

Informe

GRÁFICOS, CIFRAS Y FRASES
DE LA QUINCENA VOL.112

Europe



Network quality

Average mobile download speeds increased from

20Mbit/s

2015 → 2017

32Mbit/s



63%



INCREASE

The biggest increase of any region and also the best performing networks of all regions

Source: GSMA Intelligence calculations based on analysis by Ookla of Speedtest Intelligence data

Mobile-enabled services



140m

mobile subscribers use mobile to improve their **health or education**



30% of the total



160m

mobile subscribers use mobile to access **Government services**



35% of the total – the highest of any region

\$80bn

retail spending via mobile in 2017

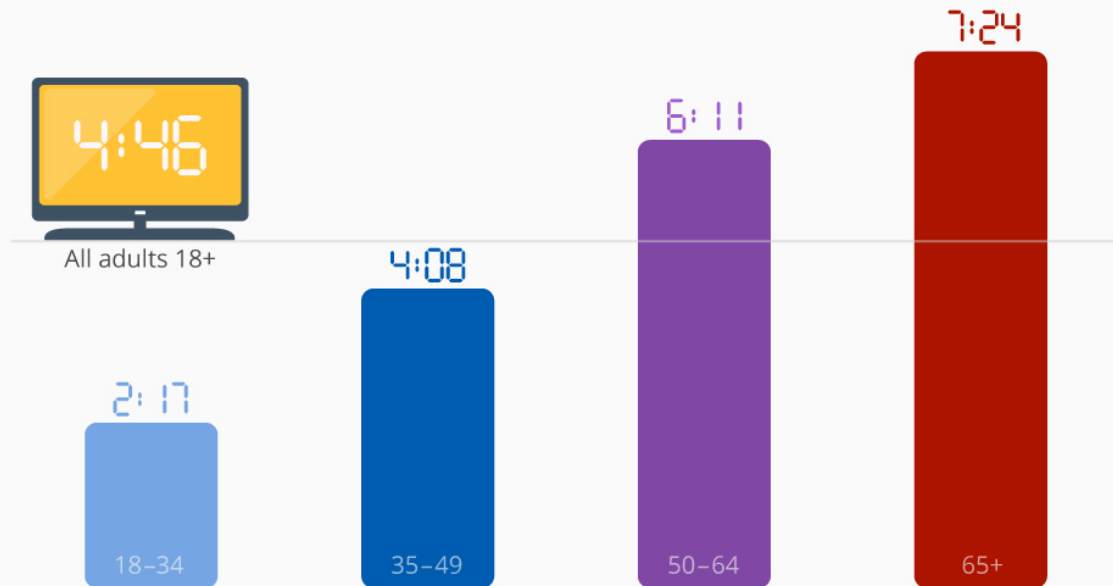
an increase of **\$30 billion** from 2015



Source: Euromonitor. Based on data for 31 countries. Excludes B2B and C2C payments and also excludes contactless payments

The Generation Gap in TV Consumption

Average daily TV consumption (live + time-shifted) of American adults, by age group (in hh:mm)

