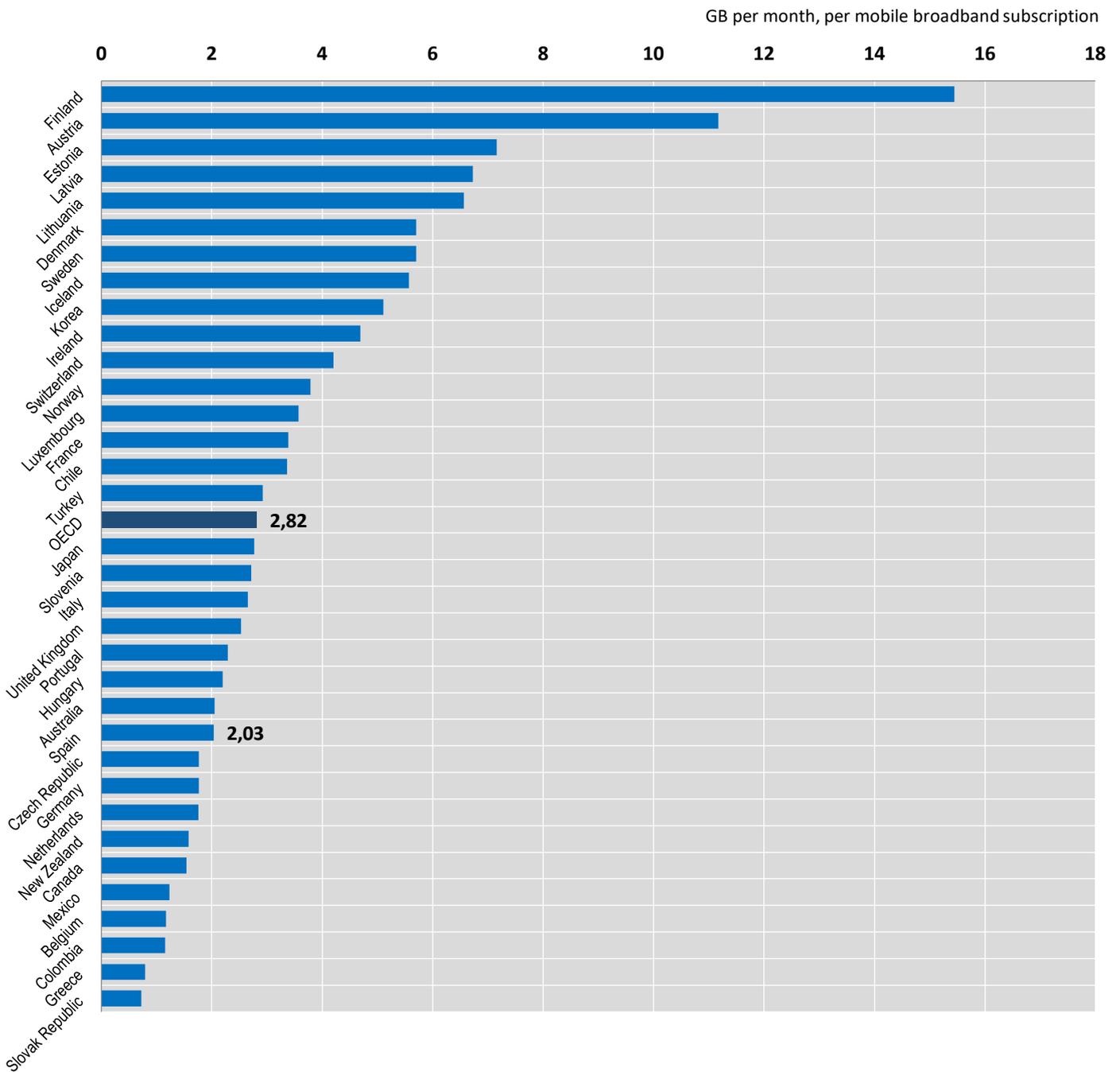


# Informe

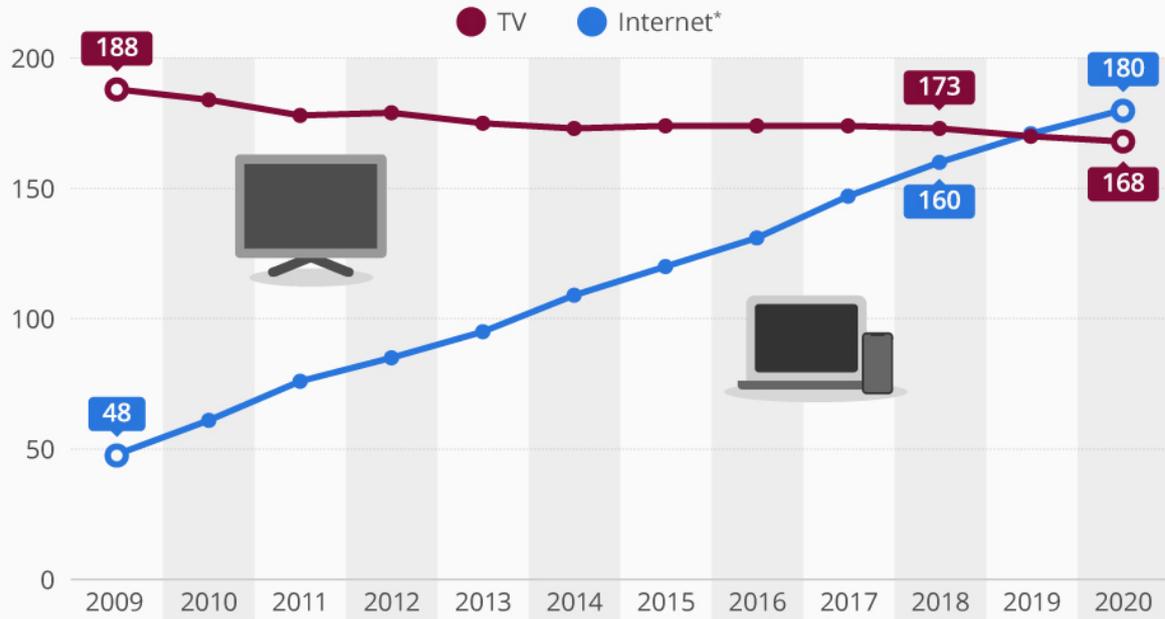
## GRÁFICOS, CIFRAS Y FRASES DE LA QUINCENA VOL.108

➔ *MOBILE DATA USAGE PER MOBILE BROADBAND SUBSCRIPTION, 2017, OCDE.*



## El reinado de la TV se acerca a su fin

Consumo medio diario de TV e Internet por persona en todo el mundo (en minutos)



\* Incluyendo uso de Internet móvil  
Fuente: Zenith vía Recode

statista

