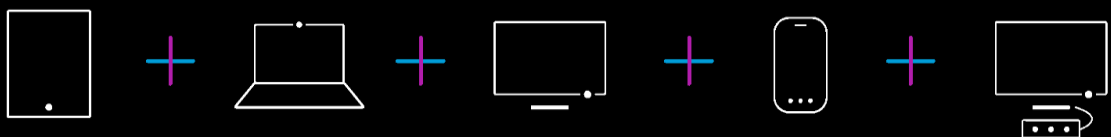# NIELSEN DIGITAL AD RATINGS BENCHMARKS AND FINDINGS

nielsen

THROUGH Q2 2016, EUROPE

NOVEMBER 2016

NIELSEN DIGITAL AD RATINGS BENCHMARKS AND FINDINGS

SUMMARY

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 24 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.

This report includes benchmarks for:

Age/gender breaks and age spans

Advertiser categories, as defined by Nielsen Ad Intel

Publishers vs. platforms/ad networks

Desktop-only and mobile-only insights

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)

REGIONAL INSIGHTS – EUROPE

DESKTOP AND MOBILE AUDIENCES DIFFER

Desktop campaigns have higher on-target rates for broad audiences, but mobile on-target starts to outperform for more narrowly defined targets. For broad audiences, defined as spanning more than 30 years in age, desktop campaigns achieved an average on-target rate of 80%, outperforming mobile's average of 68%. For medium audiences, defined as spanning 16-30 years in age, mobile campaigns achieved an on-target rate of 53%, outperforming desktop's 51%.

PRECISION IS TRICKY WITH NARROW AUDIENCES

Broad demographic zones, or mixed male and female audiences that span more than 30 years in age, had much higher on-target rates than more narrow targets. The former achieved an on-target rate of 78%, but this drops to 45% when trying to reach a male-only or female-only audience. When trying to reach a mixed male and female audience spanning less than 15 years, marketers missed the mark three-quarters of the time, highlighting optimization opportunities to improve reach and maximize return on ad spend.
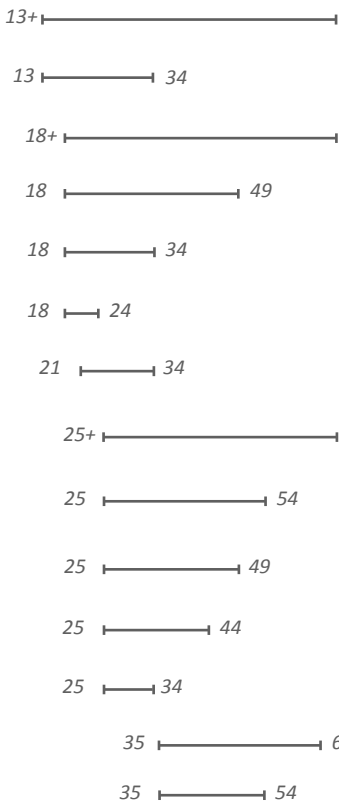
MISSING THE HOUSEHOLD SHOPPERS

Travel (65%) and Business & Consumer Services (60%) marketers all had an easier time reaching their desired audience than campaigns in other categories. CPG campaigns made up one-third (32%) of all European campaigns, but only reached their target 42% of the time, highlighting opportunities to optimize on-target delivery and maximize return on ad spend.

EUROPEAN 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+	94%	64%	56%	95%	66%	58%	86%	57%	40%
13–34	45%	35%	33%	45%	35%	32%	47%	32%	38%
18+	90%	63%	46%	91%	62%	46%	71%	70%	54%
18–49	64%	44%	36%	64%	45%	36%	66%	33%	–
18–34	44%	33%	25%	44%	34%	24%	44%	22%	28%
18–24	24%	17%	14%	24%	17%	15%	24%	13%	–
21–34	31%	–	24%	31%	–	24%	–	–	23%
25+	75%	49%	43%	78%	50%	43%	55%	–	43%
25–54	56%	40%	34%	55%	41%	33%	62%	33%	41%
25–49	51%	37%	30%	51%	37%	30%	51%	33%	34%
25–44	40%	30%	26%	40%	29%	25%	44%	35%	32%
25–34	27%	16%	11%	28%	16%	10%	24%	–	21%
35–64	54%	37%	31%	54%	38%	31%	53%	29%	–
35–54	38%	29%	30%	38%	29%	29%	42%	29%	32%

European campaigns focusing on P25-54 reached their desired audience 56% of the time. This can be contrasted with the just 27% on-target accuracy for campaigns targeting P25-34, a more narrow target. Among the P25-54 demographic, digital campaigns did a better job reaching males with 40% accuracy versus 34% for females. Accuracy can also be influenced by device type; mobile campaigns for the P25-54 demographic were 7 percentage points higher than those delivered on a desktop computer.

