NIELSEN DIGITAL AD RATINGS

BENCHMARKS AND FINDINGS THROUGH 1H 2017

SOUTHEAST ASIA

INTRODUCTION

To evaluate your digital advertising's audience, you need to focus on the people, not the devices, your advertising was delivered to, and measure your campaign's **on-target percent**, or the percentage of impressions accurately delivered to your intended audience out of the total number of campaign impressions. While marketers can achieve high on-target rates, it's still incredibly hard to achieve a 100% on-target rate – essentially serving all impressions to the intended audience. With this understanding, media buyers and sellers require reliable benchmarks to evaluate campaign success.

Available in 33 countries globally, **Nielsen Digital Ad Ratings** is the industry standard for audience-based digital media buying and selling. Leveraging our database of historical performance, the **Nielsen Digital Ad Ratings Benchmarks and Findings Report** serves as guidance for individual campaign effectiveness compared to marketplace averages across total digital, desktop-only, and mobile-only* for the following:

Age and gender demographics

Advertiser categories

Age spans - range of ages covered by target audience

Site type - publishers, platforms/ad networks

HOW TO READ AND APPLY BENCHMARKS

P25-54 total digital on-target percent is 59%. This means that 59% of all impressions served to an intended audience of people aged 25-54 across all digital devices were actually delivered to people aged 25-54.

If a campaign with a P25-54 target audience has an on-target percent of 65%, then its performance 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

SOUTHEAST ASIA 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%	-	88%	96%	-	71%	96%	-	90%
13–34	-	-	-	-	-	-	-	-	-
18+	88%	76%	89%	88%	64%	72%	88%	80%	92%
18–49	85%	73%	71%	85%	69%	55%	85%	73%	74%
18–34	68%	62%	51%	61%	53%	41%	70%	67%	59%
18–24	-	-	19%	-	-	21%	-	-	12%
21–34	72%	-	42%	47%	-	23%	77%	-	50%
25+	68%	-	47%	63%	-	34%	69%	-	57%
25–54	61%	-	41%	66%	-	31%	56%	-	46%
25–49	65%	-	60%	52%	-	51%	76%	-	67%
25–44	59%	-	50%	51%	-	37%	66%	-	61%
25–34	47%	-	46%	48%	-	41%	46%	-	49%
35–64	-	-	-	-	-	-	-	-	-
35–54	-	-	53%	-	-	31%	-	-	58%

After open-ended demographics (e.g. 13+, 18+), P18-49 was the highest performing digital benchmark, reaching the desired audience 86% of the time. This can be contrasted with 48% on-target accuracy for campaigns focusing on P25-34, a narrower audience.

Among the 18-34 demographic, digital campaigns did a better job reaching males with 59% accuracy versus 46% for females.

Accuracy can also be influenced by device type; mobile on-target performance for the P21-34 demographic (78%) was 32 percentage points higher than desktop performance (46%).

*Mobile insights provided for directional purposes only

SOUTHEAST ASIA ON-TARGET BENCHMARKS

ADVERTISER CATEGORY	TOTAL DIGITAL	DESKTOP ONLY	MOBILE ONLY*
AUTOMOTIVE	56%	55%	62%
BUSINESS & CONSUMER SERVICES	73%	80%	70%
COMPUTERS & ELECTRONICS	75%	49%	81%
CONSUMER PACKAGED GOODS	67%	53%	74%
ENTERTAINMENT	55%	72%	52%
FINANCIAL SERVICES	64%	61%	65%
SHOPPING/RETAIL	70%	75%	66%
TRAVEL	-	-	-
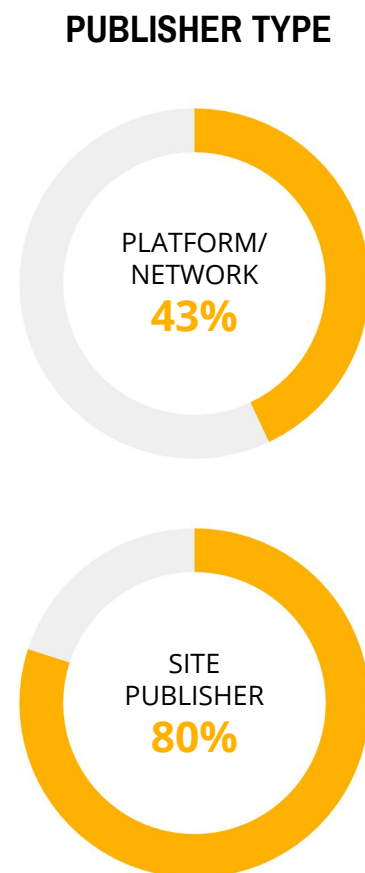
PUBLISHER TYPE

