

2025 Global Insights: North America Report



A Quick Snapshot: Global vs. North America

Media Authentication Trends in North America and Across the Globe

When ads appear in unsuitable environments, aren't viewable or are served to bots instead of real people, it leads to media waste – and ultimately, lost revenue. This is why it's essential for advertisers to prioritize brand suitability, viewability, fraud prevention and attention optimization. These core elements of media quality directly impact campaign performance and ROI.

As technology evolves and consumer behavior shifts, so do the risks and opportunities for brands. This report explores these dynamics through a global lens, with a close-up view of the North American region. To the right, we present global benchmark data adjacent to regional insights, allowing for side-by-side comparisons that offer immediate clarity into both global and North American performance trends. This year's report also includes original research from regional marketers and consumers, offering additional context around digital media investment strategies and the real-world impact of media quality on audience behavior.

What Is Media Waste?

Media waste (as defined by DV for the purposes of this report) is the approximate calculated cost associated with total media violations (Brand Suitability, Fraud/SIVT, etc.). This cost figure is derived by multiplying the total violations by an estimated \$3 cost-per-mille (CPM), which reflects the cost per 1,000 impressions.

	Global	North America
Brand Suitability Violation Rate	5.2% ↓15%	4.6% ↓15%
Fraud/SIVT Rate	1.0% ↓ 7%	1.0% ↓ 3%
Authentic Viewable Rate	70% ↑ 3%	71% ↑ 3%
Display Viewable Rate	72% ↑ 2%	73% ↑ 2%
Video Viewable Rate	80% ↑ 6%	79% ↑ 7%
Attention Index	100	96

North America Marketer Insights

This section presents high-level statistics from a survey conducted among 400 marketers in the U.S. and Canada. Commissioned by DV through Sapio Research, this survey offers insights into buying trends in the region and provides context for the benchmarks discussed throughout the rest of the report.

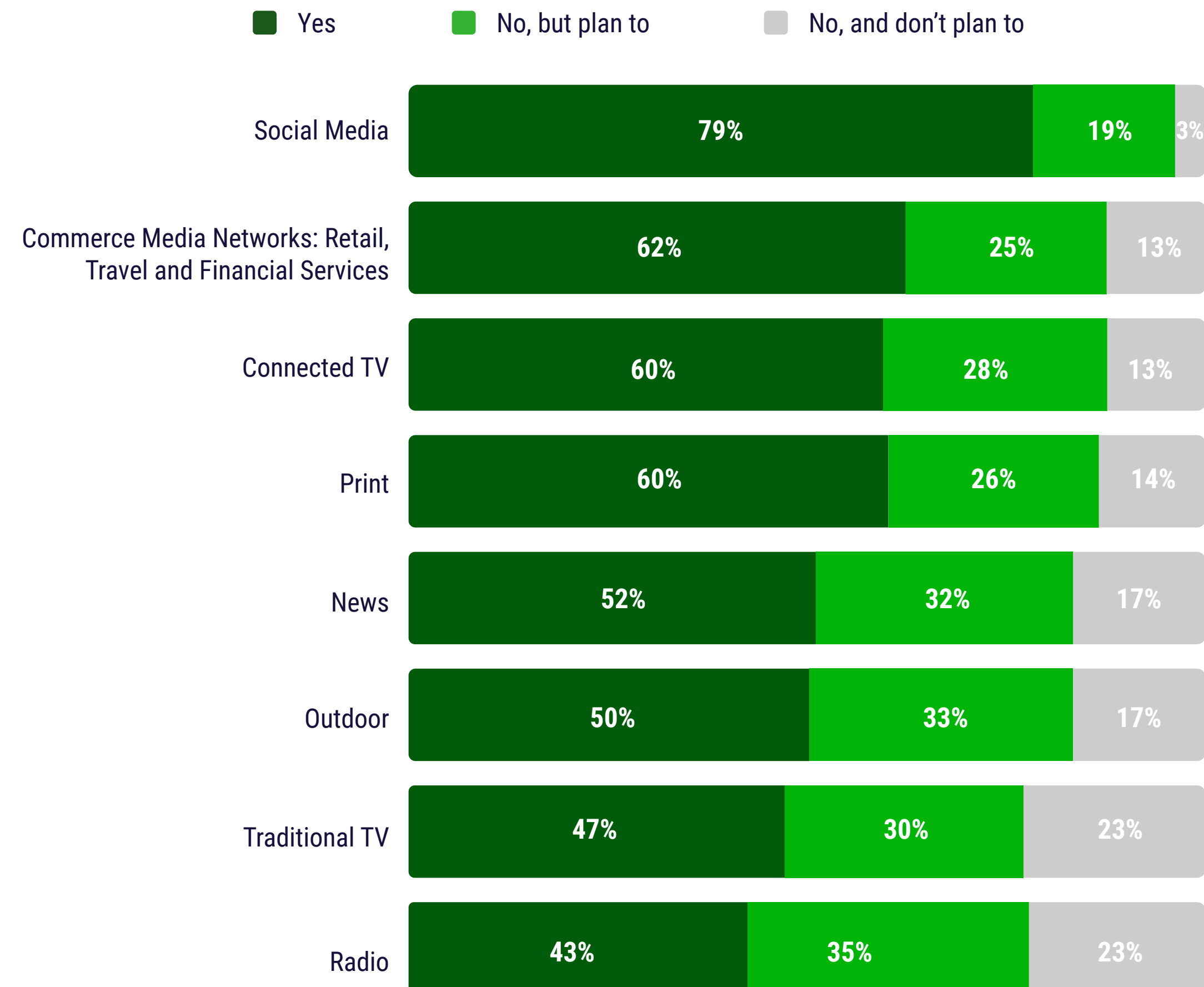
Channel Planning: Where Marketers Are Allocating 2025 Budgets

Social media is the advertising channel of choice among marketers in North America, with commerce media networks and connected TV (CTV) a close second and third. However, a substantial portion of marketers also plan to start using the latter two channels, indicating a continued trend towards digital and connected advertising platforms. In the U.S. specifically, 67% of U.S. marketers who are not currently advertising in commerce media networks plan to start within the next year. Notably, 68% of surveyed Canadian marketers say they already advertise on CTV.

68% of Canadian marketers surveyed said they already advertise on CTV.

In North America overall, a higher percentage of brands than agencies are advertising in commerce media networks, with 64% of brand marketers doing so, compared with 56% of agencies.

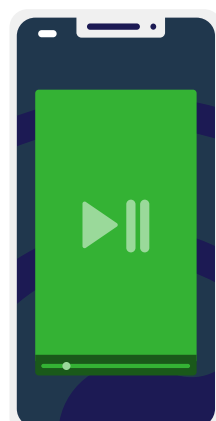
North America Marketer Investment by Advertising Channel



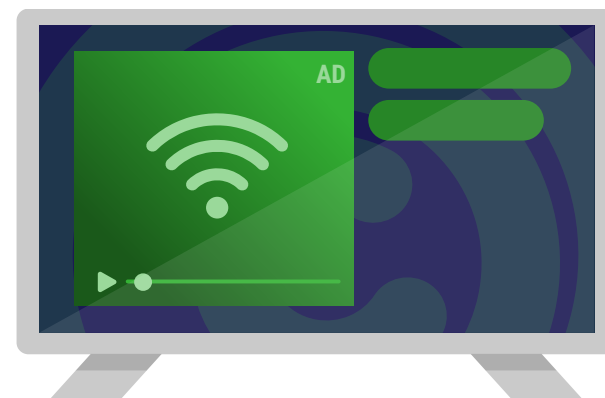
Performance: The Top 5 Formats According to Marketers

In North America, social media reigns supreme in campaign performance, particularly social media reels and social feeds — which significantly outperform campaign baselines. CTV and commerce media networks tag closely behind, with audio/podcast advertising taking last position, albeit still outperforming by 58%.

In Canada, more than 80% of marketers report that social reels and feeds outperform their baselines. More than two-thirds (68%) of U.S. marketers said CTV outperforms campaign baselines, but only 57% are actually investing in it today.



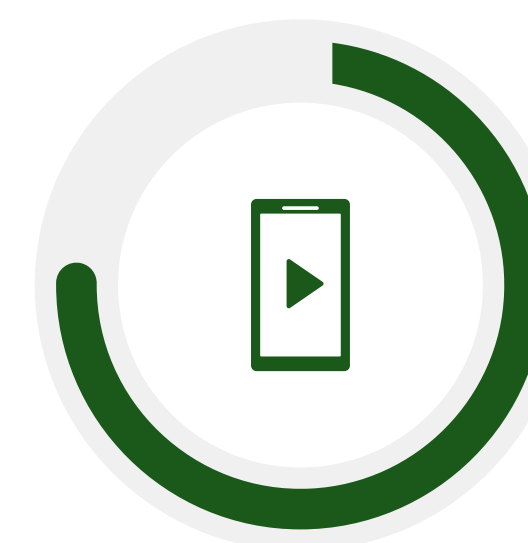
80% of Canadian marketers reported that social reels and feeds outperform their baselines.



