NIELSEN DIGITAL AD RATINGS

BENCHMARKS AND FINDINGS THROUGH 2H 2016, EUROPE

INTRODUCTION

In the age of digital advertising measurement, the key indicators of a successful campaign include reach and **on-target percentage**, or the percentage of impressions delivered within the target audience out of the total served during the entire campaign. While marketers can achieve high on-target rates, it's still incredibly hard to achieve a 100% on-target rate – effectively serving all ads to the defined audience. With this understanding, media buyers and sellers require reliable benchmarks to evaluate campaign success.

Available in 27 countries globally, **Nielsen Digital Ad Ratings** has become an industry standard for buying and selling digital media. Leveraging our sample of historic campaigns, the **Nielsen Digital Ad Ratings Benchmarks and Findings Report** serves as guidance for individual campaign efficiency compared to marketplace averages for the following:

Total digital age/gender breaks and age spans

Advertiser categories, across total digital, desktop-only and mobile-only

Platforms/ad networks vs. publishers

Desktop-only age/gender breaks and age spans

Mobile-only age/gender breaks and age spans*

HOW TO READ AND APPLY BENCHMARKS

P25-54 overall on-target percent is 59%. This means that 59% 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 65%, this is 6 points above the 59% benchmark for this demographic segment.

Age spans refers to the range of ages the target audience covers, and is organized into three groups:

Broad – more than 30 years (e.g. P18+)

Medium – 16 to 30 years (e.g. P25-54)

Narrow – less than 15 years (e.g. P18-34)

*Mobile insights provided for directional purposes only

EUROPEAN ON-TARGET BENCHMARKS

AGE AND GENDER BREAKS

AGE BRACKETS

| Age Bracket	TOTAL DIGITAL P	TOTAL DIGITAL M	TOTAL DIGITAL F	DESKTOP ONLY P	DESKTOP ONLY M	DESKTOP ONLY F	MOBILE ONLY* P	MOBILE ONLY* M	MOBILE ONLY* F
13+	96%	64%	55%	96%	64%	54%	98%	65%	59%
13–34	44%	31%	34%	45%	33%	32%	45%	25%	40%
18+	91%	62%	46%	92%	62%	45%	96%	68%	53%
18–49	66%	45%	39%	64%	45%	39%	74%	42%	43%
18–34	44%	31%	25%	45%	33%	24%	47%	25%	29%
18–24	25%	18%	13%	24%	19%	14%	25%	13%	-
21–34	32%	-	22%	32%	-	22%	-	-	23%
25+	79%	49%	42%	79%	50%	42%	84%	-	42%
25–54	56%	41%	35%	54%	41%	33%	63%	35%	44%
25–49	51%	35%	31%	51%	36%	29%	57%	31%	39%
25–44	41%	30%	27%	40%	31%	25%	47%	29%	36%
25–34	28%	16%	13%	28%	16%	12%	30%	15%	22%
35–64	54%	37%	32%	54%	37%	31%	55%	30%	41%
35–54	40%	29%	30%	39%	30%	30%	43%	28%	31%
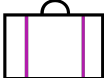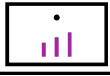
After open-ended demographics (e.g. 13+, 18+, 25+), P18-49 was the highest performing digital benchmark, reaching the desired audience 66% of the time. This can be contrasted with just 25% on-target accuracy for campaigns focusing on P18-24, a more narrow audience.

Among the 18+ demographic, digital campaigns did a better job reaching males with 62% accuracy versus 46% for females.

Accuracy can also be influenced by device type; mobile on-target performance for the P25-54 demographic (63%) was 9 percentage points higher than desktop performance (54%).

*Mobile insights provided for directional purposes only

EUROPEAN ON-TARGET BENCHMARKS

ADVERTISER CATEGORY		TOTAL DIGITAL	DESKTOP ONLY	MOBILE ONLY*
	AUTOMOTIVE	45%	45%	45%
	BUSINESS & CONSUMER SERVICES	63%	62%	71%
	COMPUTERS & ELECTRONICS	49%	49%	54%
	CONSUMER PACKAGED GOODS	43%	42%	48%
	ENTERTAINMENT	57%	55%	61%
	FINANCIAL SERVICES	56%	56%	55%
	SHOPPING/ RETAIL	49%	50%	49%
	TRAVEL	65%	70%	72%

PUBLISHER TYPE

PLATFORM/ NETWORK
52%

SITE PUBLISHER
53%

AGE SPANS – PEOPLE VS MALE-ONLY OR FEMALE-ONLY

	TOTAL DIGITAL		DESKTOP ONLY		MOBILE ONLY*	
	P	M or F	P	M or F	P	M or F
Broad >30 years	81%	46%	81%	46%	83%	47%
Medium 16-30 years	52%	31%	51%	30%	56%	35%
Narrow ≤15 years	29%	20%	29%	19%	29%	23%