PLATFORM/NETWORK
43%

SITE PUBLISHER
80%

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	85%	79%	89%	65%	79%	83%
Medium 16-30 years	71%	64%	66%	50%	74%	71%
Narrow ≤15 years	59%	37%	49%	29%	65%	45%

*Mobile insights provided for directional purposes only

SOUTHEAST ASIA SPOTLIGHT

INDONESIA

MALAYSIA
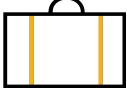
PHILIPPINES

SINGAPORE

THAILAND

INDONESIA ON-TARGET BENCHMARKS

ADVERTISER CATEGORY	TOTAL DIGITAL	DESKTOP ONLY	MOBILE ONLY*
AUTOMOTIVE	-	-	-
BUSINESS & CONSUMER SERVICES	81%	92%	55%
COMPUTERS & ELECTRONICS	-	-	-
CONSUMER PACKAGED GOODS	78%	69%	80%
ENTERTAINMENT	-	-	-
FINANCIAL SERVICES	-	-	-
SHOPPING/ RETAIL	-	-	-
TRAVEL	-	-	-

PUBLISHER TYPE

PLATFORM/ NETWORK
49%

SITE PUBLISHER
84%

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	95%	84%	95%	79%	92%	85%
Medium 16-30 years	72%	70%	56%	54%	75%	72%
Narrow ≤15 years	60%	80%	55%	69%	-	83%

*Mobile insights provided for directional purposes only

MALAYSIA ON-TARGET BENCHMARKS

ADVERTISER CATEGORY		TOTAL DIGITAL	DESKTOP ONLY	MOBILE ONLY*
	AUTOMOTIVE	-	-	-
	BUSINESS & CONSUMER SERVICES	68%	70%	68%
	COMPUTERS & ELECTRONICS	-	-	-
	CONSUMER PACKAGED GOODS	58%	48%	66%
	ENTERTAINMENT	-	-	-
	FINANCIAL SERVICES	-	-	-
	SHOPPING/ RETAIL	-	-	-
	TRAVEL	-	-	-

PUBLISHER TYPE

PLATFORM/ NETWORK
47%

SITE PUBLISHER
78%

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	72%	77%	78%	70%	70%	79%
Medium 16-30 years	62%	52%	64%	44%	62%	58%
Narrow ≤15 years	-	35%	-	19%	-	59%

*Mobile insights provided for directional purposes only

PHILIPPINES ON-TARGET BENCHMARKS

ADVERTISER CATEGORY	TOTAL DIGITAL	DESKTOP ONLY	MOBILE ONLY*
AUTOMOTIVE	-	-	-
BUSINESS & CONSUMER SERVICES	78%	67%	82%
COMPUTERS & ELECTRONICS	77%	50%	81%
CONSUMER PACKAGED GOODS	75%	59%	83%
ENTERTAINMENT	-	-	-
FINANCIAL SERVICES	-	-	-
SHOPPING/ RETAIL	-	-	-
TRAVEL	-	-	-
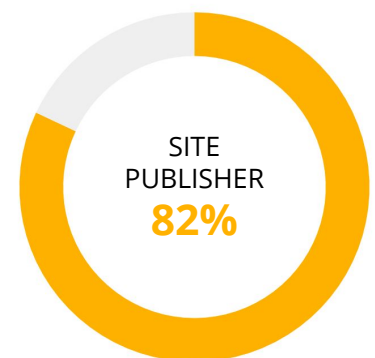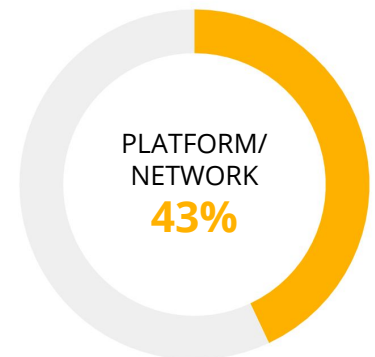
PUBLISHER TYPE

PLATFORM/ NETWORK
43%

SITE PUBLISHER
82%

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	85%	91%	83%	78%	87%	93%
Medium 16-30 years	77%	71%	66%	56%	81%	78%
Narrow ≤15 years	66%	40%	44%	34%	73%	55%

*Mobile insights provided for directional purposes only

SINGAPORE ON-TARGET BENCHMARKS

ADVERTISER CATEGORY	TOTAL DIGITAL	DESKTOP ONLY	MOBILE ONLY*
AUTOMOTIVE	-	-	-
BUSINESS & CONSUMER SERVICES	53%	51%	54%
COMPUTERS & ELECTRONICS	-	-	-
CONSUMER PACKAGED GOODS	55%	42%	64%
ENTERTAINMENT	89%	98%	86%
FINANCIAL SERVICES	-	-	-
SHOPPING/ RETAIL	84%	-	86%
TRAVEL	-	-	-