*Mobile insights for provided directional purposes only

EUROPEAN ON-TARGET BENCHMARKS

ADVERTISER CATEGORY	TOTAL DIGITAL	DESKTOP ONLY	MOBILE ONLY*
AUTOMOTIVE	45%	46%	39%
BUSINESS & CONSUMER SERVICES	60%	60%	58%
COMPUTERS & ELECTRONICS	49%	49%	52%
CONSUMER PACKAGED GOODS	42%	41%	43%
ENTERTAINMENT	57%	58%	46%
FINANCIAL SERVICES	57%	57%	54%
SHOPPING/RETAIL	49%	49%	47%
TRAVEL	65%	65%	60%

PUBLISHER TYPE
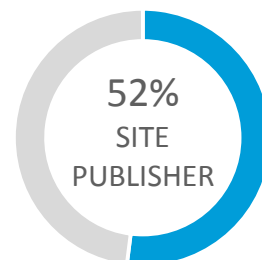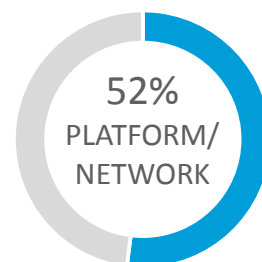
52% PLATFORM/ NETWORK

52% SITE PUBLISHER

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	78%	45%	80%	45%	68%	42%
Medium 16-30 years	51%	31%	51%	30%	53%	34%
Narrow ≤15 years	26%	23%	27%	24%	20%	21%

*Mobile insights for provided directional purposes only

EUROPEAN SPOTLIGHT

FRANCE
GERMANY
ITALY
UNITED KINGDROM

FRANCE ON-TARGET BENCHMARKS

AGE AND GENDER BREAKS

age brackets

0   15   30   45   60

Age bracket	TOTAL DIGITAL P	M	F	DESKTOP ONLY P	M	F	MOBILE ONLY* P	M	F
13+	95%	–	–	95%	–	–	97%	–	–
13 – 34	42%	35%	–	42%	35%	–	–	–	–
18+	93%	–	47%	93%	–	45%	95%	–	56%
18 – 49	64%	–	–	64%	–	–	64%	–	–
18 – 34	44%	32%	27%	43%	33%	26%	51%	26%	31%
18 – 24	31%	–	–	30%	–	–	36%	–	–
21 – 34	–	–	28%	–	–	29%	–	–	–
25+	–	–	–	–	–	–	–	–	–
25 – 54	48%	–	–	48%	–	–	50%	–	–
25 – 49	51%	36%	29%	51%	37%	29%	51%	32%	34%
25 – 44	–	37%	27%	–	36%	27%	–	38%	28%
25 – 34	28%	22%	10%	28%	22%	9%	35%	–	–
35 – 64	54%	37%	–	55%	38%	–	–	29%	–
35 – 54	40%	33%	27%	39%	33%	28%	42%	30%	–

French campaigns focusing on P25-49 reached their desired audience 51% of the time. This can be contrasted with the just 28% on-target accuracy for campaigns targeting P25-34, a more narrow target. Among the younger 18-34 demographic, digital campaigns did a better job reaching males with 32% accuracy versus 27% for females. Accuracy can also be influenced by device type; mobile campaigns for the 18-34 demographic were 8 percentage points higher than those delivered on a desktop computer.
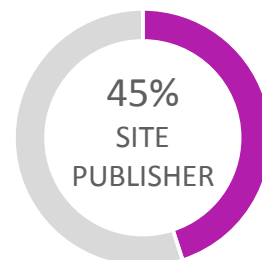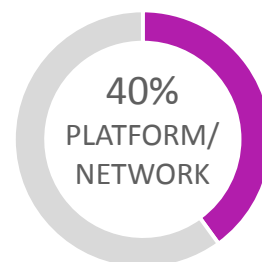
*Mobile insights for provided directional purposes only

FRANCE ON-TARGET BENCHMARKS

ADVERTISER CATEGORY	TOTAL DIGITAL	DESKTOP ONLY	MOBILE ONLY*
AUTOMOTIVE	40%	40%	37%
BUSINESS & CONSUMER SERVICES	42%	43%	35%
COMPUTERS & ELECTRONICS	49%	49%	50%
CONSUMER PACKAGED GOODS	39%	40%	33%
ENTERTAINMENT	48%	48%	60%
FINANCIAL SERVICES	51%	52%	46%
SHOPPING/RETAIL	34%	34%	40%
TRAVEL	43%	42%	43%