68% of U.S. marketers said CTV outperforms campaign baselines.

Top Channels According to Marketers

Percent of Marketers Who Say Channel Performs Better than Baseline



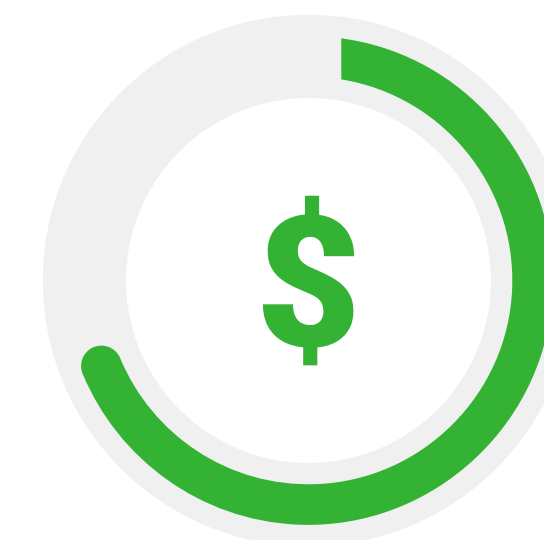
77% Social Media Reels



75% Social Media Feeds



69% Connected TV



67% Commerce Media Networks



58% Audio & Podcast

North America Consumer Insights

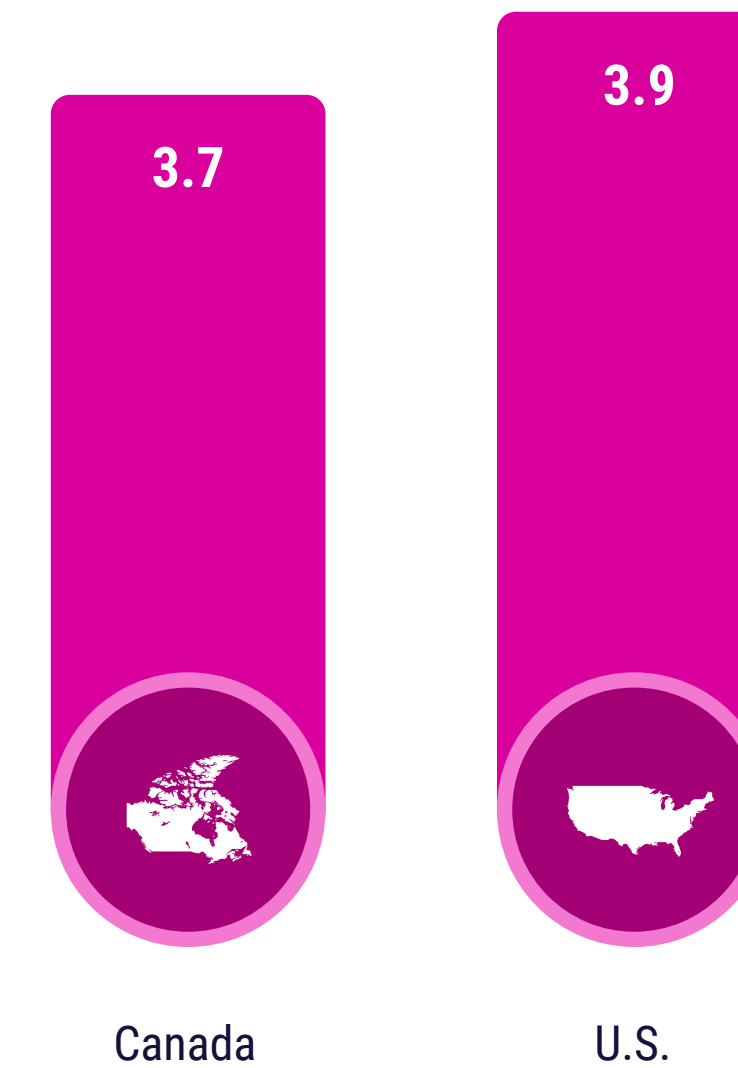
This section presents high-level statistics from a survey of 3,000 consumers in the U.S. and Canada commissioned by DV through Sapio Research. These statistics provide insights into consumer behavioral trends that impact online ad performance.

Online Content Consumption Is Growing Steadily

Online content consumption is on the rise in North America, with an average of 3.8 hours of leisure time spent per day consuming online content, surpassing the global average. Driving this prevalence of online consumption is social media, with 90% of consumers currently engaging with this content, and 23% expecting to spend more time on social media over the next 12 months.

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Average Online Content Consumption (Hours) by Country

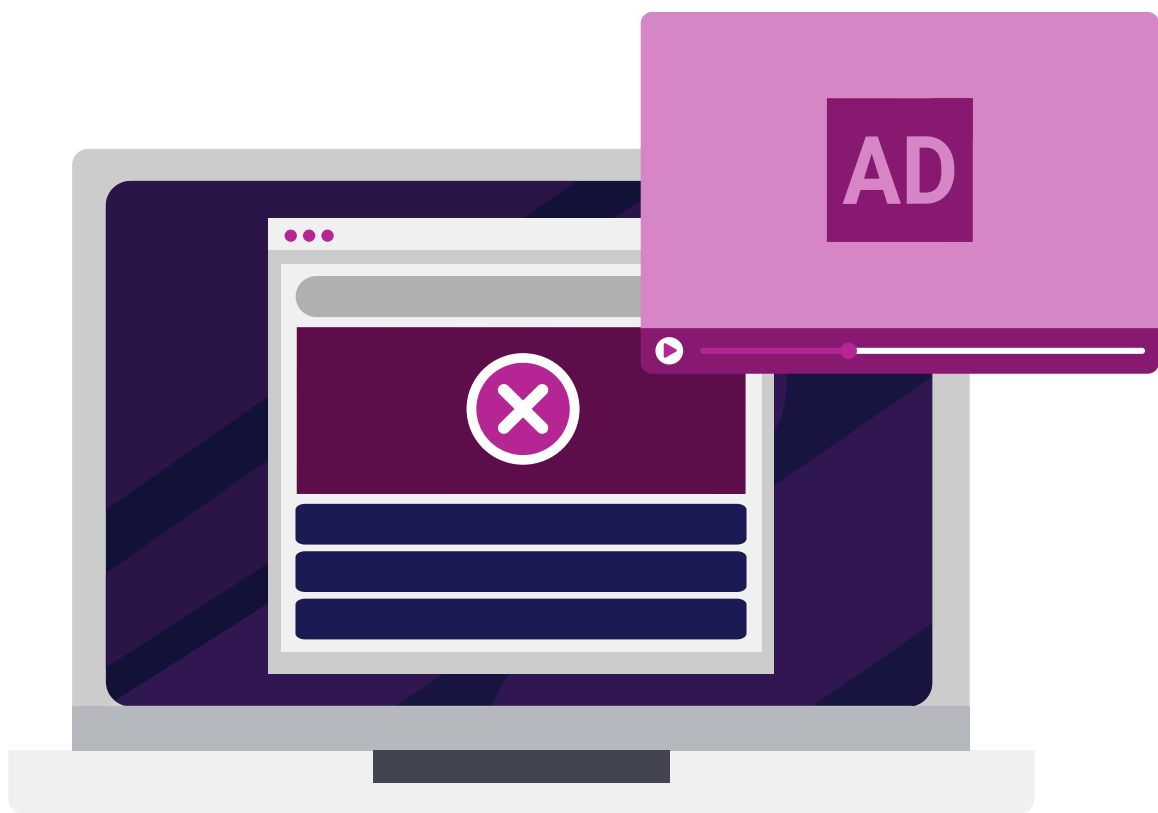


Ad Avoidance Is a Growing Reality

The survey found that **41% of consumers in North America** use ad blockers. This underscores the urgent need for relevant, high-quality ad experiences. Advertisers must prioritize media quality to ensure their messages are seen and trusted, even as consumer control over ad experiences increases.

