

THE SCIENCE OF WHAT'S NEXT: CANADA DIGITAL WHITE PAPER

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DIGITAL AD RATINGS CANADIAN DATA

Over **16,000** campaigns and **56** billion impressions measured

Auto, CPG, Entertainment, Financial Services, Retail Sectors



Source: DAR May 2013 to April 2018

TODAY'S AGENDA

Canadian On-Target and Reach Norms

Mobile Deep Dive

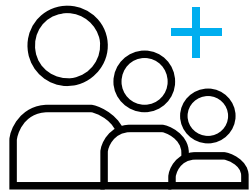
Canadian Resonance with Brand Lift Norms

Reach & Resonance Together

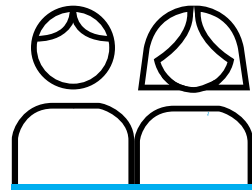
In-App Brand Lift Deep Dive with Juice Mobile

WHO IS SEEING MY ADS?

On-Target Rate and Reach



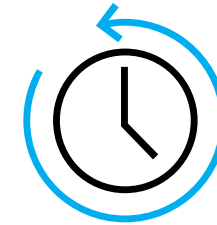
AGE



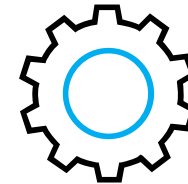
GENDER



REACH

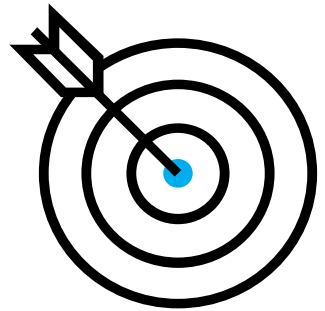


FREQUENCY



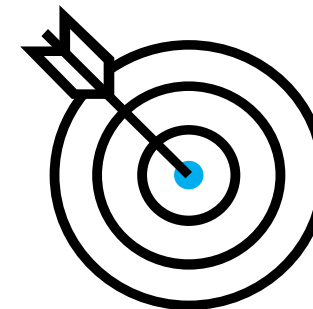
GRPs

WHAT IS ON-TARGET RATE?



$$\text{ON-TARGET RATE} = \frac{\text{IN-TARGET IMPRESSIONS}}{\text{TOTAL IMPRESSIONS}}$$

WHAT INFLUENCES ON-TARGET RATE?



