



Media Quality in the Age of AI

Asia Pacific

 2026 Global Insights





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Media Quality in the Age of AI



Welcome

So, here we are.

The digital advertising industry has been expecting this moment for quite some time. Now it has arrived: The year generative AI transforms the open web.

This unprecedented technology presents never-before-seen advertising opportunities that are still emerging. There are already conversational/chatbot ads in beta that deliver ultra-personalised marketing directly tied to consumer intent. Soon these ads will scale. And AI agents that make purchase decisions on a user's behalf will become an entirely new and separate audience for ecommerce ads.

Methodology

Data for this report comes from proprietary metrics culled from campaigns DV measured post-bid in 2025, additional DV data, and our annual commissioned surveys of marketers and consumers. To enable an accurate comparison, global averages are weighted by region.

[See the full methodology](#)

The emerging platforms and audiences made possible by AI have incredible promise in Asia Pacific. Marketers and consumers in India and Southeast Asia in particular are exceptionally optimistic and open-minded about AI tools and AI-generated content.

Faster, Cheaper, More

Other markets, including Australia and Japan, are more wary, and with good reason: AI is creating new media quality challenges. It threatens brand suitability by churning out Made for Arbitrage/Advertising (MFA) sites and low-quality content cheaply, at breakneck speed and staggering scale. It is also flooding the open web with malicious bots that mimic human behaviour.

Along with providing you with comprehensive media quality information, this report will deep dive into the nuances and complexity of AI, and why Asia Pacific advertisers should care.

We hope you find it useful and illuminating.

Conrad Tallariti

*Managing Director, Sales
Asia Pacific*



Conrad Tallariti

AI Changes Everything



Consumer Sentiment

Does AI improve the online experience? Do people like it? Globally, consumers surveyed for this report are warming up to the technology. A majority uses AI tools or platforms frequently, and most say AI-powered tools improve their online experience.

Asia Pacific is a particularly enthusiastic region, with the highest overall share of consumers likely to use AI tools or platforms several times a week or more. Within specific markets, however, there are wide differences: Japan reported the lowest frequency of use, while India reported the highest.

Definitions

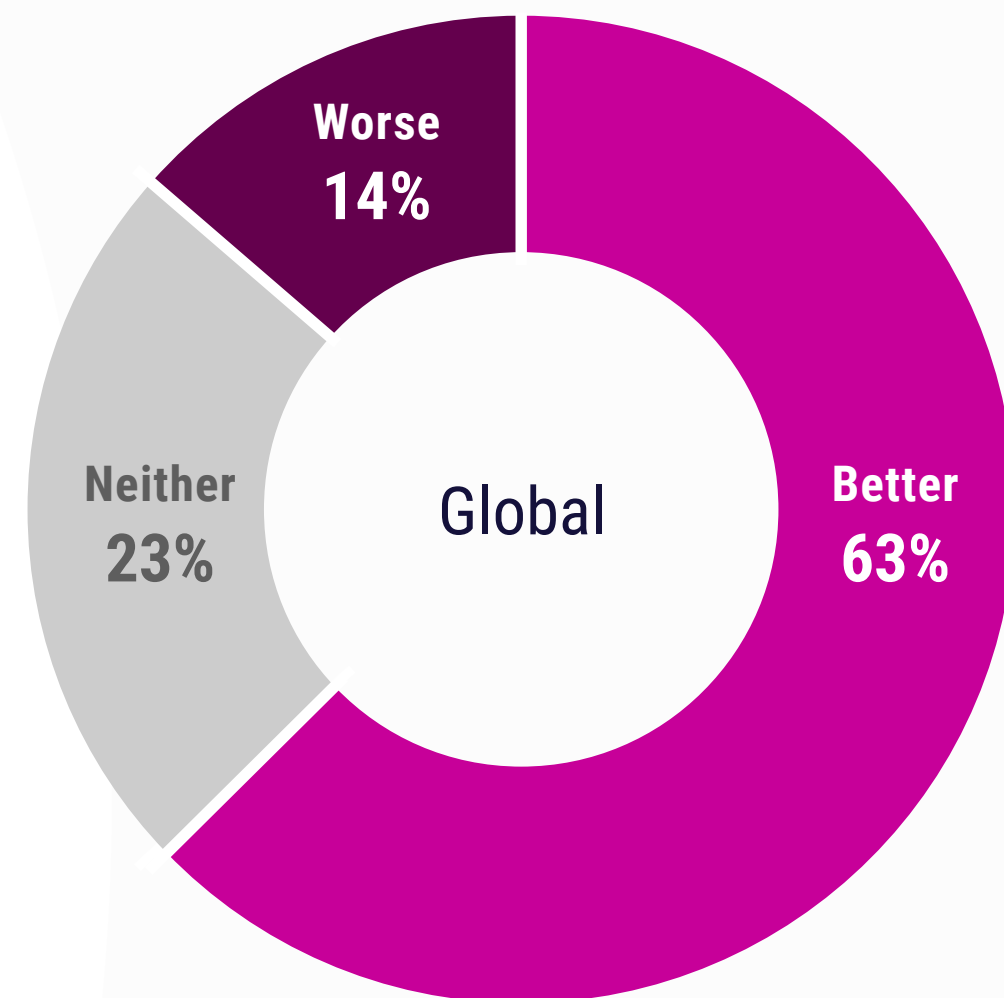
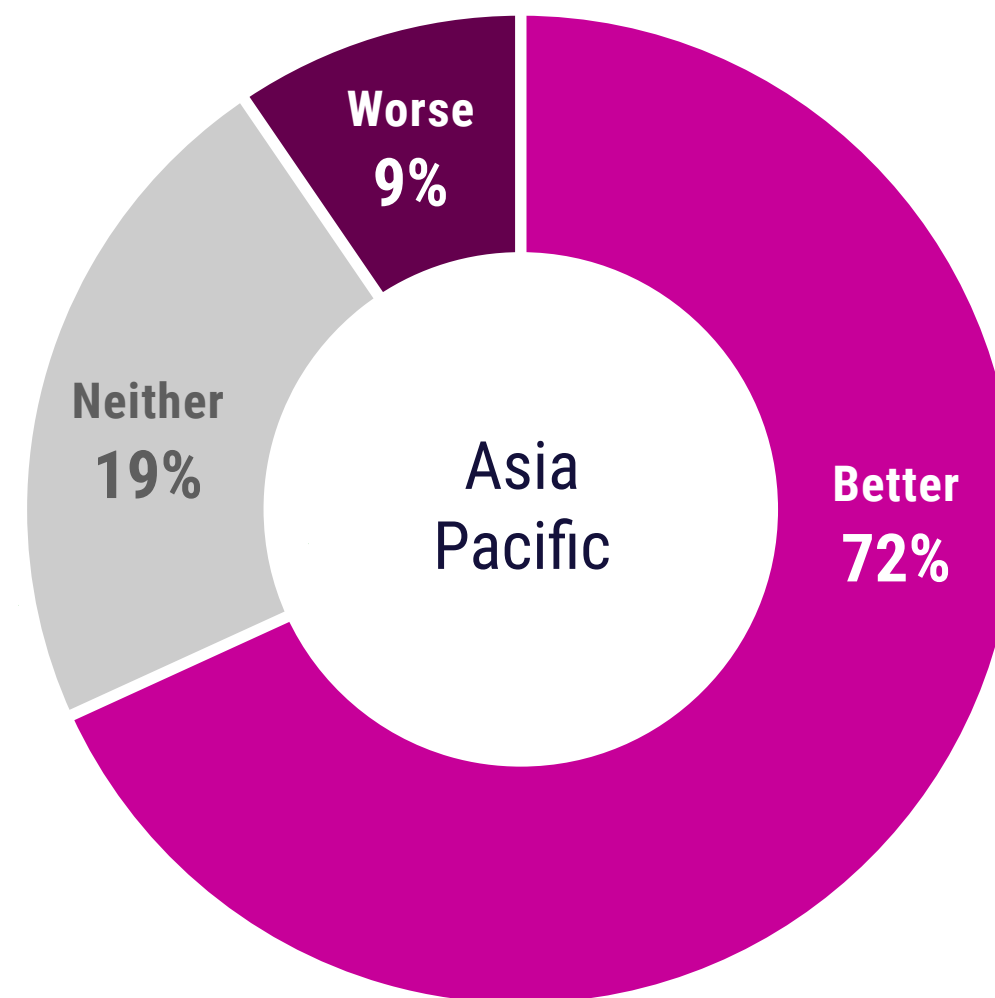
AI ingests and analyses vast amounts of data to learn language, logic and patterns. This allows it to “understand” a user’s prompt and do what the user is asking.

Generative AI (“GenAI”) can autonomously create written and visual content based on a user’s prompt.