*Mobile insights provided for directional purposes only

EUROPEAN SPOTLIGHT

FRANCE

GERMANY

ITALY

UNITED KINGDOM

FRANCE ON-TARGET BENCHMARKS

AGE AND GENDER BREAKS

AGE BRACKETS

Age bracket	Total Digital P	M	F	Desktop Only P	M	F	Mobile Only* P	M	F
13+	96%	-	65%	95%	-	65%	98%	-	-
13–34	42%	35%	29%	43%	34%	28%	55%	40%	39%
18+	93%	-	49%	93%	-	47%	95%	57%	59%
18–49	71%	-	-	66%	-	-	83%	-	-
18–34	44%	29%	27%	43%	29%	26%	52%	26%	33%
18–24	30%	13%	27%	28%	13%	-	36%	12%	-
21–34	-	-	29%	-	-	29%	-	-	-
25+	80%	-	-	79%	-	-	83%	-	-
25–54	55%	-	36%	52%	-	35%	64%	-	39%
25–49	52%	36%	29%	51%	36%	28%	58%	35%	37%
25–44	44%	37%	27%	44%	37%	26%	47%	38%	31%
25–34	29%	22%	11%	28%	21%	10%	31%	-	22%
35–64	55%	37%	-	55%	37%	-	-	29%	-
35–54	41%	31%	27%	41%	31%	28%	44%	29%	25%

After open-ended demographics (e.g. 13+, 18+, 25+), P18-49 was the highest performing digital benchmark, reaching the desired audience 71% of the time. This can be contrasted with just 29% on-target accuracy for campaigns targeting P25-34, a more narrow audience.
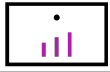
Among the 25-44 demographic, digital campaigns did a better job reaching males with 37% accuracy versus 27% for females.

Accuracy can also be influenced by device type; mobile on-target performance for the P18-49 demographic (83%) was 17 percentage points higher than desktop performance (66%).
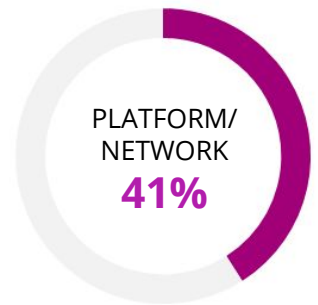
*Mobile insights provided for directional purposes only

FRANCE ON-TARGET BENCHMARKS

ADVERTISER CATEGORY	TOTAL DIGITAL	DESKTOP ONLY	MOBILE ONLY*
AUTOMOTIVE	40%	40%	40%
BUSINESS & CONSUMER SERVICES	46%	44%	50%
COMPUTERS & ELECTRONICS	49%	49%	53%
CONSUMER PACKAGED GOODS	39%	39%	39%
ENTERTAINMENT	49%	48%	66%
FINANCIAL SERVICES	50%	50%	47%
SHOPPING/ RETAIL	36%	36%	47%
TRAVEL	41%	38%	45%

PUBLISHER TYPE

PLATFORM/ NETWORK
41%

SITE PUBLISHER
45%

AGE SPANS – PEOPLE VS MALE-ONLY OR FEMALE-ONLY

	TOTAL DIGITAL		DESKTOP ONLY		MOBILE ONLY*	
	P	M or F	P	M or F	P	M or F
Broad >30 years	84%	46%	82%	45%	90%	49%
Medium 16-30 years	50%	30%	49%	30%	56%	33%
Narrow ≤15 years	31%	20%	31%	20%	31%	24%

*Mobile insights provided for directional purposes only

GERMANY ON-TARGET BENCHMARKS

AGE AND GENDER BREAKS

AGE BRACKETS

Age Bracket	TOTAL DIGITAL			DESKTOP ONLY			MOBILE ONLY*		
	P	M	F	P	M	F	P	M	F
13+	97%	-	-	97%	-	-	98%	-	-
13–34	-	-	-	-	-	-	-	-	-
18+	93%	64%	45%	93%	64%	44%	95%	53%	49%
18–49	66%	47%	34%	63%	48%	25%	72%	45%	43%
18–34	40%	-	24%	39%	-	24%	40%	-	-
18–24	11%	-	-	11%	-	-	-	-	-
21–34	-	-	-	-	-	-	-	-	-
25+	90%	-	44%	90%	-	43%	89%	-	45%
25–54	62%	-	38%	62%	-	34%	-	-	-
25–49	-	34%	35%	-	36%	35%	-	31%	38%
25–44	48%	-	-	48%	-	-	-	-	-
25–34	-	-	-	-	-	-	-	-	-
35–64	-	-	-	-	-	-	-	-	-
35–54	-	-	-	-	-	-	-	-	-

After open-ended demographics (e.g. 13+, 18+, 25+), P18-49 was the highest performing digital benchmark, reaching the desired audience 66% of the time. This can be contrasted with just 11% on-target accuracy for campaigns targeting P18-24, a more narrow audience.