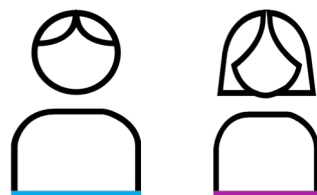
DEMO TARGET



Broad Target



Narrow Target



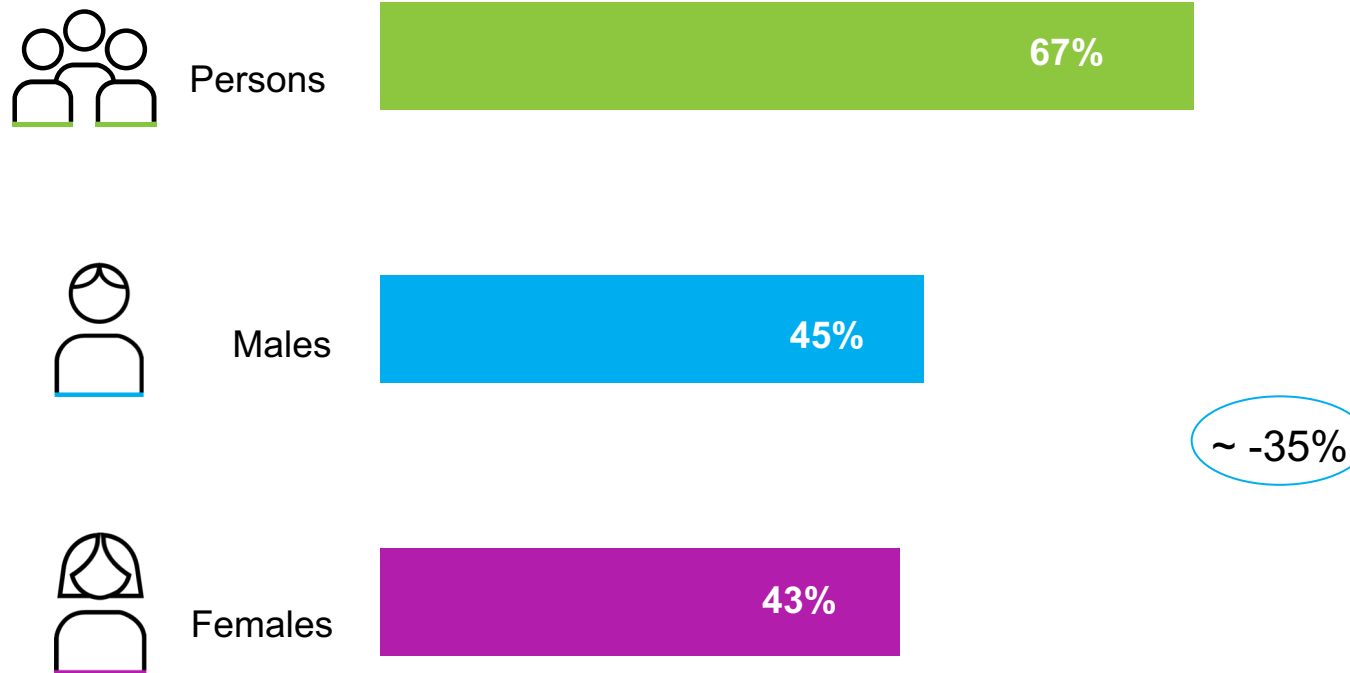
Gender



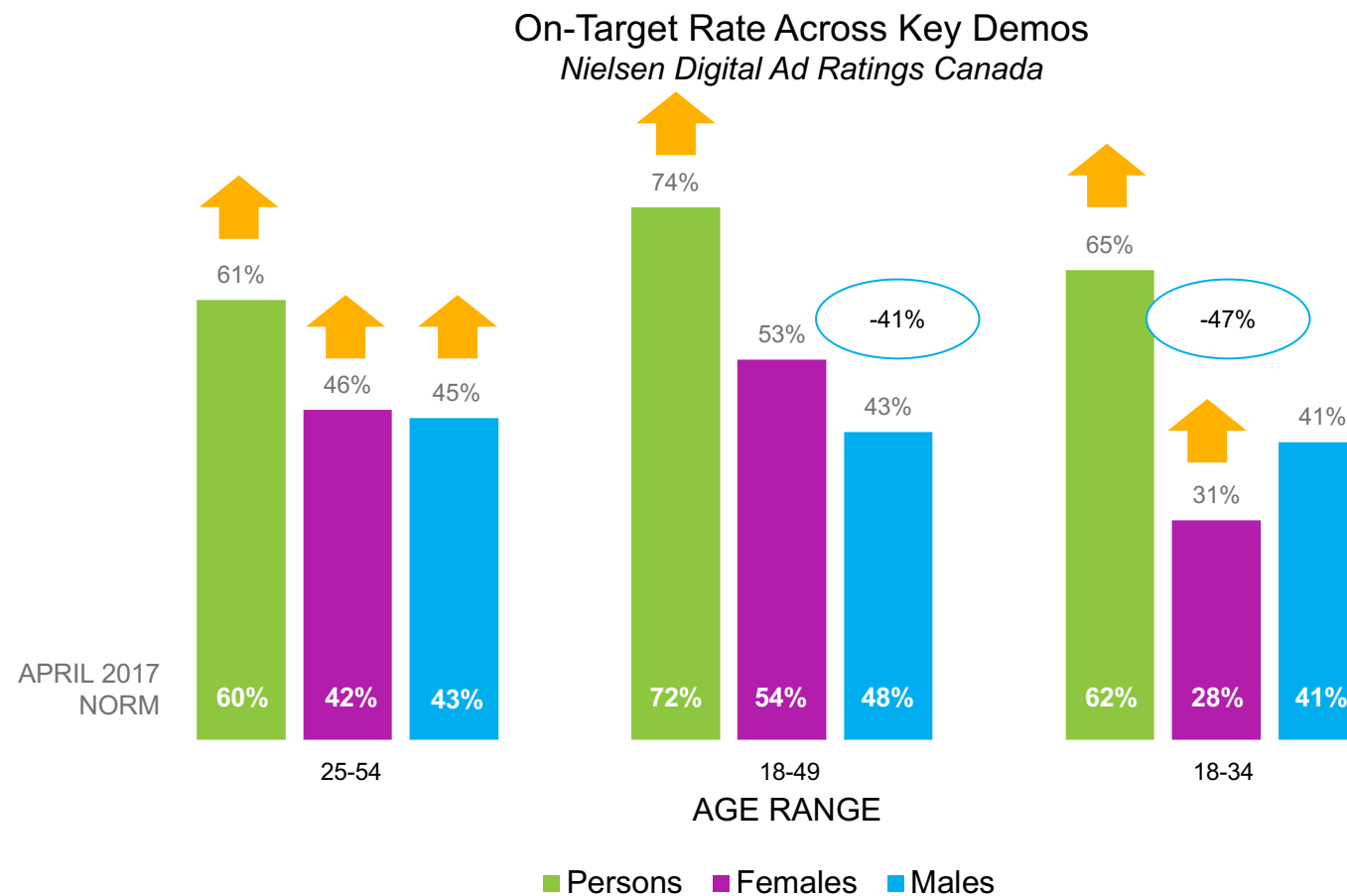
Age

GENDER AND TARGETING

Narrowing the target decreases the on-target accuracy



ACCURACY AMONG MOST TARGET DEMOS HAS INCREASED SINCE LAST YEAR

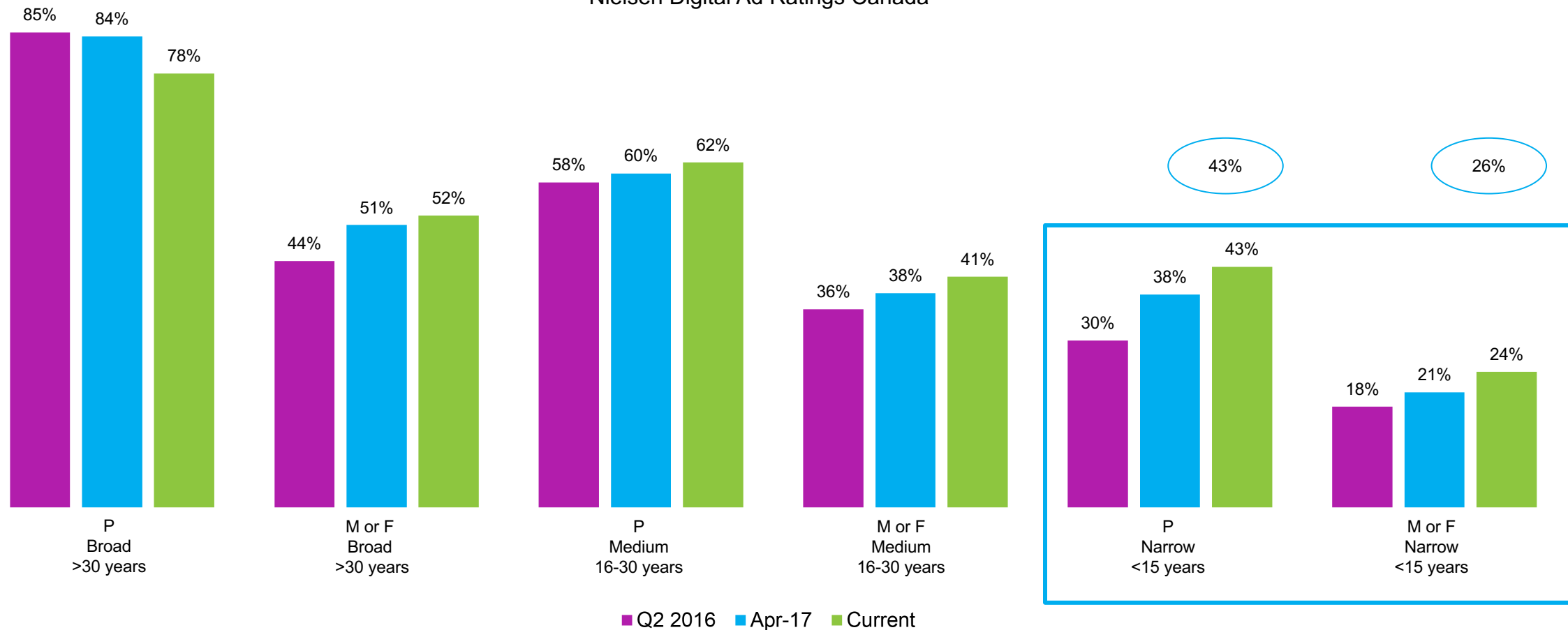


CANADIAN ON-TARGET TRENDS

PERFORMANCE IMPROVING PARTICULARLY AMONG MOST NARROW TARGET

ON-TARGET RATE ACROSS DEMO ZONES

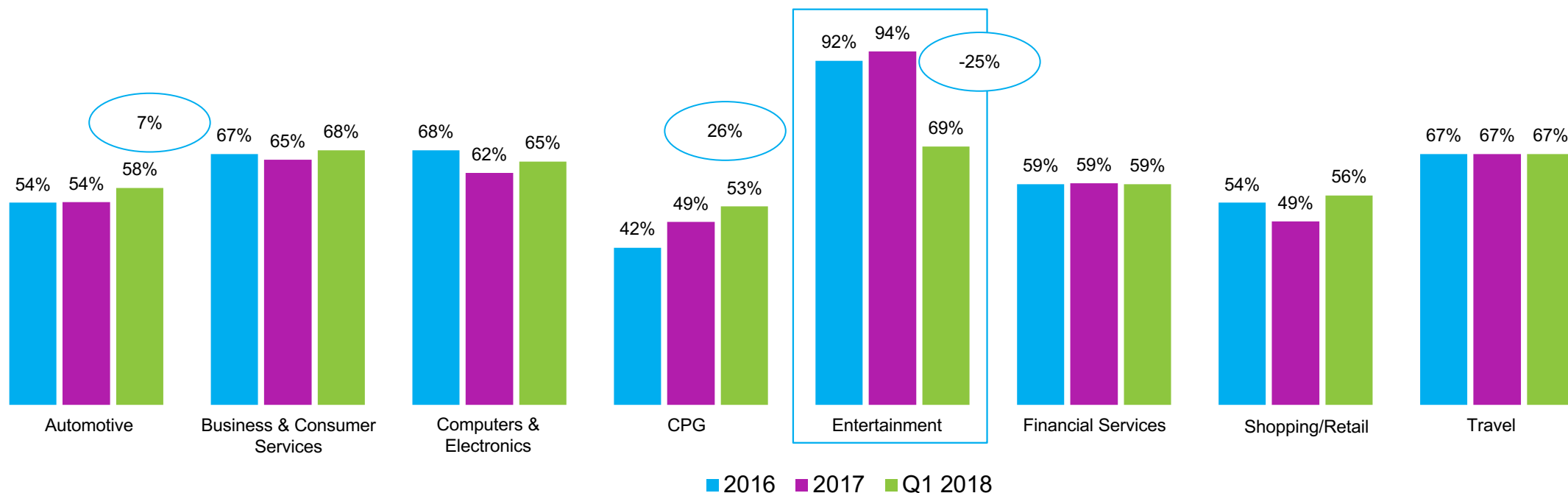
Nielsen Digital Ad Ratings Canada



ON-TARGET RATE VARIES WIDELY BASED ON VERTICAL AUDIENCE GOALS

ON-TARGET RATE ACROSS VERTICALS

Nielsen Digital Ad Ratings Canada



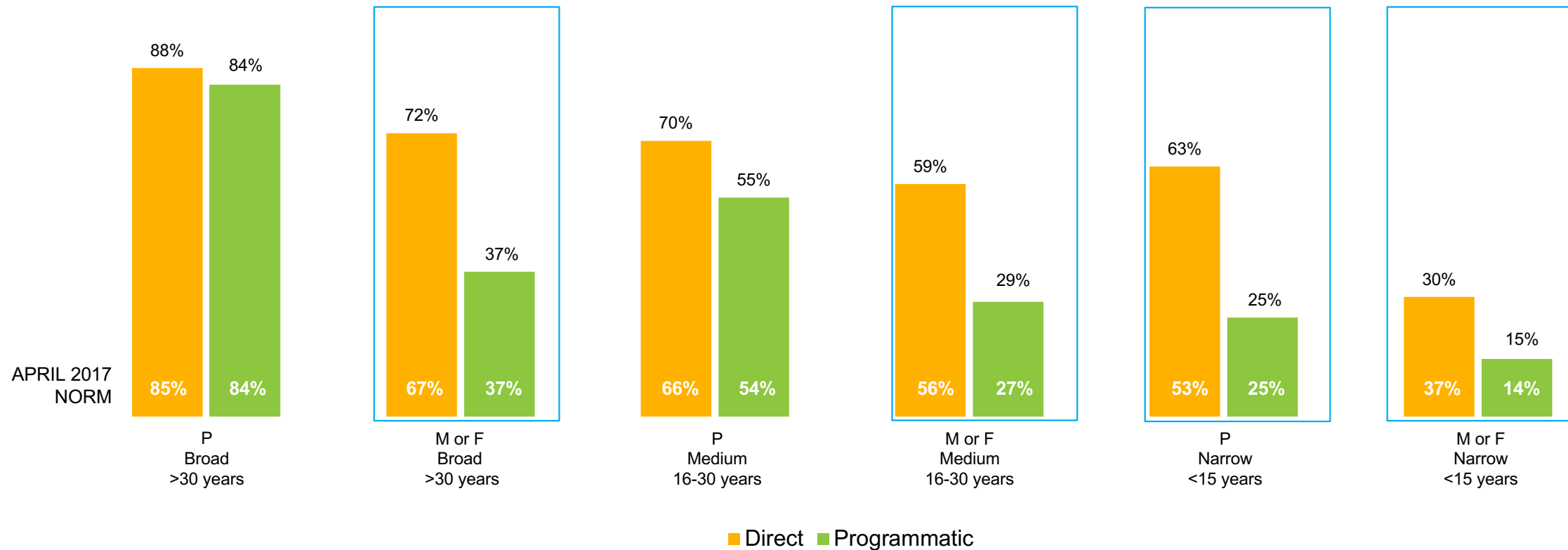
P25-54	P13+	P18-49	F25-54	P18-49	P25-54	P25-54	P25-54	1 st most common demo
M25-54	P25-54	P18+	F18-49	P18-34	P18-49	F25-54	P18+	2 nd most common demo
M18-49	F25-54	P18-34	P18-49	P18+	P35-54	P18-49	F25-54	3 rd most common demo