PUBLISHER TYPE

40% PLATFORM/NETWORK

45% SITE PUBLISHER

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%	44%	79%	45%	84%	42%
Medium 16-30 years	48%	30%	48%	30%	47%	32%
Narrow ≤15 years	28%	24%	29%	24%	23%	26%

*Mobile insights for provided directional purposes only

GERMANY ON-TARGET BENCHMARKS

AGE AND GENDER BREAKS

age brackets

age brackets	TOTAL DIGITAL			DESKTOP ONLY			MOBILE ONLY*		
	P	**M**	**F**	**P**	**M**	**F**	**P**	**M**	**F**
13+	83%**	–	–	92%	–	–	–	–	–
13–34	–	–	–	–	–	–	–	–	–
18+	92%	63%	45%	92%	63%	44%	95%	53%	49%
18–49	64%	46%	36%	64%	47%	36%	64%	29%	–
18–34	40%	–	24%	40%	–	24%	–	–	–
18–24	11%	–	–	11%	–	–	–	–	–
21–34	–	–	–	–	–	–	–	–	–
25+	77%	–	44%	88%	–	44%	50%	–	45%
25–54	61%	–	41%	61%	–	41%	–	–	–
25–49	–	38%	35%	–	40%	35%	–	35%	40%
25–44	48%	–	–	48%	–	–	–	–	–
25–34	–	–	–	–	–	–	–	–	–
35–64	–	–	–	–	–	–	–	–	–
35–54	–	–	–	–	–	–	–	–	–

German campaigns focusing on P25-54 reached their desired audience 61% of the time. This can be contrasted with the just 11% on-target accuracy for campaigns targeting P18-24, a more narrow target. Among the 18-49 demographic, digital campaigns did a better job reaching males with 46% accuracy versus 36% for females. Accuracy can also be influenced by device type; mobile campaigns for females 25-49 were 5 percentage points higher than those delivered on a desktop computer.

*Mobile insights for provided directional purposes only
**On-Target % including unmeasurable impressions.

GERMANY ON-TARGET BENCHMARKS

ADVERTISER CATEGORY	TOTAL DIGITAL	DESKTOP ONLY	MOBILE ONLY*
AUTOMOTIVE	43%	45%	34%
BUSINESS & CONSUMER SERVICES	59%	59%	59%
COMPUTERS & ELECTRONICS	46%	47%	28%
CONSUMER PACKAGED GOODS	44%	47%	37%
ENTERTAINMENT	63%	63%	–
FINANCIAL SERVICES	75%	75%	70%
SHOPPING/RETAIL	63%	63%	62%
TRAVEL	76%	78%	69%

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	75%	45%	76%	46%	65%	35%
Medium 16-30 years	54%	33%	54%	-	49%	30%
Narrow ≤15 years	26%	-	27%	-	19%	11%

*Mobile insights for provided directional purposes only

ITALY 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%	70%	55%	95%	71%	54%	97%	58%	64%
13–34	–	–	37%	–	–	37%	–	–	–
18+	85%	70%	66%	89%	73%	67%	–	61%	61%
18–49	–	–	–	–	–	–	–	–	–
18–34	45%	–	33%	44%	–	32%	46%	–	37%
18–24	–	–	–	–	–	–	–	–	–
21–34	–	–	–	–	–	–	–	–	–
25+	84%	–	–	84%	–	–	–	–	–
25–54	65%	44%	37%	65%	45%	36%	67%	34%	41%
25–49	–	–	–	–	–	–	–	–	–
25–44	46%	29%	28%	47%	29%	26%	41%	29%	33%
25–34	27%	–	24%	31%	–	22%	–	–	25%
35–64	60%	–	–	60%	–	26%	61%	–	–
35–54	43%	–	38%	43%	–	37%	44%	–	46%

Italian campaigns focusing on P25-54 reached their desired audience 65% of the time. This can be contrasted with the just 27% on-target accuracy for campaigns targeting P25-34, a more narrow target. Among the 25-54 demographic, digital campaigns did a better job reaching males with 44% accuracy versus 37% for females. Accuracy can also be influenced by device type; mobile campaigns for females 25-44 were 7 percentage points higher than those delivered on a desktop computer.
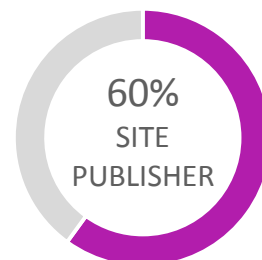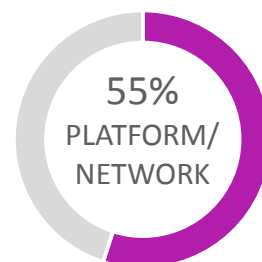
*Mobile insights for provided directional purposes only

