# How Consumers and Marketers Use Walled Gardens

2025 Global Insights

# The State of Walled Gardens and Social Media Usage

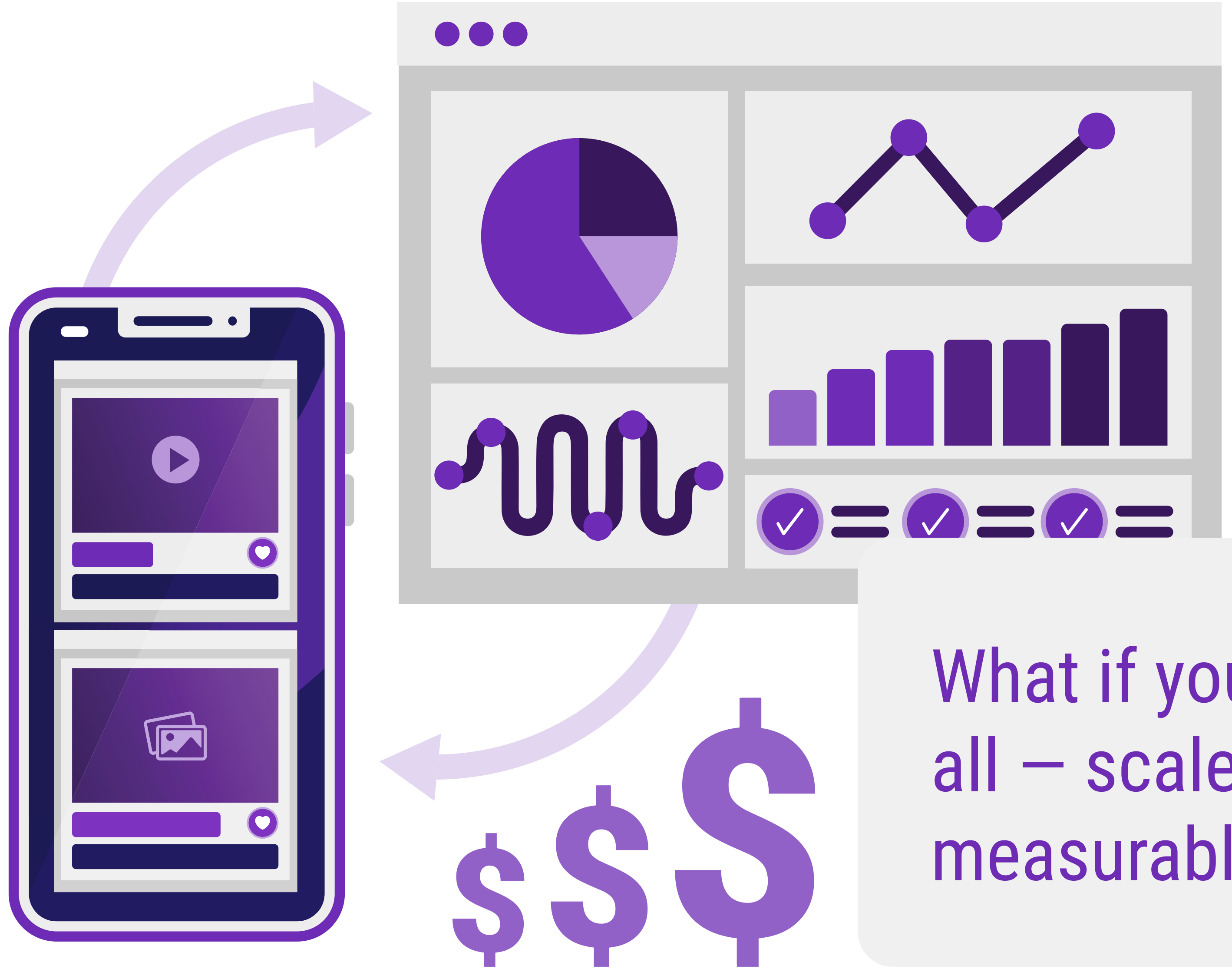
Scroll, pause, bounce; consumer attention is a commodity in great demand. As it waxes and wanes on various platforms, marketers demand tangible outcomes from their media buys; not just exposure opportunities, but contexts that offer quality ad environments, audience precision and generation of net new business.

Of the 3.5 hours of leisure time consumers spend per day consuming digital media, walled gardens are taking the lion's share of attention. Accordingly, marketers are spending record budgets. Facebook and Instagram alone command $192 billion in global ad spend in 2025 — and that's just two platforms within the "Meta-verse." This is closely followed by TikTok, raking in $34 billion in global ad spend. With two in three consumers influenced by social content in their purchase decisions, the stakes for getting context and placement right have never been higher.

While walled gardens offer scale, engagement and rich contextual placements, these opportunities introduce new complexities: fragmentation, shifting audience behaviors and a constant tradeoff between performance, protection and efficiency. The cost of compromise? Missed audiences, wasted spend and potential brand risk.

**54% of consumers** say social influencers impact their purchase decisions.

The question is no longer whether to invest in walled gardens, but how to maximize every dollar — without compromise. As marketers navigate this landscape, trusted partners play a pivotal role in turning complexity into clarity. What if you could have it all — scale, suitability and measurable outcomes? This report explores how.




What if you could have it all — scale, suitability and measurable outcomes?

# Foreword, by DoubleVerify CEO, Mark Zagorski

Marketers today face a defining moment. **The digital advertising ecosystem has never been more impactful — or more complex.** Attention is splintered across platforms, AI engagements are changing the marketer-consumer dynamic, data is locked behind walls and the path from investment to outcome has grown harder to see. Yet, amid this complexity, lies opportunity.

The brands that win will be those that bring discipline and clarity to every stage of the media journey: **verifying** the quality of their media; **optimizing** performance through data, AI and automation; and **proving outcomes** with independent, trusted measurement. These are not just best practices, they're the principles that define the future of effective marketing.

Drawing on insights from **22,000 consumers** and **1,970 marketing and advertising decision-makers** worldwide, this report explores how people and brands engage across today's most influential digital environments. The message we uncovered is clear: while walled gardens deliver scale, sustainable performance depends on transparency and trust.

In an era where **every impression counts, clarity is not a luxury, it's a competitive advantage.** By combining media quality verification, performance optimization and outcomes validation, marketers can turn complexity into confidence, attention into action and media investment into measurable impact.

Mark Zagorski

**Mark Zagorski**

CEO, DV

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# How Consumers Scroll, Tap and Shop

> The appeal of walled gardens lies in their blend of endless entertainment, vibrant community and hyper-personalized experiences.

Wherever there are screens, there are eyes — and wherever there are eyes, there are opportunities for marketers to make an impact. It's this ever-present yet fleeting attention that makes consumer behavior the most powerful, dynamic and volatile engine, driving marketing investment decisions. The appeal of walled gardens lies in their blend of endless entertainment, vibrant community and hyper-personalized experiences — across both user-generated content and ads — driven by sophisticated algorithms. For consumers, every scroll brings something new, relevant and engaging, making these platforms a daily digital destination.

To decode these behaviors, DV surveyed 22,000 consumers across 21 countries, uncovering how people of all ages engage with platforms, consume news, interact with influencers and respond to advertising within walled gardens.

## DV Surveyed 22,000 Consumers

## Across 21 Countries

**Our survey findings reveal:**

- Platform and content consumption patterns by demographic
- Consumer perception of ads and impact on purchasing decisions
- News consumption patterns by demographic
- Influencer impact on purchasing decisions and social commerce patterns