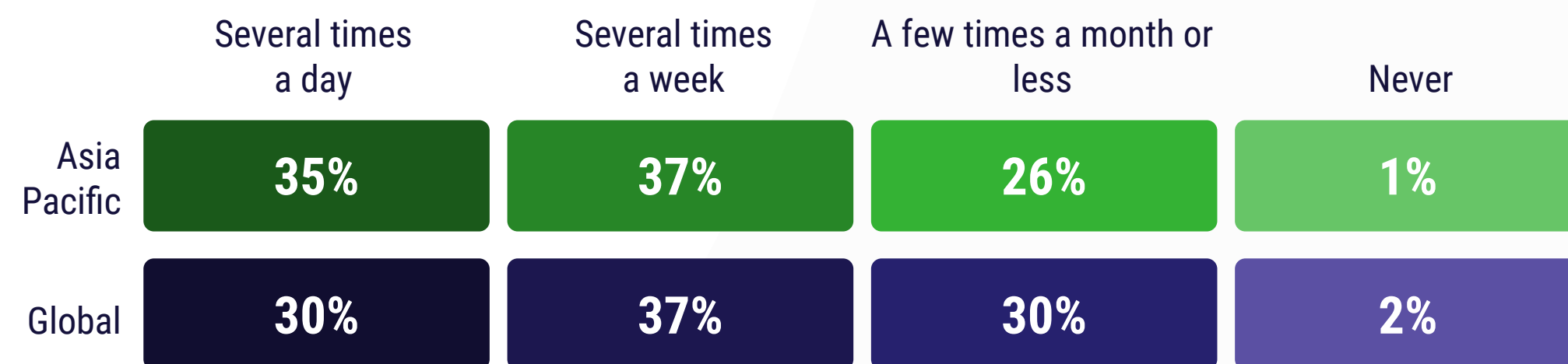
An **AI agent** (or “agentic AI”) goes a step further. It can make decisions and execute complex tasks, such as processing a merchandise return or building a travel itinerary.

[See the full methodology](#)

CONSUMERS
Do AI tools make your online experience better or worse?



CONSUMERS
How frequently do you use AI tools or platforms?



AI CHANGES EVERYTHING

How Consumers Use AI in General

Consumers who interact with AI in their daily lives use it in different ways: for research and planning, to track their activity and monitor smart home devices, or during chats with virtual assistants.

CONSUMERS

What are the three most common ways you interact with AI in your daily life?

Asia Pacific



Global

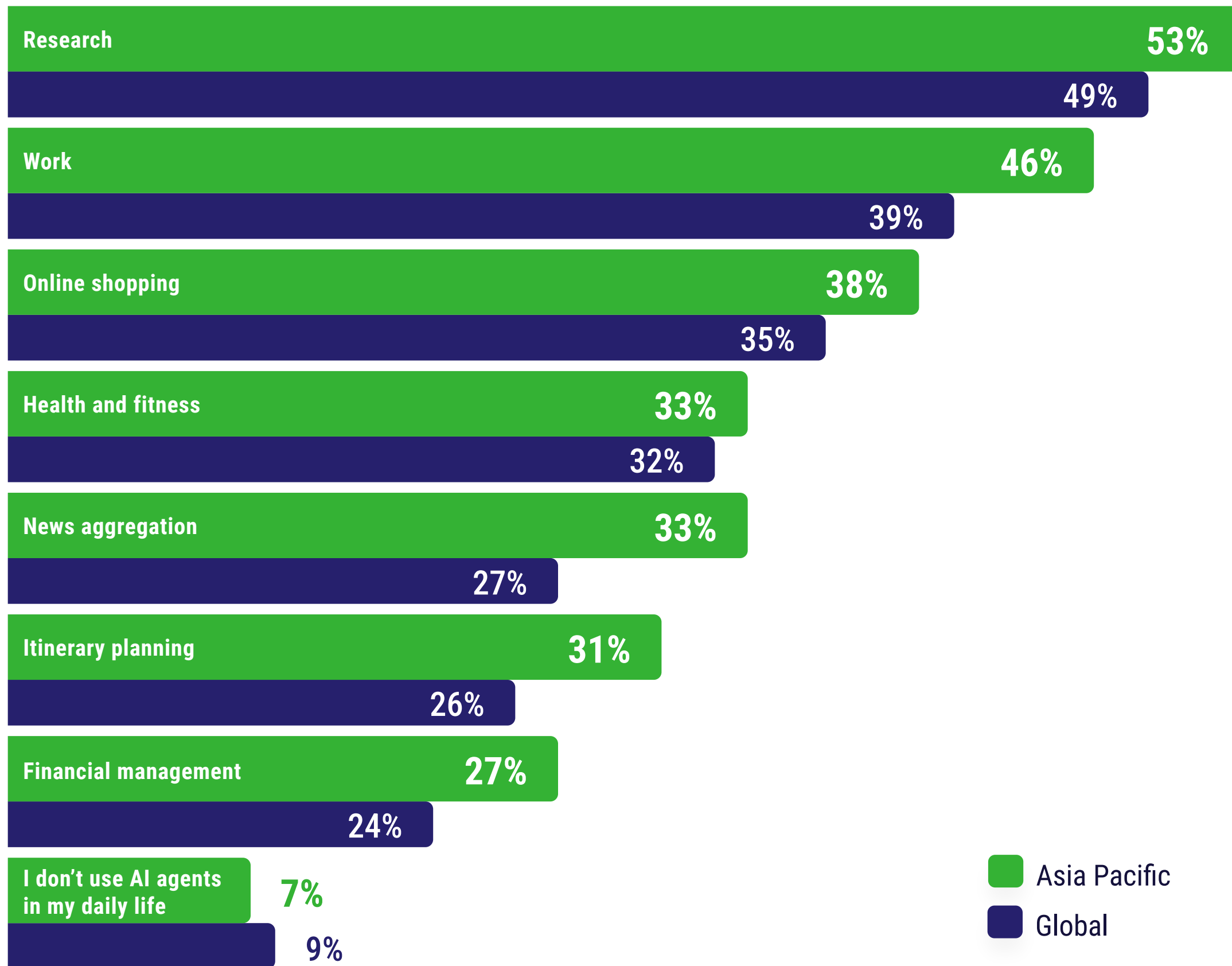


How Consumers Use AI Agents in Particular

Those who use GenAI agents commonly use them to research topics such as recipes and travel, for tasks related to their work, and to shop online.

CONSUMERS

How do you use AI agents in your daily life?



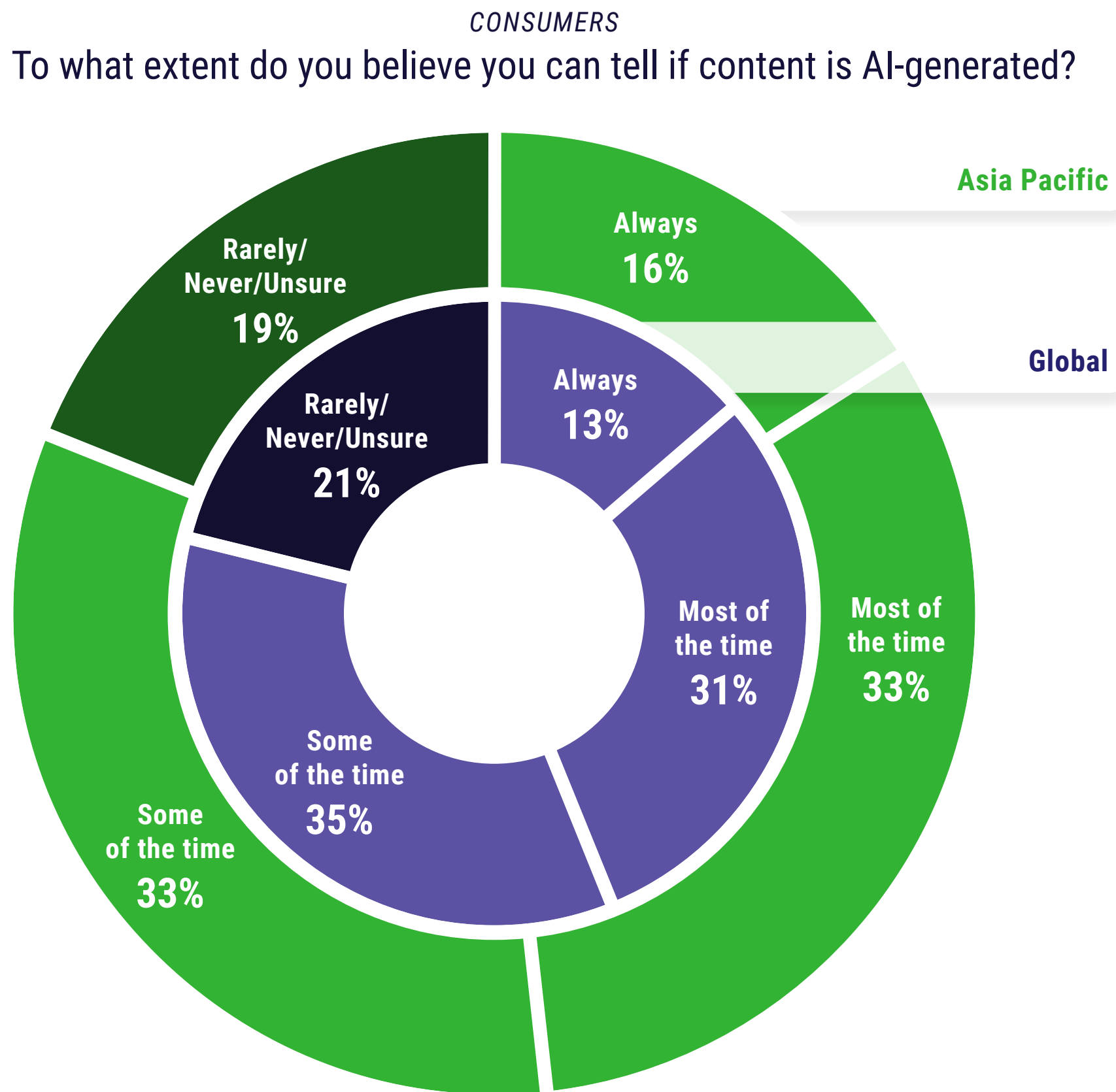
■ Asia Pacific
■ Global

AI CHANGES EVERYTHING

How Consumers View AI Content

Asia Pacific consumers are pretty sure they know when content is AI-generated. Most of them believe they can identify synthetic content always, most of the time or some of the time.