DIRECT VS PROGRAMMATIC VIDEO VS DISPLAY ENGLISH VS FRENCH LANGUAGE

DIRECT ACCURACY IS HIGHER THAN PROGRAMMATIC ACCURACY

ON-TARGET RATE ACROSS DEMO ZONES

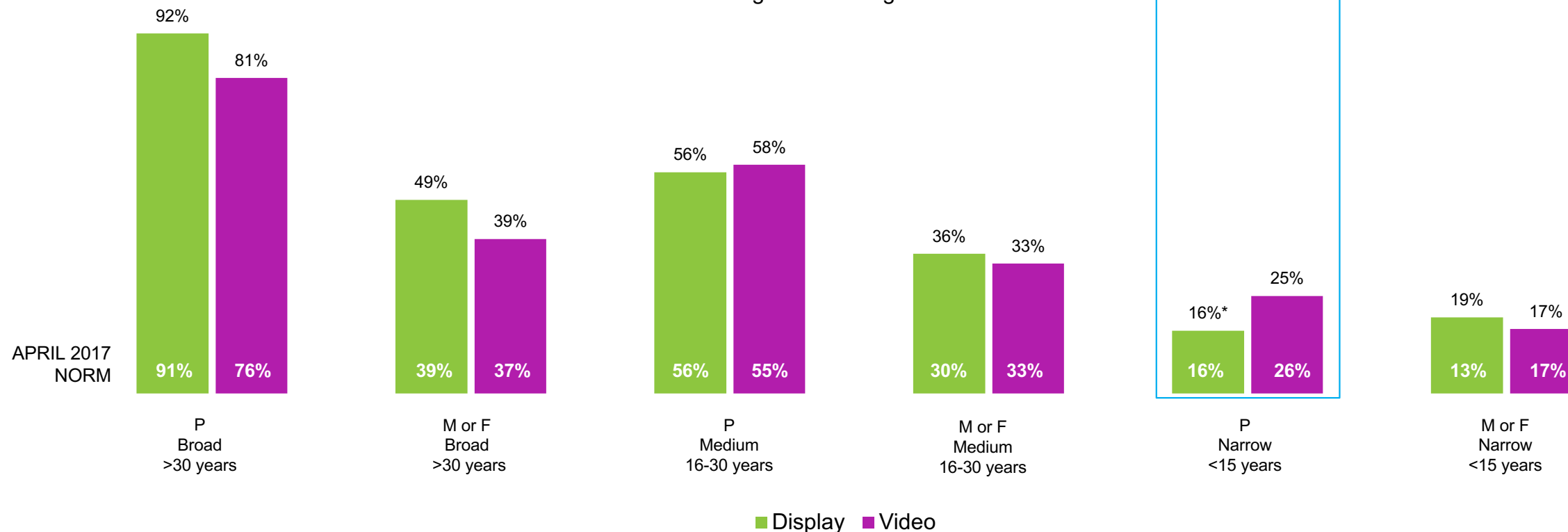
Nielsen Digital Ad Ratings Canada



DISPLAY OUTPERFORMS ON BROAD TARGETS; VIDEO OUTPERFORMS ON NARROW TARGETS

ON-TARGET RATE ACROSS DEMO ZONES

Nielsen Digital Ad Ratings Canada



TARGETING SUCCESS NOT INFLUENCED BY LANGUAGE



67%

Campaign measured in both French & English

MOBILE DEEP DIVE

MOBILE TAKES CENTER STAGE

Mobile platforms have become a standard platform for effective digital campaigns

84%

of *all* DAR campaigns in Canada
leveraged mobile

Since 2017

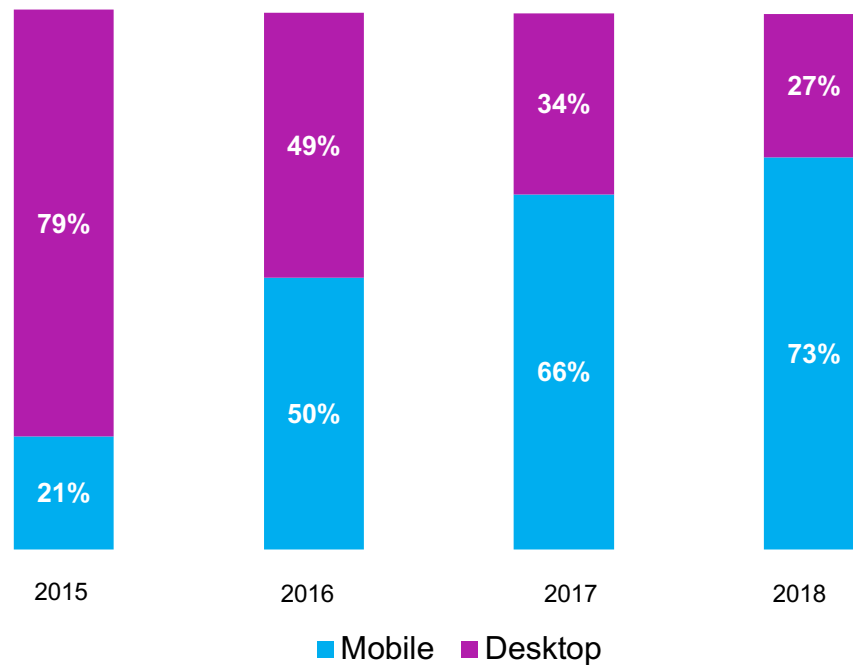
99%

of *all* DAR campaigns in Canada
leveraged mobile

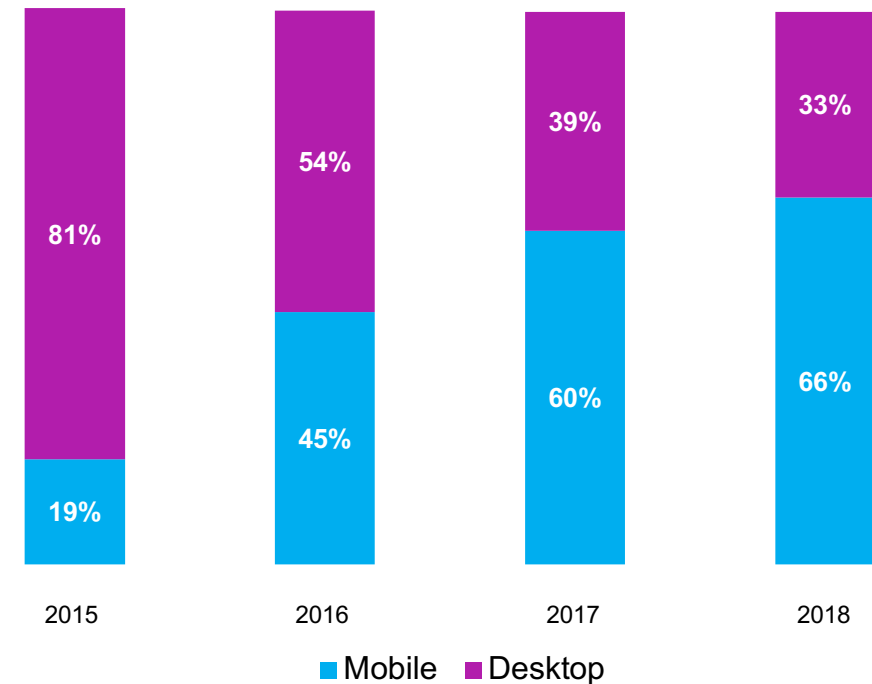
MOBILE IMPRESSIONS TREND

In recent years, mobile has become the dominant digital platform. And it's not just social...

SHARE OF IMPRESSIONS BY PLATFORM



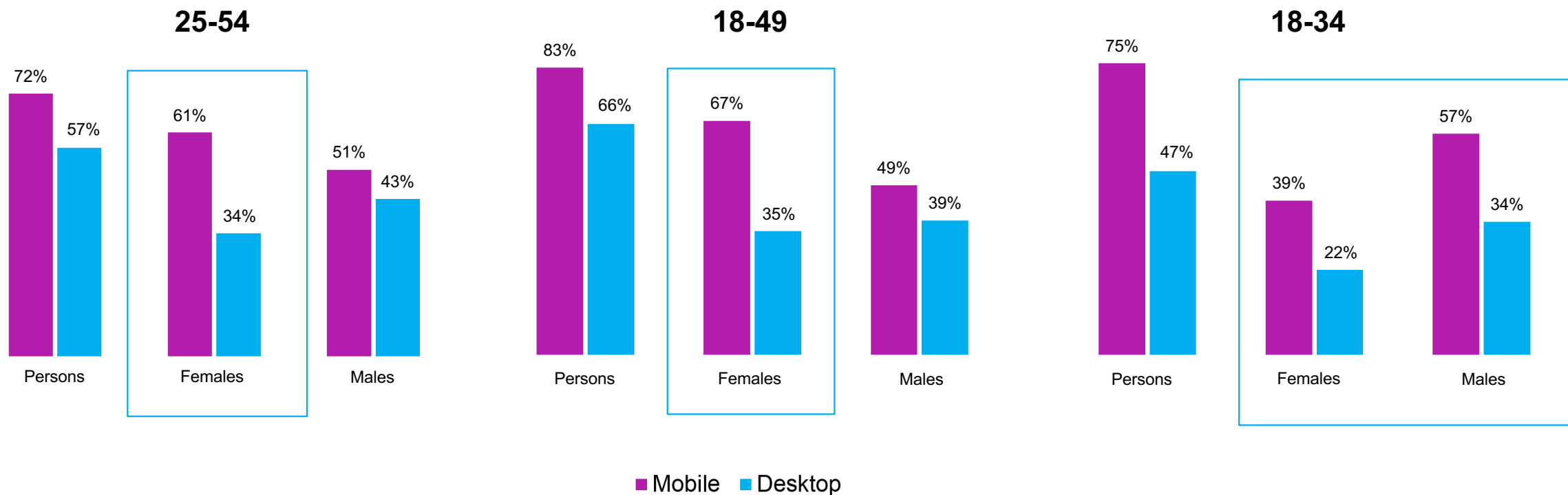
SHARE OF IMPRESSIONS BY PLATFORM
(EXCL. SOCIAL)



