

# NIELSEN DIGITAL AD RATINGS™

## GLOBAL BENCHMARKS AND FINDINGS

### SUMMARY

The global advertising landscape continues to evolve as investment shifts to digital across various devices and channels. This change in direction underscores the need to understand your campaign audience delivery across screens in a way that is comparable and easily actionable. This release of our Digital Ad Ratings benchmarks and findings gives you an inside look into audience delivery across four geographic regions with the market specific information required to make strategic decisions around how you invest and optimize your campaigns.

With a new industry focus on digital advertising there has been a burst of new metrics and targeting capabilities, but our experience has taught us that this has not been enough. In the UK, 45% of impressions delivered to campaigns targeting Persons aged 25-54 ended up reaching the wrong target audience. And this only gets lower for more narrowly targeted campaigns.

Nielsen can help solve the audience delivery problem by giving you benchmarks that quantify performance against all the key demographics at global scale. This is quantified by measuring a campaign's "On-Target Percent." and can give useful information about when further optimization is needed. These benchmarks continue to become more robust and will expand as we start including results from the nine new markets we on-boarded this year, bringing our total to 17 Digital Ad Ratings markets globally.

This report contains benchmarks for the following countries through Q1 2015:

- (1) **Europe:** France, UK, Germany, Italy
- (2) **LATAM:** Brazil
- (3) **North America:** Canada
- (4) **SEANAP:** Australia

Norms in this report include:



Benchmarks for age/gender breaks and zones. A zone is defined as a group of demos that have a similar span of years between their lower and upper bounds.



Benchmarks for advertiser categories

### HOW TO READ AND APPLY NORMS



P25-54 overall On-Target Percent is 55 percent. This can be read as 55 percent of all impressions served to a campaign, with a target audience of P25-54 were actually delivered to P25-54.

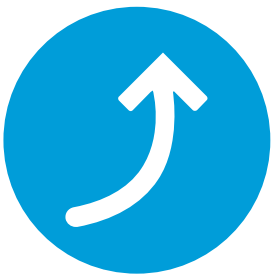
If a campaign with a P25-54 target audience has an On-Target Percent of 40 percent, this is 15 points below the 55 percent norm for this demographic segment.

Note: Similar to the U.S. benchmarks report, **we used weighted data, which allows site observations of a website or ad network appearing within a campaign** with higher impression counts to have a higher contribution to the final benchmarks. This provides a more statistically sound representation of average campaign performance. Overall benchmarks are calculated using all historical campaign data.

## SPOTLIGHTS

### PRECISION VARIES WITH NARROWNESS OF CAMPAIGN TARGET

Campaigns with broader targets have significantly better performance when it comes to reaching your desired audience. In the UK for example, campaigns targeting P18-24 have a norm of 31% while campaigns targeted at P18-49 reach 75% of the audience.



### OPTIMIZATION CAN MAKE A DIFFERENCE IN CAMPAIGN PERFORMANCE

Australia's overall On-Target percentage norm is 54%. This means that 46% of impressions are being delivered outside of desired audiences. There is a clear need to optimize in flight and shift impressions served to the wrong people.