## U.S. 4G Networks Are Improving Across the Board

Average 4G (LTE) download speed on major mobile networks in the United States (in Mbps)

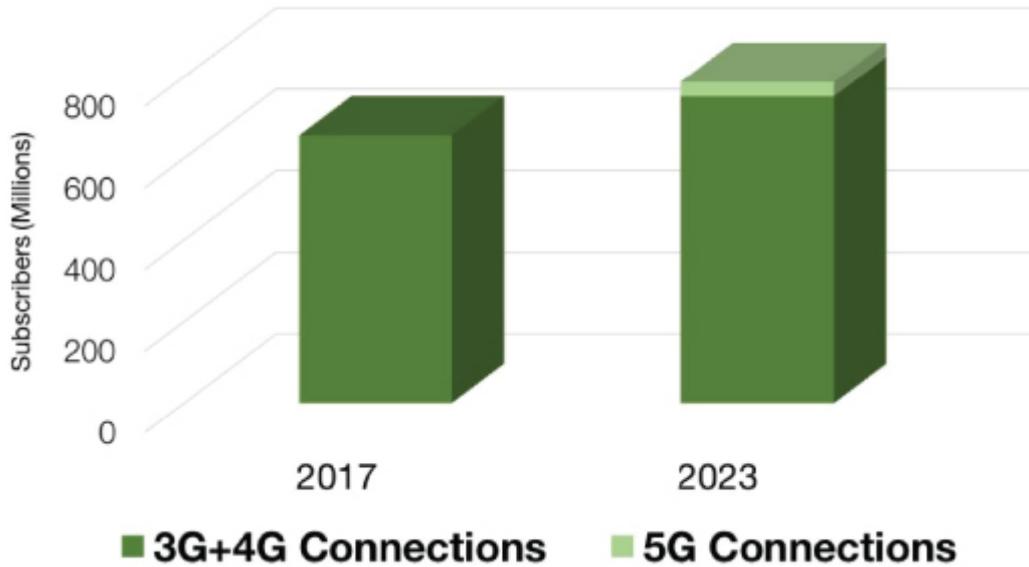


\* This metric shows the proportion of time OpenSignal users have an LTE connection available to them. It's a measure of how often users can access a 4G network rather than a measure of geographic or population coverage.

All figures based on 4.5+ billion measurements across 150,000+ test devices  
Source: OpenSignal