MOBILE ON-TARGET CONSISTENTLY OUTPERFORMS DESKTOP

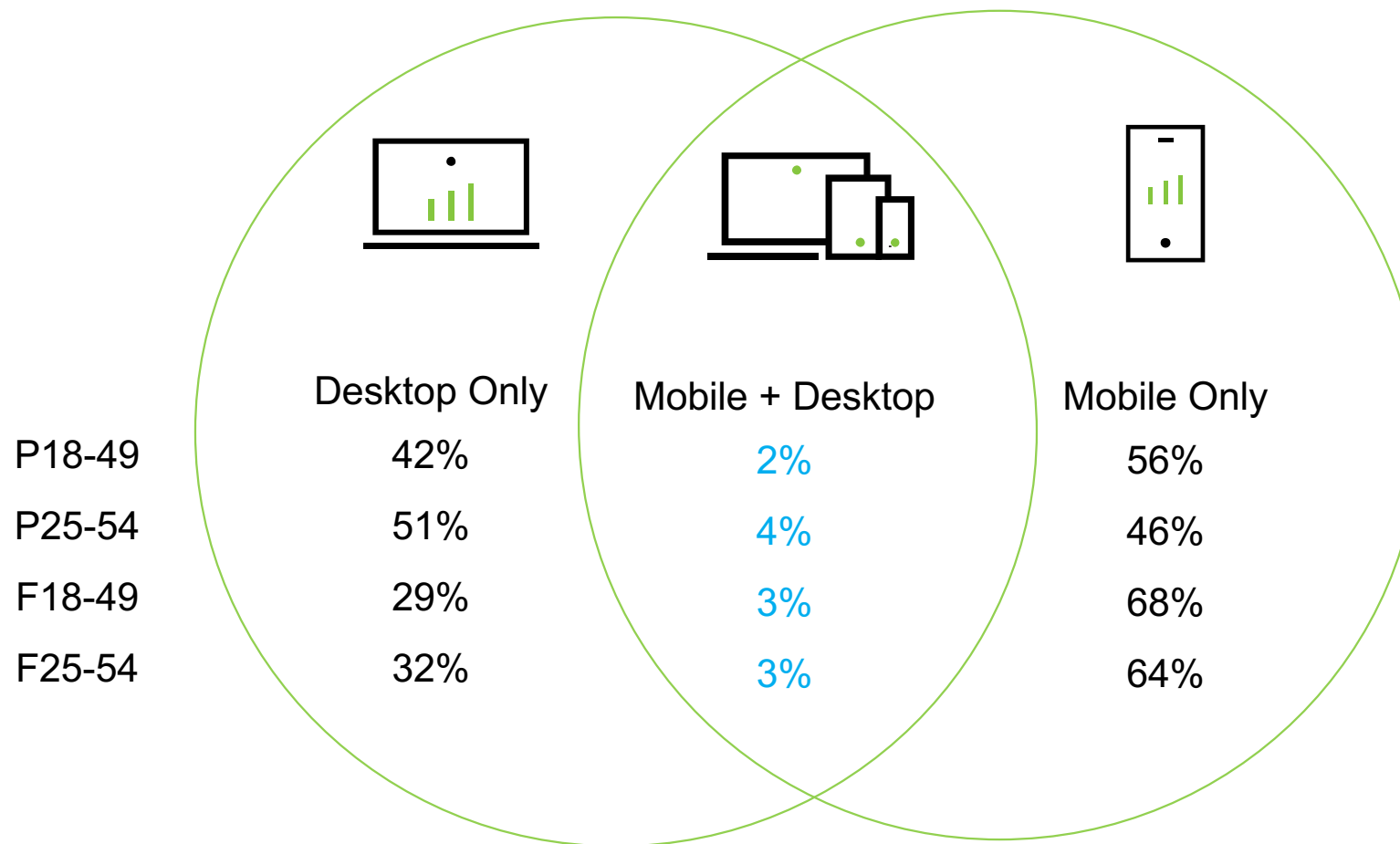
ON-TARGET RATE ACROSS KEY DEMOS

Nielsen Digital Ad Ratings Canada

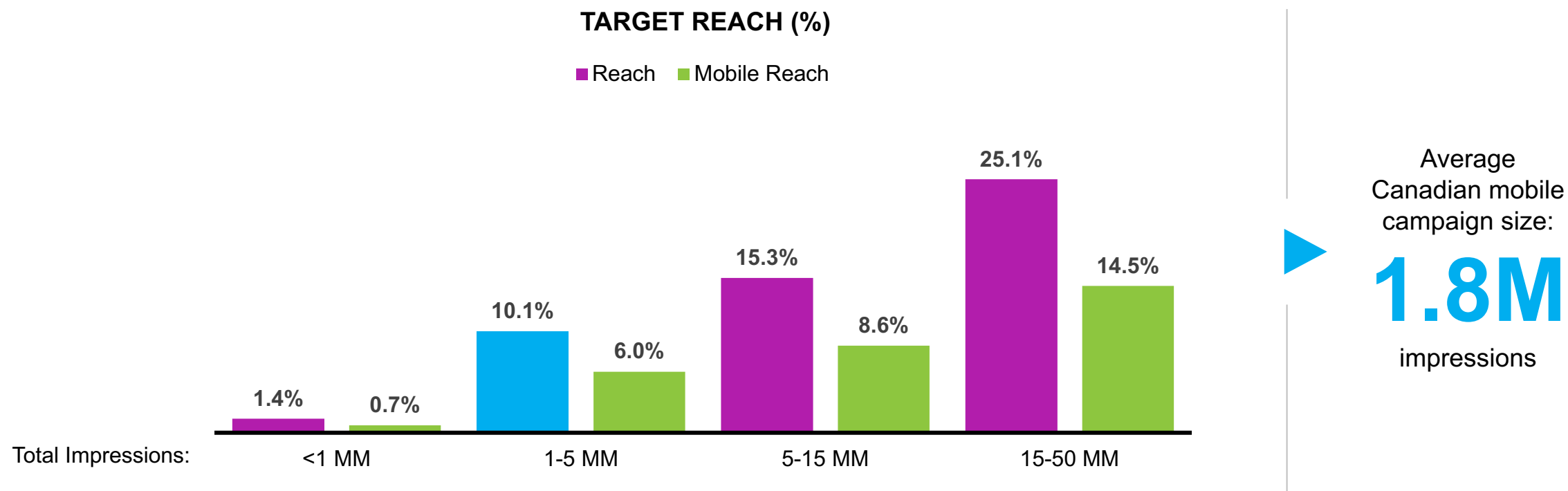


EXPLORING REACH DUPLICATION

There is very small percentage of digital reach that is shared across Desktop and Mobile – suggesting that advertisers can rely on platforms individually



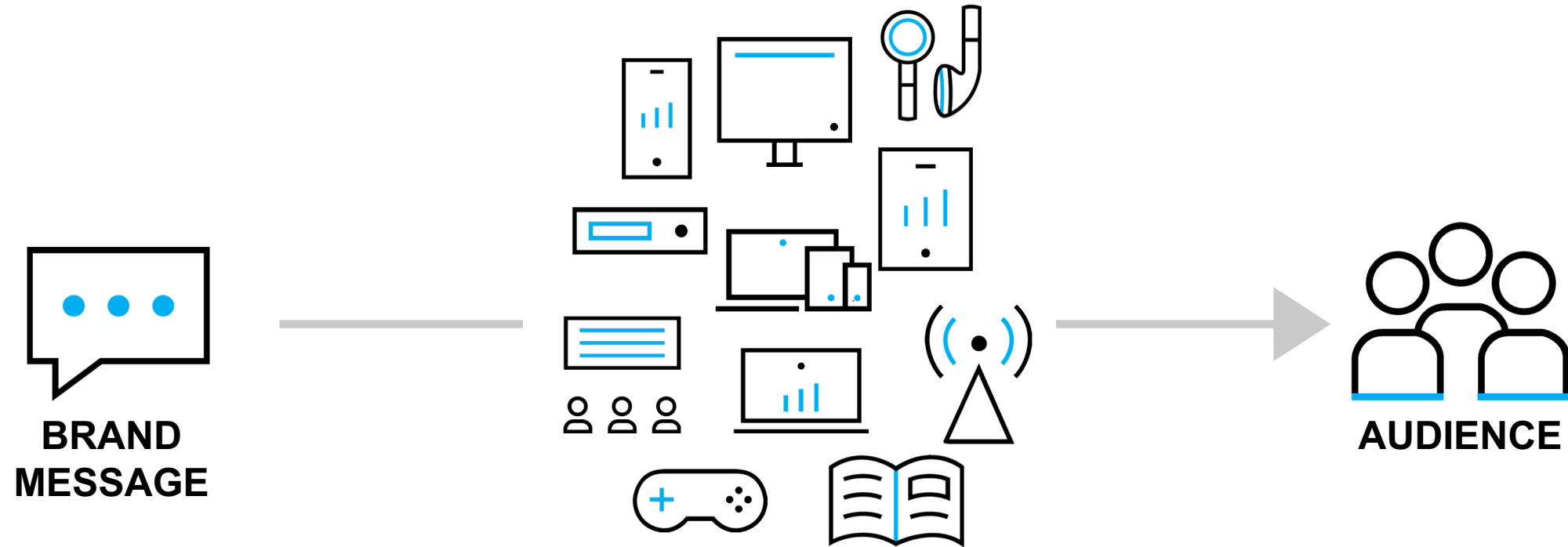
WITH SMALLER OVERALL MOBILE CAMPAIGNS REACH IS LESS THAN WITH DESKTOP AND MOBILE



ARE THE ADS RESONATING?

BRAND LIFT

THE EVOLUTION OF THE DIGITAL LANDSCAPE IS CHANGING THE WAY BRANDS ADVERTISE

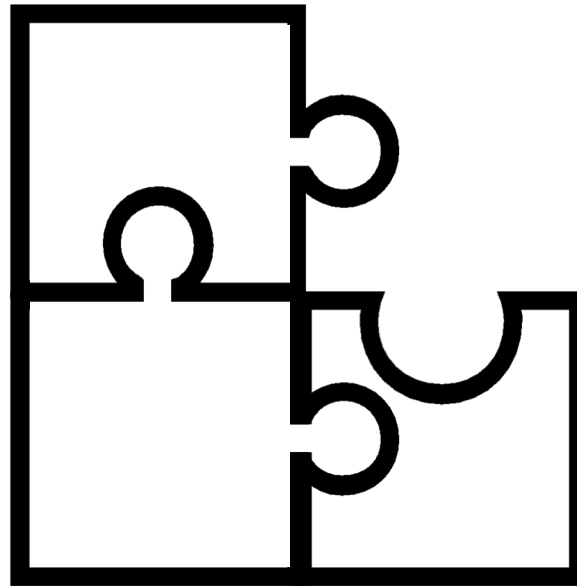


More platforms • More media partners • More segmentation • More metrics

RESONANCE IS THE MISSING PIECE

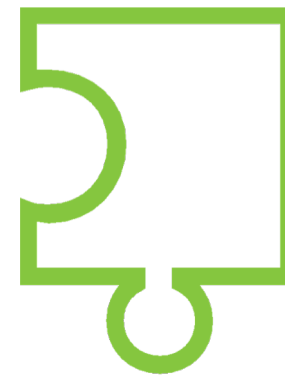
It's not enough for
an ad to reach the
right people