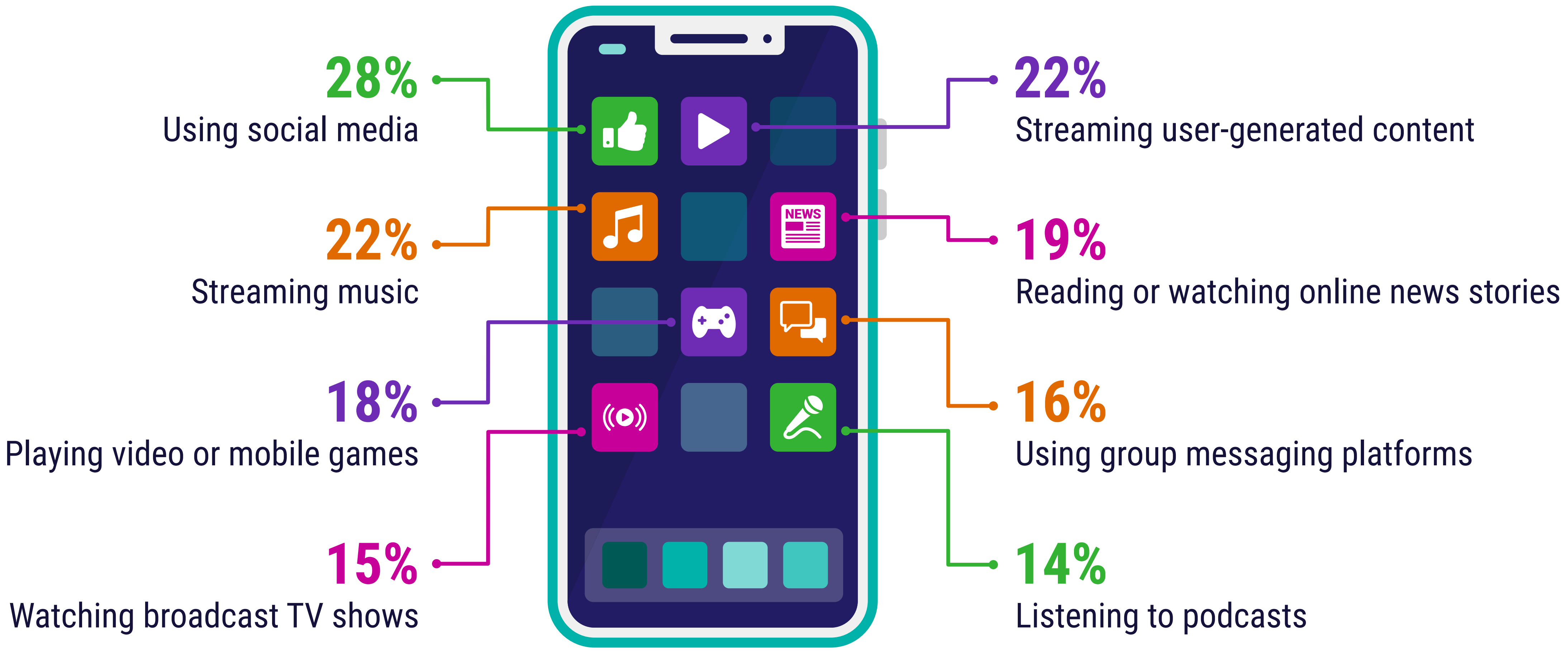
# Platform Behavior and Demographics

## A Snapshot: Consumers Spend their Time Online

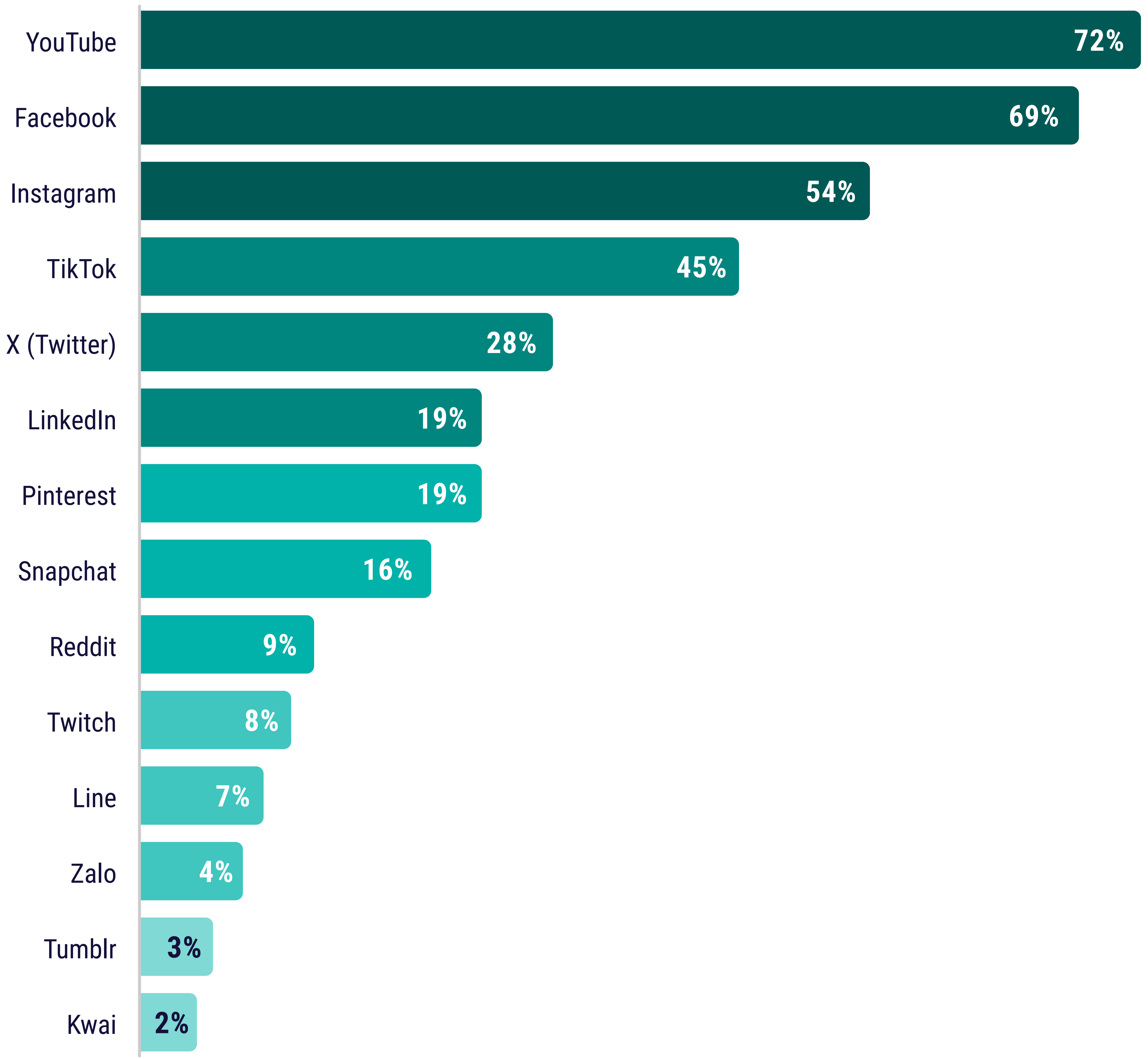
Of surveyed consumers, 28% expect to spend more time on social media platforms in the next year. YouTube is capturing the majority of user attention, closely followed by Facebook, Instagram and TikTok. Evidently, YouTube's broad appeal and high usage frequency make it an appealing and foundational marketing channel for mass reach. However, the fragmentation of preferences — especially among younger and older demographics — needs to be kept in mind when devising multi-channel strategies.

**28% of consumers** expect to spend more time on social media in the coming year.

**Where Consumers Intend to Spend More Time in the Next Year**



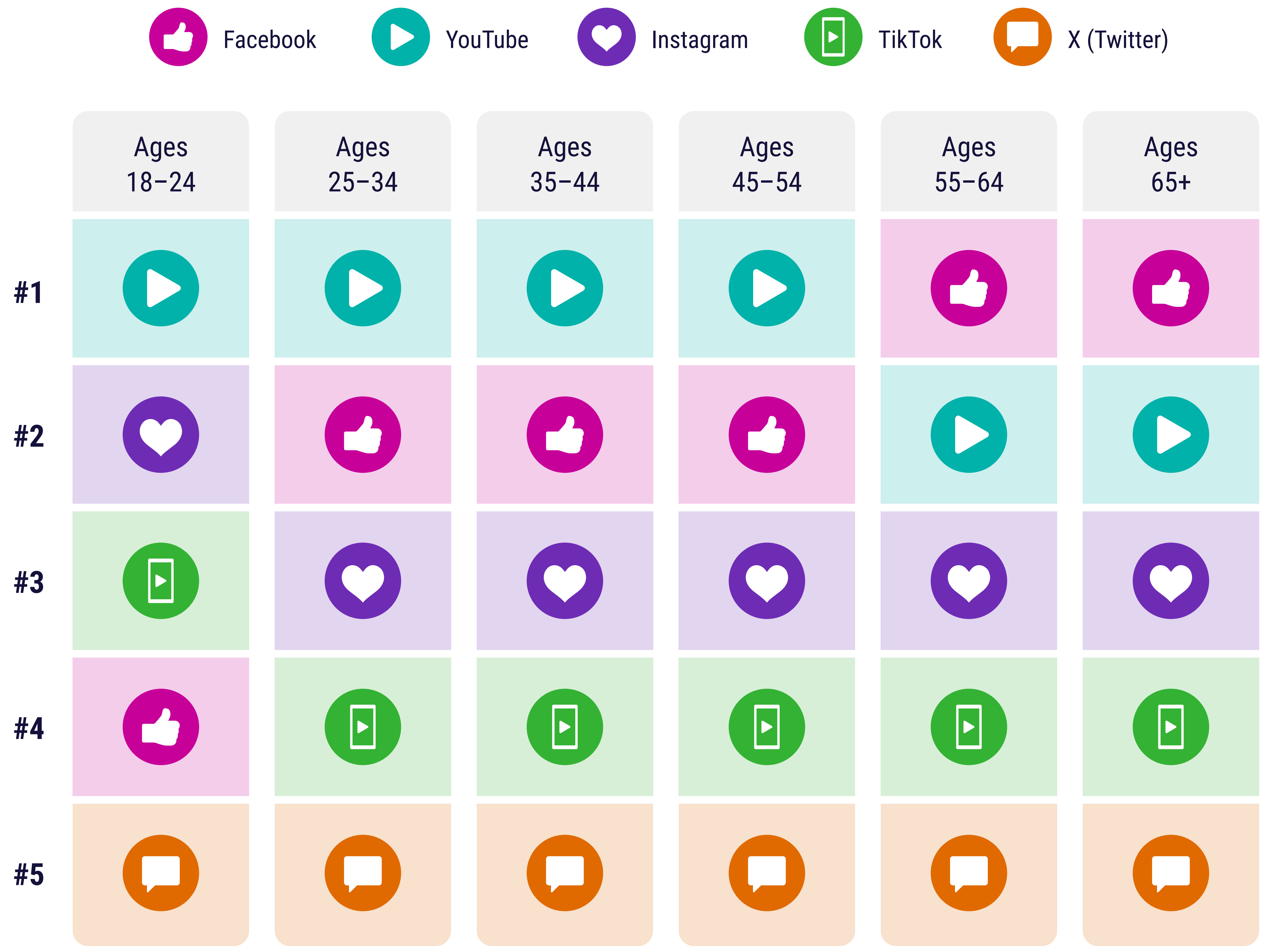

**Social Media Platform Usage Among Consumers in 2025**



## Different Platforms for Different Demographics

Facebook's dominance among older and female users contrasts with the younger cohort's preference for visually driven, video-first platforms like YouTube, Instagram and TikTok.

### Top 5 Social Platforms by Age




### Significant Differences in Platform Usage by Gender

**71%** of women use Facebook

**75%** of men use YouTube

Platform preferences are undoubtedly influenced by demographics. While the user base and engagement are consistent with older demographics, these variables tend to fluctuate more among younger users. Emerging platforms can divert attention away, or younger users might "age out" of platforms — just as Facebook's user base has experienced a demographic shift over the years.

### Social Media Usage by Region

| | **Global** | APAC | EMEA | LATAM | North America |
|---|---|---|---|---|---|
| YouTube | **72%** | 78% | 63% | 86% | 66% |
| Facebook | **69%** | 69% | 63% | 80% | 71% |
| Instagram | **54%** | 54% | 51% | 74% | 40% |
| TikTok | **45%** | 48% | 38% | 65% | 36% |
| X (Twitter) | **28%** | 33% | 24% | 33% | 20% |

# Social as a News Channel

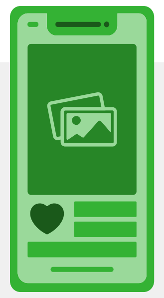
## Catch the Morning News on Your Feed

Younger consumers (18–44) today turn to social media and video platforms as their primary news source. This is particularly true for consumers ages 18–24 and 25–34, with **over 40% of respondents in both brackets citing social media and YouTube/ other video platforms as the top way they consume news content.** Older consumers (45+) still rely on traditional TV news channels, with usage rising sharply with age (from 38% at 35–44 to 71% at 65+).