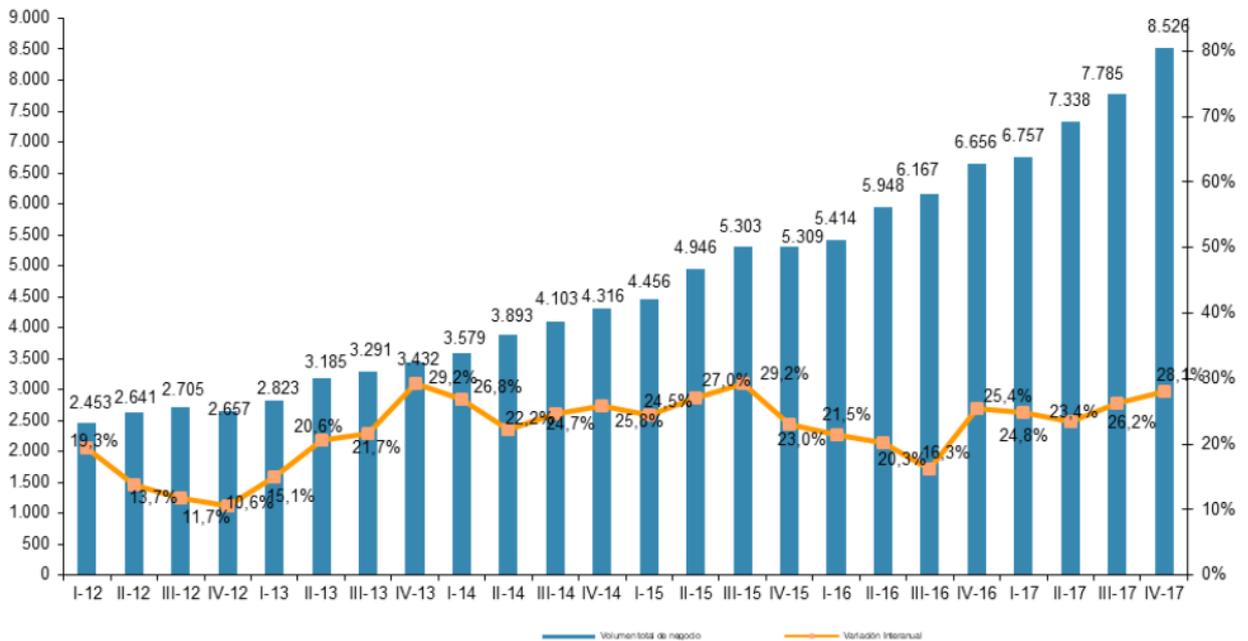
statista

### EUROPE - 3G/4G/5G CONNECTIONS FORECASTS



Source: Dataxis

### EVOLUCIÓN TRIMESTRAL DEL VOLUMEN DE NEGOCIO DEL COMERCIO ELECTRÓNICO Y VARIACIÓN INTERANUAL (millones de euros y porcentaje)