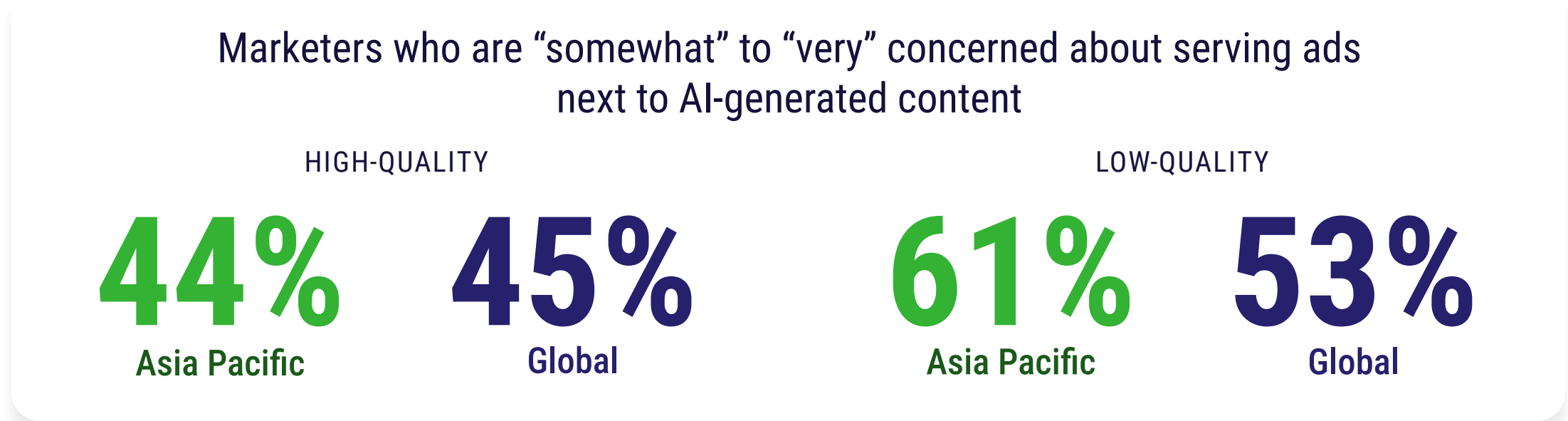
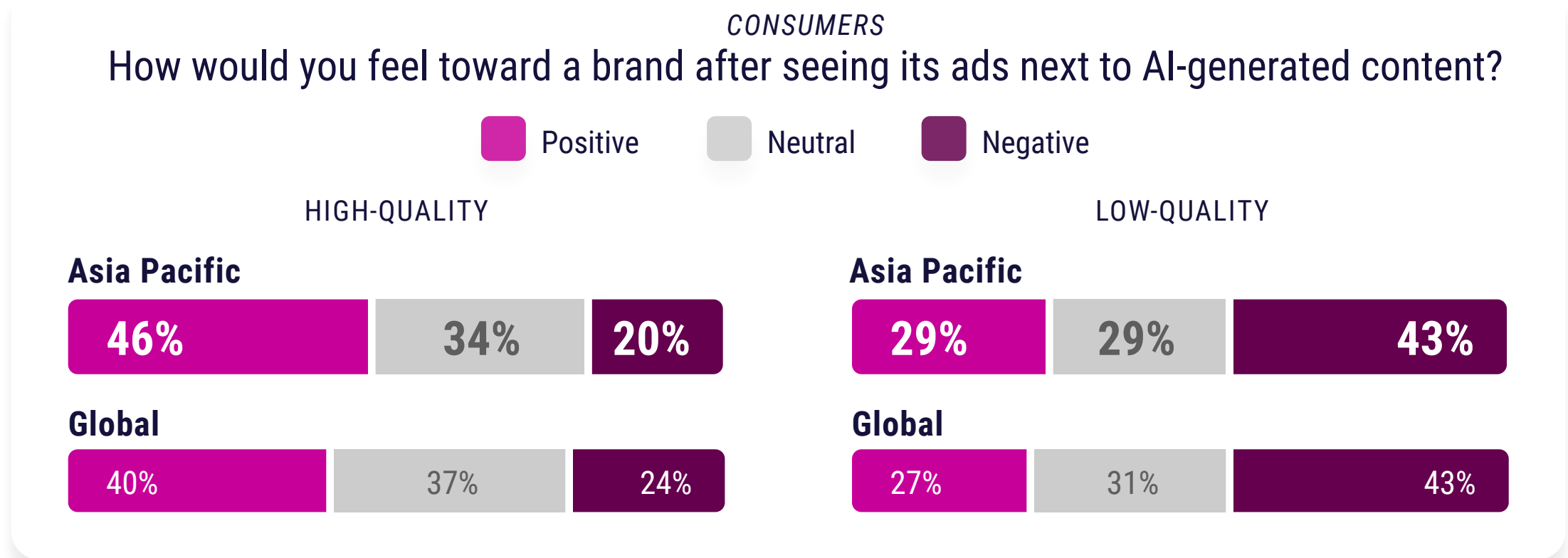
Compared with global consumers, Asia Pacific consumers are more positive about ads in high-quality AI-generated content. Indian and Southeast Asian consumers are particularly receptive.



Two markets are less so: The majority of Japanese consumers are neutral toward this type of content, and Australia is the most negative of all countries globally.

Not surprisingly, ads in low-quality AI-generated content are likely to fare worse, especially in Australia, Japan and Singapore. In the region overall, marketers are more concerned than global marketers are about serving ads in low-quality content.

The takeaway? Be extra careful that the content in which your ads appear is appropriate for your brand.



AI CHANGES EVERYTHING

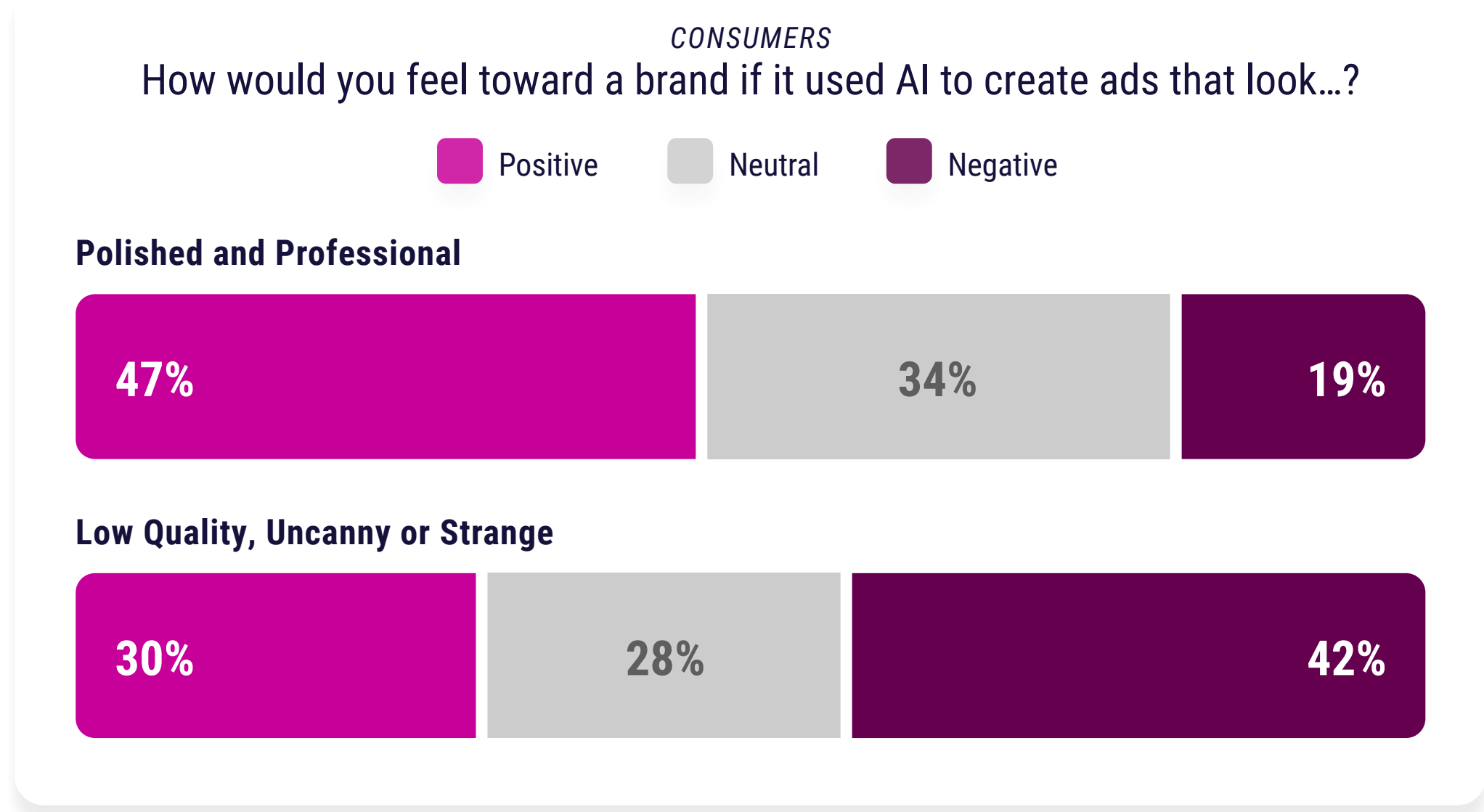
AI-Generated Ads: Serve With Caution

Nearly half of Asia Pacific marketers are concerned about using AI to generate ad copy and creatives.