REACH



EFFECTIVE ADVERTISING

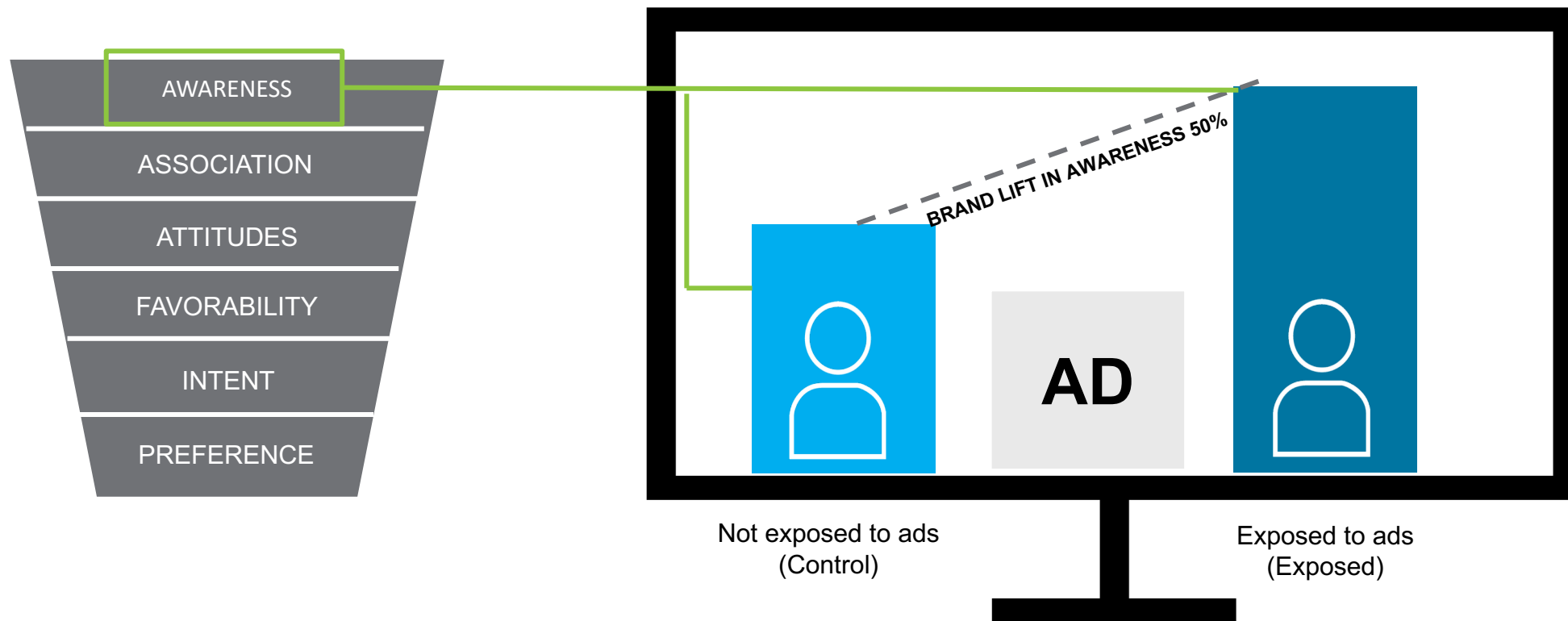
RESONANCE



Ads need to
resonate with the
audience in
order to achieve
marketing goals

WHAT IS BRAND LIFT?

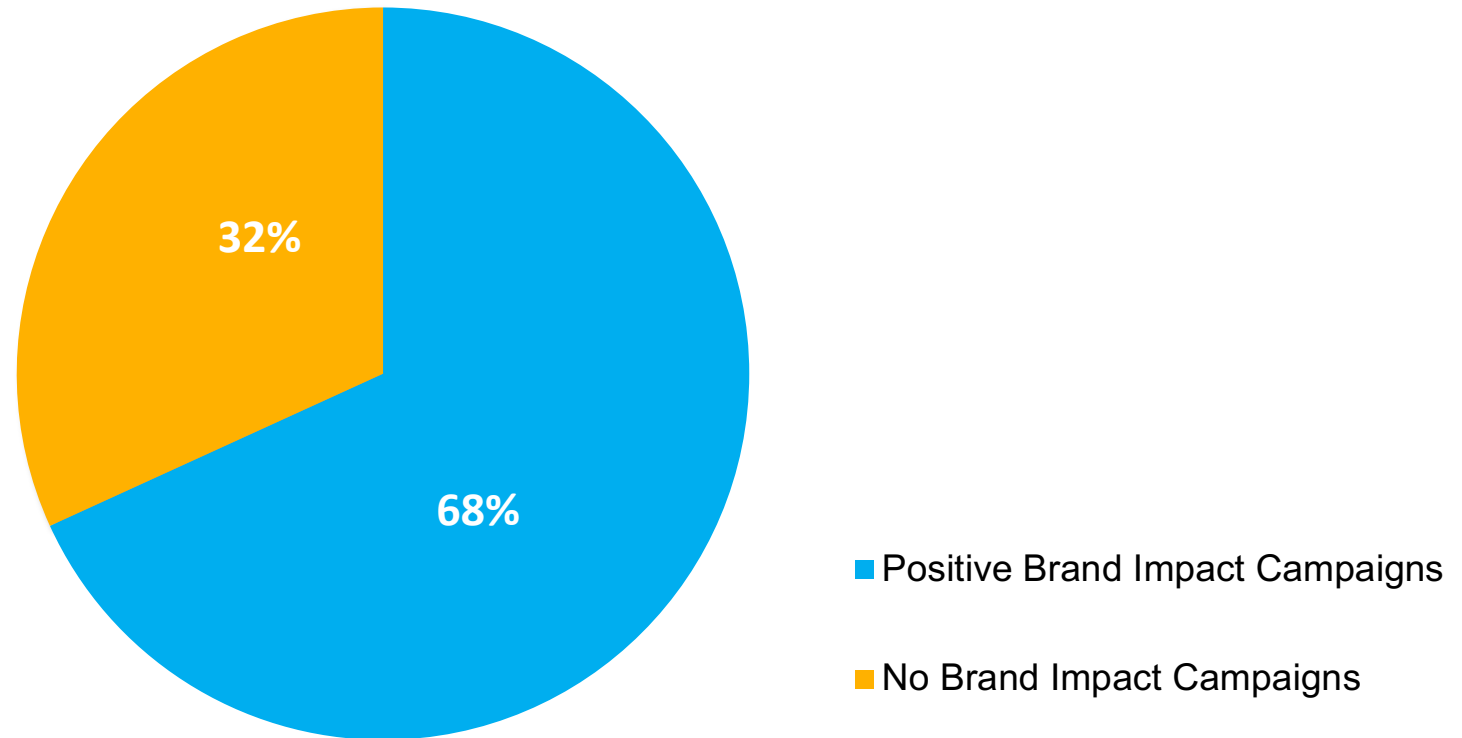
Brand lift is the percentage increase in the primary objective of a brand advertising campaign, measuring the extent to which an advertising campaign has shifted consumer perception against one of the key purchase funnel metrics



DIGITAL CAMPAIGNS DRIVE DESKTOP BRAND IMPACT

MEASURED CAMPAIGNS: POSITIVE VS NO BRAND LIFT

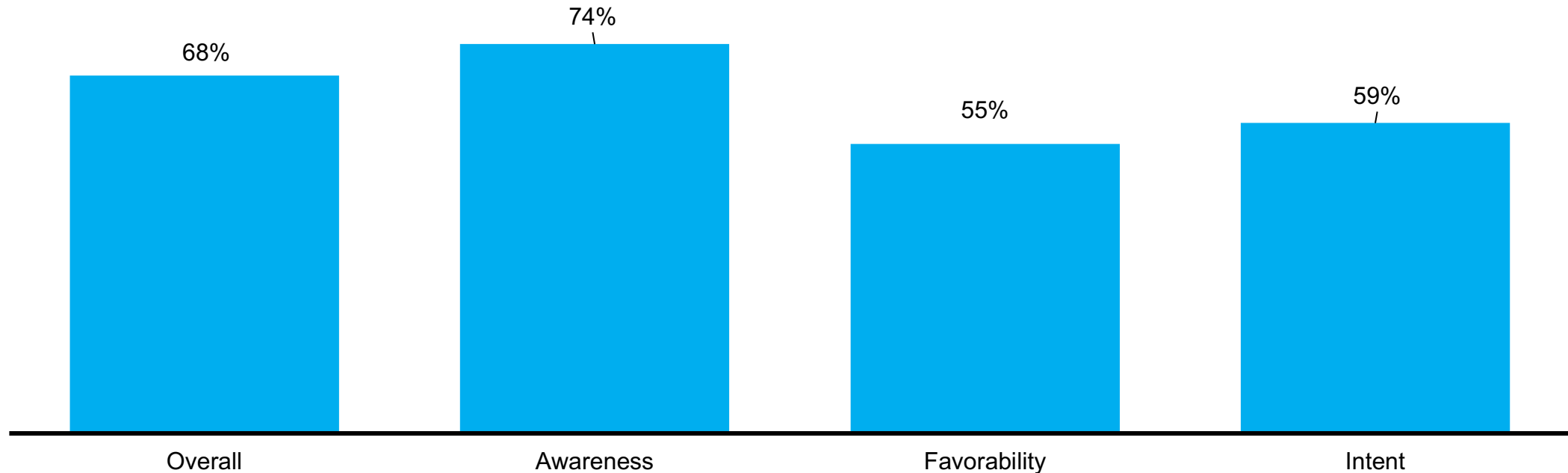
Nielsen Digital Brand Effect, Canada Campaigns



BRAND LIFT BY PERCENTAGE OF CAMPAIGNS - TREND BY METRIC

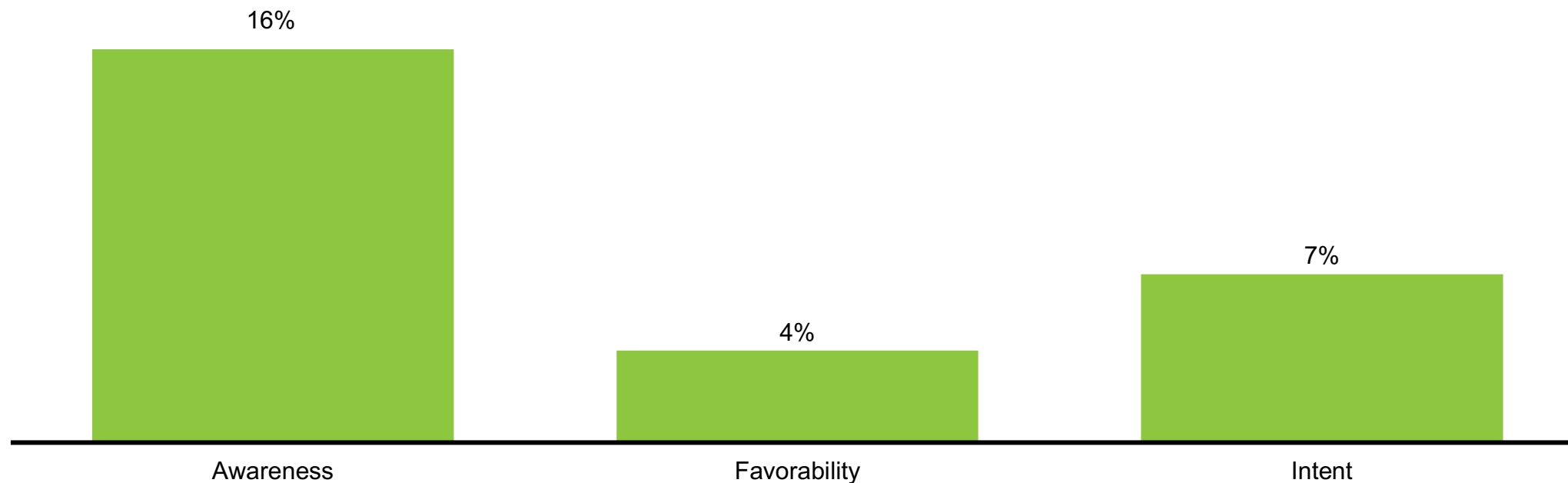
MEASURED CAMPAIGNS WITH POSITIVE/NEGATIVE BRAND LIFT