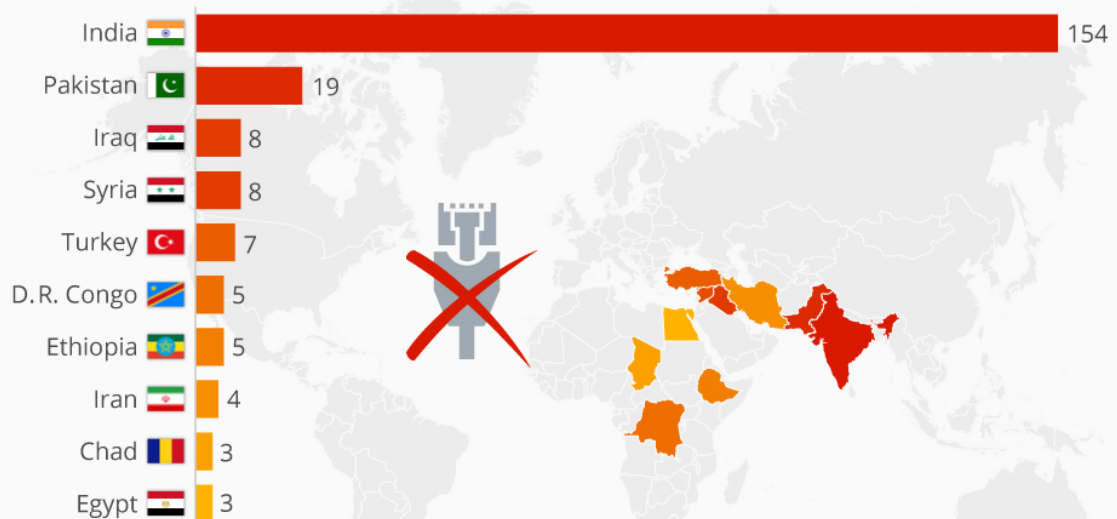


As of Q1 2018
Source: The Nielsen Total Audience Report

statista

The Countries Shutting Down The Internet The Most

Number of internet shutdowns by country (Jan 2016–May 2018)*

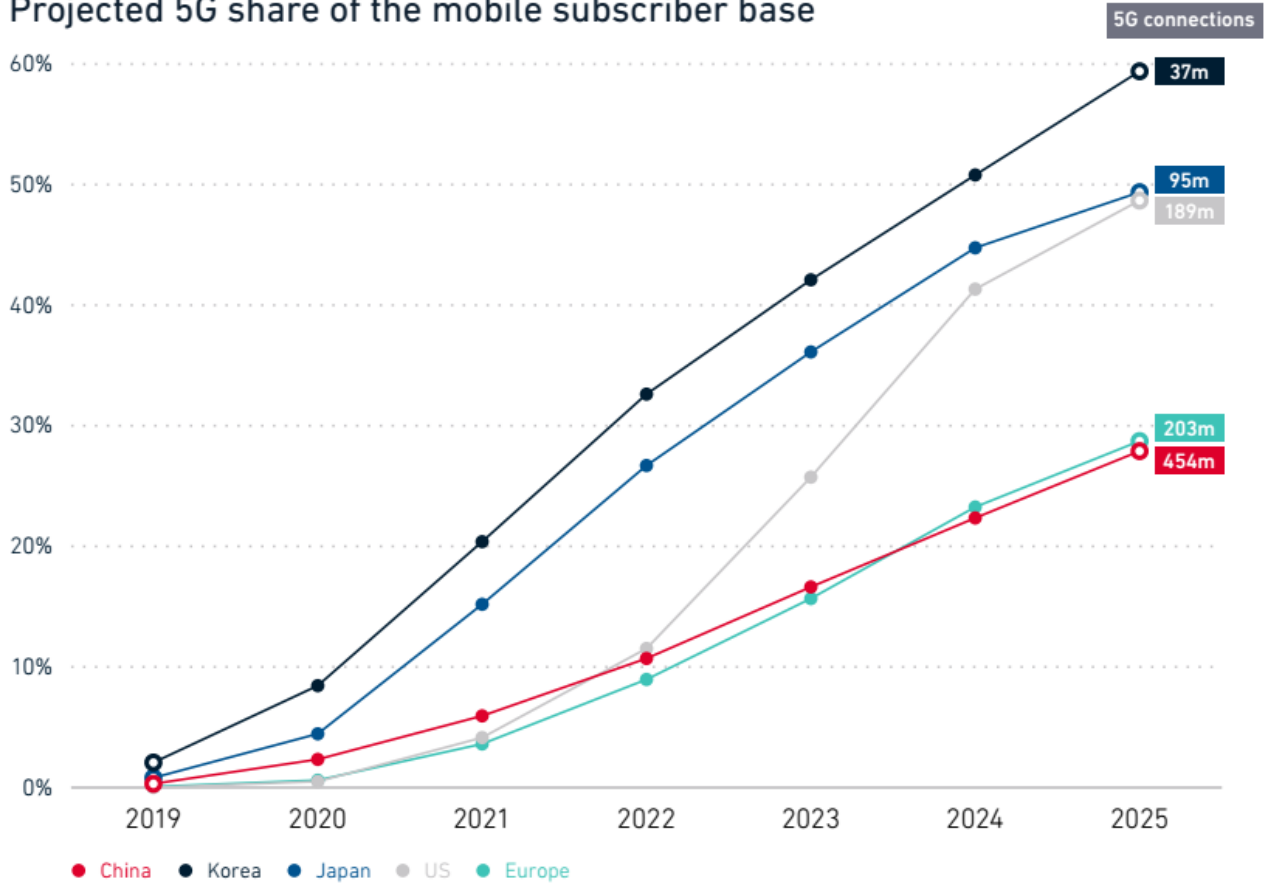


* An internet shutdown occurs when someone (usually the government) intentionally disrupts the internet or mobile apps to control what people say or do.

Source: Access Now via Vice News

statista

Projected 5G share of the mobile subscriber base



Source GSMA Intelligence

TAKE-UP OF COMMUNICATIONS SERVICES IN UK, OFCOM.