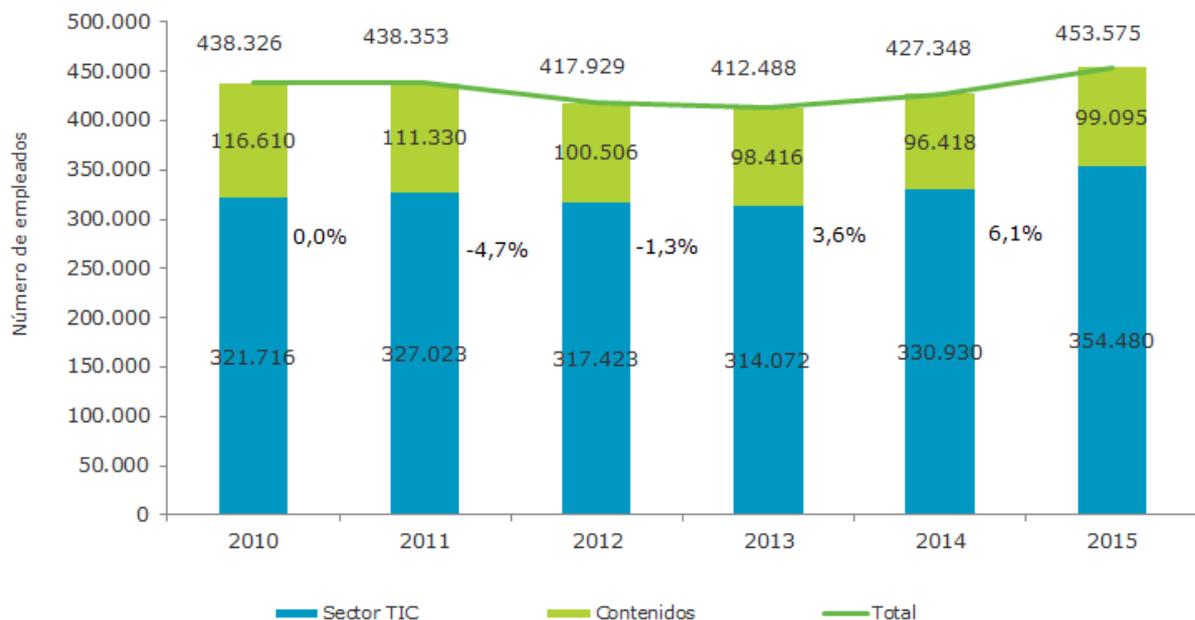


Fuente: CNMC

➔ **REPARTO DEL ESPECTRO EN ESPAÑA, ADSL ZONE.**

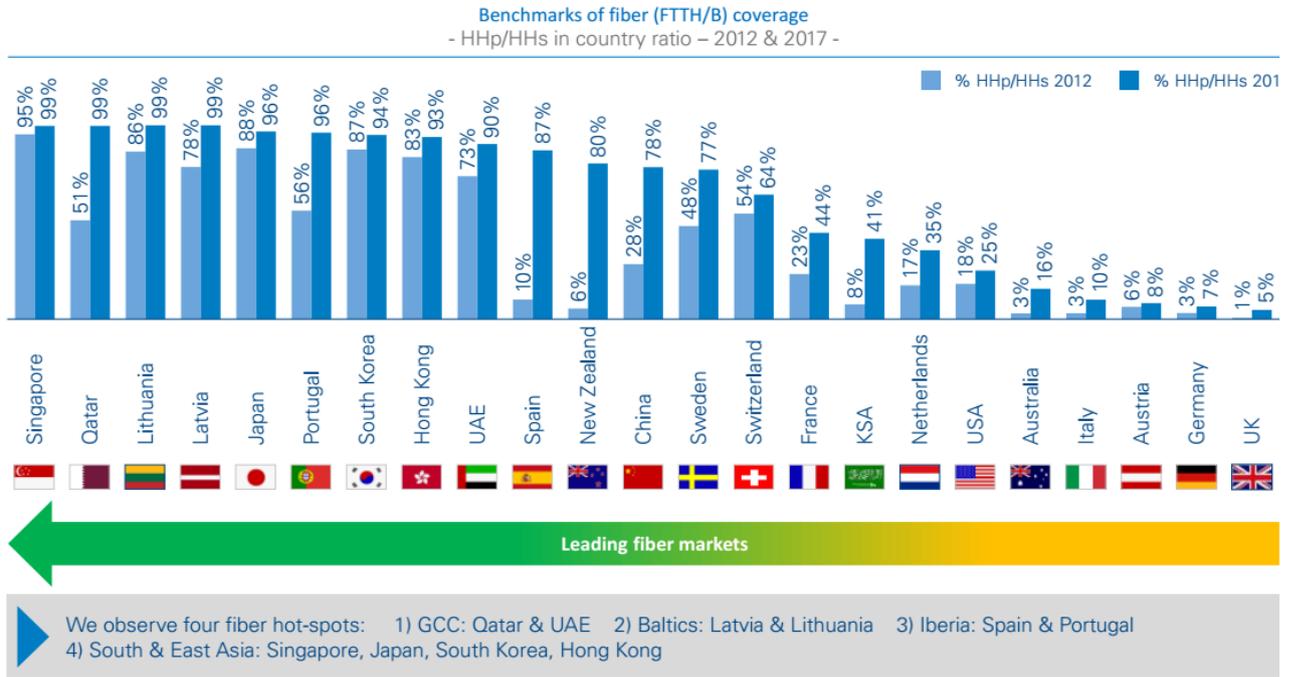
	800 MHz 4G banda 20	900 MHz 2G/3G banda 8	1800 MHz 2G/4G banda 3	2100 MHz 3G banda 1	2600 MHz 4G banda 7	3500 MHz 5G banda 42
<b>Movistar</b>	10 MHz	14,8 MHz	20 MHz	15 MHz FDD 5 MHz TDD	20 MHz	90 MHz
<b>Vodafone</b>	10 MHz	10 MHz	20 MHz	15 MHz FDD 5 MHz TDD	20 MHz FDD 20 MHz TDD	90 MHz
<b>Orange</b>	10 MHz	10 MHz	20 MHz	15 MHz FDD 5 MHz TDD	20 MHz	100 MHz
<b>MásMóvil</b>			14,8 MHz	15 MHz FDD 5 MHz TDD	10 MHz TDD (autonómicos)	80 MHz