PUBLISHER TYPE

PLATFORM/ NETWORK
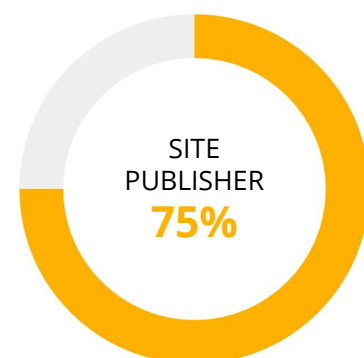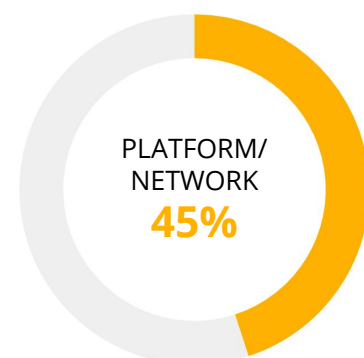**45%**

SITE PUBLISHER
75%

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	87%	56%	84%	32%	89%	80%
Medium 16-30 years	71%	53%	72%	38%	71%	60%
Narrow ≤15 years	41%	-	33%	-	43%	-

*Mobile insights provided for directional purposes only

THAILAND ON-TARGET BENCHMARKS

ADVERTISER CATEGORY	TOTAL DIGITAL	DESKTOP ONLY	MOBILE ONLY*
AUTOMOTIVE	59%	57%	62%
BUSINESS & CONSUMER SERVICES	68%	79%	58%
COMPUTERS & ELECTRONICS	-	-	-
CONSUMER PACKAGED GOODS	57%	47%	63%
ENTERTAINMENT	-	-	-
FINANCIAL SERVICES	-	-	-
SHOPPING/ RETAIL	72%	69%	74%
TRAVEL	-	-	-

PUBLISHER TYPE
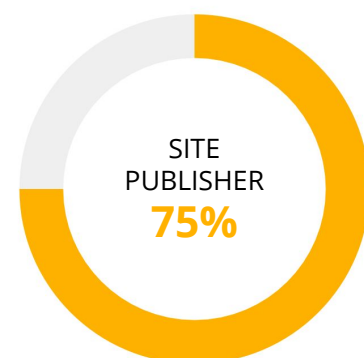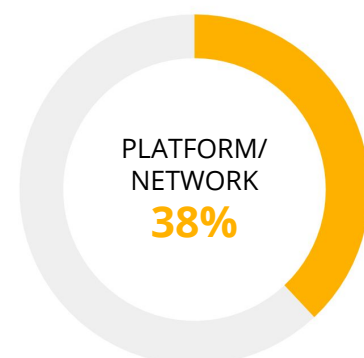
PLATFORM/ NETWORK
38%

SITE PUBLISHER
75%

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	89%	68%	89%	51%	88%	73%
Medium 16-30 years	66%	59%	67%	47%	66%	67%
Narrow ≤15 years	48%	25%	50%	24%	46%	26%

*Mobile insights provided for directional purposes only

AGE/GENDER BENCHMARKS

INDONESIA

MALAYSIA

PHILIPPINES

SINGAPORE

THAILAND

INDONESIA ON-TARGET BENCHMARKS

AGE AND GENDER BREAKS

AGE BRACKETS
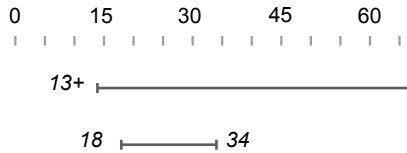
Age Bracket	TOTAL DIGITAL			DESKTOP ONLY			MOBILE ONLY*		
	P	M	F	P	M	F	P	M	F
13+	95%	-	87%	-	-	68%	-	-	89%
18–34	59%	-	-	53%	-	-	60%	-	-

MALAYSIA ON-TARGET BENCHMARKS

AGE AND GENDER BREAKS

AGE BRACKETS
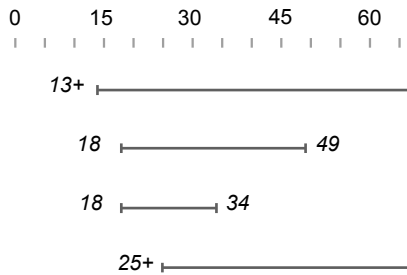
Age Bracket	TOTAL DIGITAL			DESKTOP ONLY			MOBILE ONLY*		
	P	M	F	P	M	F	P	M	F
13+	97%	-	-	98%	-	-	95%	-	-
18–49	-	75%	78%	-	71%	58%	-	75%	79%
18–34	61%	-	-	65%	-	-	59%	-	-
25+	68%	-	-	62%	-	-	68%	-	-