ITALY ON-TARGET BENCHMARKS

ADVERTISER CATEGORY	TOTAL DIGITAL	DESKTOP ONLY	MOBILE ONLY*
AUTOMOTIVE	65%	65%	66%
BUSINESS & CONSUMER SERVICES	67%	68%	64%
COMPUTERS & ELECTRONICS	38%	35%	–
CONSUMER PACKAGED GOODS	46%	46%	45%
ENTERTAINMENT	63%	63%	–
FINANCIAL SERVICES	73%	74%	50%
SHOPPING/RETAIL	41%	42%	40%
TRAVEL	–	–	–

PUBLISHER TYPE

55% PLATFORM/ NETWORK

60% SITE PUBLISHER

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%	53%	78%	52%	65%	56%
Medium 16-30 years	59%	35%	59%	35%	57%	38%
Narrow ≤15 years	26%	23%	30%	23%	24%	23%

*Mobile insights for provided directional purposes only

UK ON-TARGET BENCHMARKS

AGE AND GENDER BREAKS *age brackets*	TOTAL DIGITAL			DESKTOP ONLY			MOBILE ONLY*		
	P	M	F	P	M	F	P	M	F
13+	95%	–	–	95%	–	–	89%	–	–
13–34	51%	34%	26%	52%	34%	27%	43%	–	–
18+	88%	62%	49%	90%	61%	49%	69%	74%	–
18–49	65%	–	–	63%	–	–	–	–	–
18–34	44%	33%	22%	45%	34%	22%	41%	17%	22%
18–24	23%	–	–	25%	–	–	–	–	–
21–34	–	–	–	–	–	–	–	–	–
25+	73%	51%	42%	77%	51%	42%	54%	–	–
25–54	54%	38%	31%	53%	38%	30%	60%	–	42%
25–49	46%	–	38%	46%	–	39%	–	–	–
25–44	38%	26%	25%	37%	26%	25%	47%	–	33%
25–34	–	12%	12%	–	12%	13%	–	–	–
35–64	54%	–	28%	54%	–	28%	–	–	–
35–54	38%	22%	17%	37%	22%	16%	42%	22%	26%

UK campaigns focusing on P25-54 reached their desired audience 54% of the time. This can be contrasted with the just 23% on-target accuracy for campaigns targeting P18-24, a more narrow target. Among the younger 18-34 demographic digital campaigns did a better job reaching males with 33% accuracy versus 22% for females. Accuracy can also be influenced by device type; mobile campaigns for the 25-54 demographic were 7 percentage points higher than those delivered on a desktop computer.
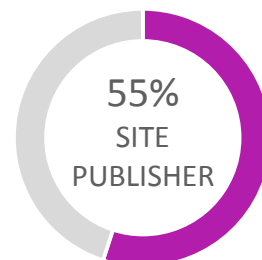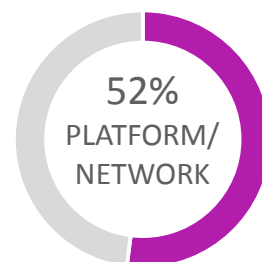
*Mobile insights for provided directional purposes only

UK ON-TARGET BENCHMARKS

ADVERTISER CATEGORY	TOTAL DIGITAL	DESKTOP ONLY	MOBILE ONLY*
AUTOMOTIVE	55%	55%	56%
BUSINESS & CONSUMER SERVICES	63%	64%	58%
COMPUTERS & ELECTRONICS	50%	50%	63%
CONSUMER PACKAGED GOODS	40%	39%	49%
ENTERTAINMENT	64%	66%	41%
FINANCIAL SERVICES	55%	55%	55%
SHOPPING/RETAIL	42%	42%	40%
TRAVEL	66%	67%	53%

PUBLISHER TYPE

52% PLATFORM/ NETWORK

55% SITE PUBLISHER

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%	43%	83%	44%	69%	40%
Medium 16-30 years	51%	29%	50%	28%	53%	33%
Narrow ≤15 years	24%	20%	25%	20%	14%	22%

*Mobile insights for provided directional purposes only

APPENDIX

METHODOLOGY
This report assessed data from more than 6,800 Nielsen Digital Ad Ratings campaigns from France, Germany, Italy, and the United Kingdom through 30 June, 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. Overall benchmarks are calculated using all historical campaign data.

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 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 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 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.

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