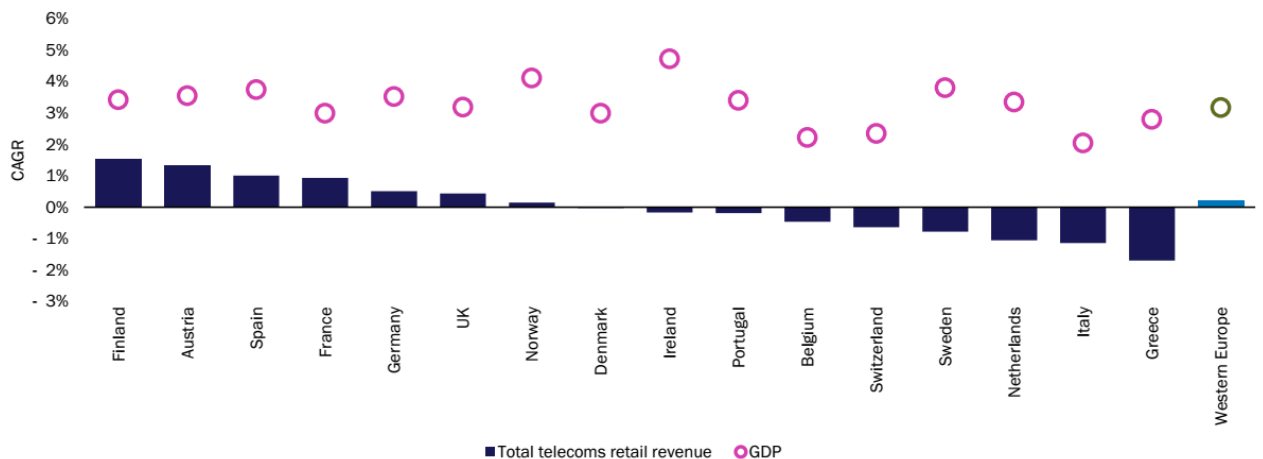
Ganancia mensual líneas banda ancha fija agosto 2018 (miles)



Fuente: CNMC.

elEconomista

Figure 2: Growth in telecoms retail revenue and nominal GDP by country, Western Europe, 2017 – 2023

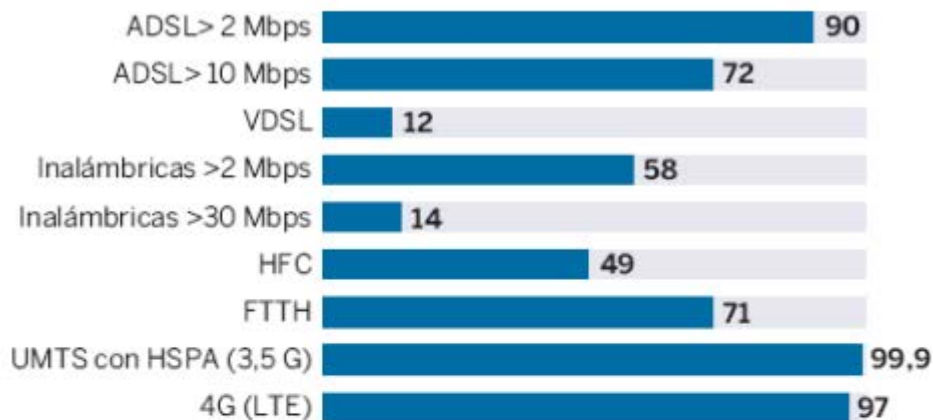


Source: Analysis Mason

Internet rural

COBERTURA TERRITORIAL POR TECNOLOGÍA

A 30 de junio de 2017. En %



POBLACIÓN EN ESPAÑA

	Nº de municipios	Nº de habitantes	Nº de hogares
Más de 500.000	6	7.485.171	3.068.586
De 100.001 a 500.000	56	10.971.589	4.268.645
De 50.001 a 100.000	81	5.854.053	2.194.229
De 20.001 a 50.000	259	7.668.118	2.878.665
De 10.001 a 20.000	347	4.914.991	1.838.201
De 5.001 a 10.000	551	3.869.029	1.442.717
De menos de 100 a 5.000	6.825	5.794.057	2.276.608
TOTAL	8.125	46.557.008	17.967.650

Fuente: Ministerio de Energía, Turismo y Agenda Digital

EL PAÍS

UGT Comunicaciones