News websites/apps maintain steady relevance across all age groups, **but never surpass social or TV as the top sources.**

### Top 3 Ways Consumers Get News Content

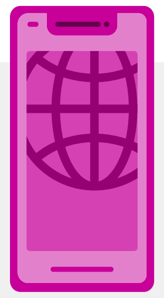

**42%** YouTube or other video platforms


**40%** Social Media Platforms


**34%** TV News Channels

**Age 18–44**

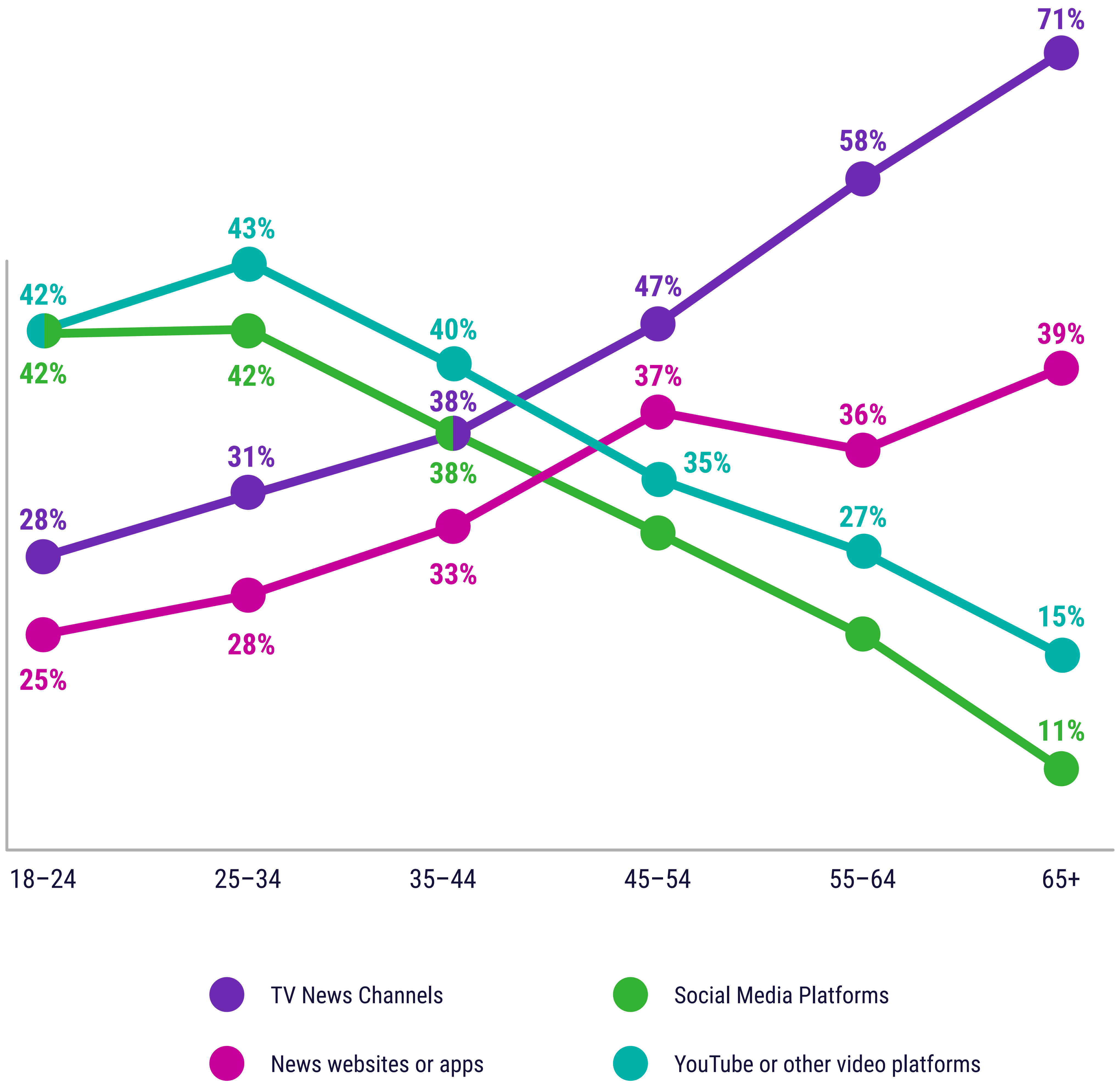

**59%** TV News Channels


**37%** News Websites or Apps


**29%** YouTube or other video platforms

**Age 45–65+**

### Primary Ways Consumers Consume News-Related Content



## Regional Differences in News Consumption Channels

Naturally, news consumption patterns vary based on regions. In APAC and LATAM, social media and YouTube/video platforms are as important as TV news channels for news consumption (39-46% for each channel).

In EMEA and North America, TV news channels remain the leading source, but social media and news websites/apps are also significant.

**>40%**

**of respondents**

in both 18–24 and 25–34 brackets cited social media and YouTube/ other video platforms as the top way they consume news content.

### Primary News Sources by Region

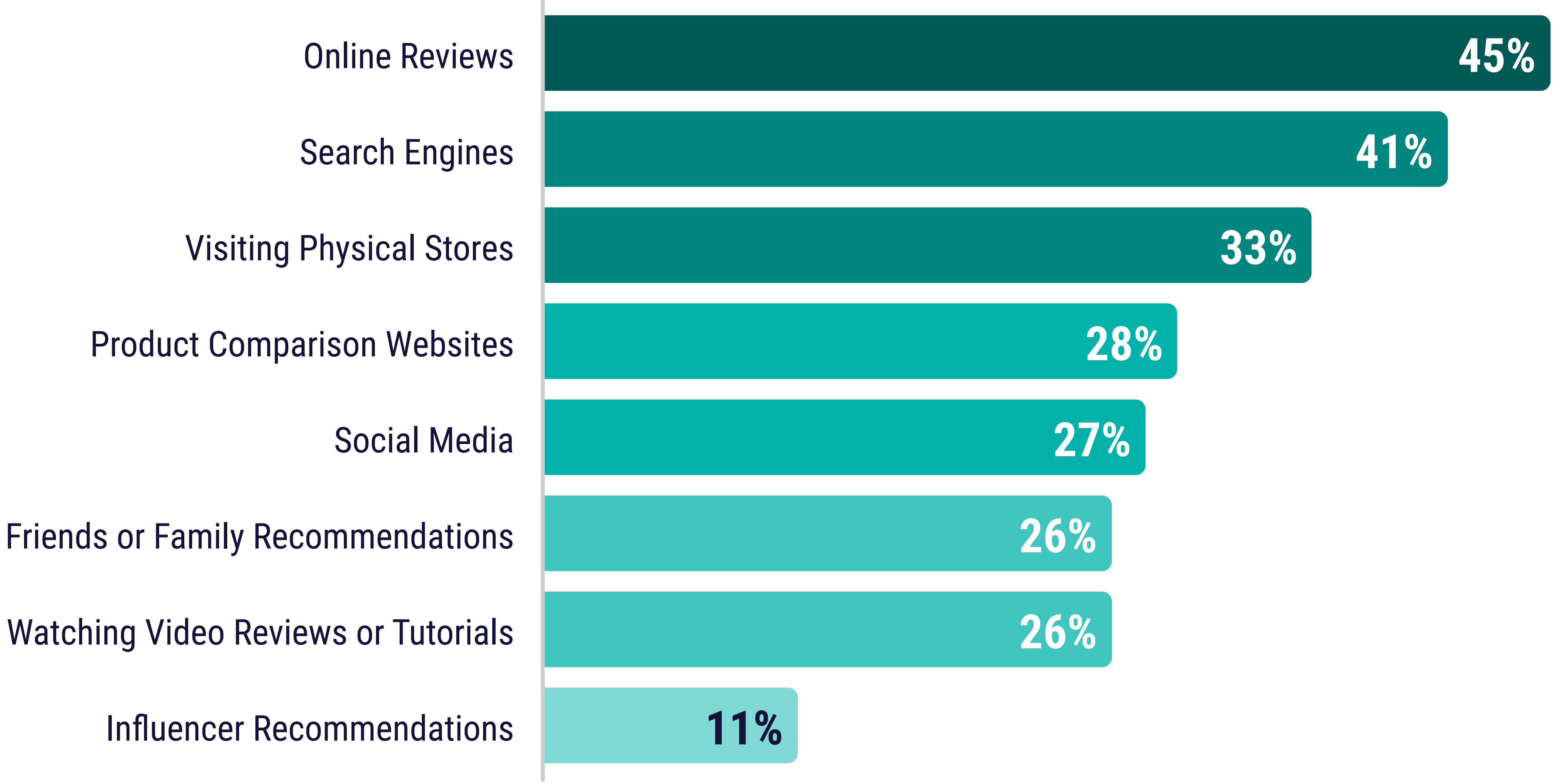
# Influencer Impact and Social Commerce

## Social Media as Social Proof for Products

While consumers are most likely to turn to online reviews (45%) and search engines (41%) before making a purchase, social media is on the rise; 27% of consumers revealed that social media and 26% said that video reviews or tutorials (such as on YouTube and other video platforms) were one of their top three pre-purchase research tools, underscoring the growing role of social in product research.

The appeal is likely due to the personalization and algorithmic curation that social feeds have, surfacing highly relevant content tailored to individual interests.

### Where Consumers Research Products Pre-Purchase




## Influencers: The Micro, Macro and Mega

Over 58% of surveyed consumers stated that they interact (follow, like, share, comment) with influencers, especially micro influencers (24%). The lower-funnel strength of these interactions is also high — 54% of consumers reported that social media influencers impact their purchase decisions.

**54% of consumers** reported that social media influencers impact their purchase decisions.

Baked into the influencer audiences is high engagement; many build their dedicated followings through helpful, emotionally resonant or entertaining content. In the marketing world, this translates to greater influence over purchasing decisions — making influencer content an effective context for advertising campaigns that require both scale and credibility.

### Social Media Usage by Region

| | **Total** | APAC | EMEA | LATAM | North America |
|---|---|---|---|---|---|
| Consumers impacted by any type of influencer | **54%** | 64% | 44% | 66% | 43% |
| Consumers significantly impacted by any type of influencer | **31%** | 37% | 24% | 38% | 25% |
| Consumers who purchased a product based on positive comments about it under an influencer's post | **23%** | 30% | 16% | 29% | 15% |

Globally, influencers appear to have the strongest impact on consumers in APAC and LATAM. Both regions reported the highest overall impact from any type of influencers. This is likely due to both of these regions being mobile-centric markets, with a high prevalence of internet browsing and social commerce on mobile. For an in-depth analysis of media trends per region, look to DV's Global Insights Reports for APAC and LATAM.