They would be wise, indeed, to consider the quality of their creatives and specific market attitudes before proceeding.

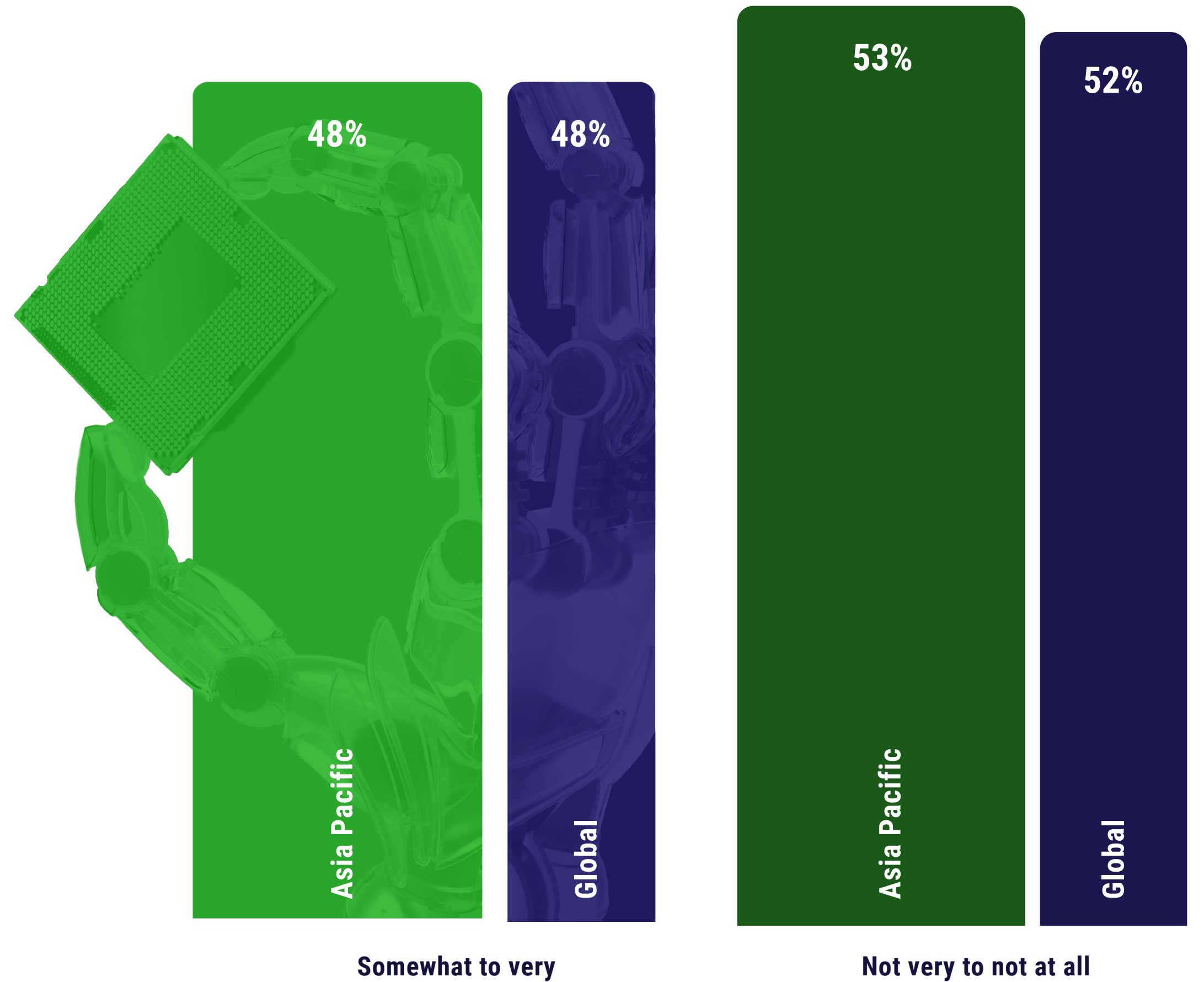
While nearly half of consumers overall would feel positive toward a brand that used AI to create high-quality ads, they would feel almost equally negative toward a brand with AI-generated low-quality ads.

In keeping with their responses to other survey questions, consumers in Australia, Japan and Singapore are less accepting than those in India, Indonesia and other Southeast Asia markets.



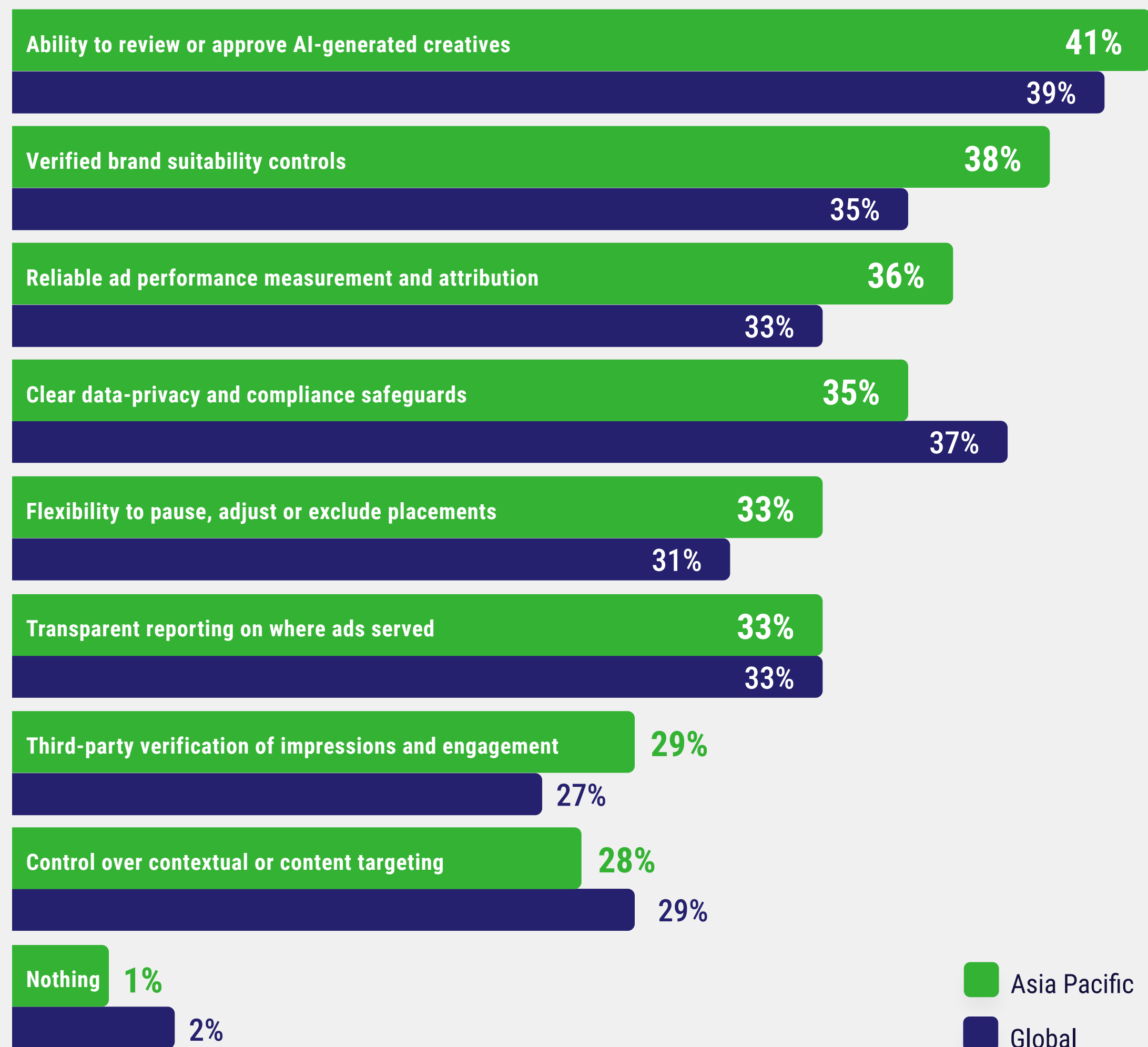
MARKETERS

How concerned are you about using AI for ad creatives?



MARKETERS

Which three of the following would make you feel more comfortable about serving ads within AI platforms?