Among the 18+ demographic, digital campaigns did a better job reaching males with 64% accuracy versus 45% for females.
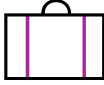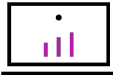
Accuracy can also be influenced by device type; mobile on-target performance for the P18-49 demographic (72%) was 9 percentage points higher than desktop performance (63%).

*Mobile insights provided for directional purposes only

GERMANY ON-TARGET BENCHMARKS

	ADVERTISER CATEGORY	TOTAL DIGITAL	DESKTOP ONLY	MOBILE ONLY*
	AUTOMOTIVE	40%	41%	31%
	BUSINESS & CONSUMER SERVICES	60%	58%	67%
	COMPUTERS & ELECTRONICS	46%	47%	28%
	CONSUMER PACKAGED GOODS	44%	43%	44%
	ENTERTAINMENT	60%	68%	36%
	FINANCIAL SERVICES	72%	75%	65%
	SHOPPING/ RETAIL	64%	65%	68%
	TRAVEL	82%	83%	89%

AGE SPANS – PEOPLE VS MALE-ONLY OR FEMALE-ONLY

	TOTAL DIGITAL		DESKTOP ONLY		MOBILE ONLY*	
	P	M or F	P	M or F	P	M or F
Broad >30 years	76%	45%	77%	46%	75%	44%
Medium 16-30 years	53%	33%	53%	34%	50%	29%
Narrow ≤15 years	26%	17%	27%	15%	24%	20%

*Mobile insights provided for directional purposes only

ITALY ON-TARGET BENCHMARKS

AGE AND GENDER BREAKS

AGE BRACKETS

Age	TOTAL DIGITAL P	M	F	DESKTOP ONLY P	M	F	MOBILE ONLY* P	M	F
13+	97%	68%	56%	95%	67%	54%	98%	61%	65%
13–34	-	-	39%	-	-	38%	-	-	42%
18+	89%	70%	66%	89%	73%	68%	94%	61%	61%
18–49	-	48%	-	-	50%	-	-	41%	-
18–34	43%	-	30%	41%	-	30%	49%	-	29%
18–24	25%	-	-	26%	-	-	18%	-	-
21–34	-	-	-	-	-	-	-	-	-
25+	84%	-	-	84%	-	-	-	-	-
25–54	65%	45%	39%	63%	46%	35%	67%	37%	47%
25–49	-	-	27%	-	-	24%	-	-	34%
25–44	47%	30%	28%	46%	32%	25%	49%	26%	34%
25–34	31%	-	26%	31%	-	23%	-	-	29%
35–64	61%	-	26%	60%	-	26%	61%	-	-
35–54	45%	-	38%	44%	-	37%	47%	-	43%

After open-ended benchmarks (e.g. 13+, 18+, 25+), P25-54 was the highest performing digital benchmark, reaching the desired audience 65% of the time. This can be contrasted with just 25% on-target accuracy for campaigns targeting P18-24, a more narrow audience.
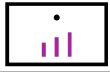
Among the 13+ demographic, digital campaigns did a better job reaching males with 68% accuracy versus 56% for females.

Accuracy can also be influenced by device type; mobile on-target performance for P18-34 demographic (49%) was 8 percentage points higher than desktop performance (41%).
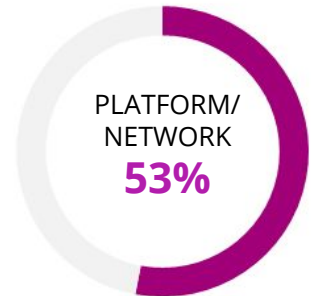
*Mobile insights provided for directional purposes only

ITALY ON-TARGET BENCHMARKS

ADVERTISER CATEGORY	TOTAL DIGITAL	DESKTOP ONLY	MOBILE ONLY*
AUTOMOTIVE	65%	60%	69%
BUSINESS & CONSUMER SERVICES	72%	67%	80%
COMPUTERS & ELECTRONICS	39%	-	48%
CONSUMER PACKAGED GOODS	46%	45%	49%
ENTERTAINMENT	61%	30%	35%
FINANCIAL SERVICES	73%	77%	64%
SHOPPING/ RETAIL	42%	44%	43%
TRAVEL	-	-	-

PUBLISHER TYPE

PLATFORM/ NETWORK **53%**

SITE PUBLISHER **60%**

AGE SPANS – PEOPLE VS MALE-ONLY OR FEMALE-ONLY

	TOTAL DIGITAL		DESKTOP ONLY		MOBILE ONLY*	
	P	M or F	P	M or F	P	M or F
Broad >30 years	79%	54%	76%	52%	84%	58%
Medium 16-30 years	58%	35%	55%	33%	60%	39%
Narrow ≤15 years	29%	21%	30%	19%	29%	24%