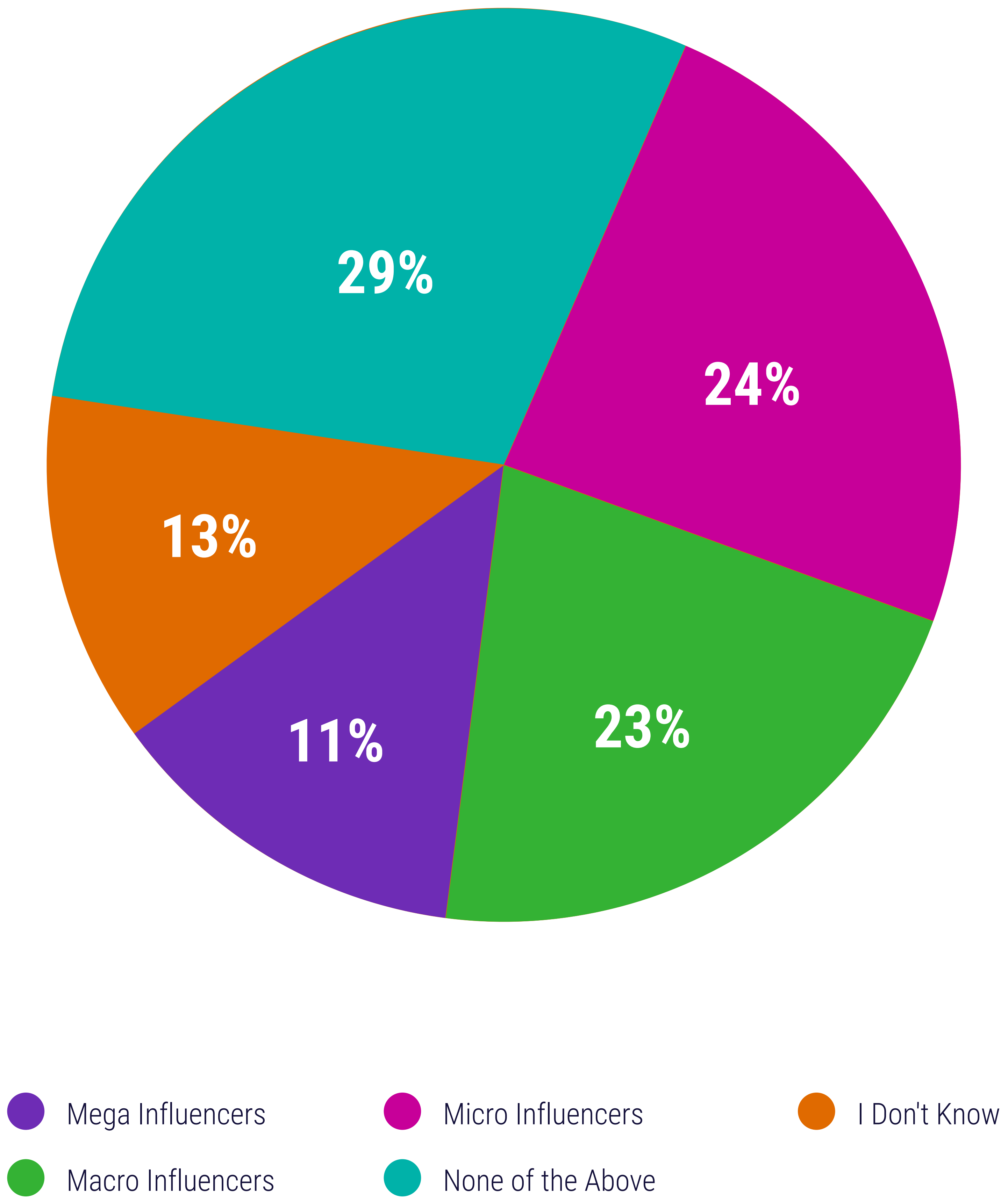
**31%**

of consumers claim social media influencers significantly impact their decision to purchase a product.

**23%**

of consumers have purchased a product based on a positive comment about it under an influencer's post.

**The Types of Influencers Consumers Interact with the Most on Social Media**



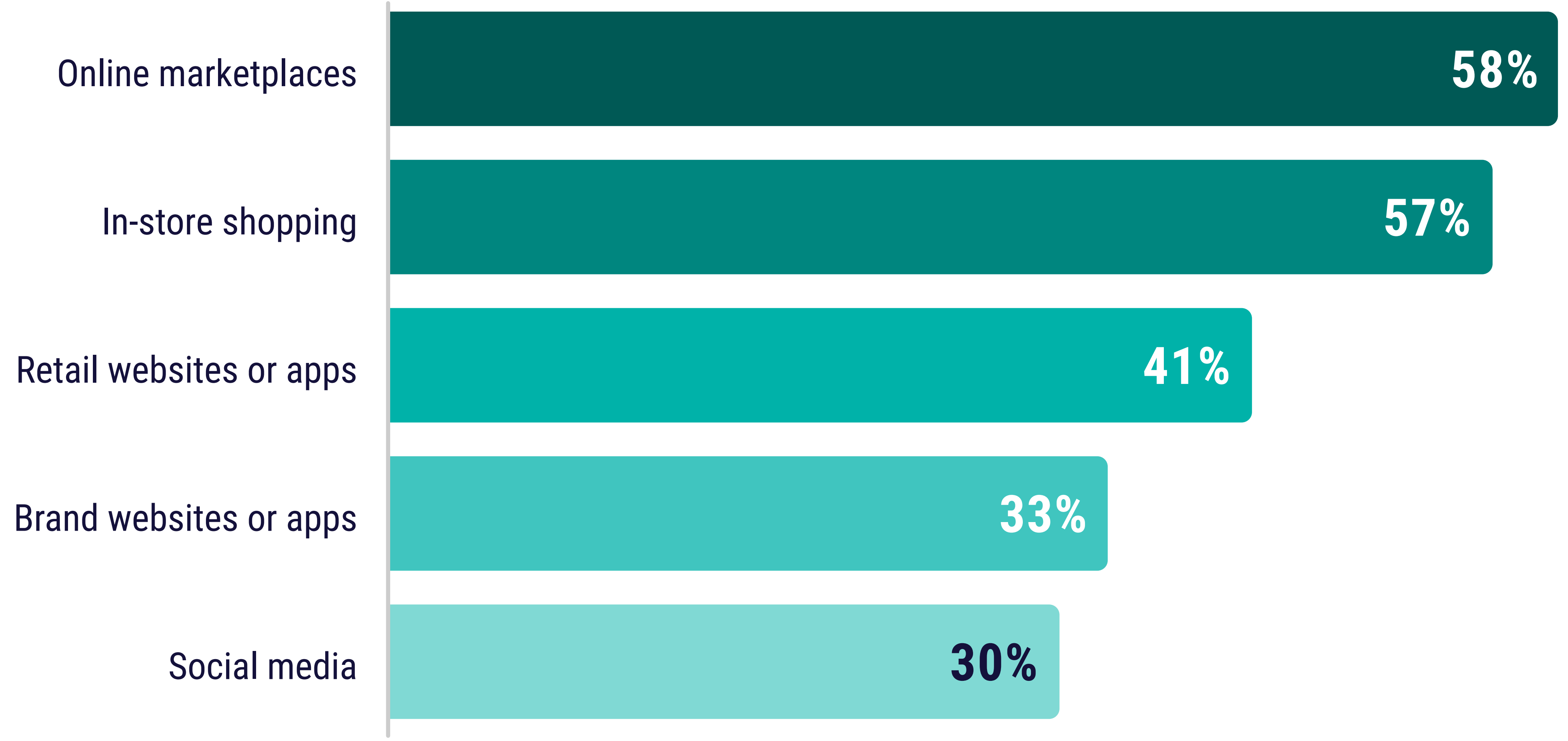

Note:
Micro Influencers: Individuals with 1,000 to 100,000 followers who have high engagement and focus on niche topics
Macro Influencers: Individuals with 100,000 to 1 million followers who are seen as experts and have a broad reach
Mega Influencers: Individuals with over 1 million followers, often celebrities, who have vast influence but lower direct engagement

## Shopping Is a Social Activity

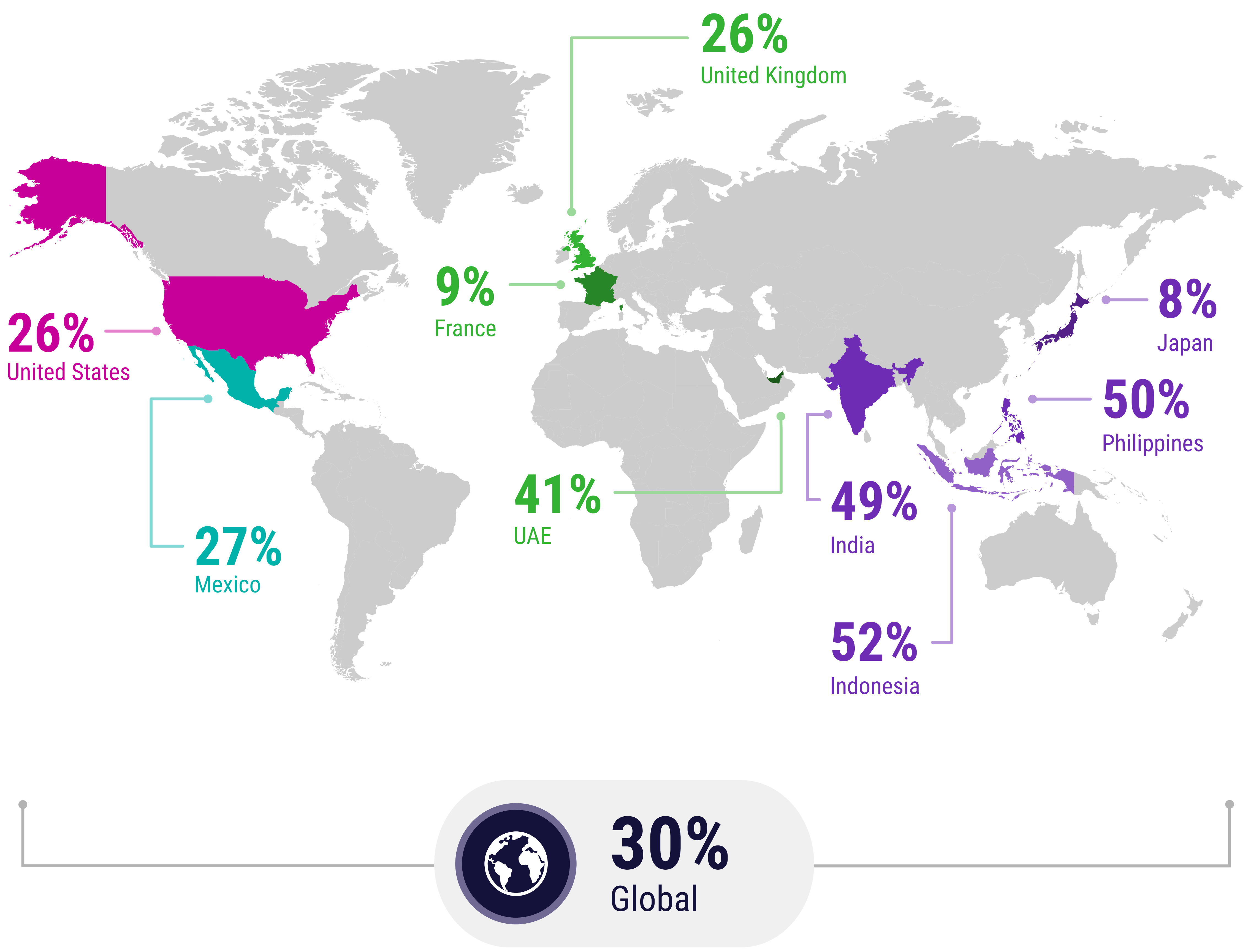
Social commerce is on the rise, with **30% of consumers making a purchase directly through a social platform in the past year**, especially in mobile-first markets like APAC. Of all regions, APAC has the highest number of consumers engaging in social commerce (40%). This is largely driven by Vietnam, Indonesia, Thailand, India and the Philippines.

Though YouTube has a higher visit rate, Facebook leads in ad-driven actions overall, likely due to its earlier adoption of features like Facebook Marketplace. Younger consumers (18-24) however, are more likely to take action on platforms like TikTok (50%) and Instagram (53%).