➔ **PERSONAL OCUPADO EN EL SECTOR TIC, ONTSI.**



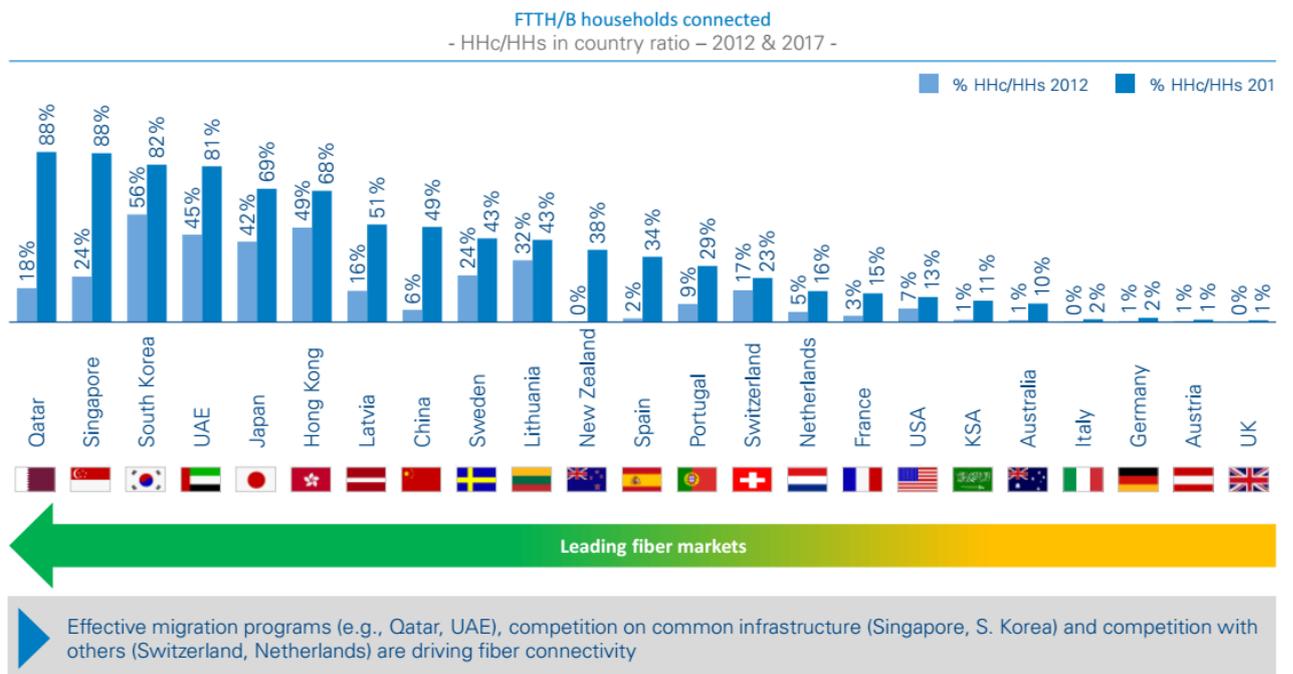
Fuente: Seguridad Social

Figure 2: Fiber (FTTH/B) households passed



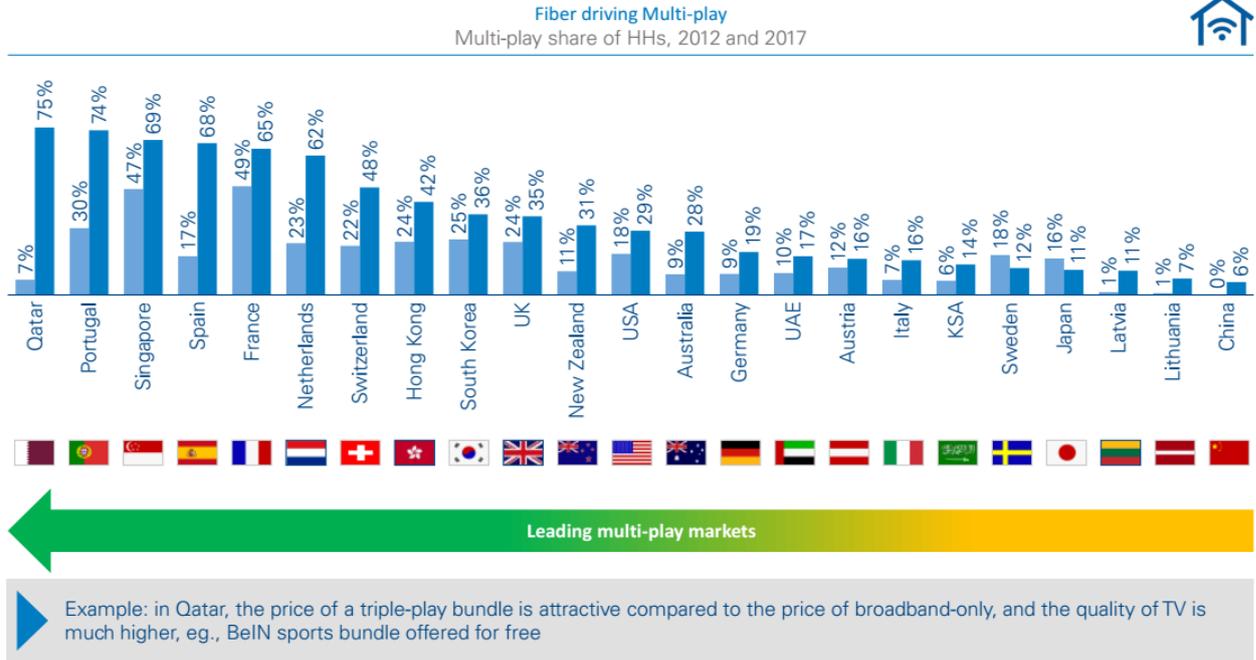
Source: Arthur D. Little Analysis, Euromonitor, FTTHCouncil.eu, FTTHCouncilMena.org, IDATE World FTTx market 2017

Figure 3: Fiber (FTTH/B) households connected



Source: Arthur D. Little Analysis, Euromonitor, FTTHCouncil.eu, FTTHCouncilMena.org, IDATE World FTTx market 2017

Figure 11: Share of multi-play



Source: Arthur D. Little Analysis, Ovum database, respective operator websites.