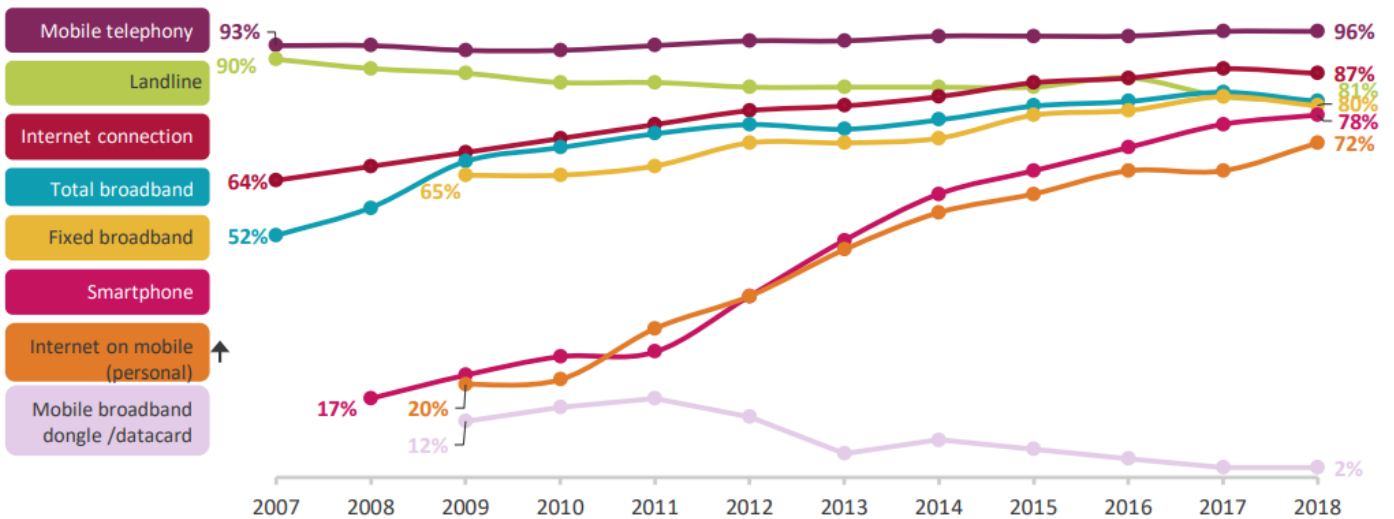
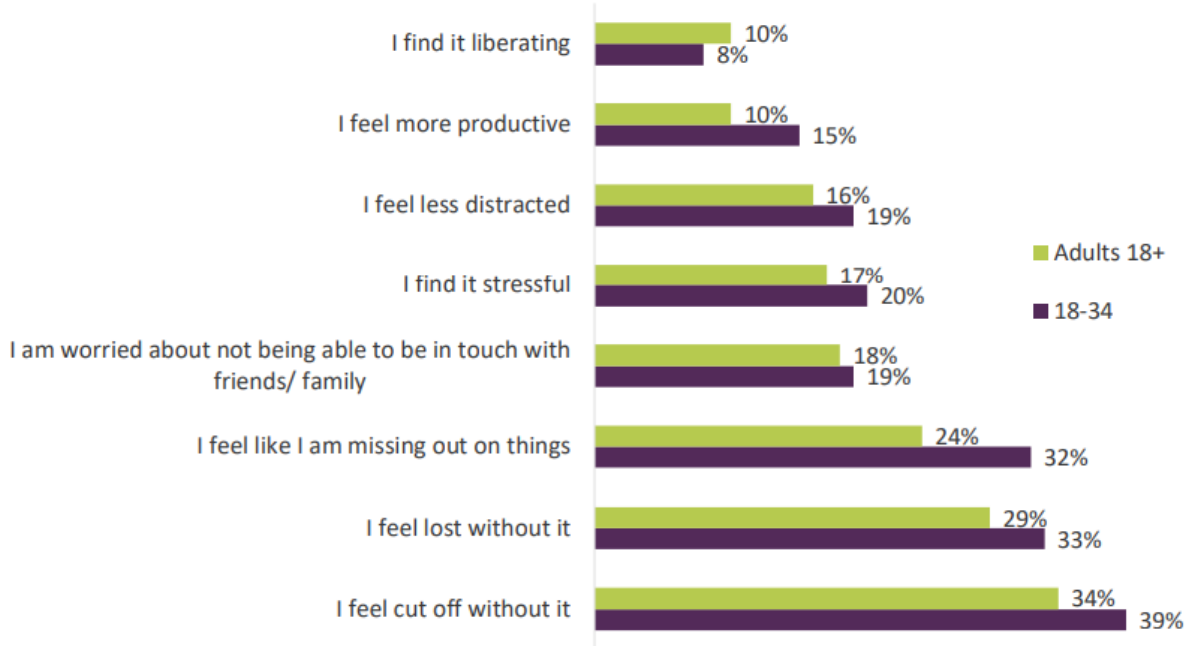
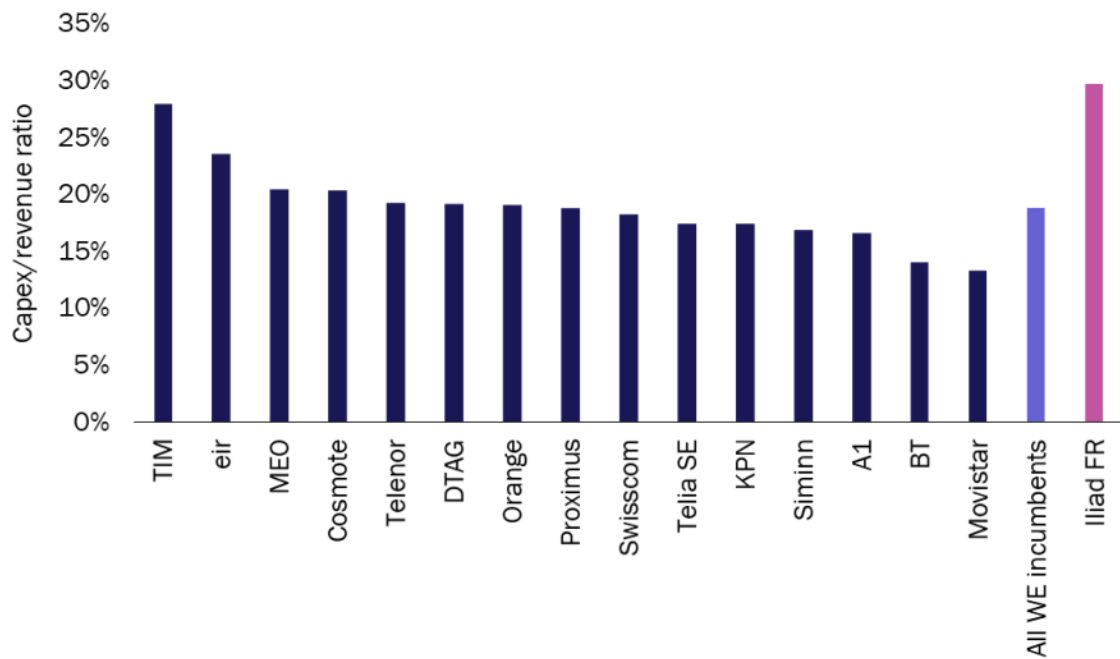