### Where Consumers Made a Purchase in the Last 12 Months




### Social Commerce Penetration by Region



# Consumer Perception of Advertising

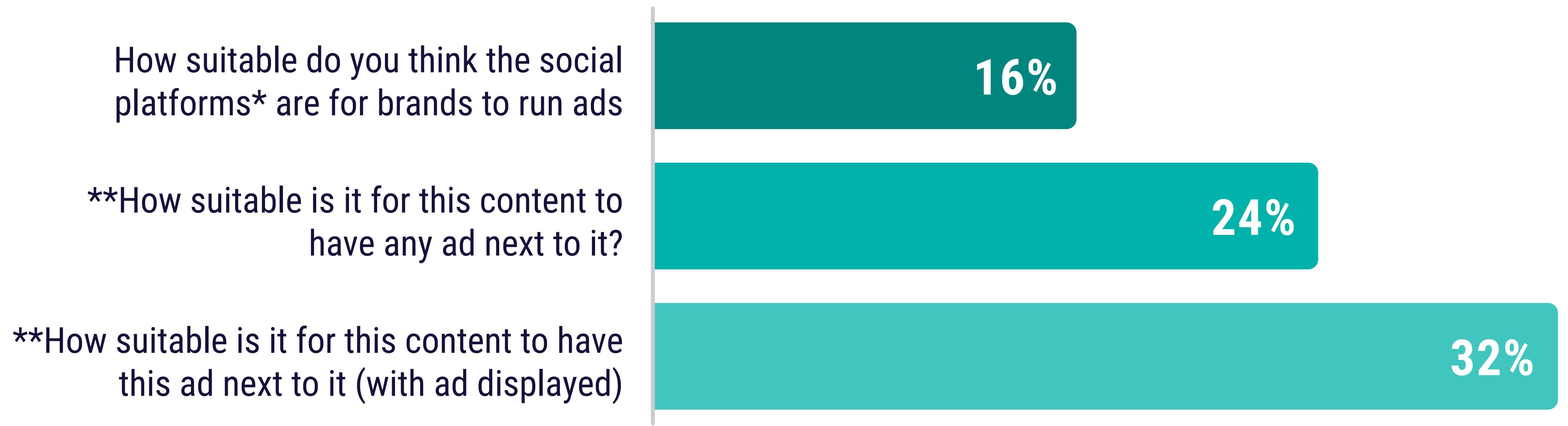
## Ad Adjacency Matters

Perception of advertising on walled gardens reflects broad acceptance, with 16% of consumers considering these platforms generally unsuitable for brands to advertise on. However, the contexts in which ads are placed have a significant impact on consumer perception; in a previous DV study, when an ad was placed next to content for some content types, the proportion that considered the content unsuitable was twice as high. This underscores the importance of context and careful ad placement, as the presence of ads can quickly transform neutral or positive perceptions into concerns about brand suitability.

**32% of consumers** consider social content in some categories unsuitable when an adjacent ad is shown.

### How Ad Adjacency Impacts Consumer Perception

Percent of Consumers who Answered “Unsuitable”




*Social Platforms included YouTube, Meta and Tiktok
**From DV Social Brand Suitability 2024.

Consumer Trends: How Consumers Scroll, Tap and Shop

## Key Takeaways

- Consumers’ age and gender help determine their platform preferences. This fragmentation underscores the need for tailored, multi-platform marketing strategies.
- Personalized social feeds with real-time community engagement are an indispensable research tool. Micro and macro influencers play an especially pivotal role in shaping younger consumers’ purchase decisions.
- Social commerce is accelerating worldwide, particularly within mobile-first markets in APAC.
- The presence of an ad next to specific content can make consumers more critical of the content’s brand suitability. Careful ad placement with ongoing measurement is key.
- A trusted partner can help marketers maximize reach and relevance within walled gardens without compromising brand suitability or effectiveness.

Marketer Trends:

# Walled Garden Challenges and Opportunities

Within walled gardens, the potential for audience reach and engagement is vast. Yet, operating within the barriers and constraints of these environments doesn't always come with the luxury of time and a limitless budget. Instead, marketers must follow the data crumbs through a growing maze of channels, platforms and ecosystems, navigating complexities and uncovering solutions as they progress through a changing digital landscape.

**DV surveyed 1,970 global marketers to explore:**

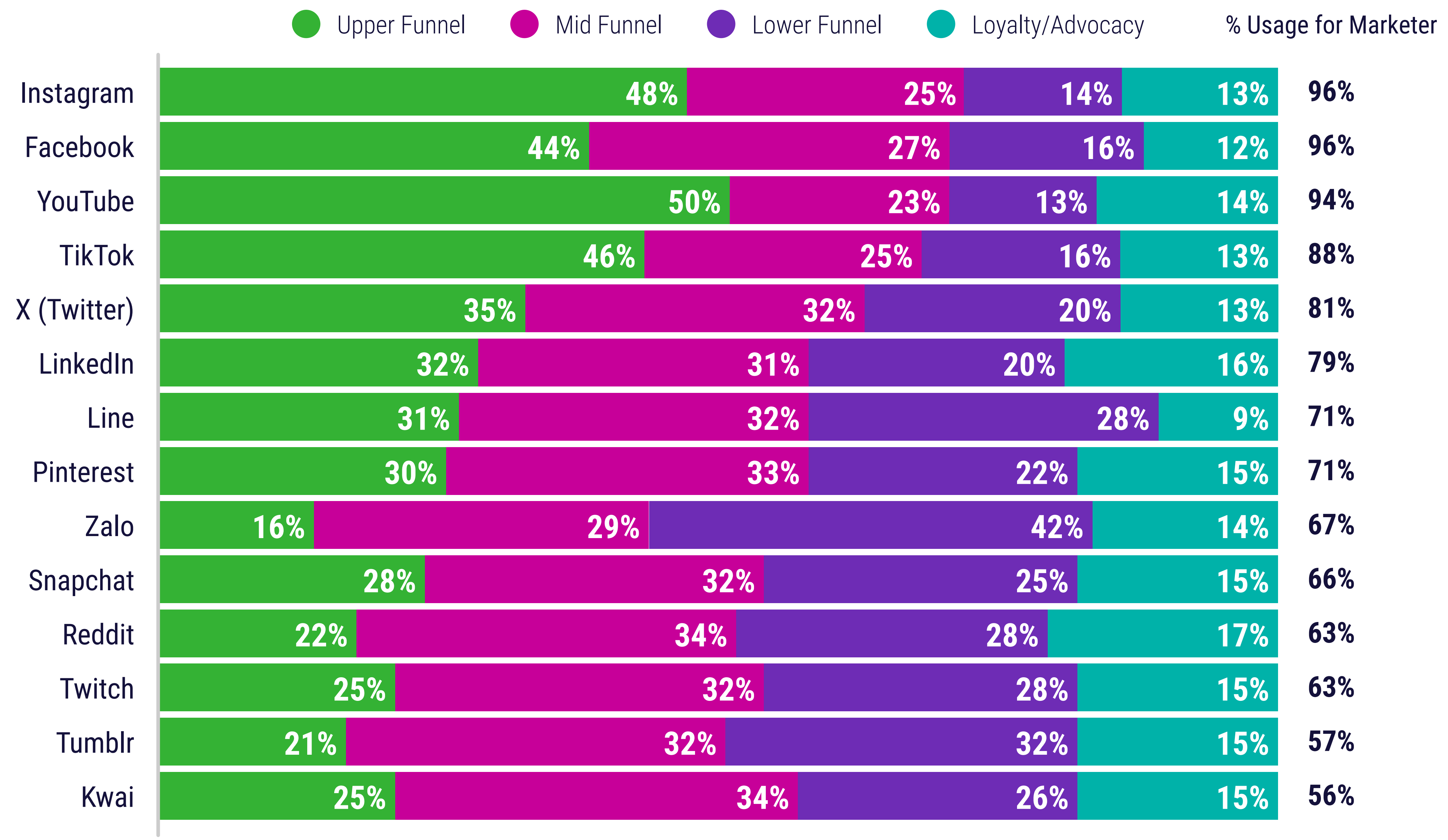
- The main challenges marketers encounter when advertising within walled gardens.
- Marketers' concerns regarding brand suitability and content adjacency in walled garden environments, especially given the surge of AI-generated content and its potential impact on consumers' perception of their brand.

## How Marketers Advertise Within Walled Gardens

### Different Platforms for Different Objectives

Eighty-eight percent of marketers surveyed use social media for advertising, although their approach varies depending on the stage of the marketing funnel. Marketers commonly turn to popular social media platforms like Instagram, Facebook, YouTube and TikTok for upper-funnel campaign objectives. In contrast, smaller platforms with lower penetration among consumers and marketers — like Zalo, Reddit, and Twitch — are often the channels of choice for mid- to lower-funnel campaign objectives.

**How Marketers Prioritize Advertising Objectives within Each Platform**

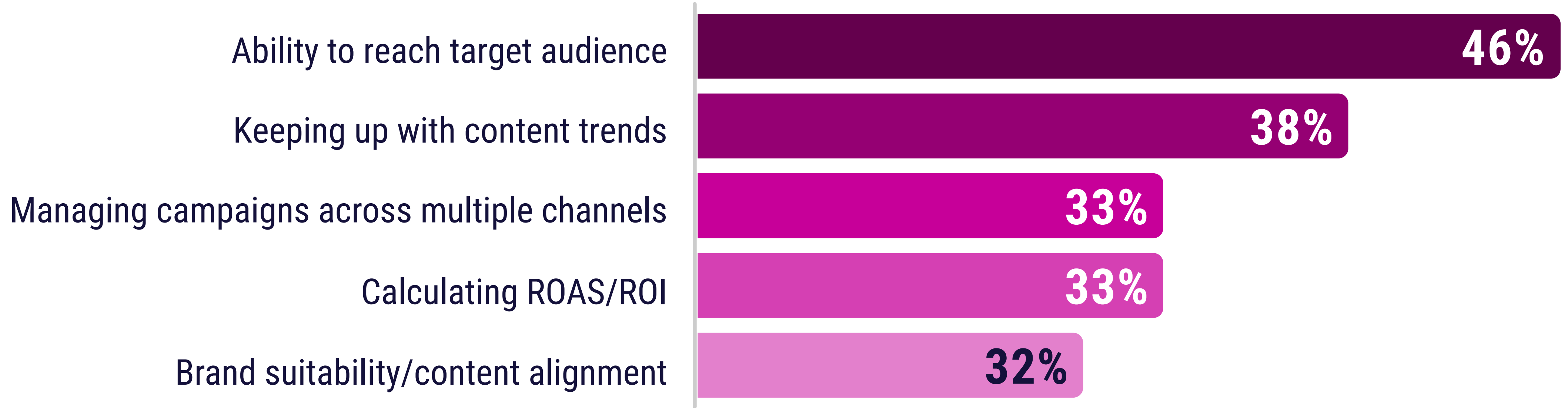


# Unpacking Marketer Concerns

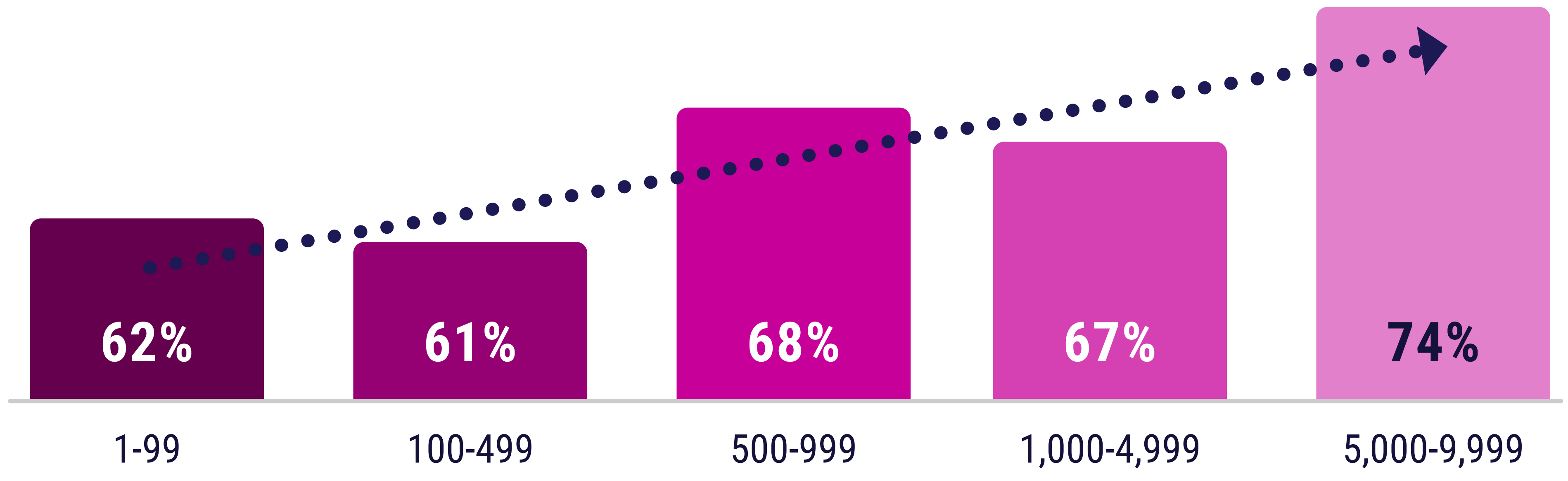
## Top Marketer Challenge: Audience Reach