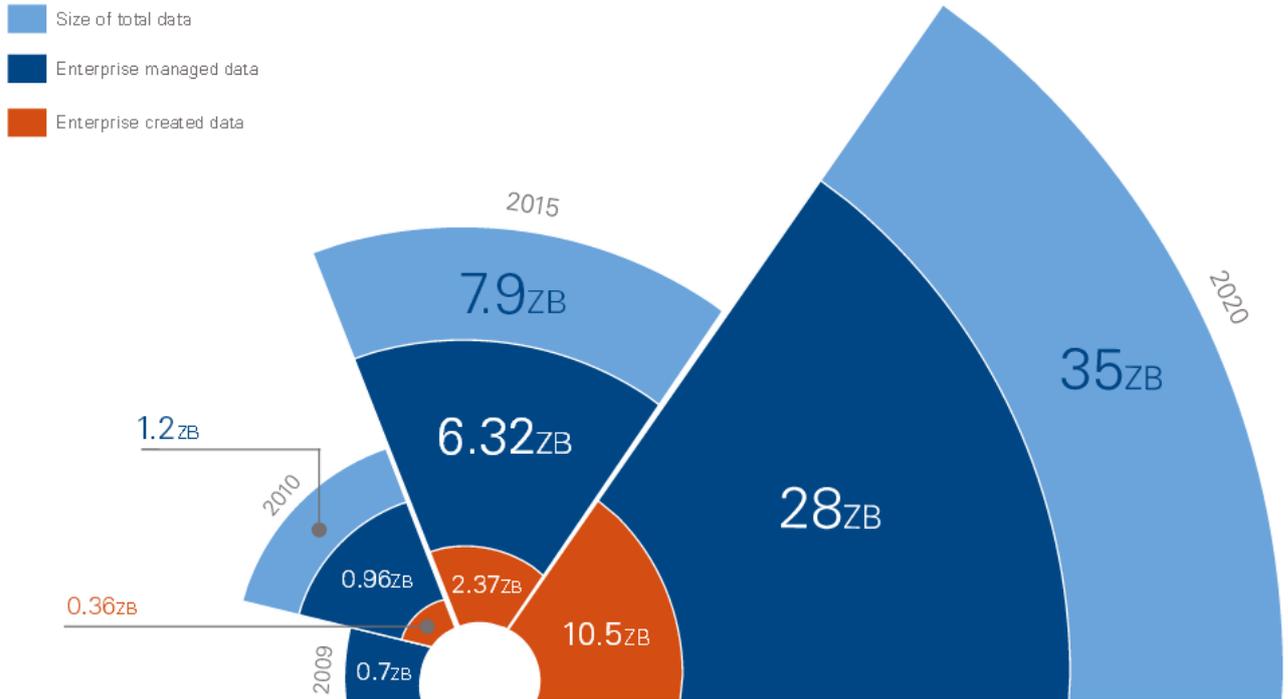
### What is your favorite app? [open ended]

Global	China	India	Japan	U.K.	U.S.
LinkedIn 4%	Baidu 7%	LinkedIn 11%	Gmail 7%	BBC 8%	Amazon 5%
Facebook 3%	Google Maps 4%	Whatsapp 9%	Line 7%	Tinder 6%	Tinder 3%
Google Maps 3%	Line 4%	Google Maps 6%	Google Maps 3%	LinkedIn 6%	LinkedIn 3%
Instagram 3%	QQ 4%	Facebook 6%	Instagram 3%	Netflix 5%	Netflix 3%
Airbnb 3%	Tinder 2%	Youtube 5%	Airbnb 3%	Facebook 5%	Youtube 3%
Tinder 3%	LinkedIn 2%	Instagram 5%	Netflix 3%	Google Maps 3%	Airbnb 3%
Netflix 3%	NBA 2%	Kindle 3%	Snapchat 3%	Snapchat 3%	Golf Clash 3%
Youtube 2%	ESPN 2%	Amazon 2%	NY Times 3%	Gmail 3%	NBA 3%
Amazon 2%	Chess 2%	Twitter 2%	Adobe 3%	Golf Clash 3%	Facebook 3%
Whatsapp 2%	Amazon 1%	Airbnb 2%		Shazam 3%	Instagram 3%
Uber 2%	Accuweather 1%	Uber 2%			Whatsapp 3%
	Kindle 1%	Scanner 2%			Snapchat 3%
	Weather Live 1%	Gmail 2%			ESPN 3%
	Spotify 1%				NY Times 3%
	Twitter 1%				