Nielsen Digital Brand Effect, Canada Campaigns



CANADIAN BRAND LIFT - TREND BY METRIC

DIGITAL BRAND EFFECT NORMS
Nielsen Digital Brand Effect, Canada Campaigns



PULLING IT ALL TOGETHER

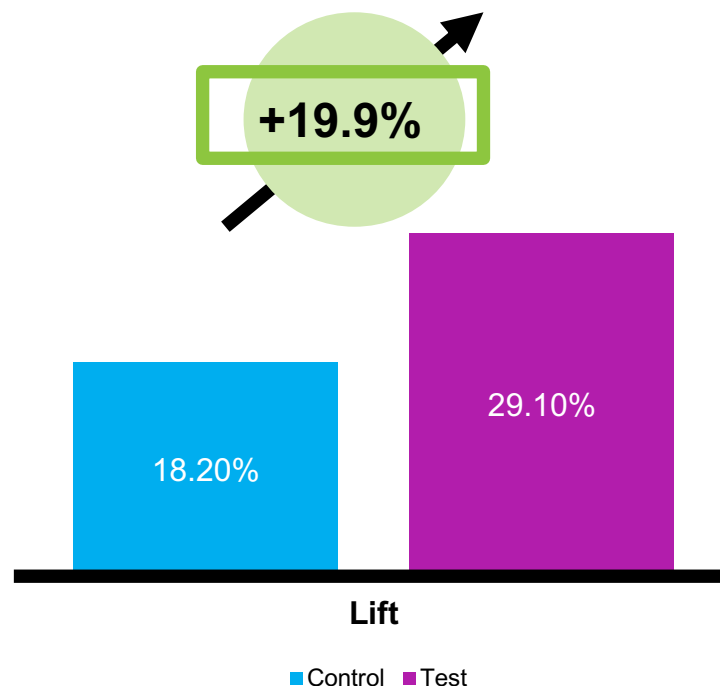
Awareness Question: Which of the following [PRODUCT] have you heard of?

DIGITAL AD RATINGS CPG Client

Target Audience	F18-49
Mobile Impressions	10.6M
On-Target Mobile Impressions	5.2
Frequency	2.4
Target Unique Audience	2.1M
Mobile On Target Rate	49%

Benchmark: 67%

MOBILE BRAND EFFECT



The MBE showed a 19.9% lift above the control.

Combining these types of measurement, we can project how many people were both **reached** and **successfully influenced** by the campaign.

$$2.1M \times 19.9\% =$$

409,739

F18-49 were successfully reached and influenced by the campaign.

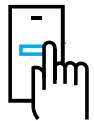
IT'S COMPLICATED



In this hyper-targeted world it's easy to lose sight of some of the other components such as reaching the right audience, broadly, with the right frequency in a way that will resonate with consumers



Traditional platforms still deliver, however it's important to “keep your eye” on the goals in a siloed media plan



Mobile has overtaken desktop in use but is still only a component of building an efficient cross platform campaign



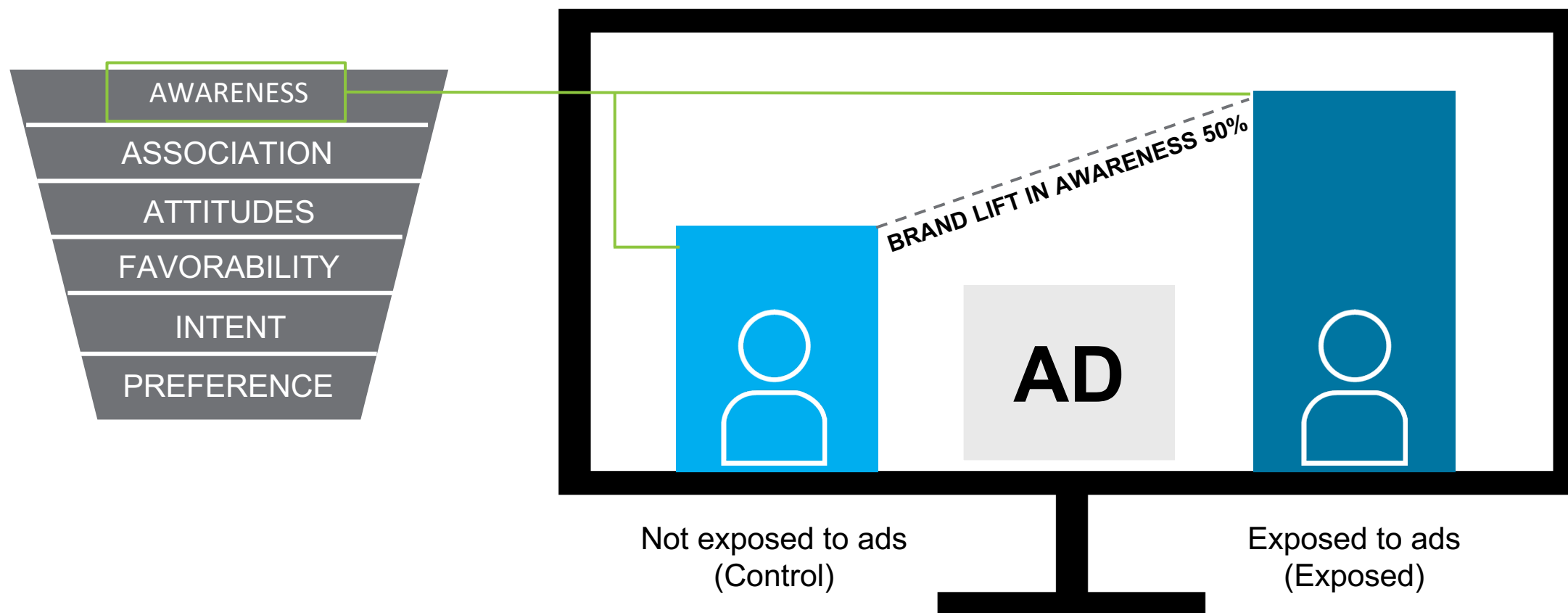
As advertisers spread their dollars to new and emerging platforms they need confidence that there are comparable metrics that allow them to evaluate all aspects of their investment. On-Target rates are only part of the story

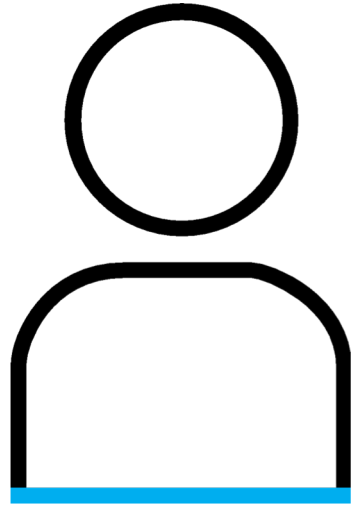
JUICE MOBILE IN-APP BEST PRACTICES

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Juice Mobile

WHAT IS BRAND LIFT?

Brand lift is the percentage increase in the primary objective of a brand advertising campaign, measuring the extent to which an advertising campaign has shifted consumer perception against one of the key purchase funnel metrics

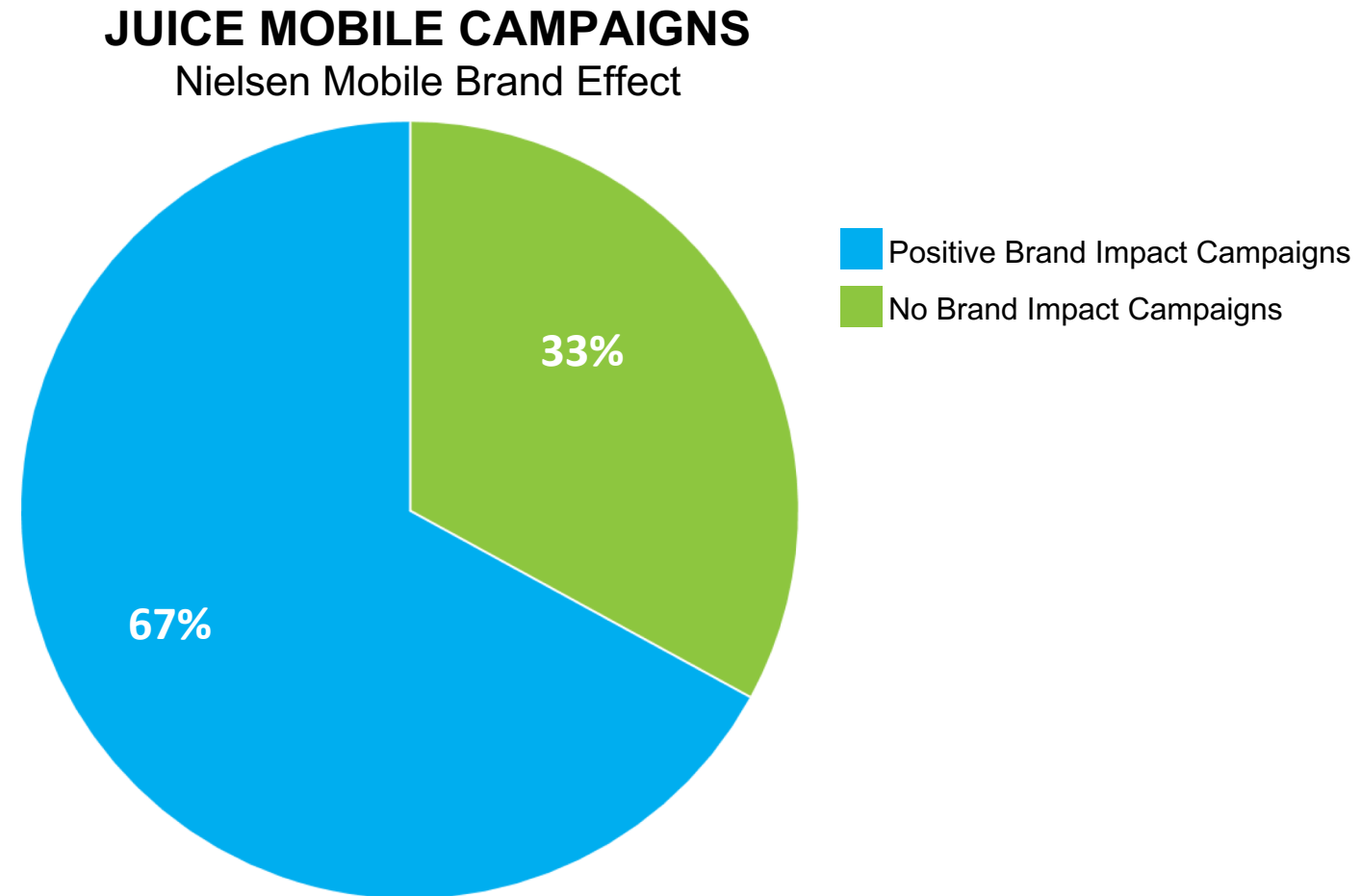




“[CLICK-THROUGH RATE] GIVES NO INDICATION OF THE IMPACT OF A CAMPAIGN ON A BRAND’S IMAGE OR ON THE CONSUMER’S SUBSEQUENT BROWSING OR PURCHASING BEHAVIOUR.”