For marketers, connecting with their target audience still feels just out of reach. In fact, 46% of marketers identified audience reach as their biggest challenge, especially in the algorithm-driven environments of walled gardens where audience restrictions are common. Following closely behind, 38% of marketers find it challenging to keep up with content trends.

### Top Challenges Marketers Face When Advertising on Social Media




### Marketers at Larger Companies More Likely to Be Concerned About Brand Suitability




## Brand Suitability Continues to be a Concern for Marketers

Almost two-thirds of marketers who advertise on social media expressed concerns about brand suitability in these placements. As companies grow in size, these concerns regarding the appropriateness of their ad placements within walled gardens tend to increase. Perhaps unsurprisingly, this concern is even more pronounced in tightly-regulated industries such as Banking & Finance and Healthcare & Pharmaceuticals.

**65% of marketers** voiced concerns about brand suitability within walled gardens.

### Marketer Brand Suitability Concerns Across the Globe

Percent of Marketers Concerned about Brand Suitability of their Ads on Social Platforms

| | | |
|---|---|---|
| Australia & New Zealand 72% | Brazil 86% | Canada 79% |
| Colombia 69% | DACH 40% | India 81% |
| Japan 78% | Southeast Asia 52% | Southern Europe 73% |
| UAE 63% | United Kingdom 56% | United States 65% |
| | Global 65% | |

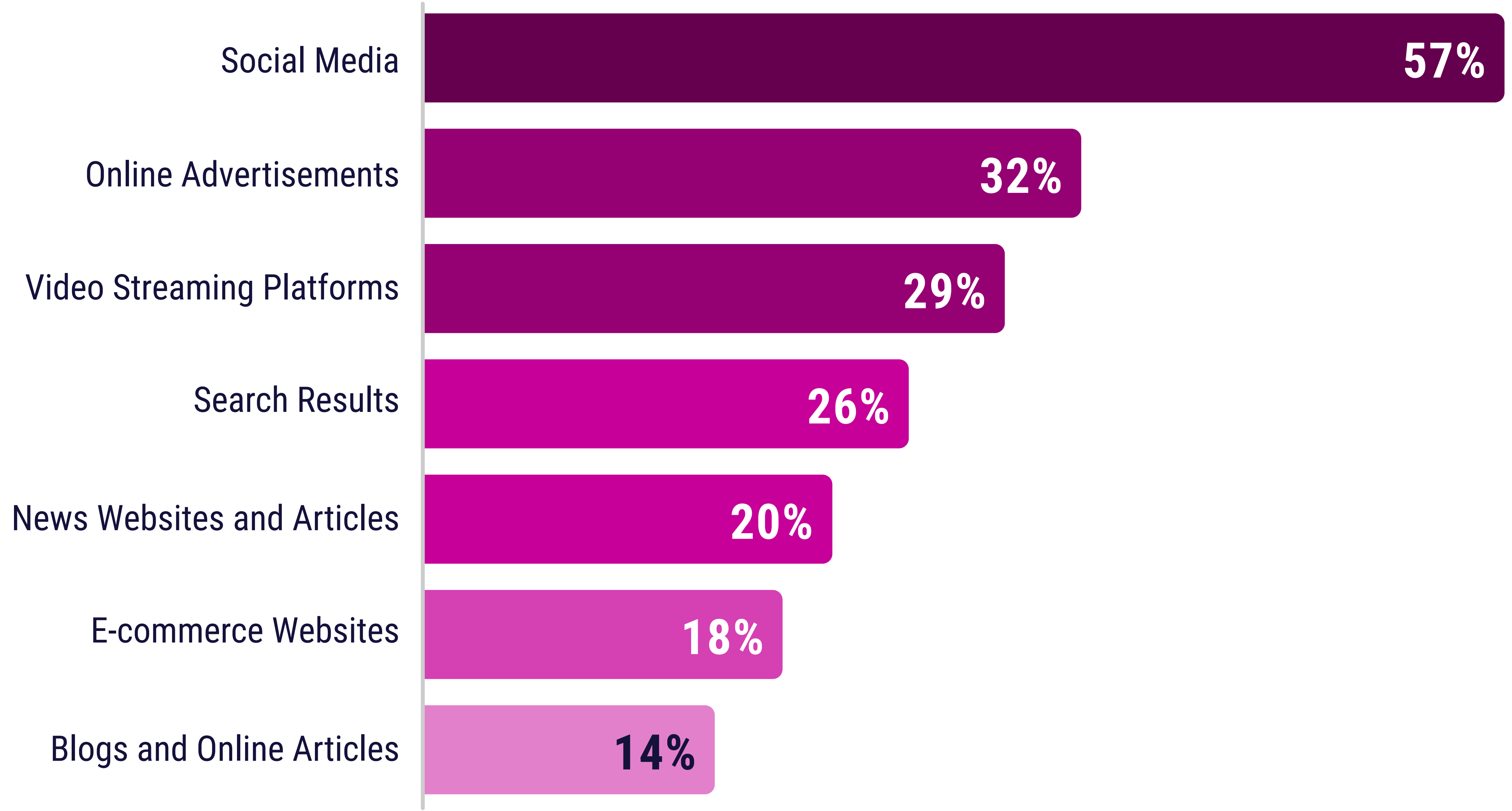
## The Blurring Line Between Bot and Human Social Content

Did a human create the video your ad is supporting, or was it generated by AI? Nowhere is AI proliferating more quickly than in consumers' feeds. In fact, 57% of consumers surveyed said they have seen AI-generated content on social media.

**57% of consumers** say they have seen AI-generated content on social media.

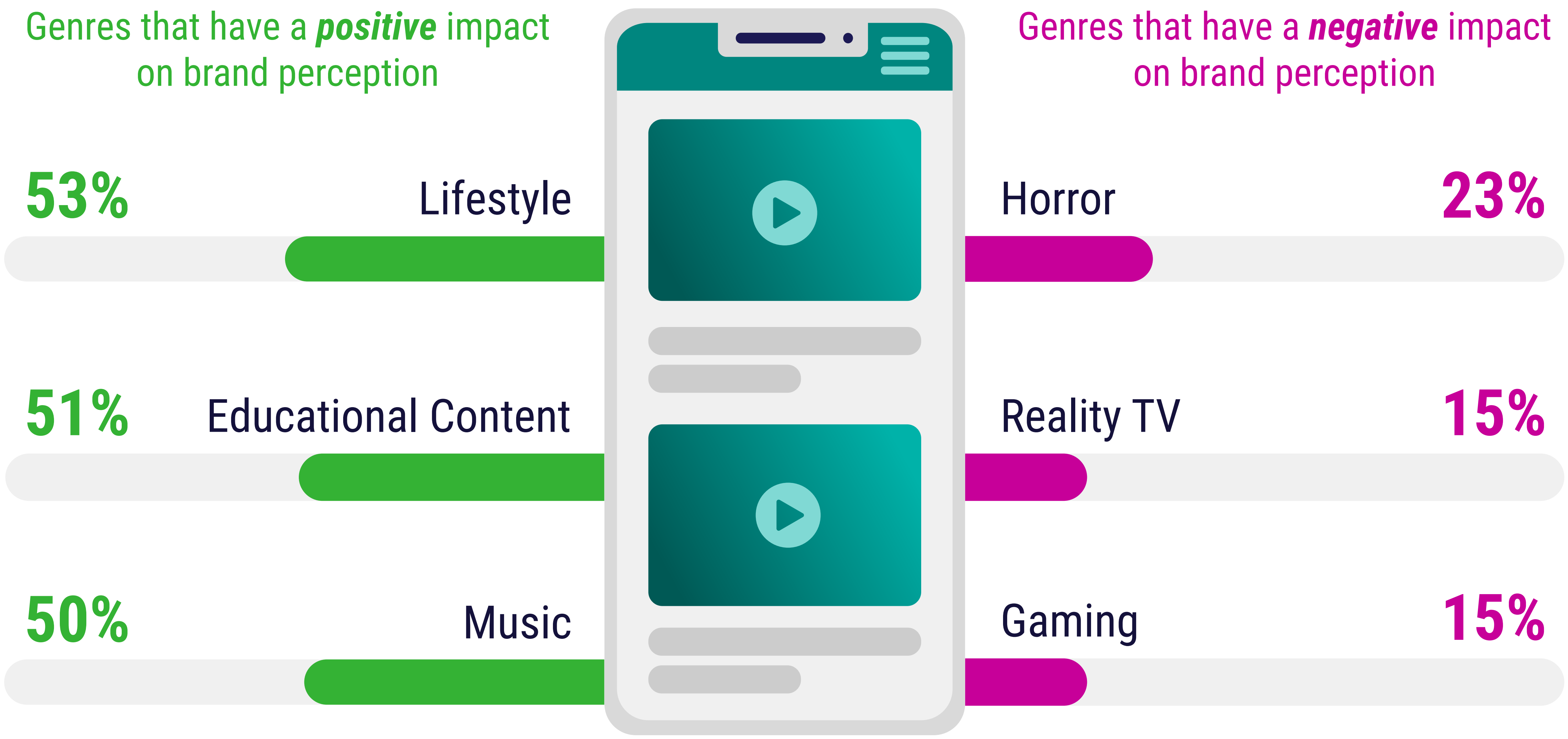
Marketers concerned about brand suitability should also consider content authenticity, since it's getting more difficult to distinguish between what's human-made and what's AI-generated.

### Where Consumers See the Most AI-Generated Content




## Brand Suitability, Authenticity and Content Adjacency: A Balancing Act

As in the offline world, context is *everything* in the digital one too. Advertisers must also consider content adjacency, as 64% of consumers say the genre of nearby content influences their perception of ads. Specifically, consumers reported that ads displayed next to certain genres can shape a favorable or unfavorable image of a brand. For example, the Lifestyle genre had the most positive impact on brand perception at 53%, while the Horror genre had the most negative impact at 23%.