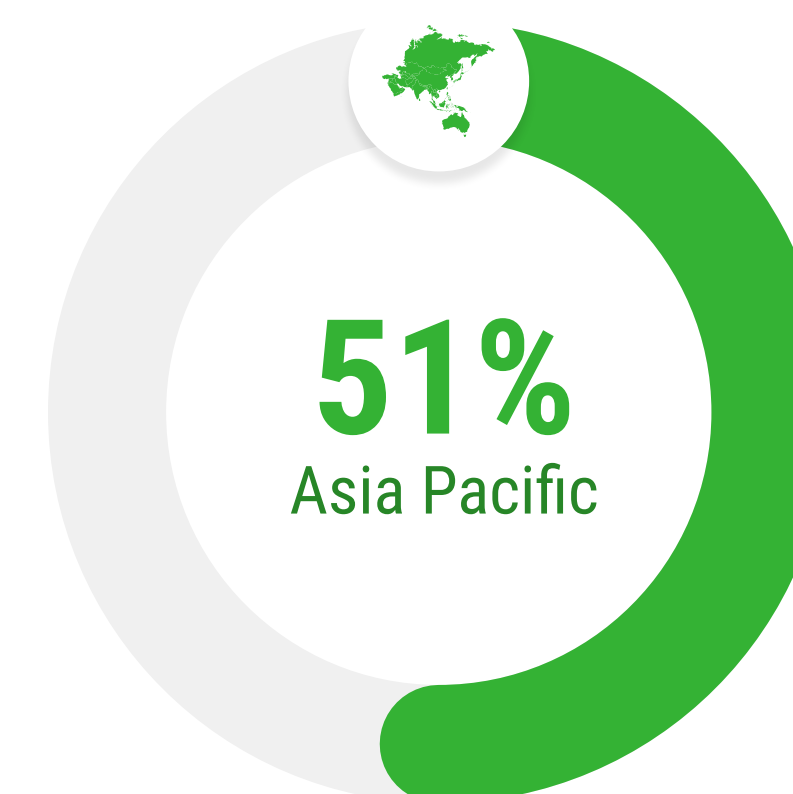
Emerging Formats: Ads on AI Platforms

In early 2026, OpenAI began testing ads within ChatGPT. While the concept of AI chat ads was mostly hypothetical when we surveyed consumers and marketers for this report, they were already forming opinions about it.

More than half of the marketers in the region are concerned about advertising in chat platforms.

As for the assurances they would need to feel more comfortable, Asia Pacific marketers put a premium on creative control, brand suitability controls and performance measurement.

Marketers who are “somewhat” to “very” concerned about serving ads within AI platforms

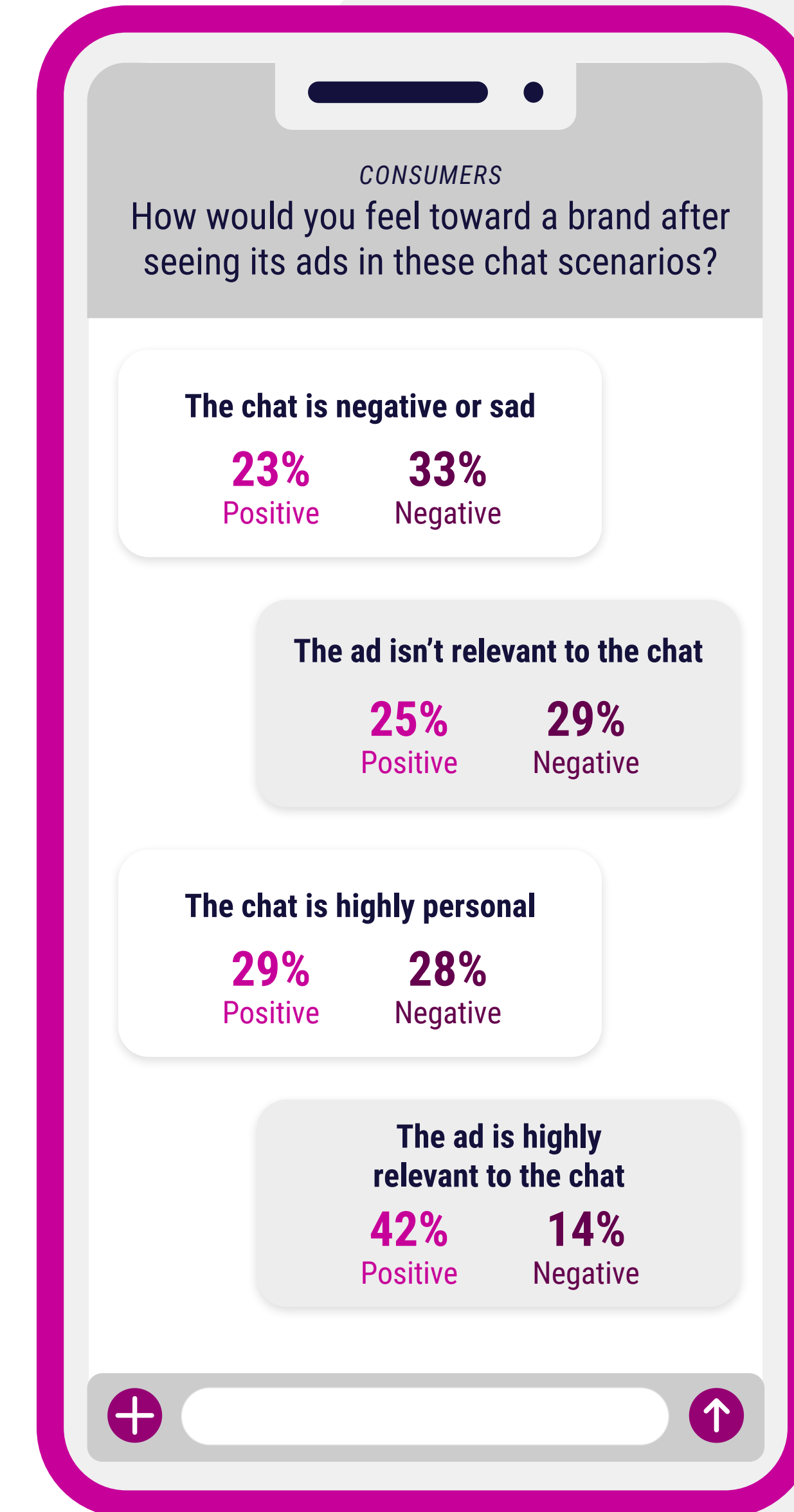
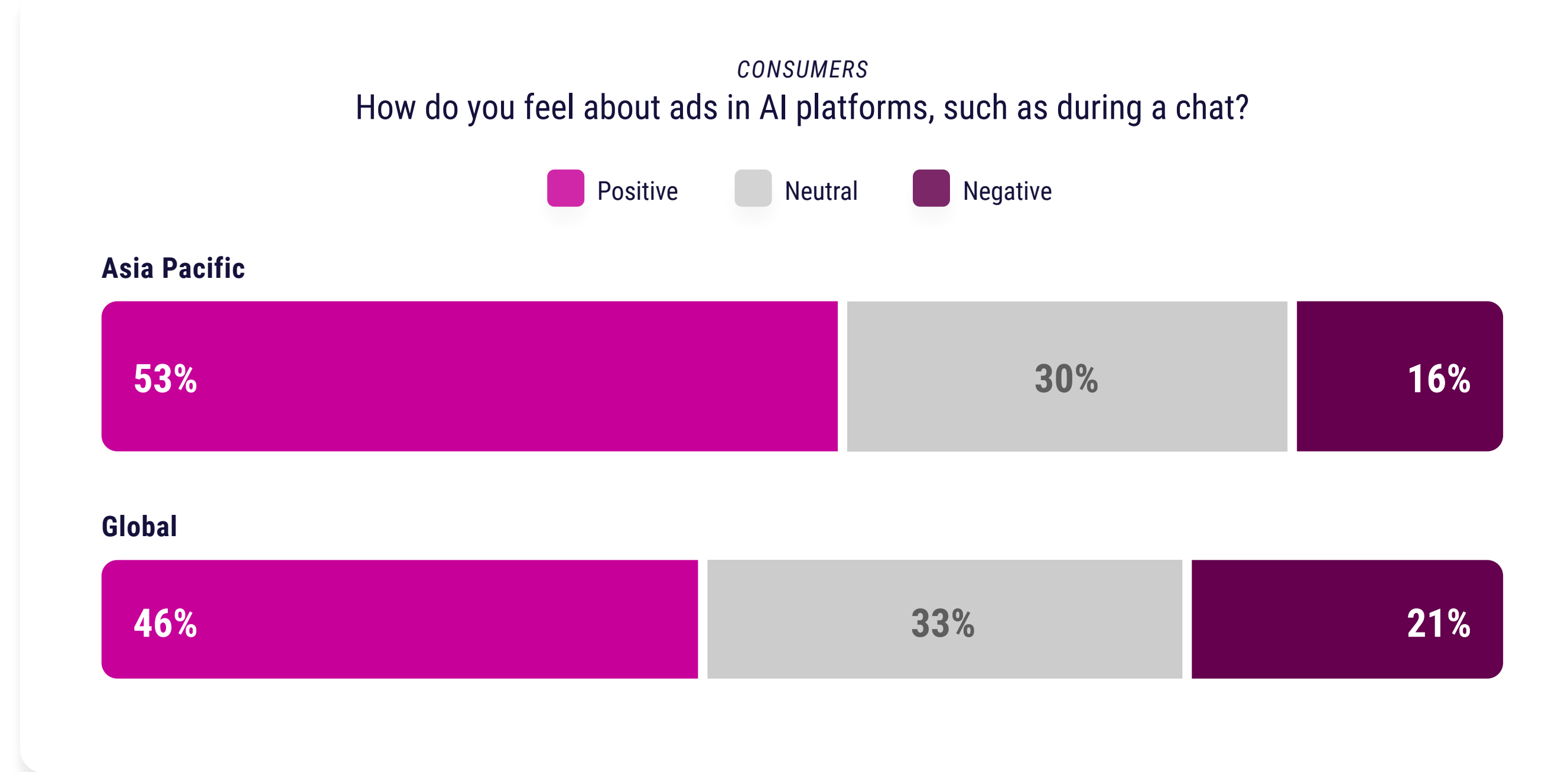


AI CHANGES EVERYTHING

Ads on AI Platforms, Continued

Consumers in Asia Pacific are relatively positive about ads in their AI chats. The scenario in which they would be most receptive: “The ad is highly relevant to the chat.”