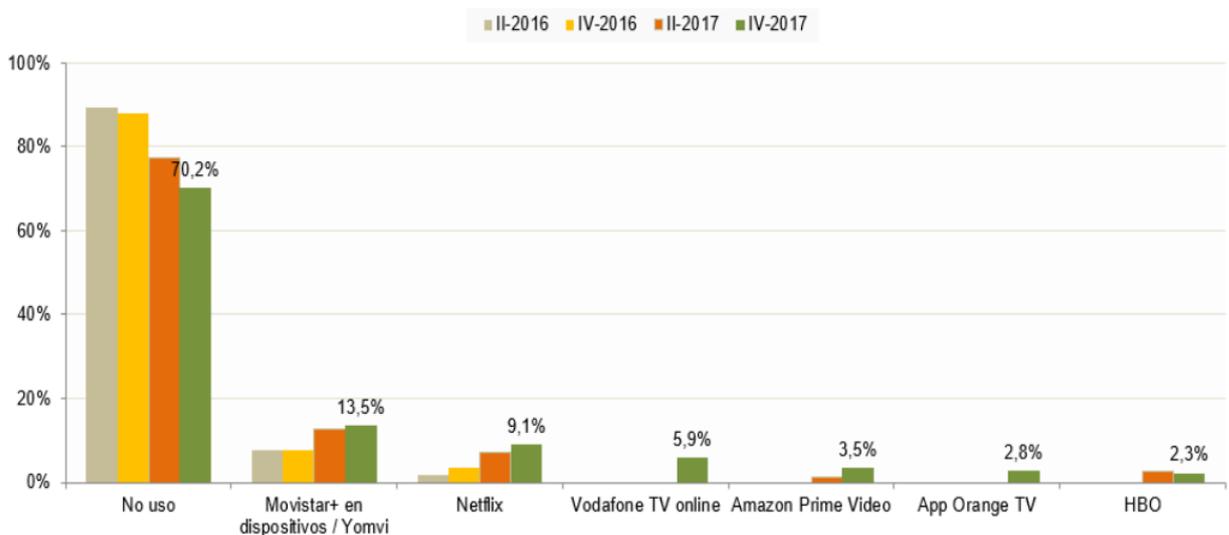
Partial list.  
Source: KPMG Technology Innovation findings, March 2018

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➔ DATA GROWTH RATE IS EXPONENTIAL, WITH DATA GROWTH IN 2017 EXCEEDING THE TOTAL AMOUNT OF DATA PRODUCED THROUGHOUT HUMAN HISTORY, ADL.



**Uso de plataformas de pago para ver contenidos audiovisuales online (porcentaje de hogares). Posible respuesta múltiple.**