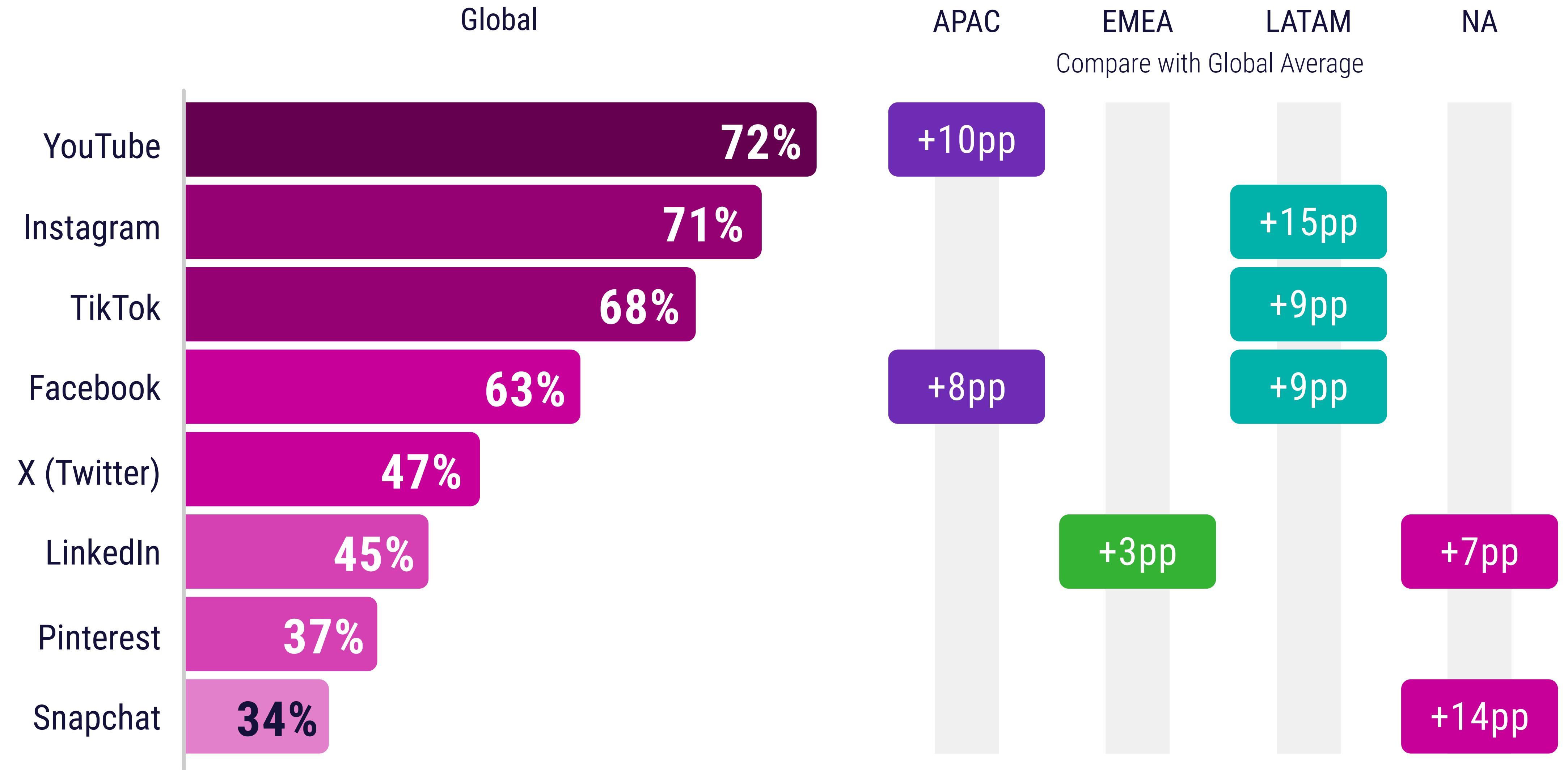


# Despite Challenges, Marketer Confidence Is Growing

## The Good News: Marketer Confidence Is Growing Globally

Marketers around the world are growing confident in walled garden advertising, particularly on platforms such as YouTube (72%), Instagram (71%) and TikTok (68%).

### The Growth of Marketer Confidence in Social Media Advertising Since 2023



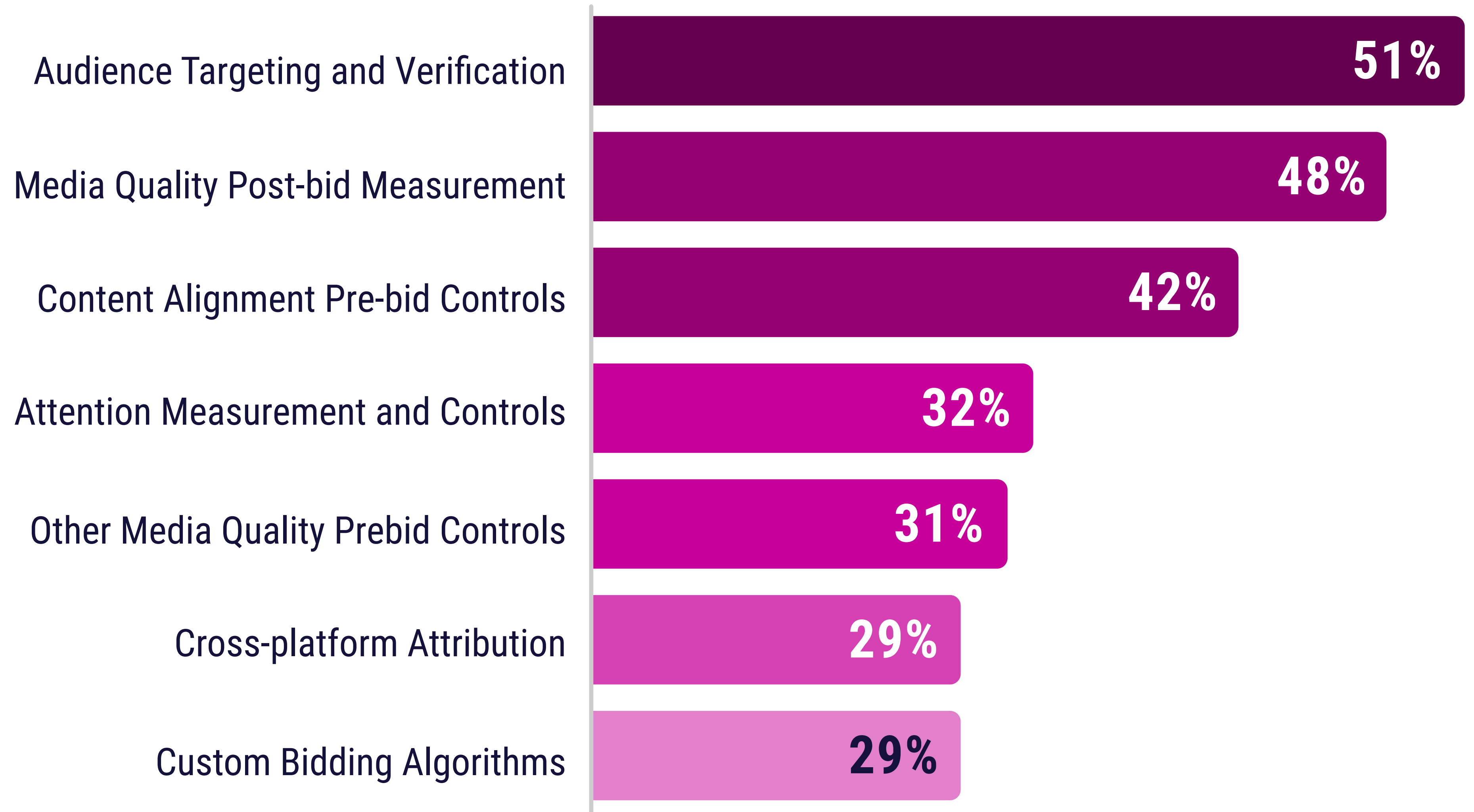

However, confidence in social media varies across different regions, creating contrasts in how marketers view different platforms. In North America, confidence has disproportionately increased on LinkedIn, while in the APAC region, it has risen on YouTube and Facebook. In LATAM, marketers have grown more confident with Instagram, TikTok and Facebook than the global average. These increases can be attributed to the differing levels of engagement and adoption for these platforms across various regions.

## Yet Confidence Alone Isn't Enough — Verification Is Critical

**51% of marketers believe audience targeting and verification are key tools for improving media planning and buying.**

As marketers' confidence in walled garden advertising grows, there's one important consideration: confidence alone isn't enough. Our data shows a rising demand for third-party tools, which are increasingly acknowledged for their value in providing transparency and impartiality in digital ad campaigns. 51% of marketers indicated that audience targeting and verification are the most crucial third-party tools for enhancing media planning and buying.

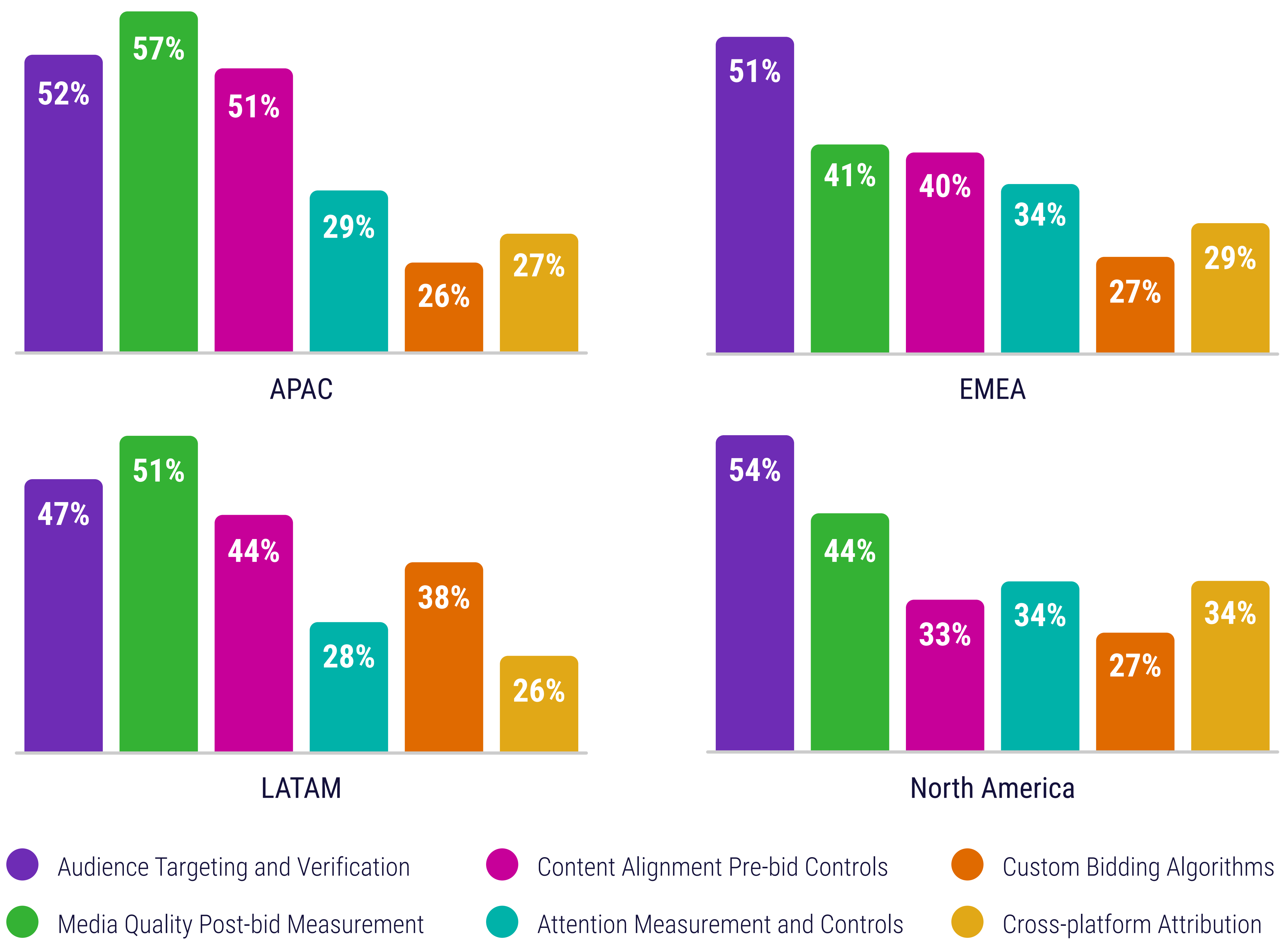
### Top Third-Party Tools to Improve Media Planning and Buying, According to Marketers