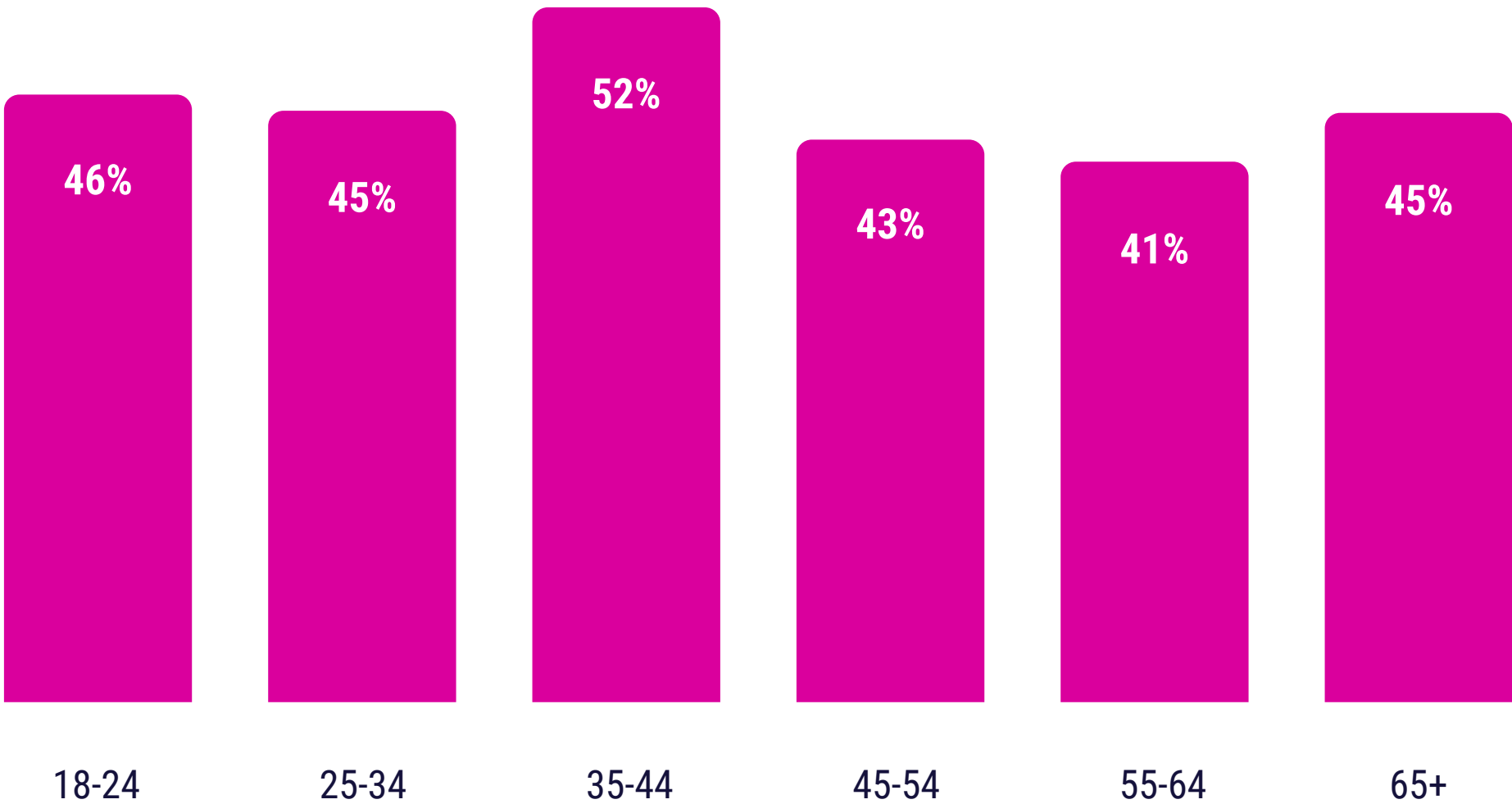
Misaligned Content Leads to Fewer Conversions for Brands

In North America, 45% of consumers said that they were likely to stop using a brand or product if an ad is displayed alongside false, objectionable or inflammatory content. Additionally, 43% of consumers said they would advise their family and friends to stop using that product as well. This trend is particularly strong in city center and urban areas, with 49% and 48% of consumers, respectively, inclined to discontinue use. This trend is also more common among men and full-time employees.



45% of consumers said that they were likely to stop using a brand or product if an ad is displayed alongside false, objectionable or inflammatory content.

Percent of Consumers That Would Stop Using a Brand Seen Next to False, Objectionable or Inflammatory Content



Brand Suitability Insights

This section provides essential benchmarks for brand suitability across North America, incorporating relevant dimensions such as media, device and buy type. By presenting these metrics, we aim to help brands assess their current standing and identify areas for improvement. In regions with high brand suitability violations, it’s crucial for marketers to take proactive steps to ensure their ad budgets are spent effectively and content is placed in appropriate environments.

North America Maintains the Lowest Brand Suitability Violation Rate Among All Regions

In North America, the brand suitability violation rate decreased by 15% year-over-year, now standing at 4.6%, which is the lowest among all regions.

	2024 Brand Suitability Violation Rate
Canada	9.0% ↓ 3%
U.S.	4.4% ↓ 17%
Total	4.6% ↓ 15%

This rate is 11% lower than the global benchmark, highlighting North America’s strong performance in maintaining brand suitability. It also shows the maturity of brand suitability in the region, evidenced by high adoption of both pre- and post-bid services. The overall decrease was largely driven by the U.S., which on its own decreased 17% year-over-year. Conversely, Canada saw a slight 3% bump.

A significant portion of brand suitability violations were attributed to display media, and specifically, mobile web display ads. Among the different types of brand suitability violations, Unsuitable Category violations made up the largest share at 62%.

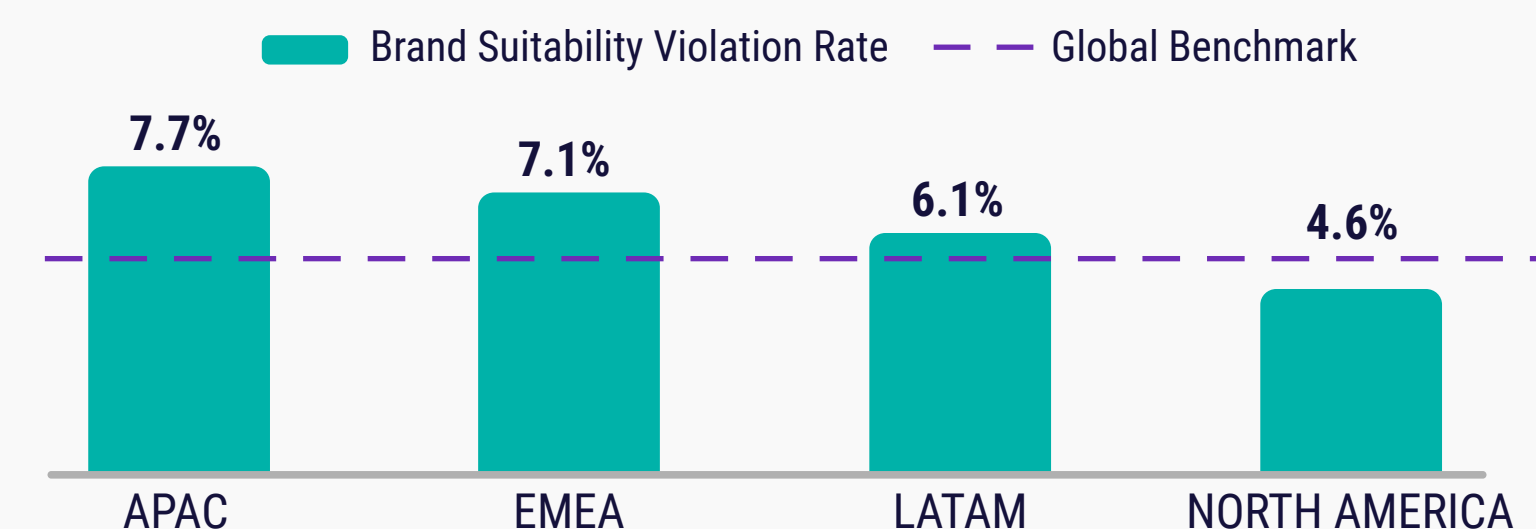
The overall decrease in brand suitability violations was largely driven by the U.S., which alone decreased 17% year-over-year.