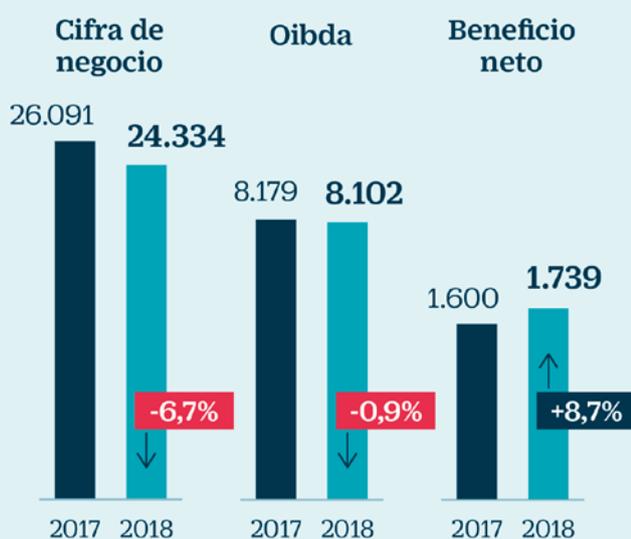


Universo: Hogares con acceso a Internet. Fuente: CNMC

➔ **RADIOGRAFÍA DE TELEFÓNICA.**

**Principales magnitudes**

Primer semestre. Millones €

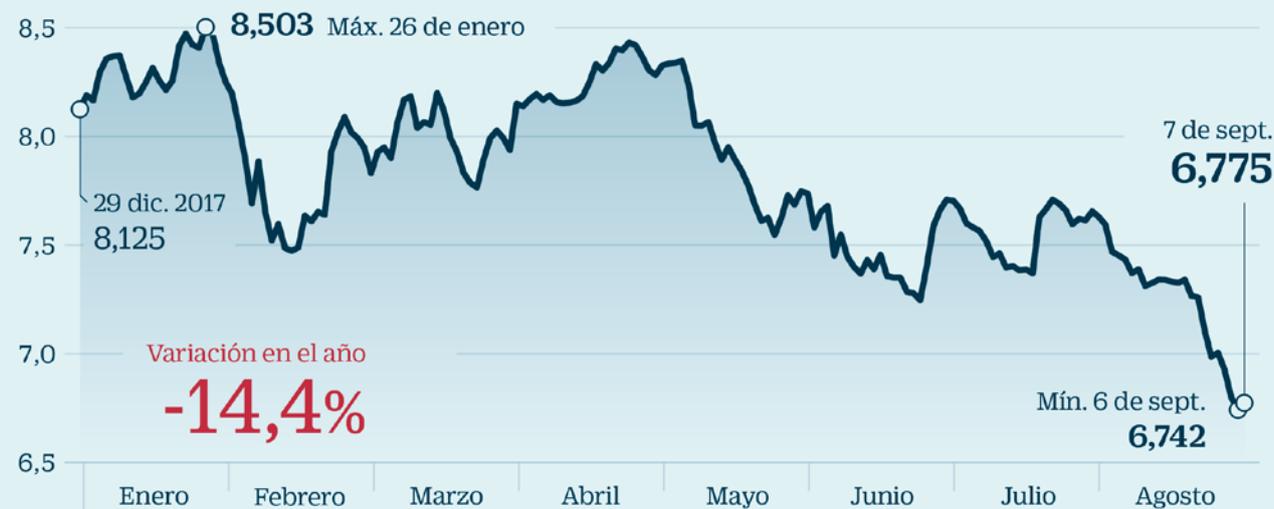


**Desglose de las ventas por regiones**

En millones € y % sobre el total



**Evolución en 2018** En € por acción

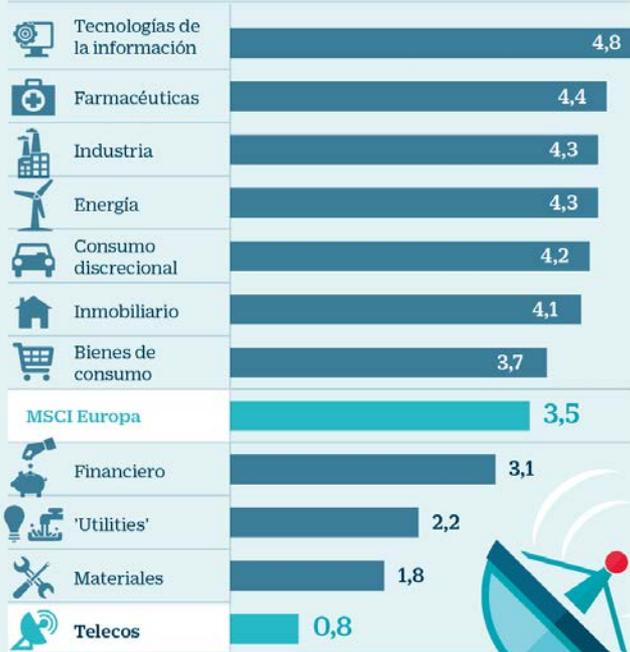


Fuentes: Telefónica y Thomson Reuters

C. CORTINAS / CINCO DÍAS

### Escenario actual de las telecomunicaciones europeas

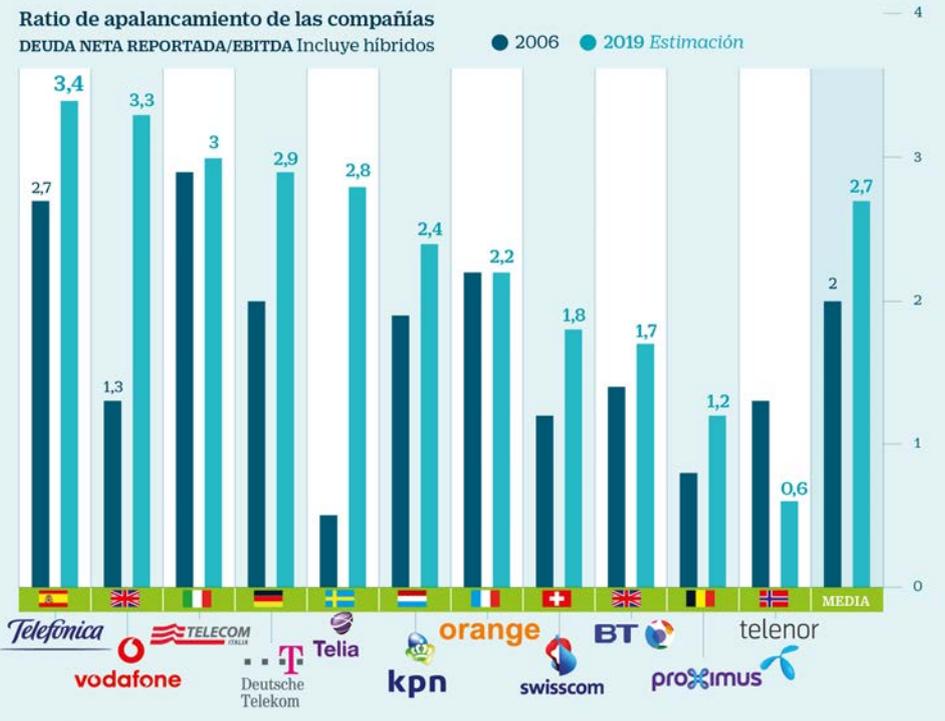
Previsión de crecimiento de los ingresos en 2018 por sectores  
En % de variación interanual



Fuente: JP Morgan

### Ratio de apalancamiento de las compañías

DEUDA NETA REPORTADA/EBITDA Incluye híbridos





**UGT** Comunicaciones