### CATEGORIES ARE NOT CREATED EQUAL

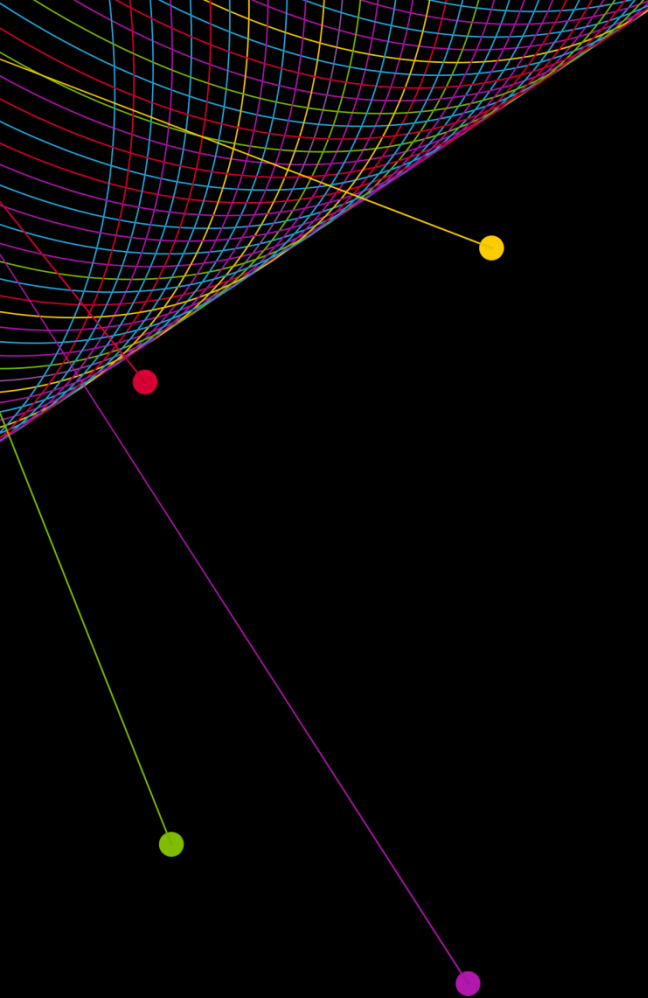
In Canada the CPG vertical is currently lagging in terms of performance with just 46% of impressions hitting the right audience. This is in contrast to 73% for computers and electronics.



### ITS EVEN HARDER TO REACH SOME AUDIENCES

When looking at the 25-49 demographic in France it's evident that it's easier to reach females vs. males. The F25-49 norm is 42% vs. 35% for M25-49.

\* Individual countries spotlighted, but findings are consistent across markets and audiences



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# EUROPE

FRANCE, UK, GERMANY, ITALY

# ON-TARGET PERCENT BENCHMARKS

Table 1: Specific Age and Gender Breaks, Europe

		FRANCE			UK			GERMANY			ITALY		
	AGE SPAN (YEARS)	P	F	M	P	F	M	P	F	M	P	F	M
13+		95%	*	*	96%	*	*	90%	*	*	*	*	*
18+		89%	41%	*	91%	85%	*	90%	45%	61%	93%	*	*
25+		*	*	*	79%	63%	51%	*	*	*	92%	*	*
18-24	7	*	*	*	31%	*	*	*	*	*	*	*	*
21-34	14	*	*	*	*	*	*	*	*	*	*	*	*
18-34	17	46%	39%	43%	54%	38%	37%	*	24%	*	79%	*	*
25-44	20	*	*	*	46%	36%	40%	*	*	*	39%	33%	*
35-54	20	37%	*	*	36%	36%	*	*	*	*	*	36%	*
13-34	22	43%	29%	40%	76%	28%	61%	*	*	*	*	20%	*
25-49	25	54%	42%	35%	70%	54%	*	*	30%	*	*	*	*
25-54	30	63%	*	*	55%	53%	45%	65%	42%	*	69%	57%	52%
35-64	30	*	*	*	55%	46%	*	*	*	*	*	*	*
18-49	32	70%	*	*	75%	*	*	66%	36%	47%	*	*	*

Note: Age and gender norms are available for demo breaks that had sufficient data to meet the minimum requirements for inclusion