GLOBAL SNAPSHOT

The Status of Brand Suitability Across Regions in 2024

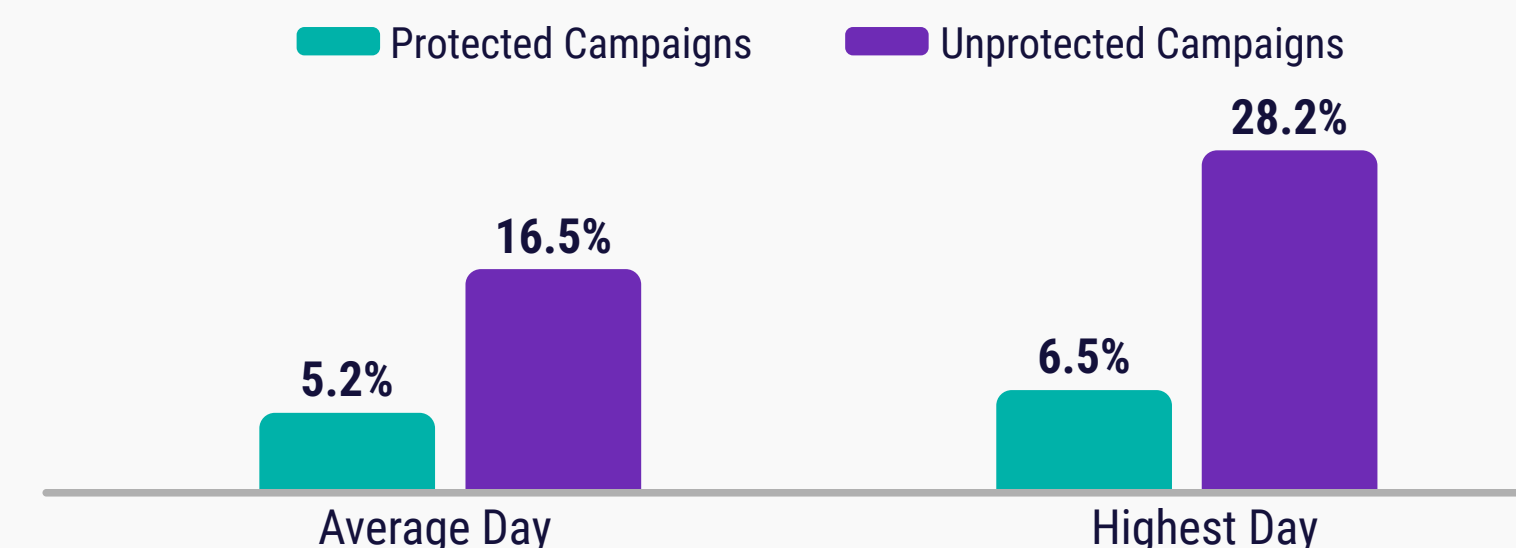
The global brand suitability violation rate went down 15% year-over-year, marking the global benchmark in 2024 at 5.2%.

Brand Suitability Violations: Global Benchmark vs. Regional Rates



Unprotected campaigns faced a significantly higher brand suitability violation rate — 2.2x greater than campaigns protected by DV, which receive pre-bid protections, video filtering and direct client support. The chart below displays this side-by-side comparison by highlighting an average day versus the highest day. This shows the swings that can occur in the open market without protections in place.

Brand Suitability Violations: DV’s Protected Campaigns vs. Unprotected Campaigns



GLOBAL SNAPSHOT

To understand the overall decline in brand suitability violations across the globe, here are some additional insights to consider.

Unsuitable Category Violation Rate Was Down 12% in 2024

- Unsuitable Category violations represent 65% of all brand suitability violations.
- In 2024, Unsuitable Category violations dropped by 12%, resulting in it being a large contributor to the overall drop in brand suitability violations.

Keyword Violations Also Dropped by 7%

- Keyword violations also fell slightly, down 7% year-over-year.
- Mobile web display ads had an 80% higher rate than the overall keyword violation rate global benchmark (1.1%).

Smart Sentiment Opened Inventory

- Smart Sentiment Category avoidance offered a meaningful improvement over traditional brand suitability categories by opening up greater scale and reach for brands. This approach helps reduce waste and increase awareness, ultimately leading to better outcomes for brand campaigns.

What Are Unsuitable Categories?

An Unsuitable Category violation refers to content deemed unsuitable for brand alignment based on categories that DV defines and clients configure. In order to meet their unique suitability needs, each client sets up profiles in which they select unsuitable categories for their brand. If an ad serves on the same page, site or app as content from these categories, it is flagged by DV as an Unsuitable Category incident.

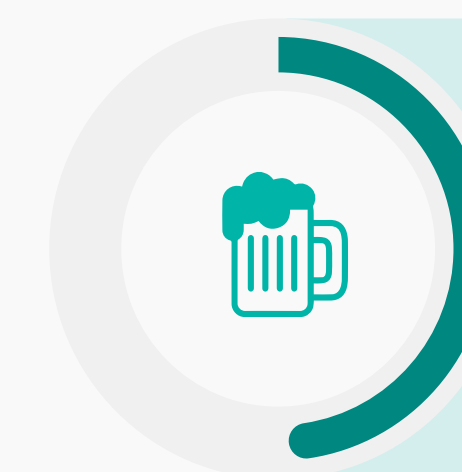
What Is Smart Sentiment?

Smart Sentiment refers to DV's advanced sentiment analysis technology that classifies content based on its emotional tone: positive, negative or neutral. This feature enables advertisers to deliver ads on web pages with positive sentiment, enhancing brand suitability while expanding inventory options.

Expanded Inventory: Share of Standard Category Opened by Smart Sentiment Category



47% Adult & Sexual

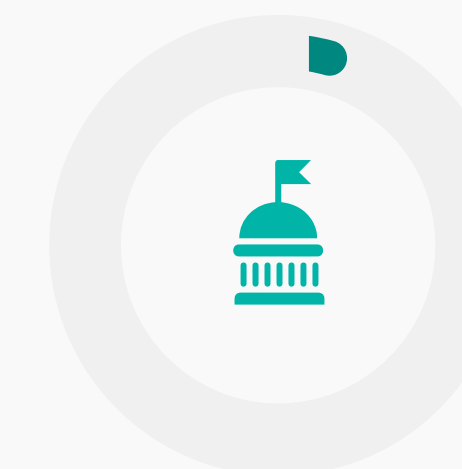


49% Alcohol

Within the Alcohol content category, Smart Sentiment opened up 49% more inventory on positive content than the standard category, reducing Unsuitable Category violations by 26%.



11% Celebrity News



3% Politics



9% Profanity

Fraud Insights

In this section, we present key benchmarks for fraud and sophisticated invalid traffic (SIVT) violations across global and North America markets. This analysis provides valuable insights for brands to understand the prevalence of fraudulent activities and invalid traffic, identify high-risk areas and implement strategies to safeguard their ad investments to ensure campaigns reach genuine and engaged audiences.

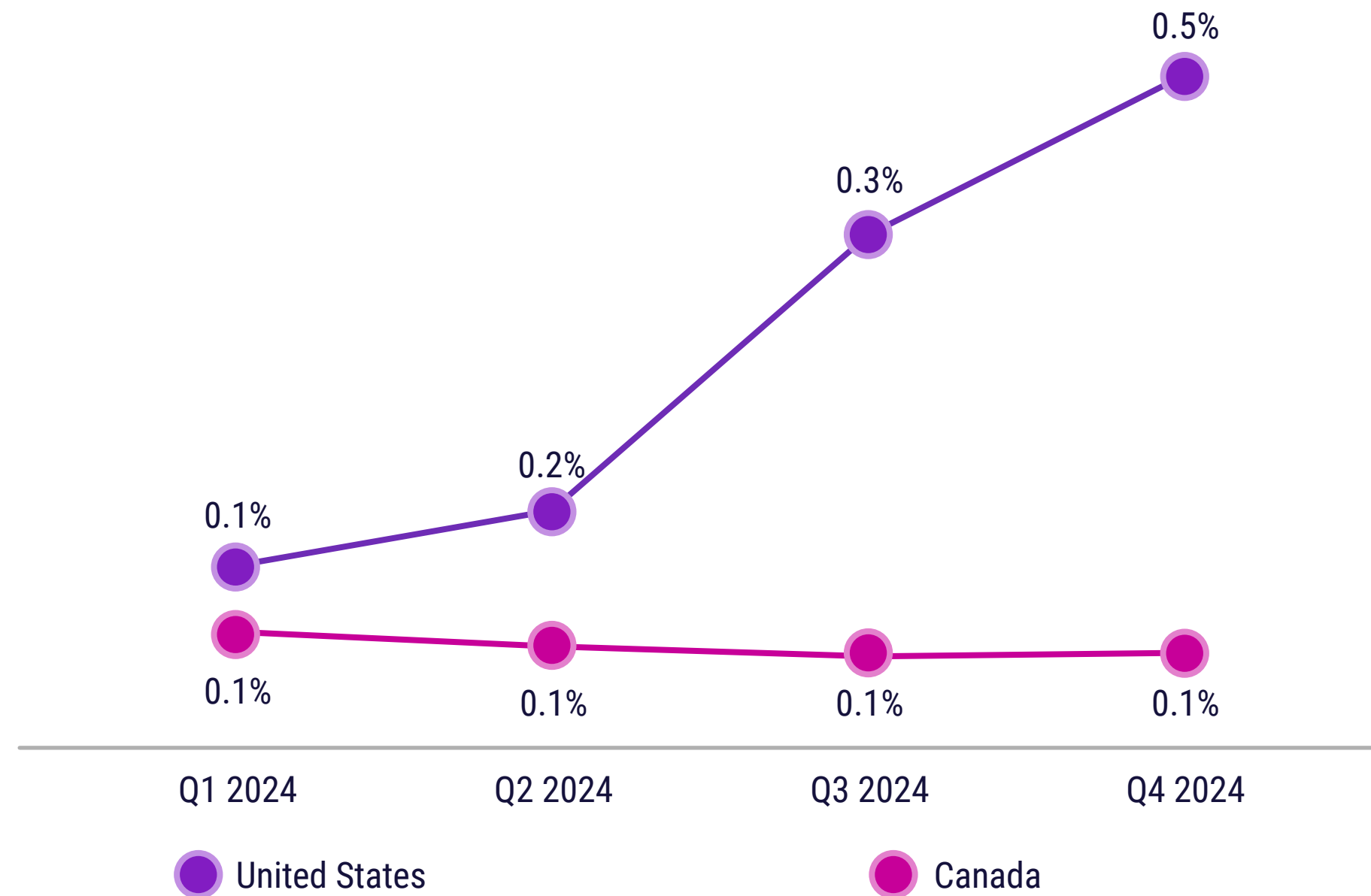
Fraud/SIVT Decreased, Yet Remains a Significant Problem in the Region