Figure 1.12: Reaction to being unable to connect to the internet



Source: 'Always on', CMR research 2018

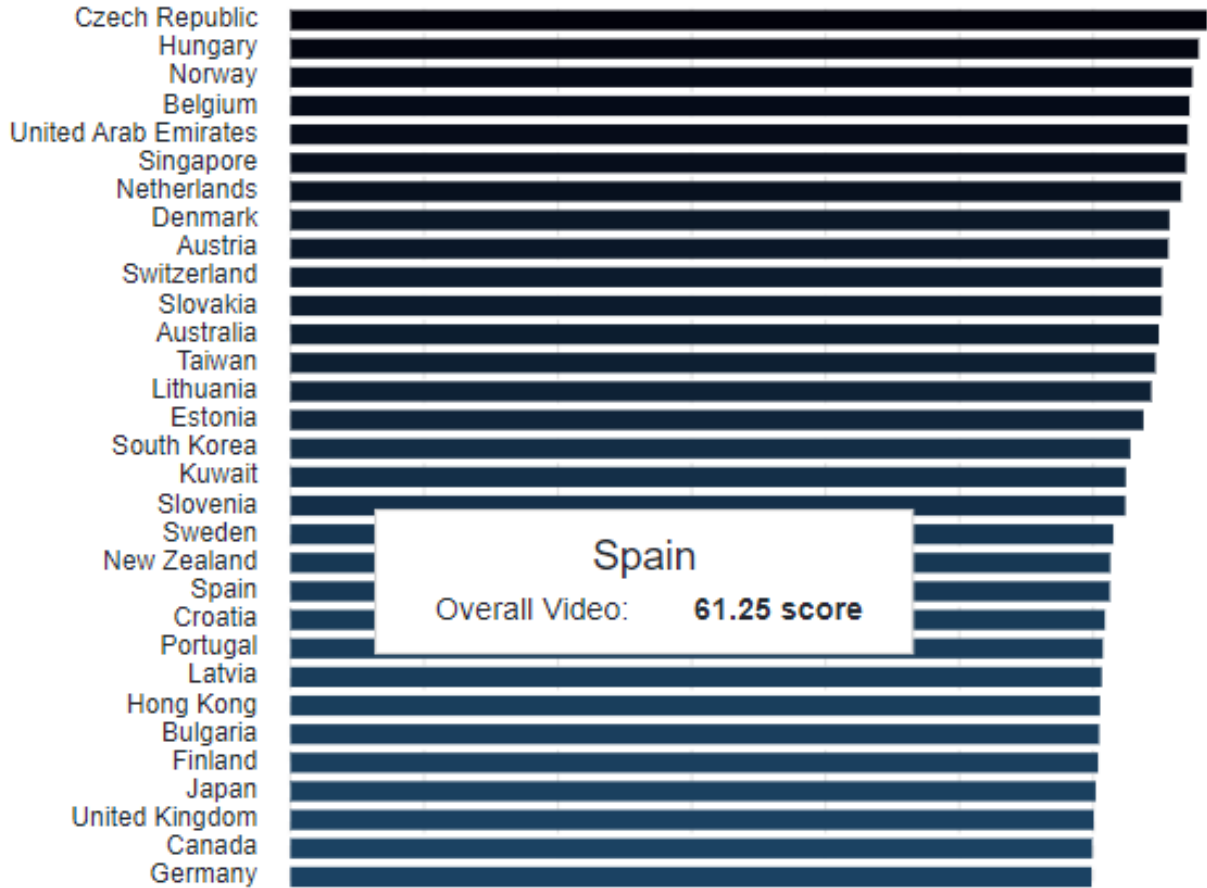
Figure 1: Capex/revenue ratio for European