# ON-TARGET PERCENT BENCHMARKS

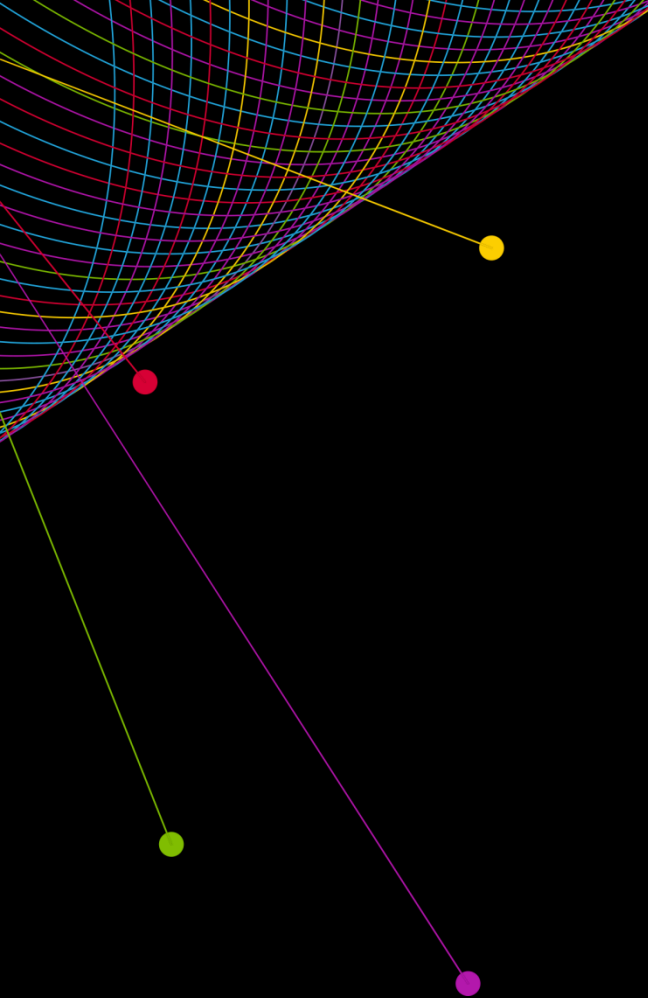
Table 2: Demographic Zone, Europe

ZONE	GENDER	AGE SPAN	FRANCE	UK	GERMANY	ITALY
1	P	Broad: >30 years	79%	87%	78%	86%
2	M or F	Broad: >30 years	48%	72%	52%	75%
3	P	Medium: 16-30 years	55%	56%	73%	70%
4	M or F	Medium: 16-30 years	40%	46%	46%	51%
5	P	Narrow: ≤ 15 years	43%	73%	77%	*
6	M or F	Narrow: ≤ 15 years	28%	34%	56%	*
<b>GRAND TOTAL</b>			54%	65%	67%	72%

Table 3: Advertiser Category, Europe

EUROPE	FRANCE	UK	GERMANY	ITALY
<b>AUTOMOTIVE</b>	44%	67%	84%	67%
<b>BUSINESS &amp; CONSUMER SERVICES</b>	54%	75%	63%	54%
<b>COMPUTERS &amp; ELECTRONICS</b>	76%	55%	80%	*
<b>CPG</b>	54%	62%	73%	76%
<b>ENTERTAINMENT</b>	51%	69%	73%	70%
<b>FINANCIAL SERVICES</b>	45%	63%	55%	73%
<b>SHOPPING/RETAIL</b>	52%	71%	58%	64%
<b>TRAVEL</b>	50%	59%	82%	*

Note: Advertiser categories are defined by Nielsen Ad Intel.



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# LATAM

## BRAZIL

# ON-TARGET PERCENT BENCHMARKS

Table 4: Specific Age and Gender Breaks, Brazil

	AGE SPAN (YEARS)	BRAZIL		
		P	F	M
13+		93%	*	*
18+		86%	*	*
25+		64%	*	*
18-24	7	*	*	*
21-34	14	*	*	*
18-34	17	45%	*	*
25-44	20	*	*	*
35-54	20	*	*	*
13-34	22	*	*	*
25-49	25	54%	*	*
25-54	30	*	*	*
35-64	30	*	*	*
18-49	32	*	*	*

Note: Age and gender norms are available for demo breaks that had sufficient data to meet the minimum requirements for inclusion

Table 5: Demographic Zone, Brazil

ZONE	GENDER	AGE SPAN	ON-TARGET PERCENT
1	P	Broad: >30 years	84%
2	M or F	Broad: >30 years	80%
3	P	Medium: 16-30 years	55%
4	M or F	Medium: 16-30 years	46%
5	P	Narrow: ≤ 15 years	*
6	M or F	Narrow: ≤ 15 years	*
<b>GRAND TOTAL</b>			77%