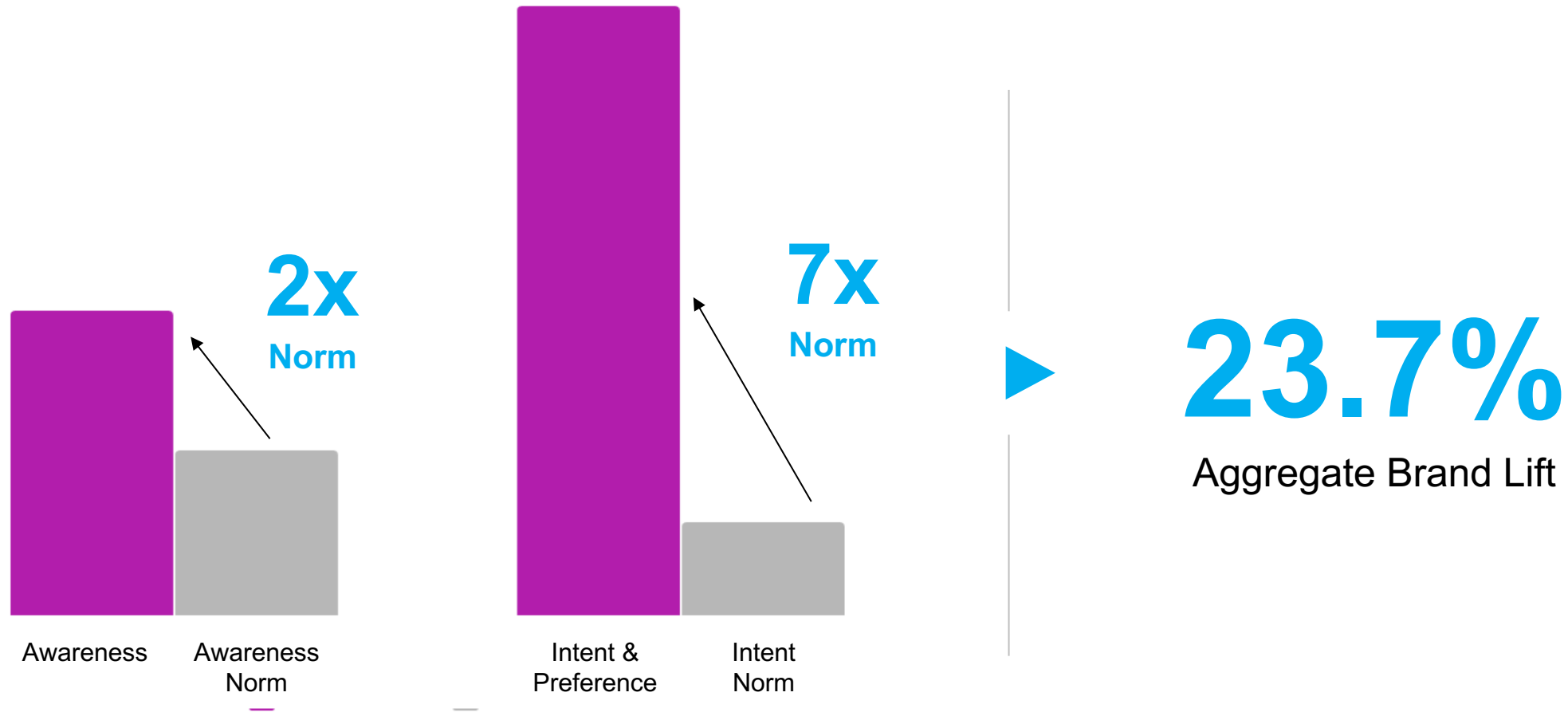
PricewaterhouseCoopers

JUICE MOBILE CAMPAIGNS DRIVE BRAND IMPACT



JUICE MOBILE OVERVIEW

Juice Mobile has measured **29** mobile campaigns with Nielsen Mobile Brand Effect across the U.S. and Canada

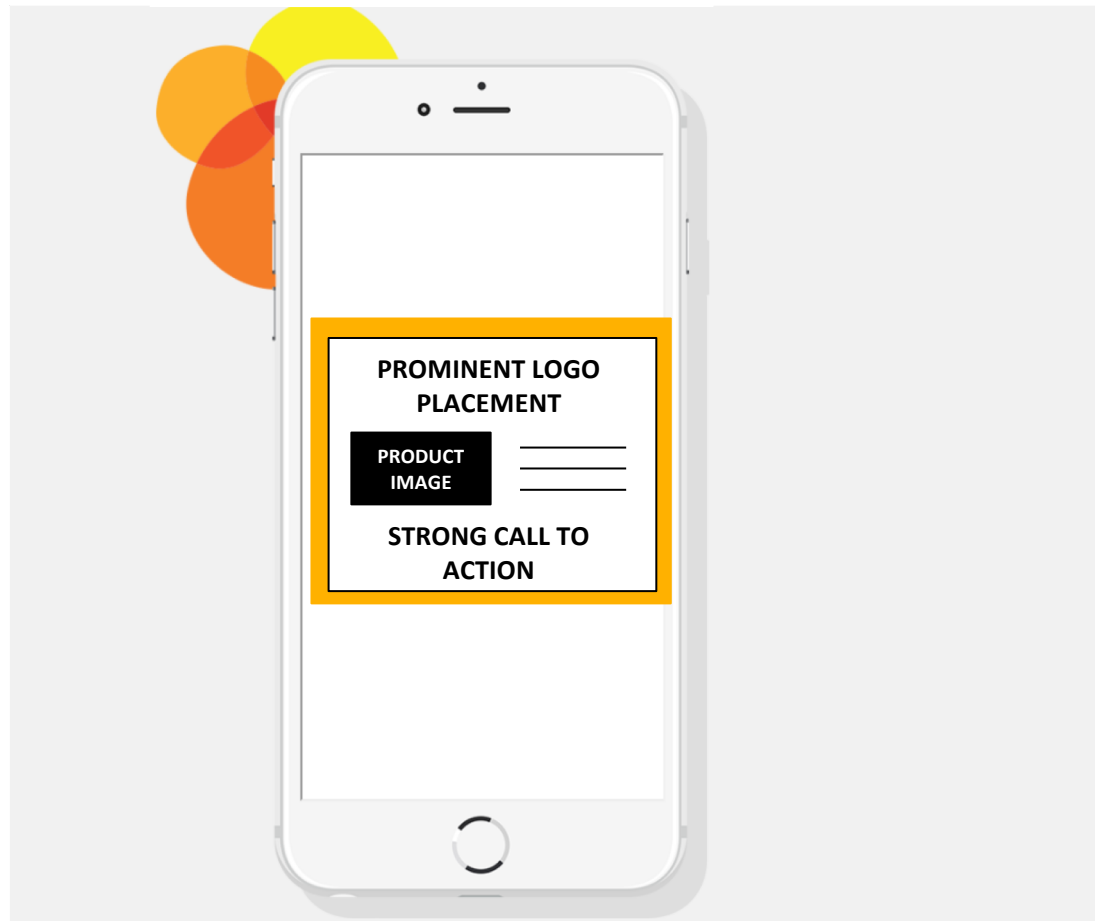


Source: Nielsen Mobile Brand Effect, All Juice Mobile Campaigns, No Custom, 2016-2018
U.S. Mobile Brand Effect Norms, Q1 2014

CASE STUDY: TOY MANUFACTURER

OBJECTIVE: To understand if geographic and behavioral targeting are successful tactics for driving intent for mobile campaigns

CREATIVE UNIT



STRATEGY



Geo-targeting allowed the client to serve ads to consumers who were located near these specific retailers



Behavioral targeting made it possible to serve the ad to people who were in the market for children's toys

CASE STUDY: TOY MANUFACTURER

INTENT QUESTION: How likely are you to purchase a [brand] product in the next 2 months?

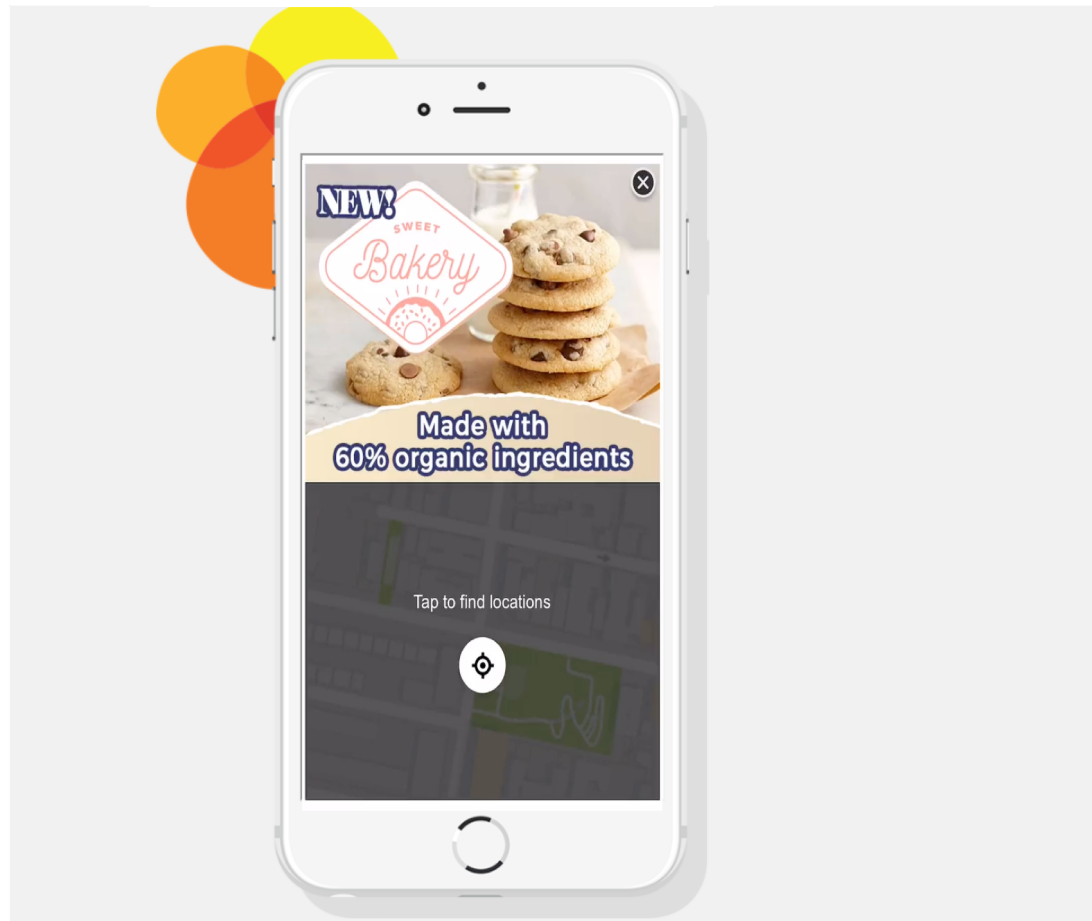


93.8%
Brand Lift

CASE STUDY: CPG COMPANY

OBJECTIVE: To understand behavioral and contextual targeting combined with utility driven creative can help drive awareness for a new product