## Regional Preference for Third-Party Tools Differ Across the Globe

Preference for third-party tools and their specific uses within walled garden campaigns varied by region. In EMEA and North America, audience targeting and verification are the most important tools at  at 51% and 54%, respectively, whereas in LATAM and APAC, media quality post-bid measurement is the most important tool at 51% and 57%, respectively.

**Top Third-Party Tools to Improve Media Planning and Buying by Region**




### Marketer Trends: Walled Garden Challenges and Opportunities

## Key Takeaways

- Pre-bid activation can help marketers avoid unsuitable content in highly dynamic walled garden environments by quickly applying controls as content changes.
- AI can generate content that raises concerns about authenticity and bias. Marketers using AI tools as part of their walled garden strategy should prioritize maintaining brand authenticity.
- Advertisers can strategically place ads alongside content genres that enhance brand perception to better engage audiences and build positive brand associations.
- Global marketing leaders can manage campaign budgeting more effectively, with greater nuance, when they understand which advertising platforms have earned marketer confidence and trust.
- Every walled garden uses its own proprietary algorithms and metrics. Third-party measurement and verification tools offer a consistent way to evaluate performance across all platforms and media buys.

Looking Ahead:

# Less Platform Disparity, More Interconnectedness

Many marketers get lost encircling the walls of the disparate advertising platforms, struggling to uncover insights that make audience reach go further and trying to discern the subtle yet complex nuances of the different tools and channels.

But transparent insights aren't unattainable. Third-party, unbiased measurement can help marketers map the maze, offering a unified, impartial view across platforms and illuminating the true impact of every impression, placement and creative. In an environment where audience behaviors are fragmented, platform preferences shift rapidly, and brand suitability can hinge on context, independent verification is no longer a luxury — it's a necessity.

By embracing objective measurement and trusted partners, marketers can move beyond guesswork and blind spots, making every dollar work harder and every campaign perform smarter. The future of walled garden advertising belongs to those who can see clearly, act confidently and adapt quickly — turning complexity into opportunity, and attention into lasting business outcomes.

# Methodology

## 2025 Sapio Survey Methodology

DV contracted with Sapio Research to conduct multiple surveys cited in this report. The "consumer survey" surveyed 22,000 consumers from 21 countries across APAC (Australia, India, Indonesia, Japan, the Philippines, Singapore, Thailand, Vietnam); EMEA (France, Germany, Italy, Netherlands, Saudi Arabia, Spain, U.A.E., U.K.); LATAM (Brazil, Colombia, Mexico); and North America (Canada, U.S.). The survey outcomes are referenced throughout this report, cited as the trends of consumers. All respondents voluntarily self-disclosed demographic characteristics such as age and gender.

The "marketer survey" surveyed 1,970 marketing and advertising decision-makers from APAC (Australia, India, Indonesia, Japan, New Zealand, the Philippines, Singapore, Thailand, Vietnam); EMEA (Austria, France, Germany, Italy, Netherlands, Poland, Saudi Arabia, Spain, Switzerland, U.A.E., U.K.); LATAM (Brazil, Colombia, Mexico); and North America (Canada, U.S.). The survey outcomes are referenced throughout this report, cited as the opinions of marketers or media buyers.

Sample data was collected from online partner panels. The interviews were conducted by Sapio Research in March 2025, using an email invitation and online survey. Results of any sample are subject to sampling variation. The magnitude of the variation is measurable and is influenced by the number of interviews and the level of precision in the percentages used to express the results. In the consumer survey, the chances are 95 in 100 that the survey result does not vary, plus or minus, by more than 0.7 percentage points from the result that would be obtained if interviews had been conducted with all persons in the universe represented by the sample. In the marketer survey, the chances are 95 in 100 that the survey result does not vary, plus or minus, by more than 2.2 percentage points from the result that would be obtained if interviews had been conducted with all persons in the universe represented by the sample.

## 2024 Sapio Survey Methodology

The previous study cited on page 13 as "DV Social Brand Suitability 2024" was also a consumer research study, based on sample data from online partner panels conducted online by Sapio Research in October 2024. This study surveyed 14,000 consumers from 12 countries across APAC (Australia, India, Indonesia, Japan); EMEA (France, Germany, Spain, U.A.E., U.K.); LATAM (Brazil, Mexico); and North America (U.S.). Consumers were shown sample content in social media placements and asked to rate its suitability for: any advertising; and specific advertisements for different verticals. At an overall level results are accurate to ± 0.8% at 95% confidence limits assuming a result of 50%.

# Appendix

Figure 1.

*What social media platforms do you use at least a few times a week? Select all that apply.*

| | Global | APAC | EMEA | LATAM | North America |
|---|---|---|---|---|---|
| YouTube | 72% | 78% | 63% | 86% | 66% |
| Facebook | 69% | 69% | 63% | 80% | 71% |
| Instagram | 54% | 54% | 51% | 74% | 40% |
| TikTok | 45% | 48% | 38% | 65% | 36% |
| X (Twitter) | 28% | 33% | 24% | 33% | 20% |
| Pinterest | 19% | 16% | 18% | 29% | 19% |
| LinkedIn | 19% | 17% | 19% | 24% | 15% |
| Snapchat | 16% | 13% | 20% | 11% | 20% |
| Reddit | 9% | 10% | 7% | 6% | 12% |
| Twitch | 8% | 8% | 8% | 9% | 8% |
| Line | 7% | 19% | - | - | - |
| Zalo | 4% | 10% | - | - | - |
| Tumblr | 3% | 3% | 3% | 3% | 4% |
| Kwai | 2% | - | - | 16% | - |
| Josh | 0% | 1% | - | - | - |
| Other | 3% | 2% | 3% | 3% | 2% |
| None of the above | 5% | 3% | 7% | 0% | 6% |

Figure 2.

*What are the primary ways that you consume news-related content? Select top three*

| | Global | APAC | EMEA | LATAM | North America |
|---|---|---|---|---|---|
| TV News Channels | 45% | 43% | 47% | 45% | 45% |
| YouTube or other video platforms | 35% | 44% | 24% | 46% | 26% |
| News websites or apps | 33% | 35% | 32% | 36% | 31% |
| Social media platforms | 32% | 39% | 24% | 42% | 26% |
| Radio | 19% | 11% | 26% | 19% | 18% |
| Word of mouth from famly and friends | 19% | 18% | 19% | 17% | 20% |
| Printed newspapers or magazines | 14% | 13% | 18% | 11% | 11% |
| Influencers on social media | 13% | 16% | 10% | 15% | 10% |
| Mass media/publishing sites | 11% | 14% | 9% | 8% | 10% |
| Podcasts focused on news or current events | 10% | 10% | 8% | 16% | 9% |
| Paid subscriptions to news sites | 7% | 7% | 6% | 6% | 8% |

Figure 3.

*How would you rate the follwing types of social media influencers in terms of their influence on your decision to purchase a product?*

| | Global | APAC | EMEA | LATAM | North America |
|---|---|---|---|---|---|
| Respondents who are impacted by any type of influencers | 54% | 64% | 44% | 66% | 43% |
| Respondents who are **significantly** impacted by any type of influencers | 31% | 37% | 24% | 38% | 25% |
| Respondents who purchased a product based on positive comments about it under an influencer's post | 23% | 30% | 16% | 29% | 15% |

Figure 4.

*Over the last 12 months, which of the following channels have you made a purchase through? Select all that apply*

| | Global | APAC | EMEA | LATAM | North America |
|---|---|---|---|---|---|
| Online marketplaces | 58% | 58% | 59% | 60% | 55% |
| In-store shopping | 57% | 57% | 59% | 57% | 55% |
| Retail websites or apps | 41% | 44% | 38% | 42% | 39% |
| Brand websites or apps | 33% | 33% | 33% | 34% | 28% |
| **Social media** | **30%** | **40%** | **21%** | **33%** | **24%** |

Figure 5.

*What are the biggest challenges you face when advertising on social media? Select up to three*

| | Global | APAC | EMEA | LATAM | North America |
|---|---|---|---|---|---|
| Ability to reach target audience | 46% | 47% | 46% | 45% | 44% |
| Keepiing up with content trends | 38% | 38% | 37% | 44% | 33% |
| Calculating ROAS/ROI | 33% | 36% | 27% | 34% | 38% |
| Managing campaigns across multiple channels | 33% | 31% | 33% | 33% | 32% |
| Brand safety/content alignment | 32% | 35% | 32% | 31% | 29% |
| Handling feedback/comments | 31% | 31% | 31% | 33% | 32% |
| Measuring cross-channel performance | 27% | 28% | 26% | 29% | 25% |
| Reporting capabilities/transparency | 24% | 27% | 21% | 22% | 28% |

Figure 6.

*Which of the following third-party tools within social platforms would be most important for you to improve your social media planning/buying? Select up to three*

| | Global | APAC | EMEA | LATAM | North America |
|---|---|---|---|---|---|
| Audience targeting and verification | 51% | 52% | 51% | 47% | 54% |
| Media quality post-bid measurement | 48% | 57% | 41% | 51% | 44% |
| Content alignment pre-bid controls | 42% | 51% | 40% | 44% | 33% |
| Attention measurement and controls | 32% | 29% | 34% | 28% | 34% |
| Other media quality pre-bid controls | 31% | 34% | 28% | 35% | 27% |
| Custom bidding algorithms | 29% | 26% | 27% | 38% | 27% |
| Cross-platform attribution | 29% | 27% | 29% | 26% | 34% |

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