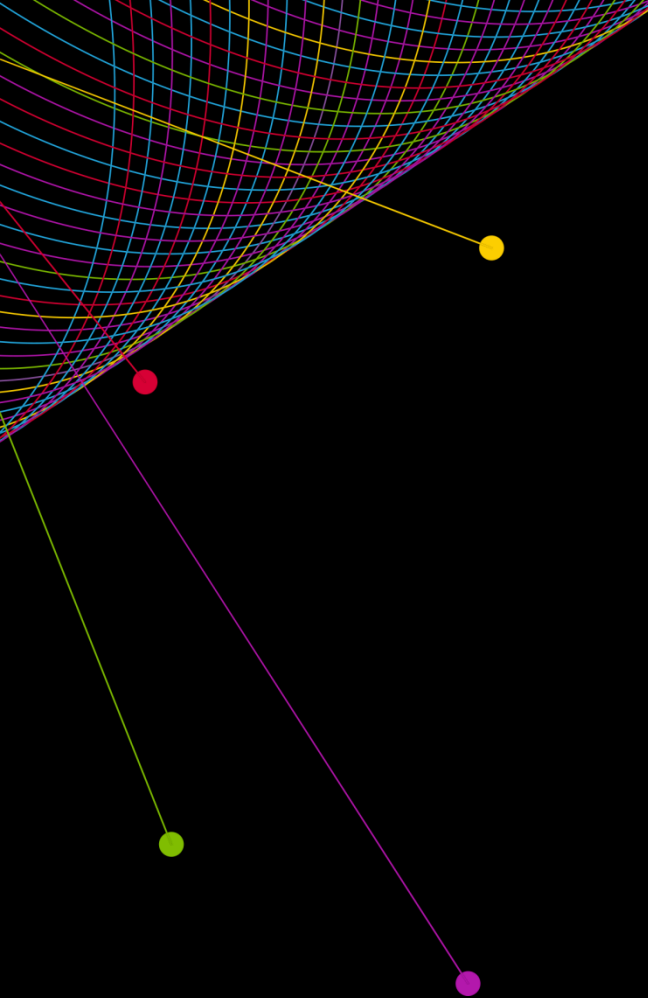
# ON-TARGET PERCENT BENCHMARKS

Table 6: Advertiser Category, Brazil

BRAZIL	ON-TARGET PERCENT
AUTOMOTIVE	68%
BUSINESS & CONSUMER SERVICES	78%
COMPUTERS & ELECTRONICS	70%
CPG	78%
ENTERTAINMENT	89%
FINANCIAL SERVICES	87%
SHOPPING/RETAIL	81%
TRAVEL	76%

Note: Advertiser categories are defined by Nielsen Ad Intel.





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# NORTH AMERICA\*

## CANADA

\*BENCHMARKS FOR THE UNITED STATES DELIVERED SEPARATELY

# ON-TARGET PERCENT BENCHMARKS

Table 7: Specific Age and Gender Breaks, Canada

		CANADA		
	AGE SPAN (YEARS)	P	F	M
13+		95%	*	*
18+		93%	*	*
25+		*	*	*
18-24	7	*	*	14%
21-34	14	*	*	*
18-34	17	66%	24%	36%
25-44	20	*	*	*
35-54	20	29%	21%	*
13-34	22	*	*	*
25-49	25	64%	*	*
25-54	30	57%	34%	41%
35-64	30	*	*	*
18-49	32	74%	42%	*

Note: Age and gender norms are available for demo breaks that had sufficient data to meet the minimum requirements for inclusion