CREATIVE UNIT



STRATEGY



High impact creative led consumers to specific retailers that sell the product



Behavioral targeting made it possible to serve the ad to those who have:

- 1) Shopped at Walmart
- 2) Shopped at organic food markets



Contextual targeting allowed the client to serve ads to consumers who are interested health and fitness

CASE STUDY: CPG COMPANY

AWARENESS QUESTION: Which of the following snack products have you heard of?

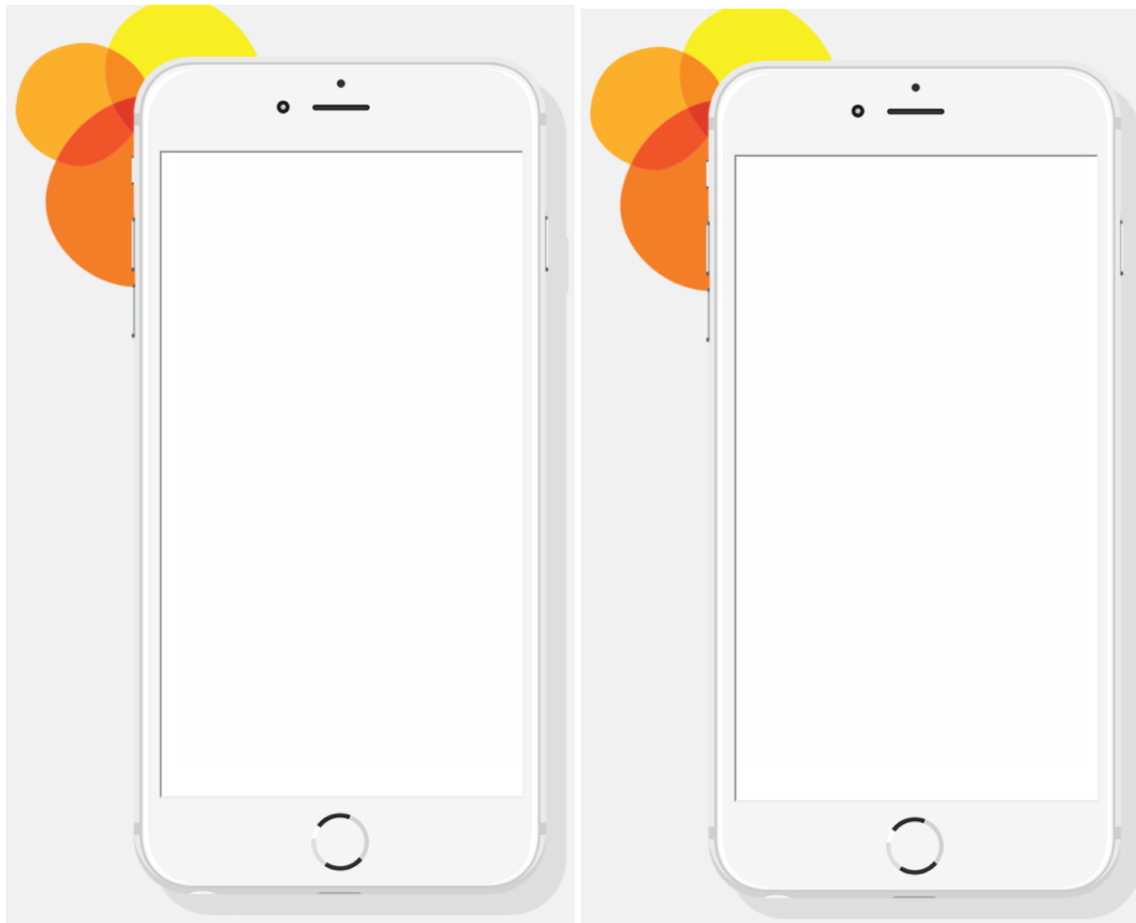


34.6%
Brand Lift

CASE STUDY: OTC ALLERGY RELIEF BRAND

OBJECTIVE: To understand if dynamic messaging based on geographic targeting can increase engagement with a condition-dependent product

CREATIVE UNIT



STRATEGY



Demographic targeting allowed the client to serve ads to W25-54, who they consider to be the primary household shoppers

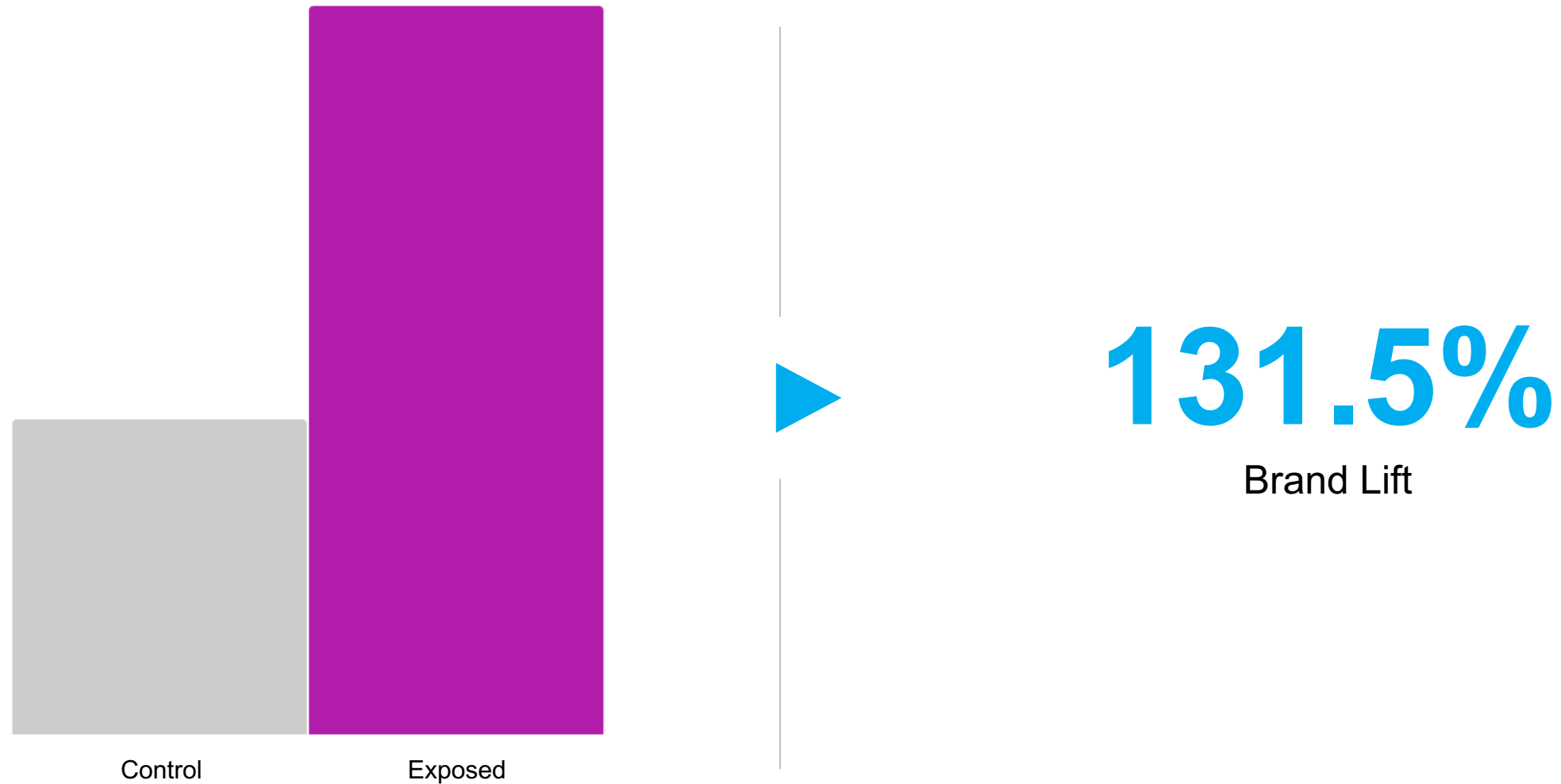


Geo-targeting made it possible to employ dynamic messaging depending on the weather conditions in a consumer's location

- High pollen count triggered a treatment-based message
- Low pollen count triggered a preventative message

CASE STUDY: OTC ALLERGY RELIEF BRAND

AWARENESS QUESTION: Which of the following [allergy products] have you heard of?



CASE STUDY: OTC ALLERGY RELIEF BRAND

PREFERENCE QUESTION: Among the following [allergy products], which one do you prefer most?



40.4%
Brand Lift

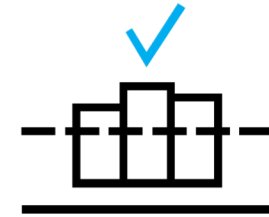
KEY LEARNINGS



Mobile can be a powerful tool for driving effective advertising



Well-executed, conventional ads can work, but more compelling creative experiences can improve success



Measurement is important, and you can measure mobile effectiveness

Nielsen Mobile Brand Effect provided validation around mobile strategies and provided a benchmark for future success



Thank You!

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