Though North America’s fraud/SIVT violation rate decreased 3% year-over-year, it’s still 6% higher than the global benchmark. The rate decreased 3% in the U.S. year-over-year and Canada’s rate increased by 6% year-over-year, which likely tempered the overall North America violation rate.

Though North America’s fraud/SIVT violation rate **decreased 3% year-over-year, it’s still 6% higher than the global benchmark.**

	Fraud/SIVT Violation Rate
Canada	0.8% ↑ 6%
U.S.	1.1% ↓ 3%
Total	1.0% ↓ 3%

North America Bot Fraud Rate, 2024



Bot fraud has more than doubled in volume year-over-year, with a rate increase of 101%.

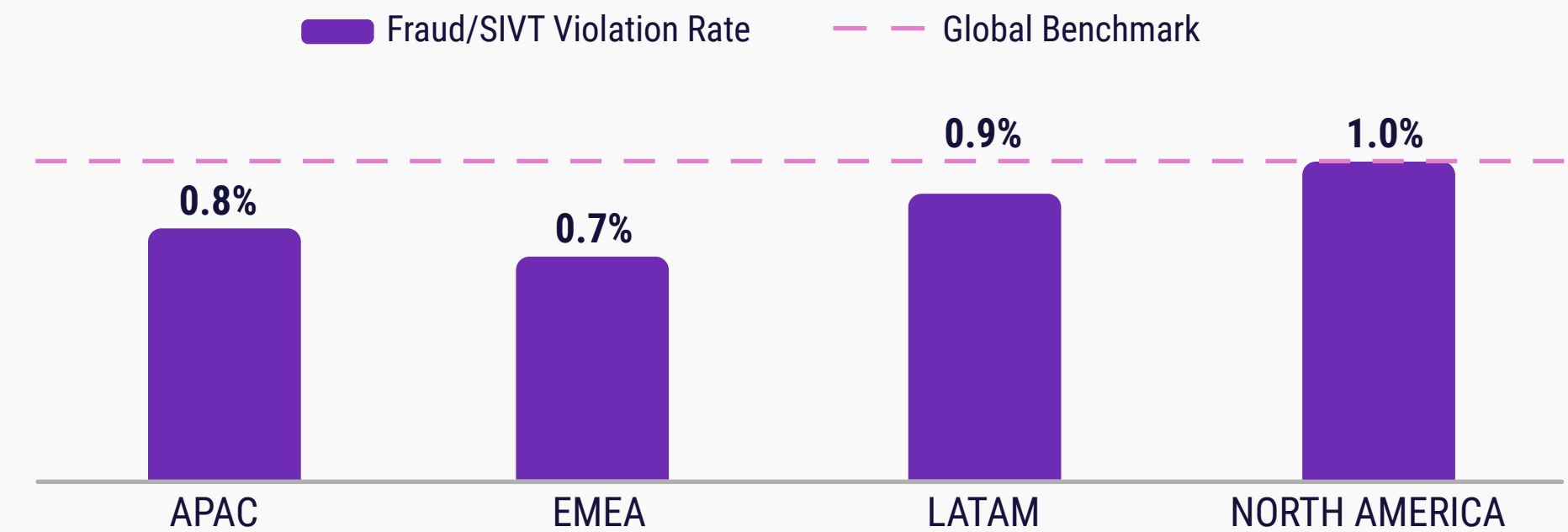
In the U.S. specifically, bot fraud increased 106% vs. a 35% decrease in Canada. It was at its highest in the U.S. in the second half of 2024 (year-over-year increases of 122% in Q3 and 234% in Q4) and can primarily be attributed to mobile app video ads. However, desktop display and CTV video ads both made up sizable shares of bot fraud in the U.S. as well.

GLOBAL SNAPSHOT

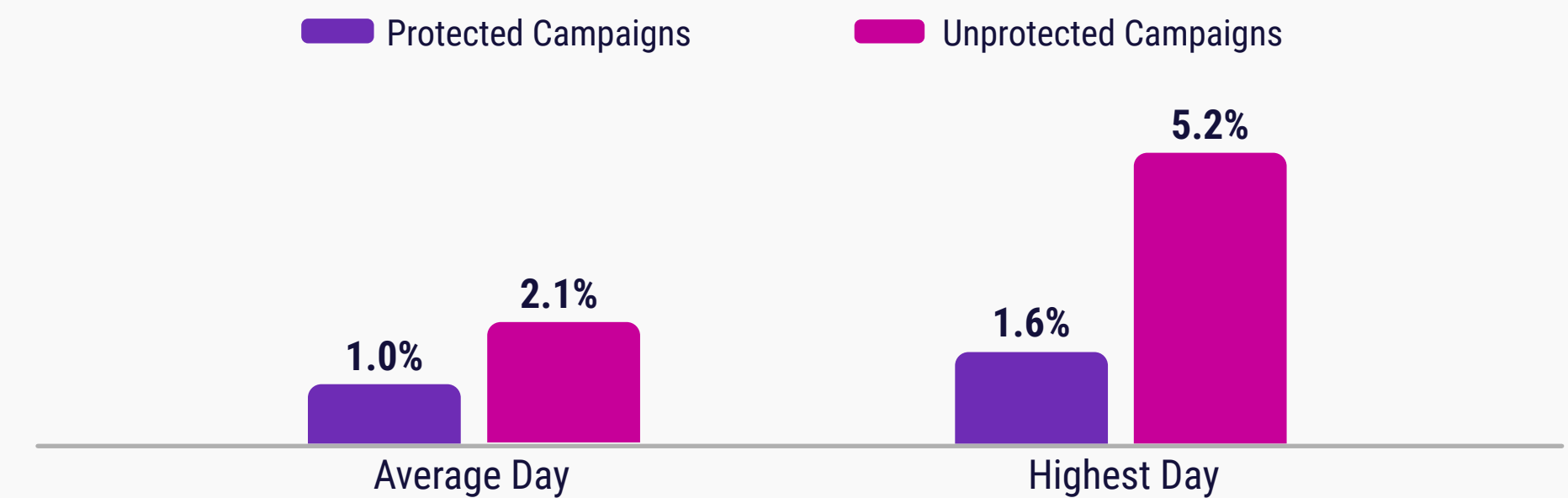
The Status of Fraud Across Regions in 2024

The global fraud/SIVT violation rate declined 7%, year-over-year, resulting in a global benchmark of 1.0%.

Fraud/SIVT Violation Rate: Global Benchmark vs. Regional Rates



Fraud Violations: DV's Protected Campaigns vs. Unprotected Campaigns



GLOBAL SNAPSHOT

To understand the overall decline of fraud across the globe, here are some additional insights to consider.