incumbents, FY2017/2018



Source: Analysys Mason

Overall Video Experience Comparison

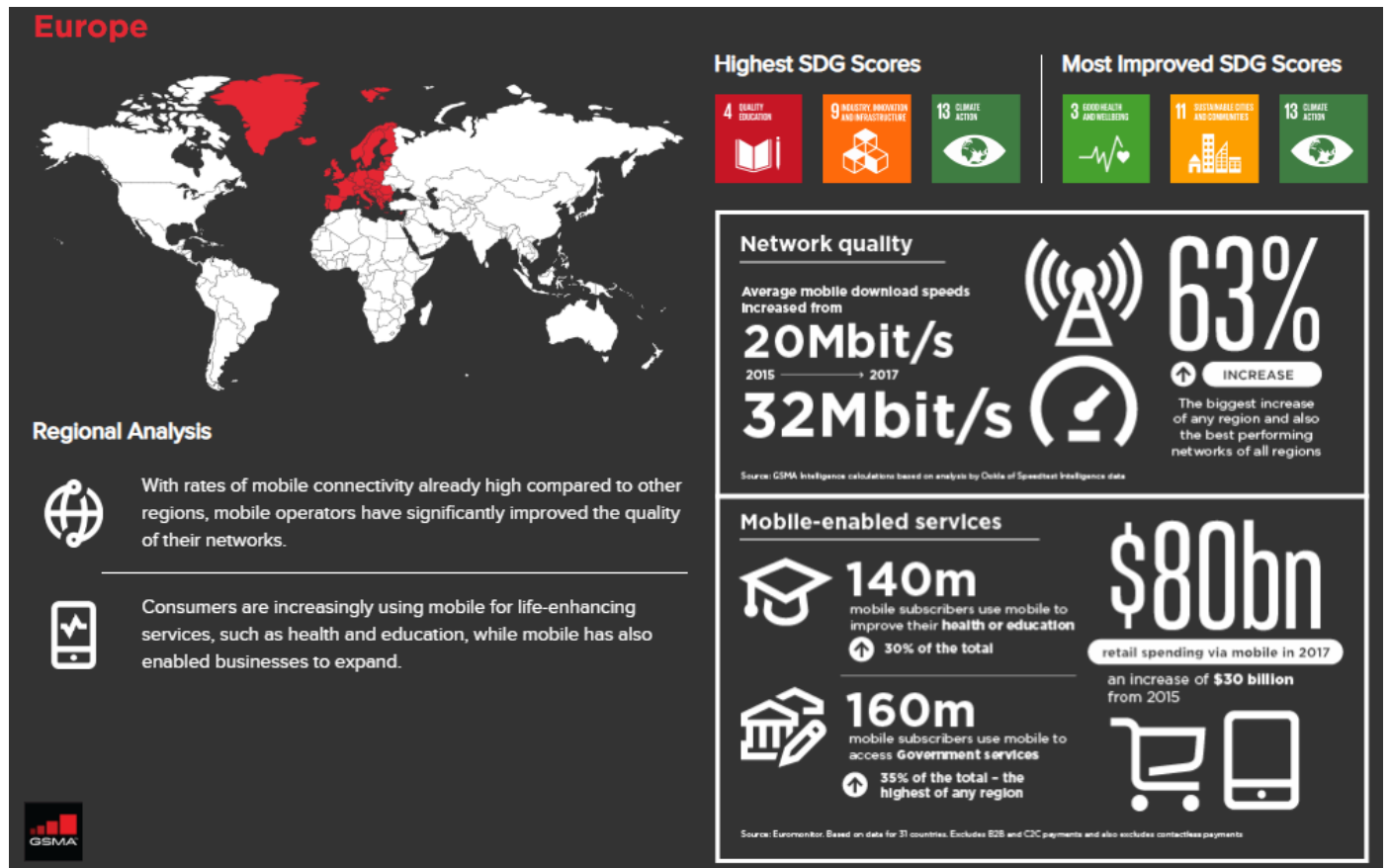
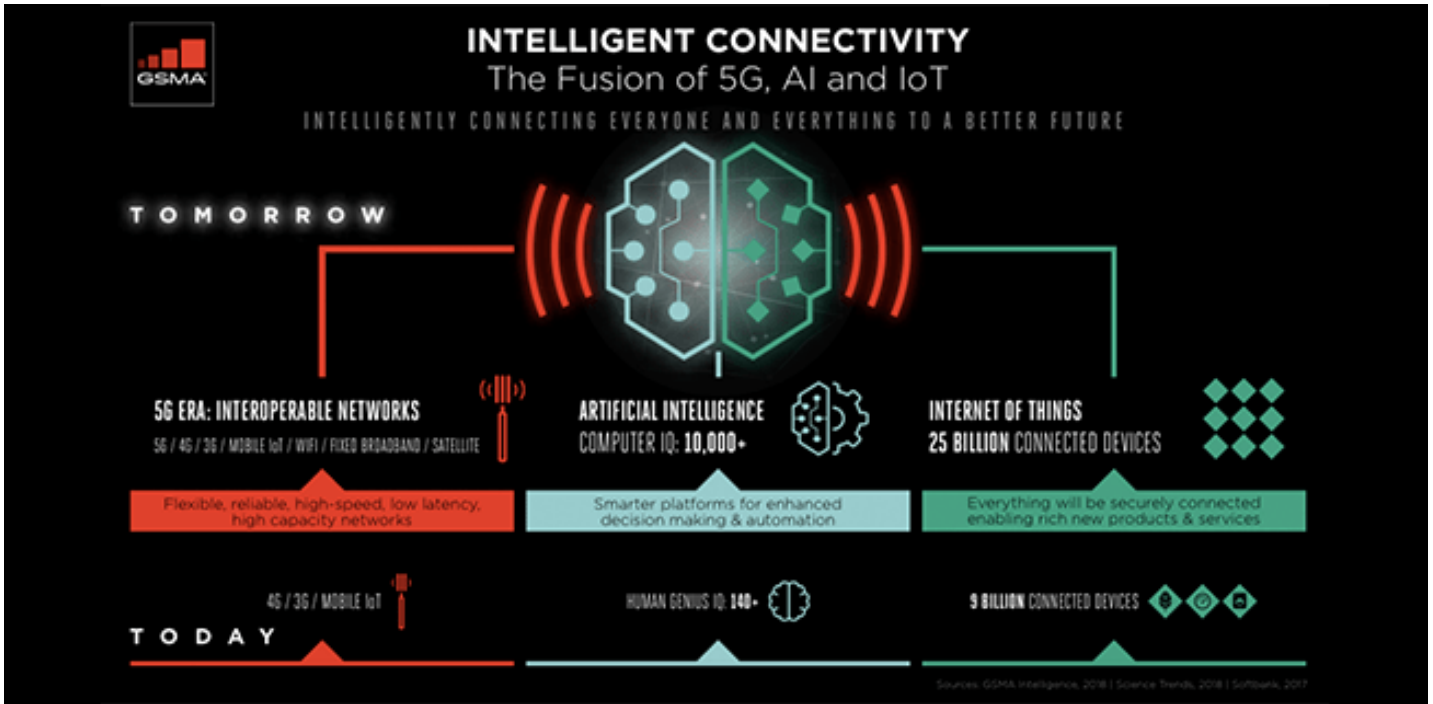
OpenSignal



