DiMAx ranks countries on their potential to generate earnings from digital media

DiMAx country rankings:

Riding the new wave of digital growth

This year’s results from DiMAx, EY’s proprietary Digital Media Attractiveness Index

Emerging markets are primed for accelerated digital media adoption — condensed rates of technology adoption and digital media consumption

Millennials and Generation C

Smartphone adoption

Broadband penetration

Disposable income

25% Emerging market consumers who are 14 years old or younger, compared with 16% in developed markets1

200% Growth in smartphone shipments between 2014 and 2018 within key emerging markets, including India, Indonesia and Russia2

2b The number of broadband connections by 2016 in the emerging markets in our index – twice that of developed markets3

268m BRIC households that have an income over US$10,000 – more households than the US and the Eurozone combined4

Four emerging market countries top DiMAx for digital earnings potential

China

>300m wireless broadband connections by 2016

>534m between the ages of 15 and 39

In three years added 3.5 times as many digital video viewers as the US

India

>500m wireless broadband connections by 2016

Average age by 2020: 29

4th in content consumption, but ubiquity of media consumption has not yet translated into significant industry revenue

Russia

3rd in cost attractiveness among emerging markets in our index

US$11k in per capita consumer spending — the highest among emerging markets

Only 21% smartphone penetration

Mexico

14th in media FDI restrictiveness due to new restrictions on foreign ownership of mass media

Four-tune your growth strategy by viewing digital market potential through the lens of benefits vs. costs

Market benefits vs. market costs

Market benefits

Market costs

1 Principal markets

Any digital media growth strategy should consider the value and stability these markets offer.

2 Big bets

Offer huge opportunity and scale but come with inherent challenges and risks.

3 Long-term options

Come with challenges and may lack the scale or levels of technology adoption to be attractive at this stage.

4 Low-hanging fruit

Attractive and low-risk options to add incremental return, but not transformative.

Identify your growth markets in real time

Based on DiMAx and our interactive tool, DiMAx Interactive

www.ey.com/DiMAxInteractive

Are you ready to catch the wave?

For more findings, download our latest report:

www.ey.com/RidingTheNewWave

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1 The Nielsen Company 2 Terrapinn Holdings Limited 3 Ovum 4 ICEF Monitor