Fraud Went Down, But GIVT Is a Growing Issue

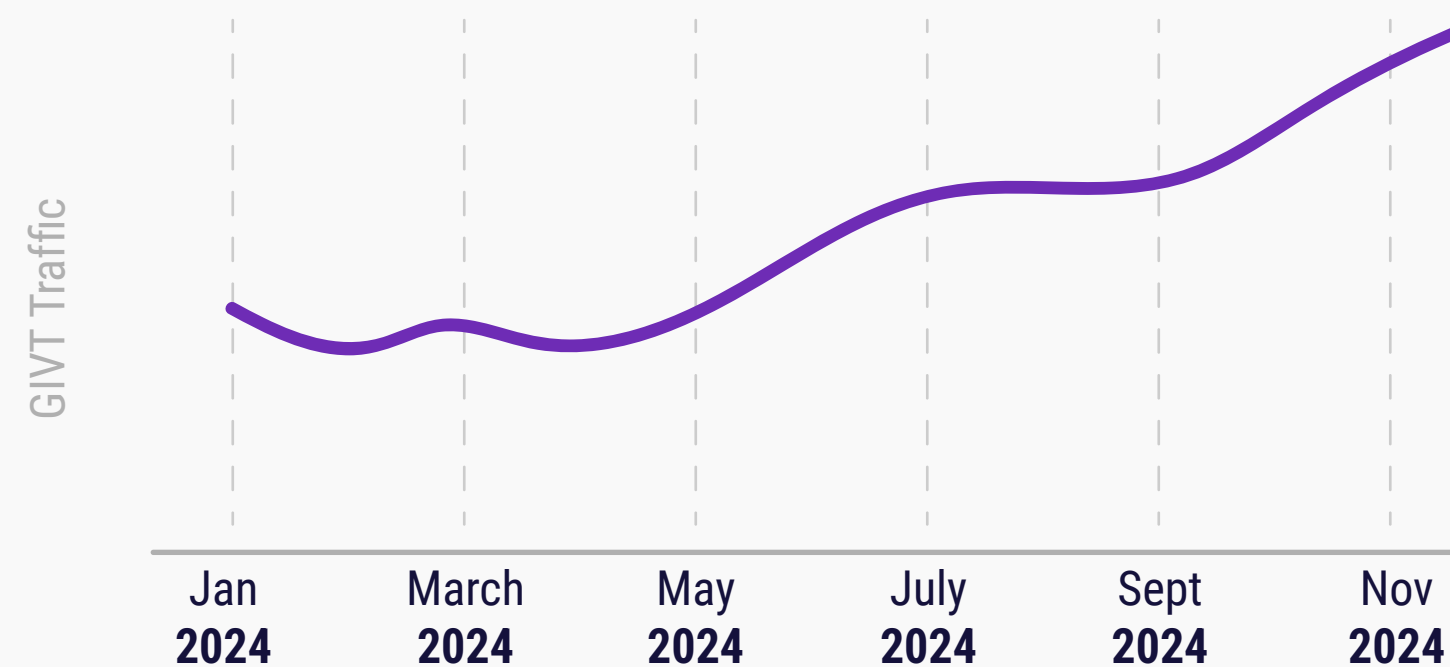
- Globally, the fraud/SIVT violation rate declined 7% year-over-year to 1.0%.
- AI-powered crawlers and scrapers are now a growing cause of invalid traffic. General invalid traffic (GIVT) spiked 86% year-over-year in 2H, with 16% of GIVT stemming from bots linked to AI tools such as GPTBot, ClaudeBot and AppleBot.

To the right, we see the overall increase in AI-based scraping in 2024, which amplifies the need for advertisers to measure and account for GIVT in their campaigns.

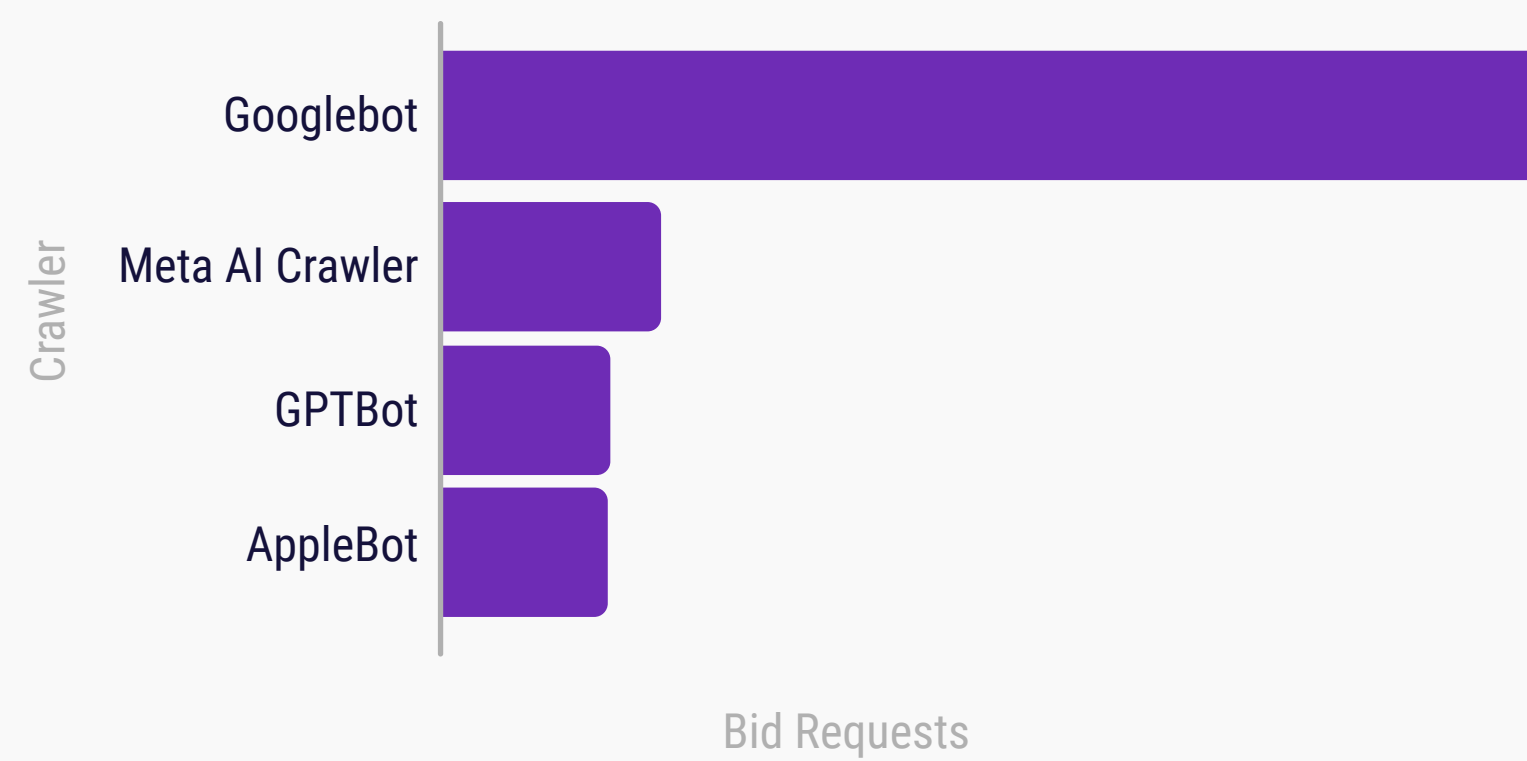
GIVT vs. SIVT: What's the Difference?

GIVT refers to non-human traffic that can be identified through declared or standard means of detection, such as using publicly available lists from the Interactive Advertising Bureau (IAB) and Trustworthy Accountability Group (TAG). GIVT includes known bots, spiders and other automated tools used for legitimate and non-intrusive purposes. In contrast, SIVT involves complex fraudulent activities that require advanced analytics and significant human involvement to detect, such as ad stacking or domain spoofing.

GIVT Traffic Volume 2024



Top Crawlers and Scrapers Driving Known-Bot GIVT Impressions December 2024



Viewability Insights

This section provides crucial benchmarks for viewability and the Authentic Viewable Rate across global and North America markets, incorporating relevant dimensions such as media, device and buy type. Understanding these benchmarks helps brands evaluate their current performance and identify opportunities to enhance their ad visibility. This ensures that advertising budgets are utilized efficiently, maximizing the impact of their campaigns.

North America’s Authentic Viewable Rate Now Exceeds 70%

The Authentic Viewable Rate ticked up 3% in North America year-over-year, bringing it 2% above the global benchmark.