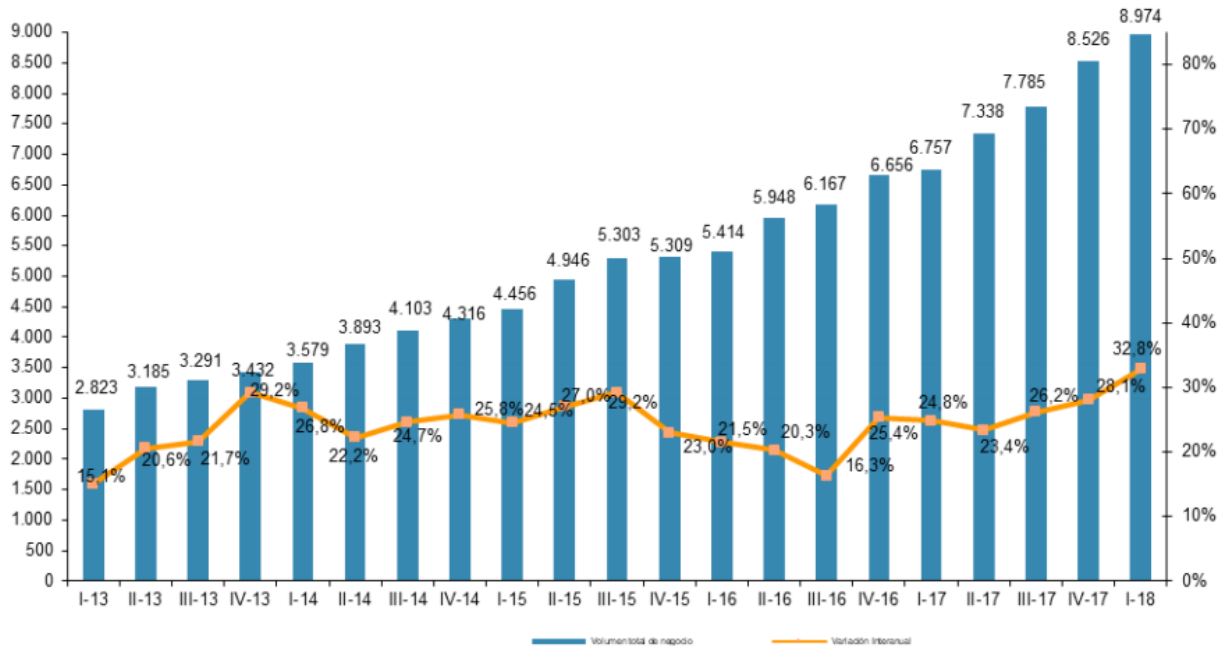
NETFLIX

~15% of worldwide downstream traffic

Source: Sandvine 1H2018 Global Internet Phenomena Report

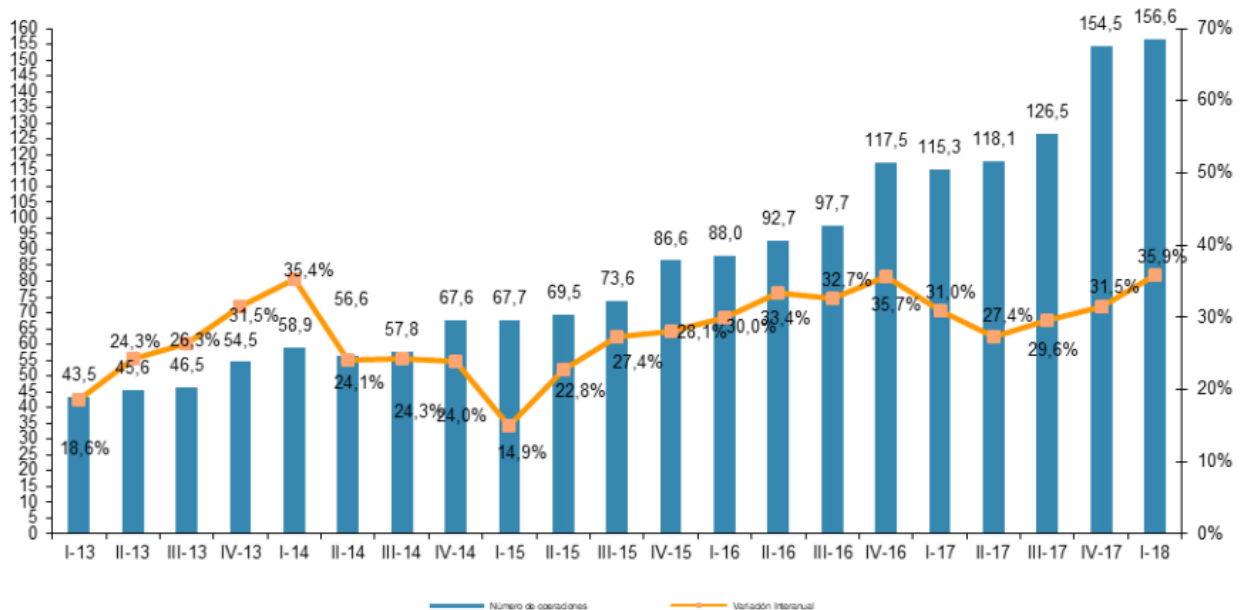


EVOLUCIÓN TRIMESTRAL DEL VOLUMEN DE NEGOCIO DEL COMERCIO ELECTRÓNICO Y VARIACIÓN INTERANUAL (millones de euros y porcentaje)



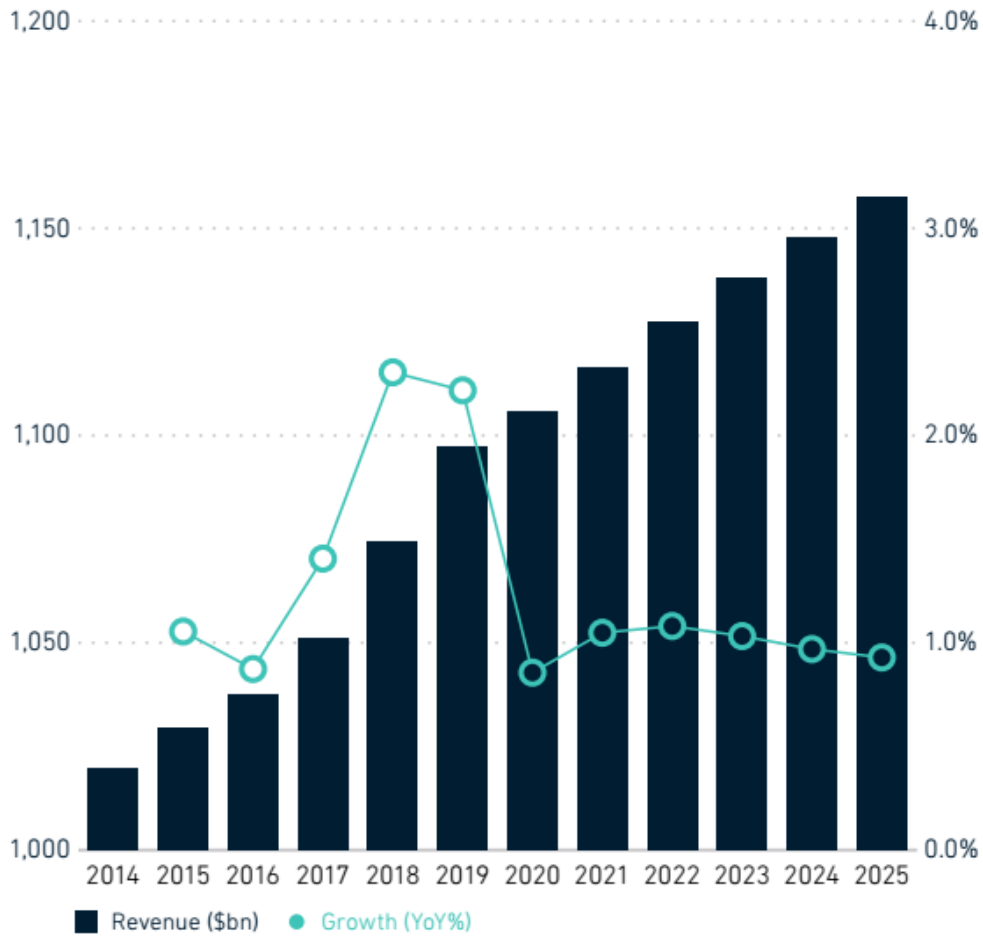
Fuente: CNMC

EVOLUCIÓN TRIMESTRAL DEL NÚMERO DE TRANSACCIONES DEL COMERCIO ELECTRÓNICO Y VARIACIÓN INTERANUAL (millones de transacciones y porcentaje)