Table 8: Demographic Zone, Canada

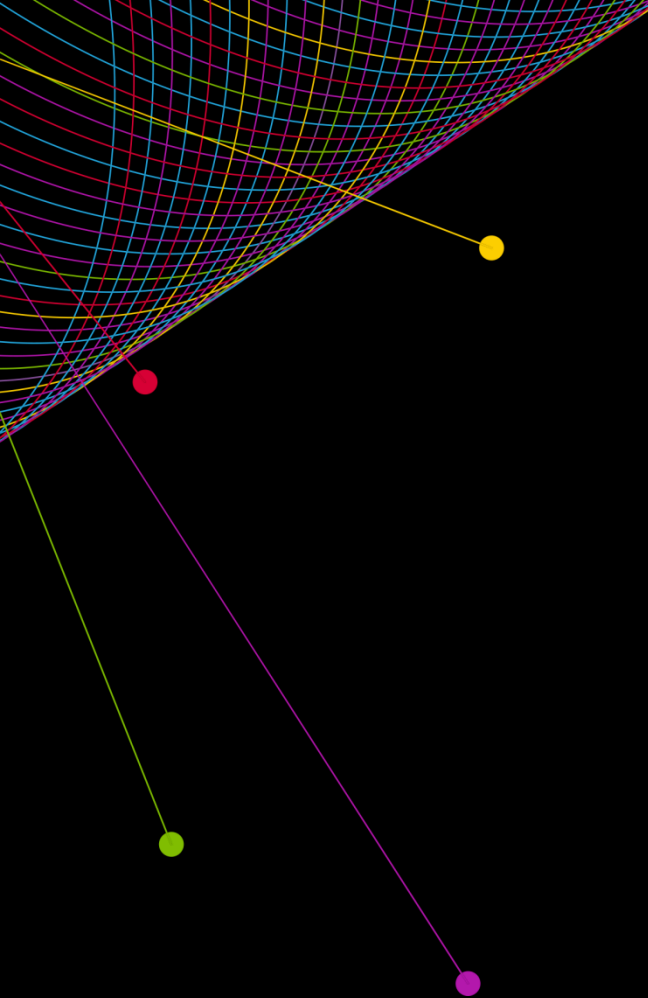
ZONE	GENDER	AGE SPAN	ON-TARGET PERCENT
1	P	Broad: >30 years	72%
2	M or F	Broad: >30 years	40%
3	P	Medium: 16-30 years	58%
4	M or F	Medium: 16-30 years	33%
5	P	Narrow: ≤ 15 years	37%
6	M or F	Narrow: ≤ 15 years	14%
<b>GRAND TOTAL</b>			53%

# ON-TARGET PERCENT BENCHMARKS

Table 9: 2015 Advertiser Category, Canada

CANADA	ON-TARGET PERCENT
AUTOMOTIVE	53%
BUSINESS & CONSUMER SERVICES	71%
COMPUTERS & ELECTRONICS	73%
CPG	40%
ENTERTAINMENT	77%
FINANCIAL SERVICES	60%
SHOPPING/RETAIL	59%
TRAVEL	58%

Note: Advertiser categories are defined by Nielsen Ad Intel.



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# SEANAP

## AUSTRALIA

# ON-TARGET PERCENT BENCHMARKS

Table 10: Specific Age and Gender Breaks, Australia

	AGE SPAN (YEARS)	AUSTRALIA		
		P	F	M
13+		*	*	*
18+		88%	*	*
25+		*	*	*
18-24	7	*	*	*
21-34	14	*	*	*
18-34	17	60%	40%	*
25-44	20	43%	33%	*
35-54	20	*	28%	*
13-34	22	48%	*	*
25-49	25	63%	*	*
25-54	30	62%	51%	39%
35-64	30	*	*	*
18-49	32	68%	52%	43%

Note: Age and gender norms are available for demo breaks that had sufficient data to meet the minimum requirements for inclusion

Table 11: Demographic Zone, Australia

ZONE	GENDER	AGE SPAN	ON-TARGET PERCENT
1	P	Broad: >30 years	74%
2	M or F	Broad: >30 years	51%
3	P	Medium: 16-30 years	59%
4	M or F	Medium: 16-30 years	42%
5	P	Narrow: ≤ 15 years	29%
6	M or F	Narrow: ≤ 15 years	31%
<b>GRAND TOTAL</b>			54%

# ON-TARGET PERCENT BENCHMARKS

Table 12: Advertiser Category, Australia

AUSTRALIA	ON-TARGET PERCENT
AUTOMOTIVE	48%
BUSINESS & CONSUMER SERVICES	56%
COMPUTERS & ELECTRONICS	71%
CPG	48%
ENTERTAINMENT	59%
FINANCIAL SERVICES	48%
SHOPPING/RETAIL	66%
TRAVEL	73%

Note: Advertiser categories are defined by Nielsen Ad Intel.