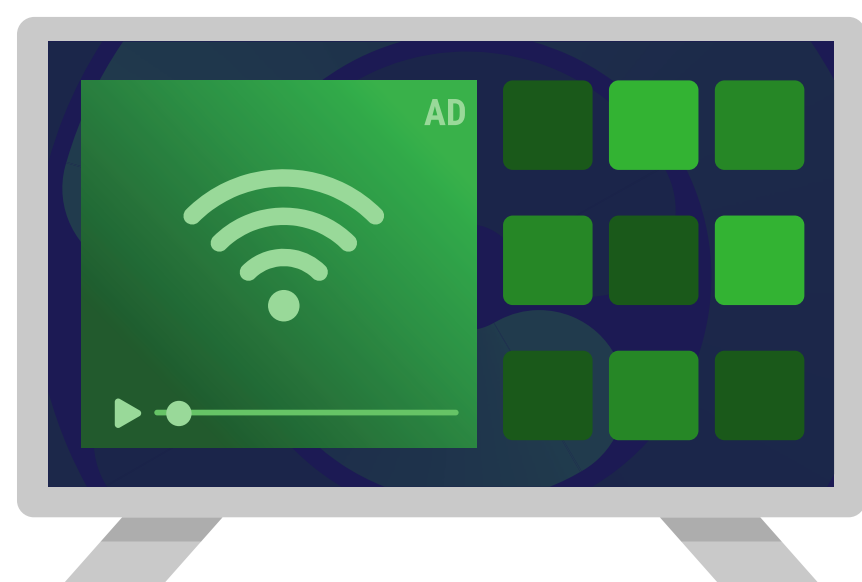
North America’s Authentic Viewable Rate grew 3% year-over-year, **bringing it 2% above the global benchmark.**

North America’s Authentic Viewable Rate Now Exceeds 70%

	2024 Authentic Viewable Rate	2024 Display Viewable Rate	2024 Video Viewable Rate
Canada	70% ↑ 2%	73% ↑ 2%	81% ↑ 4%
U.S.	71% ↑ 3%	73% ↑ 2%	79% ↑ 7%
Total	71% ↑ 3%	73% ↑ 2%	79% ↑ 7%

In North America, the modest year-over-year increase in Authentic Viewable Rate can be attributed to a 4% increase on desktop video ads and a significant 16% increase on CTV video ads.

This increase is in part due to extensive industry-wide efforts to improve Fully On-Screen certification by publishers that were not previously pausing ad delivery when TV screens were turned off, leading to higher viewability in CTV in the second half of the year.



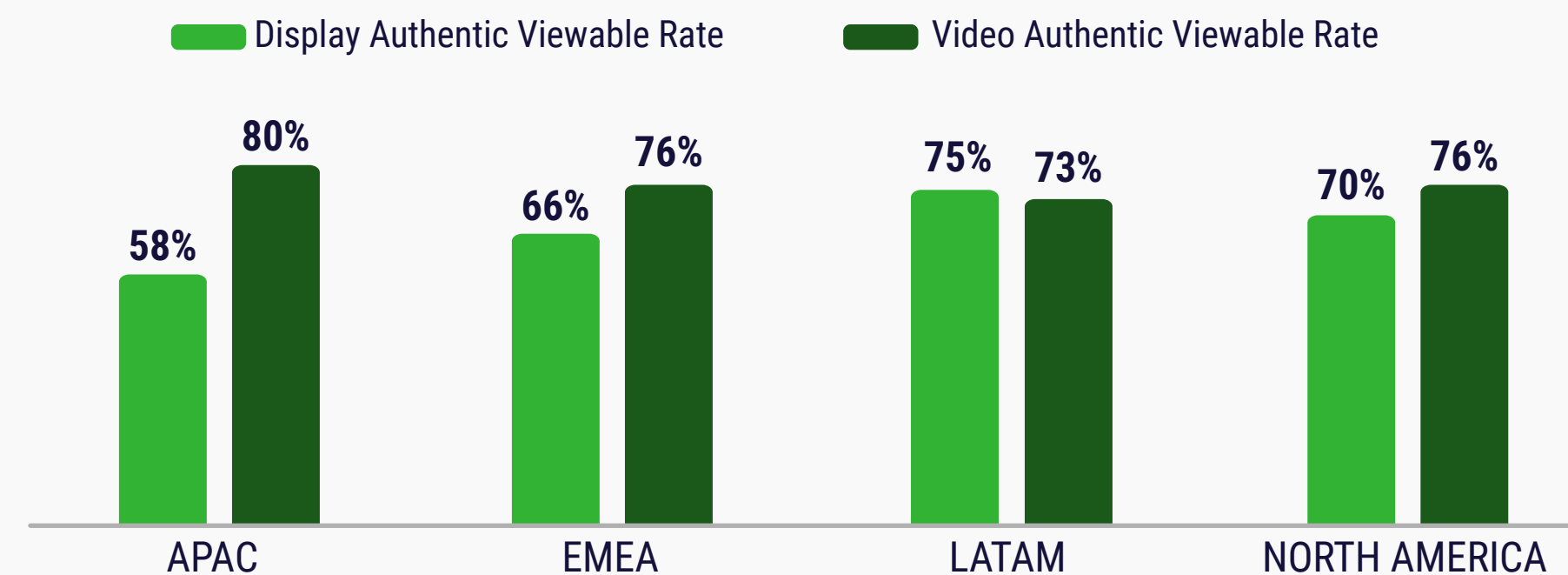
North America's modest Authentic Viewable Rate increase can be attributed to a **4% increase on desktop video ads** and a **significant 16% increase on CTV video ads**.

GLOBAL SNAPSHOT

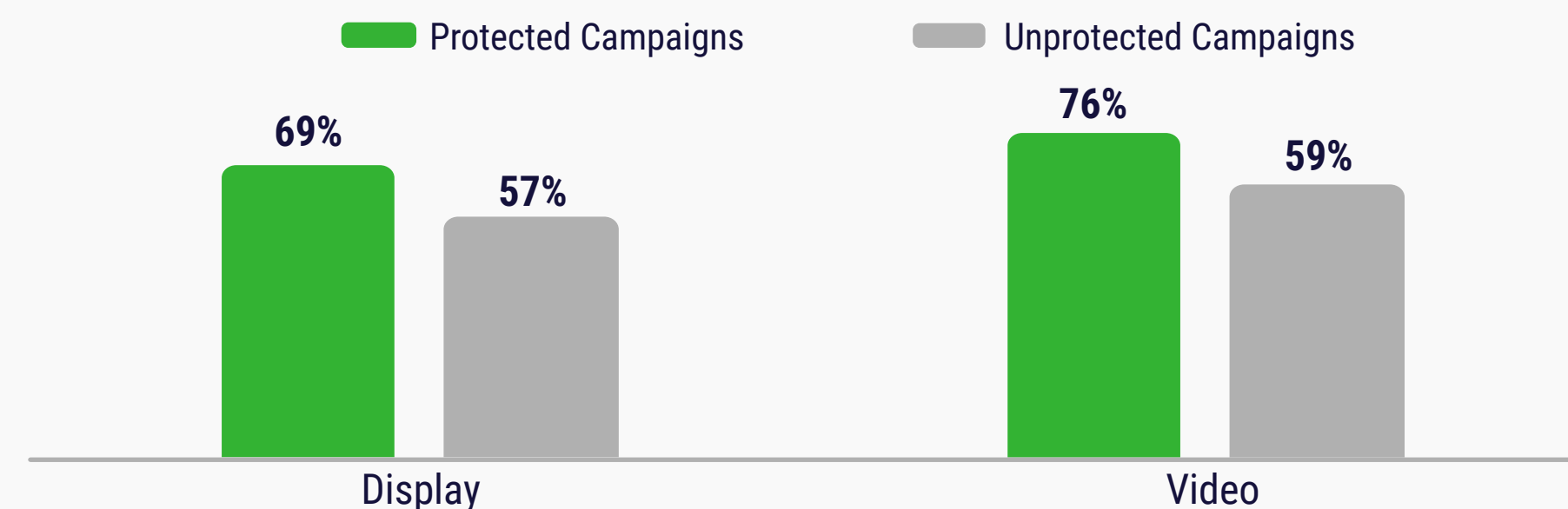
The Status of Viewability Across Regions in 2024

The global authentic viewable rate was 70% in 2024, a 3% year-over-year improvement. For display ads, this rate was 69%, a 2% year-over-year increase; for video ads, this rate was 76%, an 8% year-over-year increase.

Authentic Viewable Rate Across Regions



Authentic Viewable Rate: DV's Protected Campaigns vs. Unprotected Campaigns



Media waste for unprotected campaigns totaled an estimated \$336,000 per billion impressions.

Attention Insights

This section highlights key attention metrics across global and North America markets, providing essential benchmarks for brands to gauge their performance. By examining these metrics, we offer insights into how effectively ads are capturing and maintaining user attention, which helps brands identify areas for improvement and optimize their strategies to enhance engagement and maximize the impact of their advertising efforts.

Understanding Attention Metrics

The two critical dimensions of attention are exposure and engagement. DV Authentic Attention® analyzes over 50 data points in real time across the exposure of and engagement with an ad.



Exposure: Considers an ad’s entire presentation, quantifying its intensity and prominence through metrics that include viewable time, share-of-screen, video presentation, audibility and more.



Engagement: Analyzes key user-initiated events that occur while the ad creative is displayed, including user touches, screen orientation, video playback and audio control interactions.