*Mobile insights provided for directional purposes only

UK ON-TARGET BENCHMARKS

AGE AND GENDER BREAKS

AGE BRACKETS

Age Bracket	TOTAL DIGITAL			DESKTOP ONLY			MOBILE ONLY*		
	P	M	F	P	M	F	P	M	F
13+	96%	-	46%	96%	-	42%	97%	-	55%
13–34	48%	26%	27%	48%	30%	26%	39%	20%	-
18+	91%	62%	50%	91%	60%	46%	96%	71%	-
18–49	66%	-	-	64%	-	-	-	-	-
18–34	44%	33%	22%	48%	36%	22%	43%	24%	23%
18–24	23%	-	11%	25%	-	-	15%	-	-
21–34	-	-	20%	-	-	18%	-	-	22%
25+	78%	51%	41%	77%	51%	40%	84%	-	41%
25–54	54%	38%	31%	53%	34%	30%	61%	-	42%
25–49	46%	-	38%	44%	29%	30%	-	-	42%
25–44	38%	25%	26%	37%	25%	24%	44%	22%	37%
25–34	-	12%	12%	-	-	11%	-	-	14%
35–64	54%	-	28%	54%	-	25%	-	-	-
35–54	38%	22%	18%	37%	24%	16%	42%	22%	23%

After open-ended demographics (e.g. 13+, 18+, 25+), P18-49 was the highest performing digital benchmark, reaching the desired audience 66% of the time. This can be contrasted with just 23% on-target accuracy for campaigns focusing on P18-24, a more narrow audience.

Among the 18+ demographic, digital campaigns did a better job reaching males with 62% accuracy versus 50% for females.

Accuracy can also be influenced by device type; mobile on-target performance for the P25-54 demographic (61%) is 8 percentage points higher than desktop performance (53%).

*Mobile insights provided for directional purposes only

UK ON-TARGET BENCHMARKS

ADVERTISER CATEGORY	TOTAL DIGITAL	DESKTOP ONLY	MOBILE ONLY*
AUTOMOTIVE	55%	59%	57%
BUSINESS & CONSUMER SERVICES	67%	68%	68%
COMPUTERS & ELECTRONICS	51%	51%	60%
CONSUMER PACKAGED GOODS	43%	42%	52%
ENTERTAINMENT	65%	63%	60%
FINANCIAL SERVICES	54%	54%	56%
SHOPPING/ RETAIL	42%	42%	40%
TRAVEL	67%	76%	77%

PUBLISHER TYPE

PLATFORM/ NETWORK
53%

SITE PUBLISHER
56%

AGE SPANS – PEOPLE VS MALE-ONLY OR FEMALE-ONLY

	TOTAL DIGITAL		DESKTOP ONLY		MOBILE ONLY*	
	P	M or F	P	M or F	P	M or F
Broad >30 years	84%	42%	85%	43%	87%	40%
Medium 16-30 years	51%	29%	51%	28%	55%	35%
Narrow ≤15 years	26%	18%	26%	18%	26%	20%

*Mobile insights provided for directional purposes only

APPENDIX

METHODOLOGY

This report assessed data from more than 9,000 Nielsen Digital Ad Ratings campaigns from France, Germany, Ireland, Italy, Poland, Turkey, and the United Kingdom through 31 December, 2016, where 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. Site observations from sites that are also Nielsen Digital Ad Ratings data providers were not included in this report.

The average on-target percent is the number of impressions that reached the intended demographic 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. 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. Unmeasurable impressions and un-targeted campaigns have also been excluded from norms calculations, to provide more accurate benchmarks.

Benchmarks are calculated using all available historical campaign data. Male-only and female-only benchmarks are calculated using data from historical campaigns where the intended audience is male-only or female-only. People benchmarks are calculated using data from historical campaigns where the intended audience is male and female (i.e. no gender target). Historical data from campaigns intended for both males and females (people) are not used for male-only and female-only benchmarks, and vice versa.

Blank 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.

ABOUT NIELSEN DIGITAL AD 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 plc (NYSE: NLSN) is a global performance management company that provides a comprehensive understanding of what consumers watch and buy. Nielsen's Watch segment provides media and advertising clients with Nielsen Total Audience measurement services for all devices on which content — video, audio and text — is consumed. The Buy segment offers consumer packaged goods manufacturers and retailers the industry's only global view of retail performance measurement. By integrating information from its Watch and Buy segments and other data sources, Nielsen also provides its clients with analytics that help improve performance. Nielsen, an S&P 500 company, has operations in over 100 countries, covering more than 90% of the world's population. For more information, visit www.nielsen.com.

nielsen