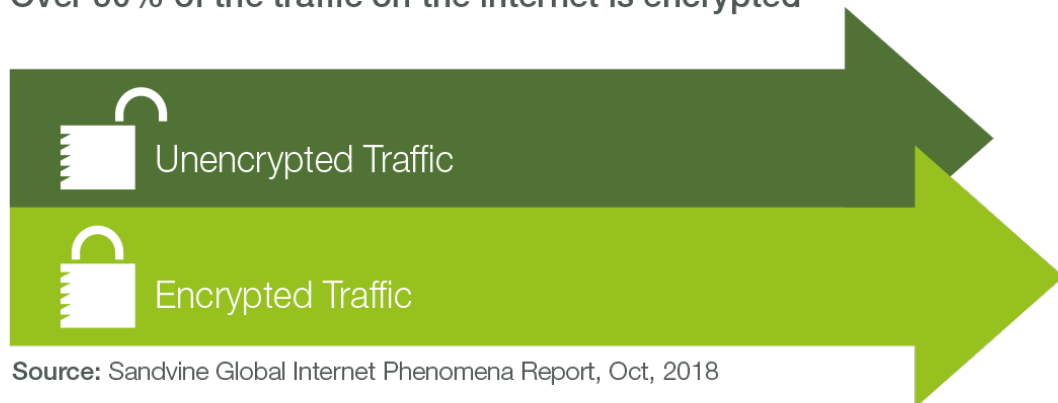
Fuente: CNMC

Projected growth in global mobile revenue

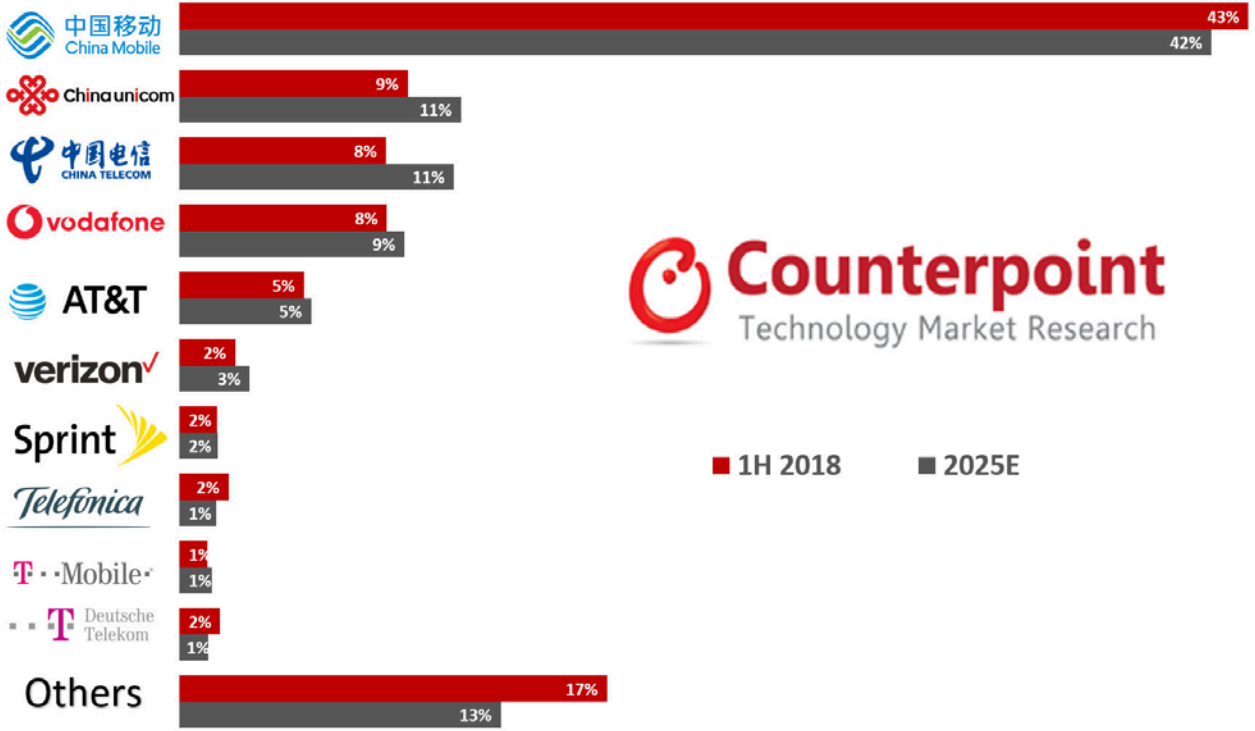


Source GSMA Intelligence

Over 50% of the traffic on the internet is encrypted

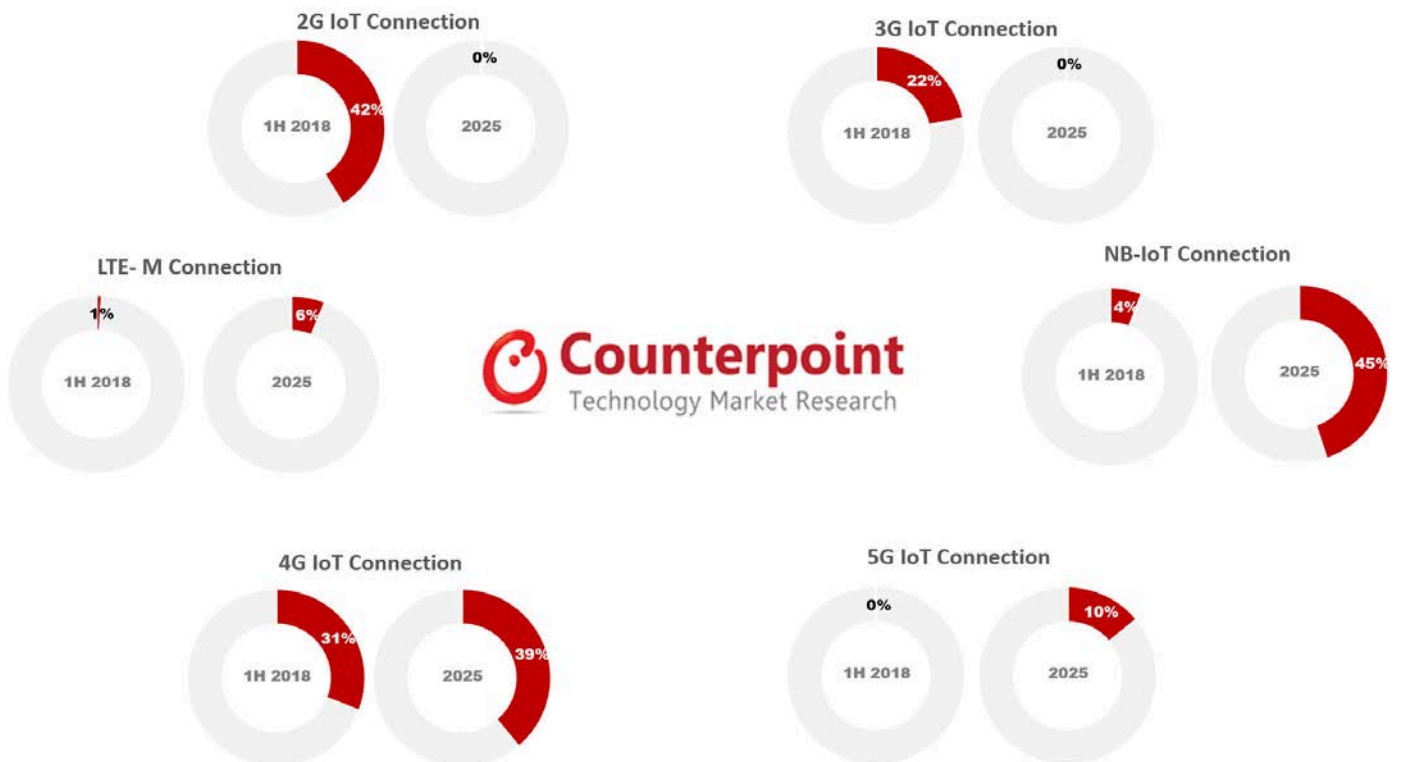


Source: Sandvine Global Internet Phenomena Report, Oct, 2018



Counterpoint
Technology Market Research

■ 1H 2018 ■ 2025E



Counterpoint
Technology Market Research