Attention Index in North America Sits Below the Global Benchmark

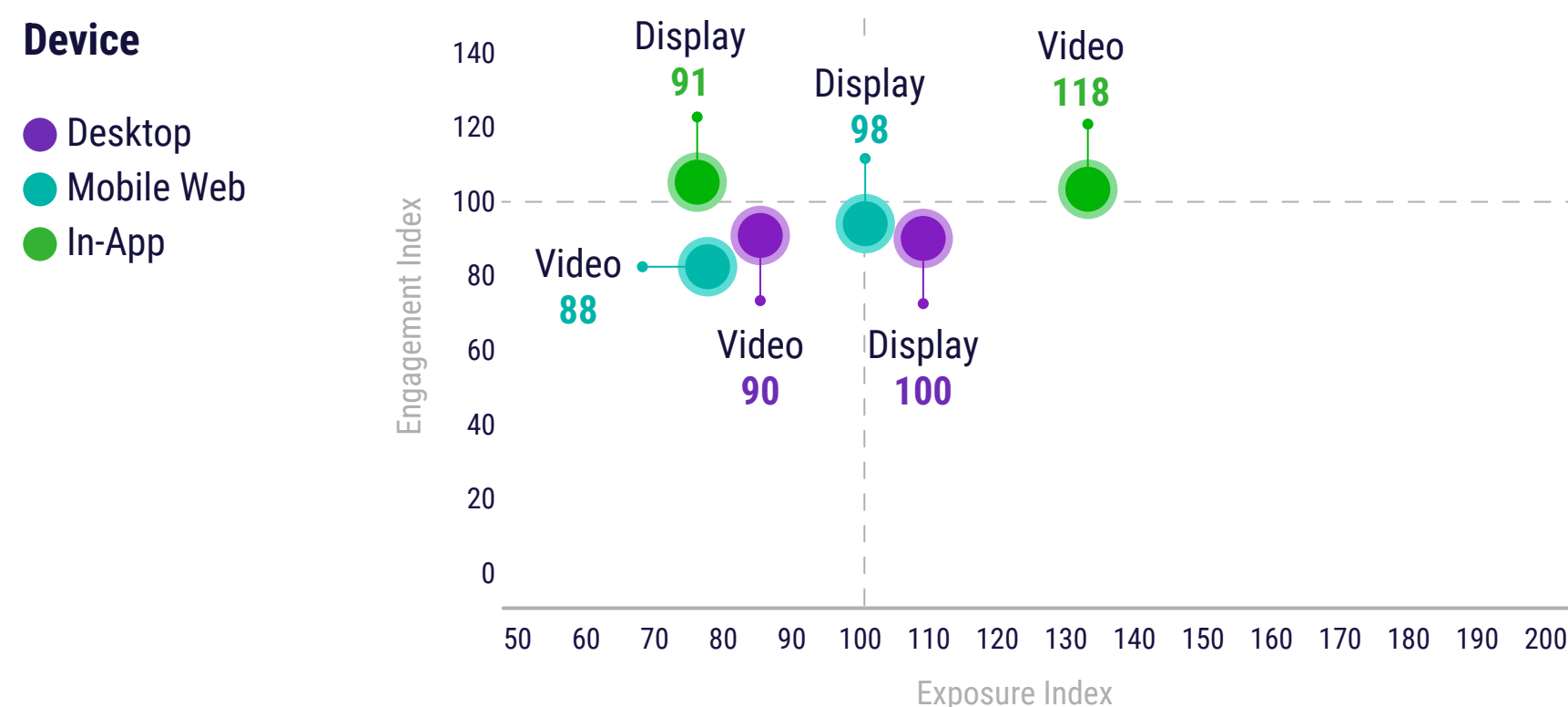
	Attention Index	Engagement Index	Exposure Index
Canada	96	96	96
U.S.	96	96	94
Total	96	96	95

North America's Attention Index was 4% below the global benchmark in 2024, proving that even more mature markets have room to improve performance in some areas.

Both the U.S. and Canada have the same Attention Index — but Canada is two points higher in their Exposure Index. Even though North America is below global benchmarks in Attention — video in-app ads in this region outperform the global index by 18%, driven by strong exposure (32% above the global index).

North America's Attention Index was 4% below the global benchmark in 2024.

North America Engagement and Exposure Index by Device



GLOBAL SNAPSHOT

How Attention Levels Varied by Region in 2024

In 2024, the global Attention Index across all environments and device types was set at a baseline of 100. APAC led all regions with an Attention Index 14% above the global average, driven by strong performance from medium-sized desktop display ads (24% above the global index).

EMEA also outperformed the global index by 8%, bolstered by medium-sized desktop display ads that exceeded the global index by 12%. LATAM followed closely, with an Attention Index 4% above the global index, thanks to high performance on video in-app ads (26% above the global index).

In contrast, North America trailed the global average by 4%, largely due to the poor performance of small-sized in-app display ads, which had an Exposure Index 35% below the global index. This suggests a gap between ad placement and user attention in mature markets.


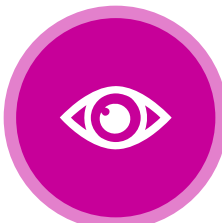

Key Takeaways for North American Marketers

DV's 2025 Global Insights: North America Report highlights a nuanced media quality landscape in the North American region, where notable improvements coexist with ongoing challenges. North America stands out for maintaining the lowest brand suitability violation rate among all regions and achieving a modest increase in authentic viewability. However, the region still faces challenges with fraud/SIVT rates rising above global benchmarks and attention metrics falling below.

For North American marketers to make sustainable and intelligent media investment decisions, it's important for those decisions to be rooted in consumer insights. Overall, North American consumers seem to be watching more online content, with social media playing a significant and growing role. However, as online content consumption grows — so does the use of ad-blocking. What's more revealing is the role that content environments play in consumer perceptions of a brand, with 45% likely to stop using a brand after viewing an ad next to false, objectionable or inflammatory content.

Marketers in North America must adopt proactive measures to enhance media quality. Investments in robust media quality tools and safeguards can significantly reduce media waste and improve campaign performance. As demonstrated throughout this report, DV-protected campaigns consistently outperform unprotected ones across key metrics: viewability, brand suitability and fraud prevention, and media waste for unprotected campaigns totaled an estimated \$336,000 per billion impressions. Although attention metrics are below the global benchmark, video in-app ads show strong performance, providing a solid foundation for further optimization.

To maximize campaign ROI and consumer trust, North American marketers should:

-  Leverage advanced brand suitability protection tools, including smart sentiment analysis and dynamic suitability categories, to optimize media buys. This approach not only mitigates risk but also enhances scale by ensuring content aligns with brand standards.
-  Focus on improving viewability metrics; support industry initiatives to improve Fully On-Screen rates in CTV and continue optimizing toward highly viewable ad formats available today.
-  Develop strategies to enhance attention performance, especially in video in-app ads, while addressing lower engagement levels in desktop and mobile web environments.

With the right strategies in place, media quality in North America can evolve from a safeguard to a significant competitive advantage, driving better engagement and more effective ad spend.

Methodology

Data Notice

Unless otherwise noted, all data contained in this report is based on DV-generated data. All data is post-bid unless otherwise indicated. Post-bid monitoring and blocking technology record violations. Violation rates are post-bid metrics because violations are tracked after an ad has been purchased. Pre-bid technology stops an advertiser from bidding on an unsuitable impression, thereby preventing violations from occurring in the first place. That is why many of the numbers we report, while directionally accurate, do not represent the full scope of DV's protection. Unless otherwise noted, comparative data points should be interpreted as year-over-year comparisons that span January 1, 2024, to December 31, 2024, versus the same time period for the prior year. However, the DV Authentic Attention® data spans July 1, 2024, to December 31, 2024. All data in this report is DV tag-based data from the open web.

Unprotected Campaign

As a point of comparison to DV customer campaigns (the majority of which use a combination of pre- and post-bid protections), DV created a test campaign with no protections. We collected monitoring data on the unprotected campaign for the full year and compared it alongside our 2024 benchmark data, which is referenced throughout the report as protected campaign data and spans January 1, 2024, to December 31, 2024. Media waste refers to the estimated cost associated with total media violations, including brand suitability, fraud/SIVT and other related issues. This cost figure is derived by multiplying the total violations by a \$3 cost-per-mille (CPM), which reflects the cost per 1,000 impressions.

Survey Methodology

DV contracted with Sapio Research to conduct multiple surveys cited in this report. The “consumer survey” surveyed 3,000 consumers from 2 countries across North America (Canada, U.S.). The survey outcomes are referenced throughout this report, cited as the trends among consumers.

The “marketer survey” surveyed 400 marketing and advertising decision-makers from 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 to an 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.



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