To maintain positive sentiment, brands should continue to insist that ads appear in appropriate contexts.



"Neutral" responses not shown

AI CHANGES EVERYTHING

Suitability Showdown: Ads in AI Chat

Like beauty, “brand-suitable” is in the eye of the beholder. Consumers can have different opinions than marketers, and regional consumers can think differently than global consumers.

Asia Pacific Consumers vs. Marketers

In Asia Pacific, consumers are more concerned about the appropriateness of ads in AI chats than marketers are.

Asia Pacific Consumers vs. Global Consumers

Consumers in the region are more likely than their global counterparts to say AI chats are suitable for ads.

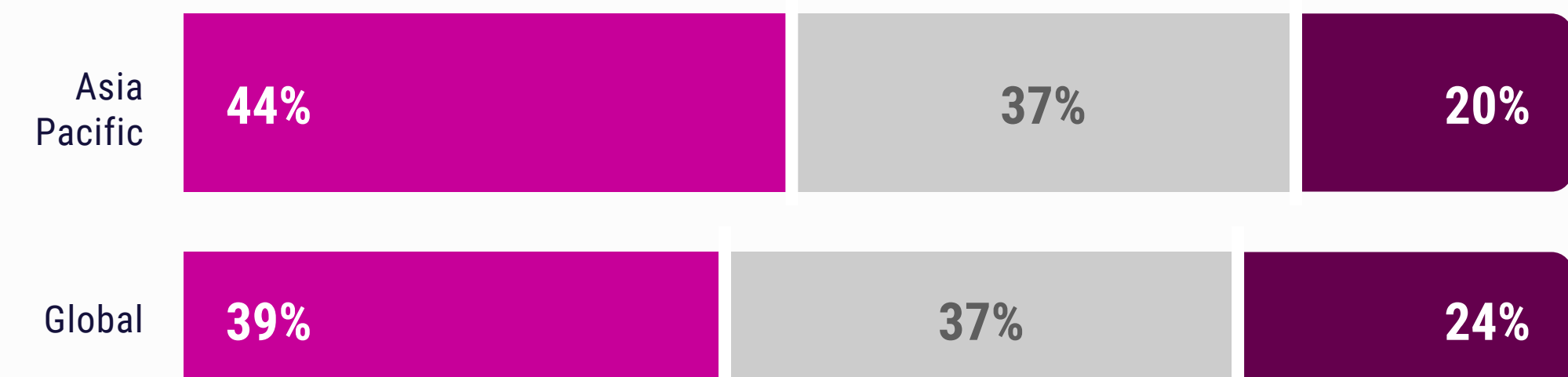
MARKETERS AND CONSUMERS How suitable for ads are chats within AI platforms?

 Suitable  Neither  Unsuitable

MARKETERS



CONSUMERS



Media Quality Keeps Improving



Quality Control Measures Are Paying Off

More ads are viewable, fraud-free and brand-suitable. Attention is outstanding.

These are media quality numbers worth celebrating, and they didn't just happen. They're the accumulated result of smart choices and direct actions taken by DV advertisers in Asia Pacific.

Increasingly, advertisers understand that while it's critical to measure impressions after the fact to find out what went wrong, it's smart business to proactively address campaign performance as well.

More and more, they're safeguarding their media investment and brand equity by taking control over where their ads show up in the first place.

They're incorporating viewability standards into their buying strategies and deploying pre-bid protections to automatically bypass fraudulent, low-quality and unsuitable content and environments.

VIEWABILITY

+4%

↑ Improved

Authentic Viewability Rate

A positive change in viewability is positive news.

FRAUD

-49%

↓ Reduced

Fraud/SIVT Violation Rate

The less fraud and sophisticated invalid traffic, the better.

BRAND SUITABILITY

-3%

↓ Reduced

Brand Suitability Violation Rate

Fewer violations means higher suitability.

ATTENTION

113

DV Attention Index™

Attention is well above the global benchmark.

Asia Pacific, 2025 vs. 2024

MEDIA QUALITY KEEPS IMPROVING

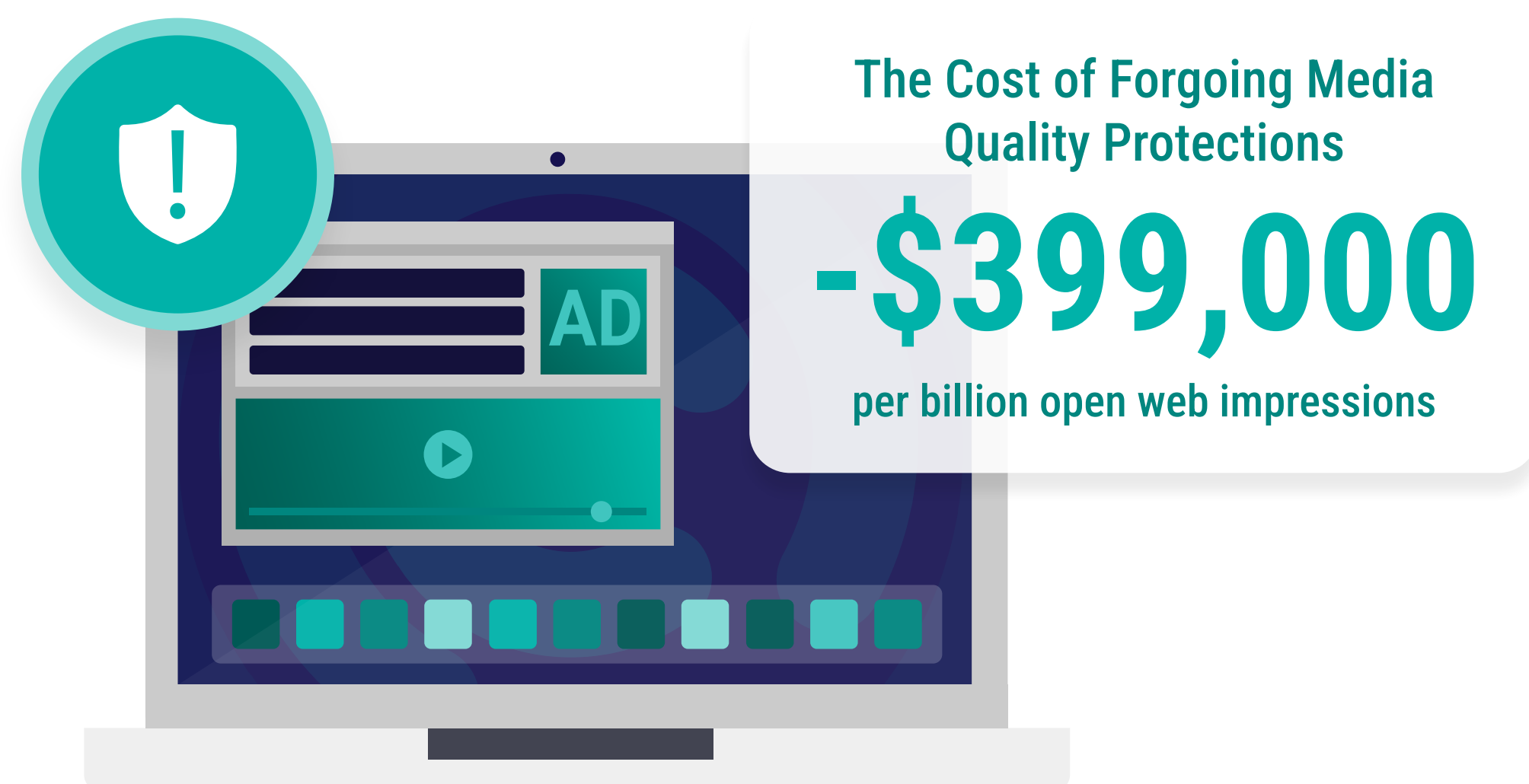
Media Quality Matters

High-quality media maximises the value of every ad dollar, minimises wasted impressions and protects brand equity.

Without media quality protections, advertisers risk paying for impressions that at best provide no value and at worst erode consumer trust.

The data in this report includes impressions that were blocked before they could serve in low-quality environments, as well as post-bid measurement of those that got through.

With year-over-year improvements to every core media quality metric, Asia Pacific has a lot to be proud of.