# APPENDIX

## Methodology and Assumptions

We have measured more than 27,000 Nielsen Digital Ad Ratings campaigns through March 31, 2015 across all of our international markets. Each of our norms are reported when the minimum number of site observations was at least 30. A site observation is defined as the performance of a campaign on one site (>5,000 impressions) with the specified demographic. With sample sizes exceeding 30, we can reasonably expect to see stable benchmarks.

The average On-Target Percent is the number of impressions that reached the intended demo divided by the number of total impressions in the campaign. The On-Target Percent is calculated by weighting each campaign by the number of impressions it contained within each category or demographic.

Asterisked cells are data points that did not meet the minimum site observation requirement. In certain cases, demographic breaks are excluded from charts due to a lack of available data points.

The following abbreviations are used:

- P: Persons (both genders)
- F: Female
- M: Male

### UNKNOWN DEMOGRAPHIC SEGMENT

On July 29, 2013, an “Unknown” demographic segment was temporarily introduced into reporting. This segment captures impressions served to Persons 2-12, as well as impressions served to browsers in which we cannot determine the user’s age from their Facebook registration data. Impressions reported in the “Unknown” demographic segment are not counted towards a campaign’s On-Target Percent. On average, impact to a campaign’s On-Target Percent is not more than a two-percent decline.

### FOOTNOTE

The following advertiser verticals are listed in this document. Advertiser verticals are consistent with the categories and definitions used in Nielsen Ad Intel.

**Automotive** – Sellers, manufacturers, or distributors of automobiles such as cars, trucks, vans, and motorcycles. This category includes automotive parts and accessories dealers and automotive repair and improvement services.

**Business and Consumer Services** - Occupations requiring special training in the arts or sciences, or requiring certification by a professional body, such as auditors, doctors and lawyers. Also includes the companies and services that support these sectors including tax advice, accounting support, etc.

**Computers and Electronics** – Computer and electronic equipment brands or manufacturers, such as phones, iPods, TVs, and printers.

**Consumer Packaged Goods (CPG)** – A business that produces or sells consumer packaged goods such as food and beverages, beauty and personal care products, over-the-counter medications and nutritional supplements, and cleaning products. In general, CPG are goods that have to be replaced frequently.

**Entertainment** – A business that sells products or services that are used primarily for the purpose of entertainment, such as movies, music, theater, broadcast and cable television stations, and video games.

**Financial Services** – A business that offers services utilized for the saving, transfer, accumulation, disbursement, and acquisition of money. This category includes credit, investment, banking, insurance, and loans.

**Shopping/Retail** – A place of business usually owned and operated by a retailer but sometimes owned and operated by a manufacturer or by someone other than a retailer in which merchandise is sold primarily to ultimate consumers.

**Travel** - A commercial organization which organizes or supports vacations and visits to places of interest.

# APPENDIX

## ABOUT NIELSEN CAMPAIGN RATINGS

Nielsen Campaign Ratings delivers clients comprehensive, comparable metrics for TV and online advertising campaigns. Part of the Nielsen Campaign Ratings product suite, Nielsen Digital Ad Ratings combines Nielsen's Cross-Platform Homes panel data with aggregated, anonymous, privacy-protected demographic information from participating online data providers. Campaign reporting is available the day after the launch of a campaign, providing vital delivery information in-flight to both advertisers and publishers. Nielsen Total Ad Ratings, also part of the suite, draws upon Nielsen Digital Ad Ratings as well as Nielsen's proprietary TV data to deliver unduplicated and incremental reach, frequency, and GRP measures for TV and Internet advertising. For more information, visit <http://www.nielsen.com/digitaladratings>.

## ABOUT NIELSEN

Nielsen Holdings N.V. (NYSE: NLSN) is a global information and measurement company with leading market positions in marketing and consumer information, television and other media measurement, online intelligence and mobile measurement. Nielsen has a presence in approximately 100 countries, with headquarters in New York, USA, and Diemen, the Netherlands. For more information, visit [www.nielsen.com](http://www.nielsen.com).