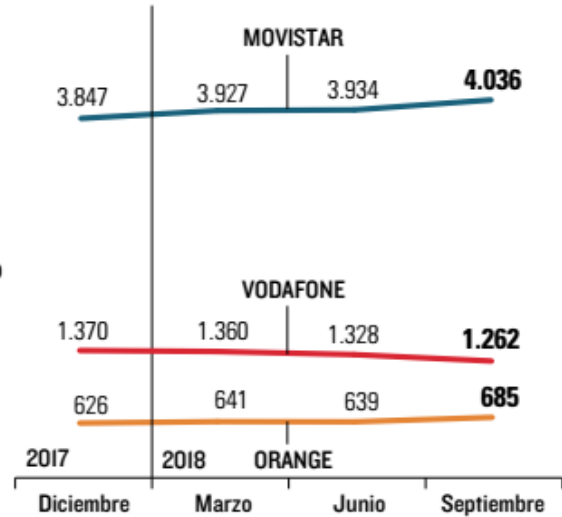
UN AÑO EN JUEGO POR LOS DERECHOS DEPORTIVOS

En miles ■ Movistar ■ Orange ■ Vodafone ■ MásMóvil

● GANANCIA DE LÍNEAS MÓVILES EN AGOSTO



● CLIENTES TV



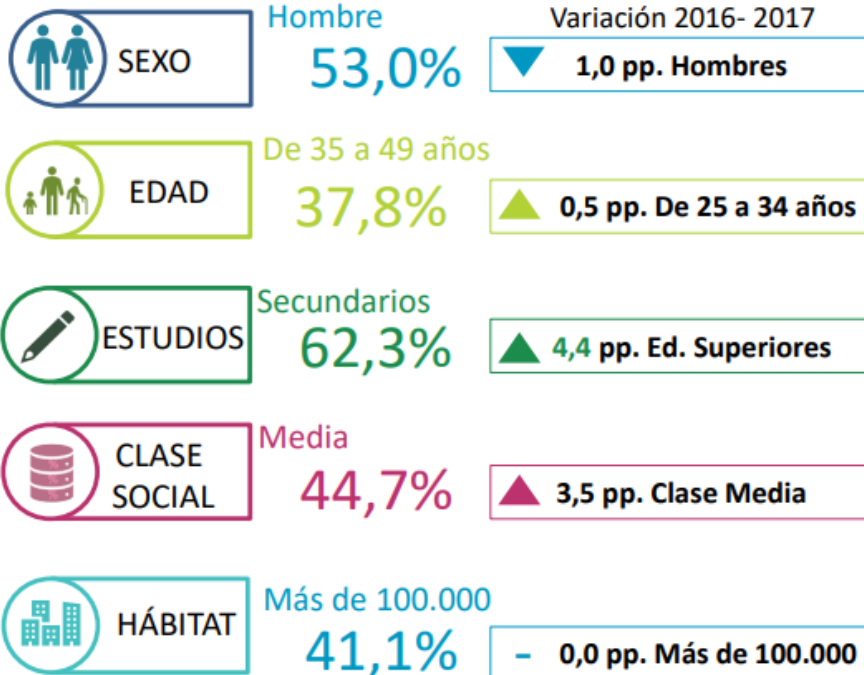
● GANANCIA EN BANDA ANCHA FIJA EN AGOSTO



FUENTE: CNMC.

EL MUNDO

INTERNAUTAS COMPRADORES



ontsi observatorio nacional de las telecomunicaciones y de la SI

UGT Comunicaciones