How DV Defines Media Quality

A high-quality impression meets the following criteria:



The ad has the *opportunity to be seen*



In a *brand-suitable environment*

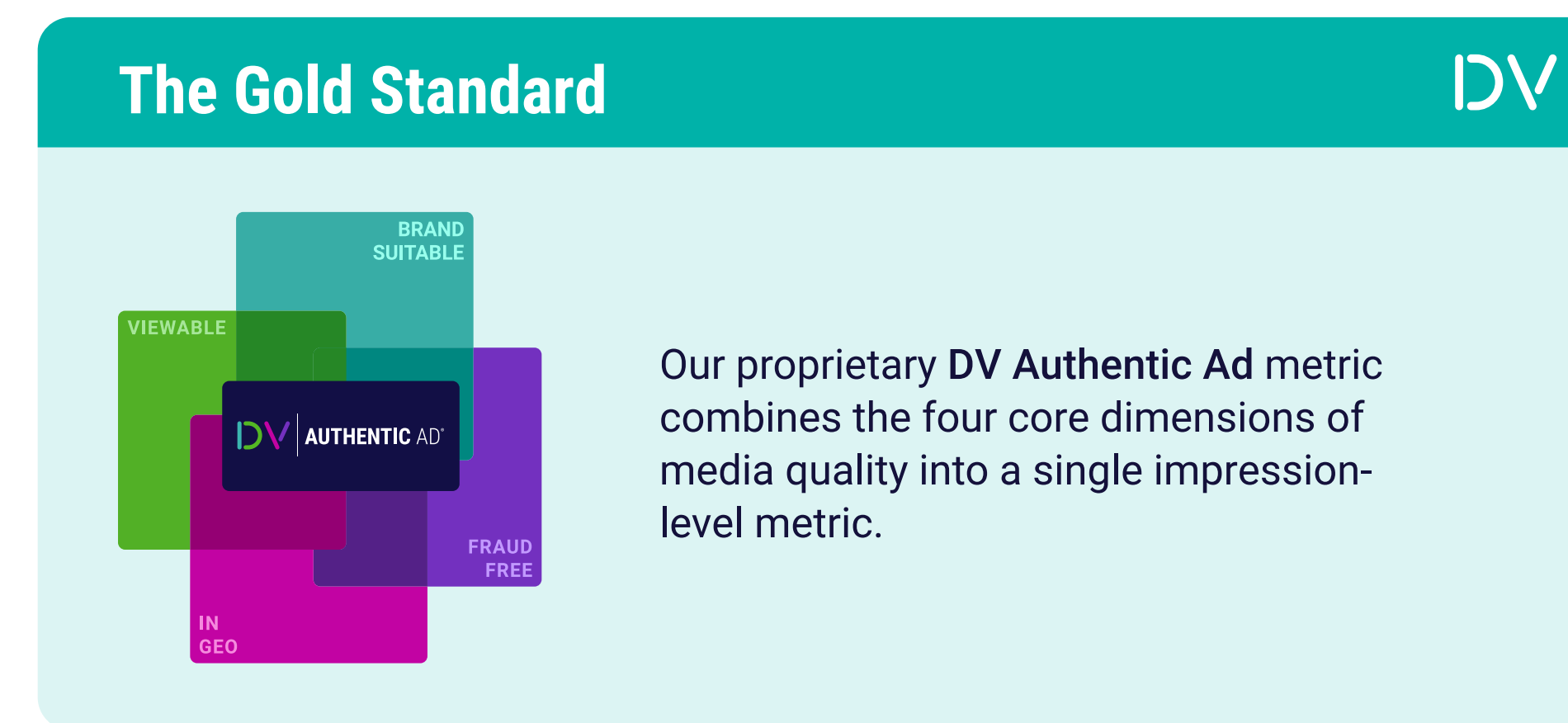


By a *human*



In the *intended geography*

When all the boxes are checked, we designate the impression as a DV Authentic Ad®.

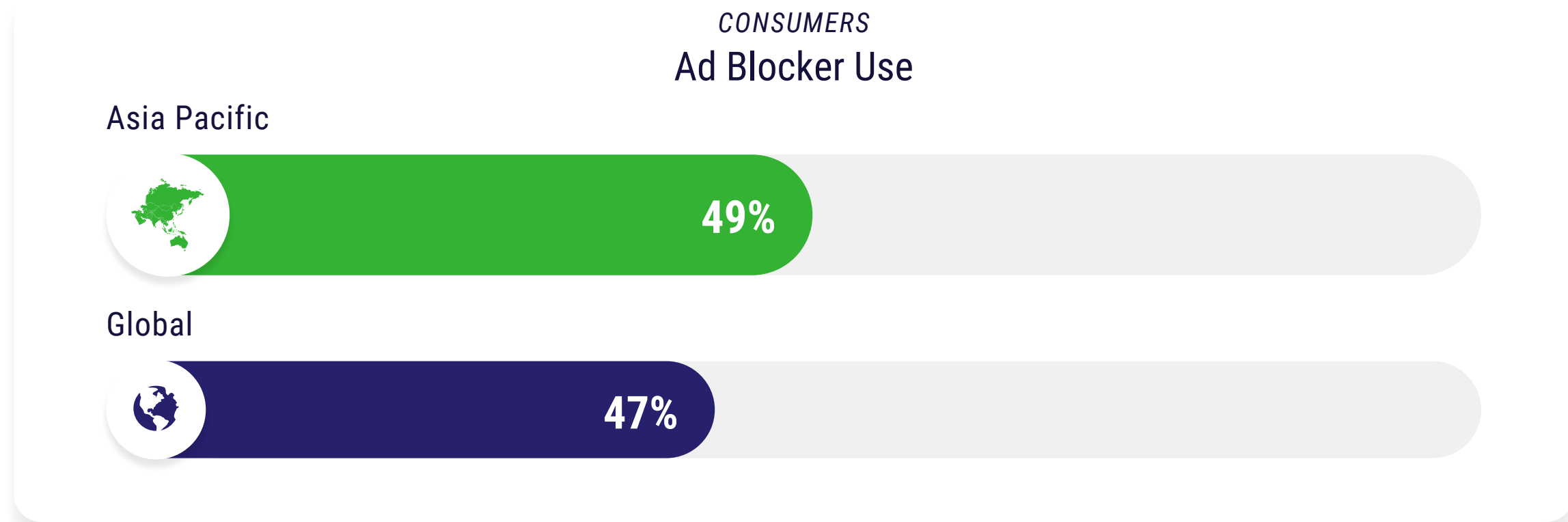


MEDIA QUALITY KEEPS IMPROVING

Don't Track Us, Please

Asia Pacific consumers are serious about privacy. Nearly half use ad blockers, and even more opt out of cookie tracking.

This reluctance to see ads and to be tracked across the internet means that marketers need to take media quality — particularly contextual relevance — very seriously.



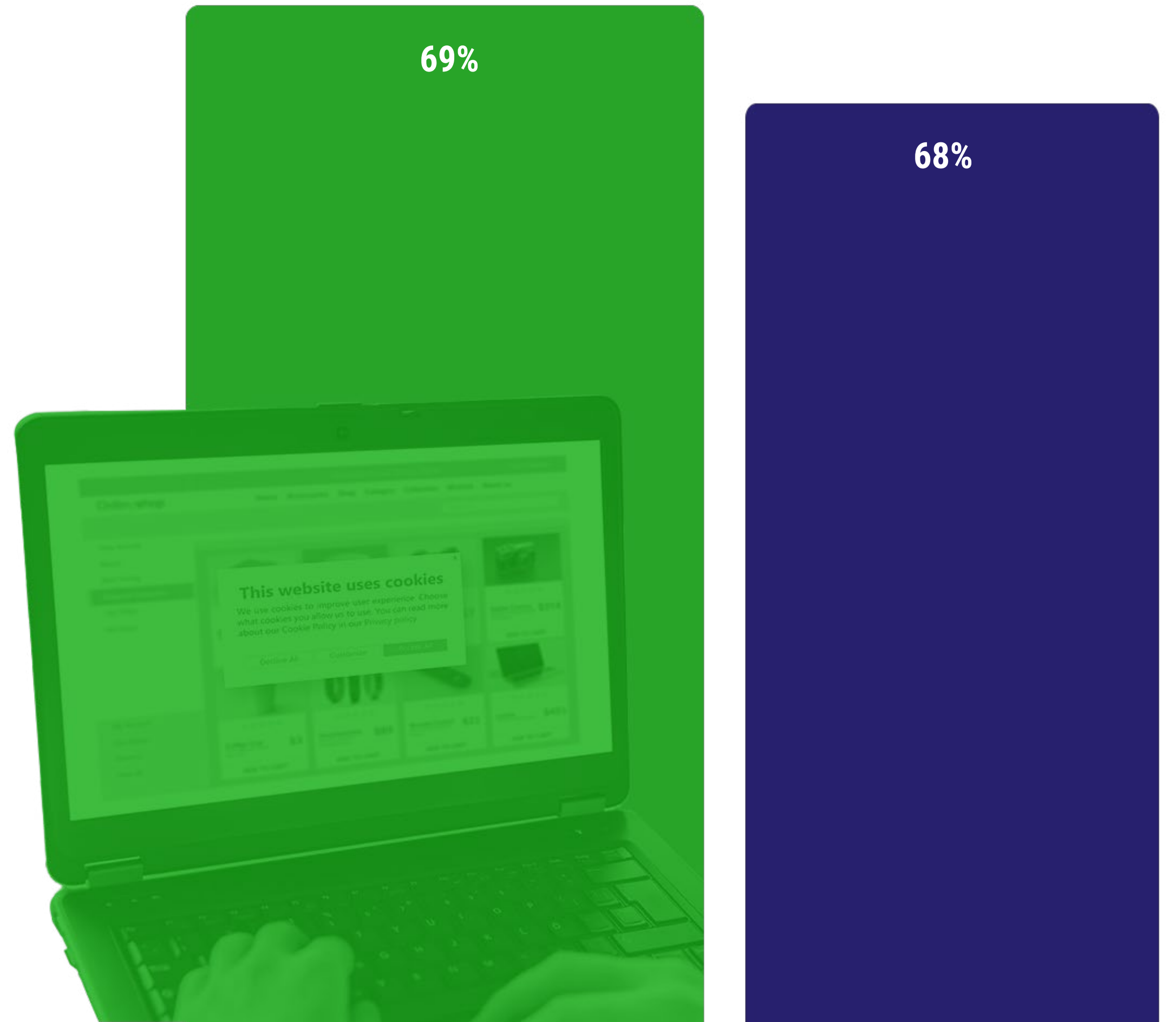
Superior Content Classification



To give advertisers better control over brand suitability and contextual alignment, DV combines deterministic rules (for consistent, trusted decisioning), machine learning (for pattern recognition) and LLMs (for contextual interpretation and emerging topics).