PHILIPPINES ON-TARGET BENCHMARKS

AGE AND GENDER BREAKS

AGE BRACKETS
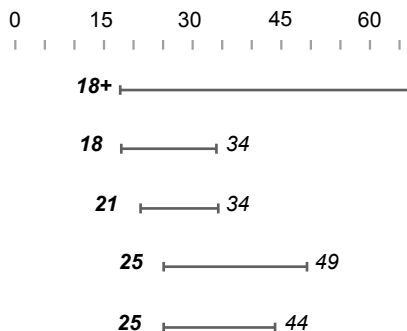
Age Bracket	TOTAL DIGITAL			DESKTOP ONLY			MOBILE ONLY*		
	P	M	F	P	M	F	P	M	F
18+	-	-	92%	-	-	76%	-	-	94%
18–34	77%	-	-	59%	-	-	81%	-	-
21–34	73%	-	-	41%	-	-	81%	-	-
25–49	82%	-	-	59%	-	-	89%	-	-
25–44	-	-	61%	-	-	45%	-	-	74%
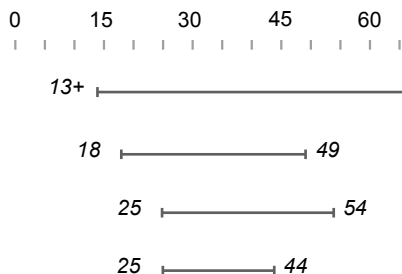
*Mobile insights provided for directional purposes only

SINGAPORE 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+	98%	-	-	99%	-	-	98%	-	-
18-49	82%	-	-	80%	-	-	84%	-	-
25-54	-	-	44%	-	-	28%	-	-	53%
25-44	-	-	36%	-	-	22%	-	-	46%

THAILAND ON-TARGET BENCHMARKS
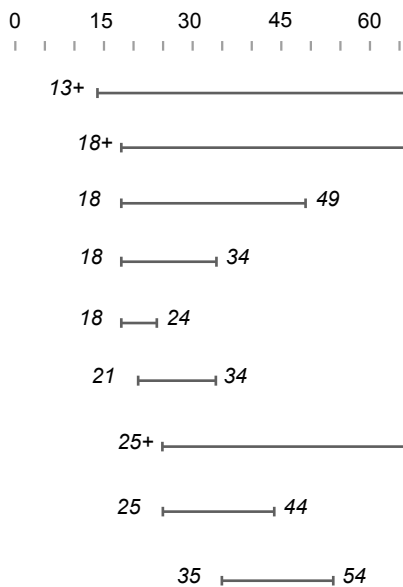
AGE AND GENDER BREAKS

AGE BRACKETS

Age Bracket	TOTAL DIGITAL			DESKTOP ONLY			MOBILE ONLY*		
	P	M	F	P	M	F	P	M	F
13+	96%	-	75%	97%	-	59%	95%	-	81%
18+	88%	-	66%	88%	-	67%	-	-	66%
18-49	-	71%	68%	-	67%	55%	-	71%	71%
18-34	56%	68%	-	62%	59%	-	52%	70%	-
18-24	-	-	14%	-	-	16%	-	-	12%
21-34	-	-	43%	-	-	-	-	-	-
25+	-	-	37%	-	-	34%	-	-	40%
25-44	-	-	44%	-	-	29%	-	-	55%
35-54	-	-	49%	-	-	28%	-	-	52%

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APPENDIX

METHODOLOGY

This report assessed data from more than 3,000 Nielsen Digital Ad Ratings campaigns from Indonesia, Malaysia, Philippines, Singapore, and Thailand through 30 June 2017, where the minimum number of site observations was at least 30. A site observation is defined as the performance of one site with at least 5,000 impressions with the specified demographic as the intended audience. With sample sizes exceeding 30 site observations, we can reasonably expect to see stable benchmarks.

The average on-target percent is the number of impressions that was delivered to 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 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 been excluded from norms calculations to provide more accurate benchmarks.

Benchmarks are calculated using all available historical campaign data that meet the above criteria. 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 Digital Ad Ratings delivers transparent and actionable audience measurement for digital advertising campaigns. Digital Ad Ratings provides overnight reporting of a campaign's reach, frequency, GRPs, impressions, and on-target percentage across digital devices in a way that is comparable to Nielsen TV Ratings. For more information, visit 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.

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