This hybrid architecture, informed by DV's massive proprietary data, delivers highly accurate content classification.

CONSUMERS
Cookie Tracking Opt-Out Use



Asia Pacific

Global



MEDIA QUALITY: VIEWABILITY

Did Your Ad Have the Opportunity to Be Seen?

An ad has to be seen to be effective. If an impression serves below the fold, or if the user immediately scrolls past it, that's a wasted impression you may still be paying for.

DV's pre-bid viewability segments help advertisers prioritise inventory in which ads are more likely to be seen. Campaigns with these segments have higher viewability than campaigns without them.

In Asia Pacific, the overall video viewability rate improved but still underperformed against the global average. The display viewable rate underperformed slightly but increased more than it did globally.

Viewable Rate by Market

2025 vs. 2024

	Video	Display
Australia/New Zealand	71% -3%	72% –
Hong Kong	59% -24%	71% +6%
India	90% +4%	71% +3%
Japan	59% -1%	48% +4%
Southeast Asia	87% +3%	75% +3%
Indonesia	91% +3%	82% +6%
Philippines	90% +11%	80% –
Singapore	76% +4%	70% +2%
Thailand	90% -1%	78% +1%
Vietnam	88% +6%	74% +7%
Asia Pacific	85% +3%	65% +5%
Global	87% +9%	73% +1%

 MEDIA QUALITY: FRAUD

Did a Bad Actor Prevent Your Ad from Being Seen by a Human?

A fraud/SIVT violation occurs when a monitored ad serves — or is blocked from serving — in response to a non-human signal or within misrepresented inventory.

Globally, campaigns with DV fraud protections have far lower violation rates.

Big Improvements

The overall Asia Pacific Fraud/SIVT Violation Rate dropped sharply in 2025, outperforming the global benchmark. India had the region’s most impressive drop, followed by Japan and Singapore.

Still a Way to Go

On the other hand, Hong Kong had the highest violation rate of all Asia Pacific markets, although it also declined year over year.

In Southeast Asia, rates dropped overall, but rose significantly in Indonesia.

Fraud Types and Formats

Data centre traffic violations decreased in the region but remained the most prevalent type of fraud/IVT.

In the region and all markets, the Fraud/SIVT rate is lower for video than display.

Fraud/SIVT Violation Rate by Campaign Protection Level

Unprotected



Protected



+384%
Unprotected vs.
Protected Campaigns

Fraud/SIVT Violation Rate by Market	
2025 vs. 2024	
Australia/New Zealand	0.6% -49%
Hong Kong	1.0% -28%
India	0.2% -74%
Japan	0.3% -57%
Southeast Asia	0.5% -36%
Indonesia	0.4% +24%
Philippines	0.2% +2%
Singapore	0.7% -54%
Thailand	0.4% –
Vietnam	0.4% -4%
Asia Pacific	0.4% -49%
Global	0.6% -42%

-59%
Non-Human Data Centre
Traffic Rate, 2025 vs. 2024

MEDIA QUALITY: FRAUD

Bot Check

While testing DV AI Verification™, which launched in late 2025, the DV Fraud Lab gained deeper visibility into how various bots are shaping media performance.

AI bots generated

10x

the clicks generated by humans in some campaigns.

The findings showed that in unprotected media, AI bots accounted for a noticeable portion of clicks. In some studies, an ad click was overwhelmingly more likely to be from a bot than from a human.

Bots and scrapers such as these aren't always fraudulent, but they create general invalid traffic (GIVT) that should be removed from campaign metrics.

15%

of clicks were generated by AI bots in unprotected campaigns.

Common Open Web Fraud Types

Adware: Malware that conducts deceptive actions, such as ad injections and unauthorized overlays.

Bot Fraud: Ad requests from computer programs mimicking human viewing behavior.

Hijacked Devices: User signatures that show automated browsing from infected or misappropriated devices.

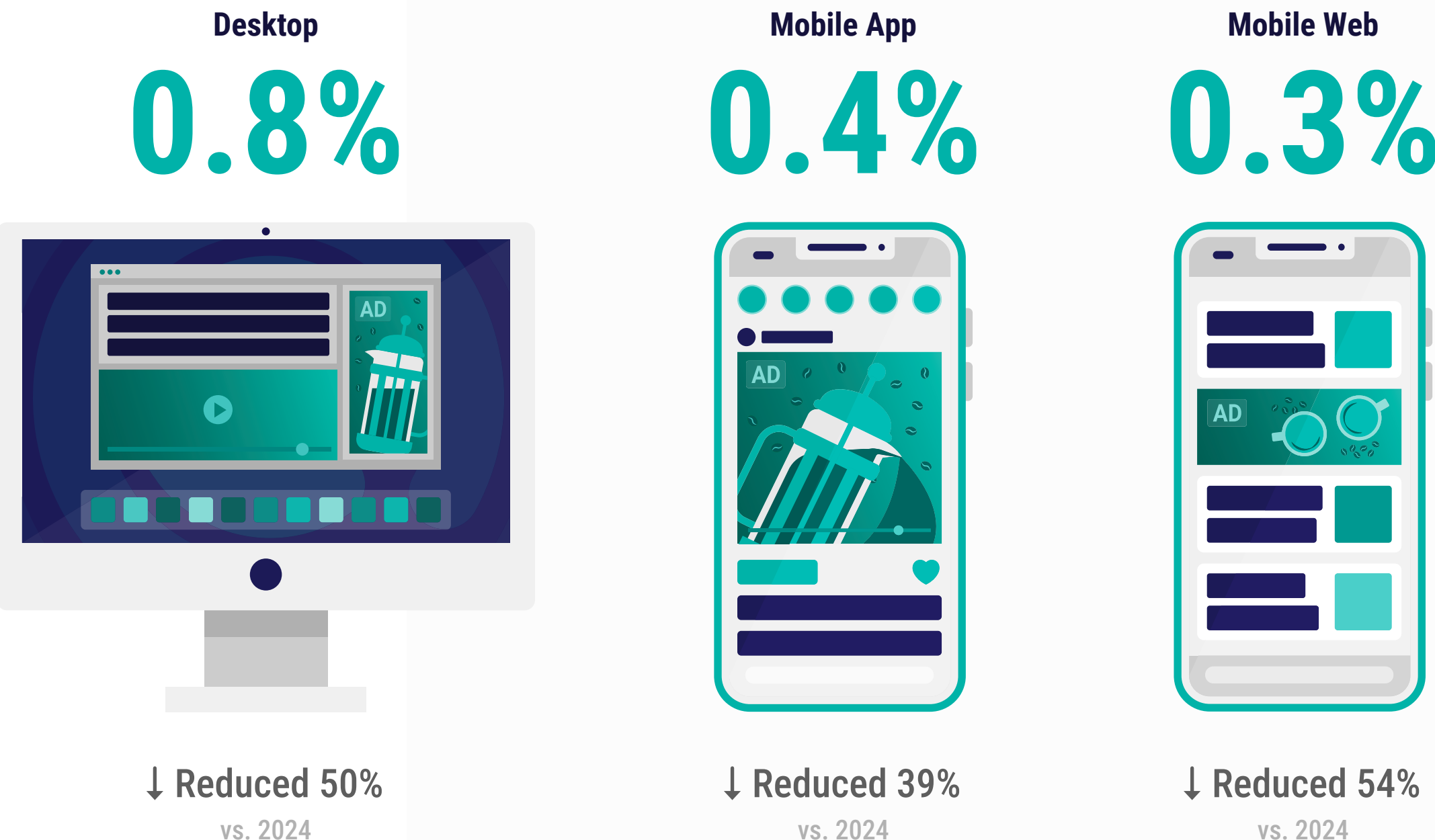
Non-Human Data Centre: Fraudulent ad requests that originate from a server facility.

Some Devices Attract More Fraud Than Others

The Fraud/SIVT Violation Rate fell notably for all devices, particularly mobile web and desktop.

Still, desktop is the device seemingly most attractive to fraudsters, so advertisers should continue to be vigilant.

Fraud/SIVT Violation Rate by Device

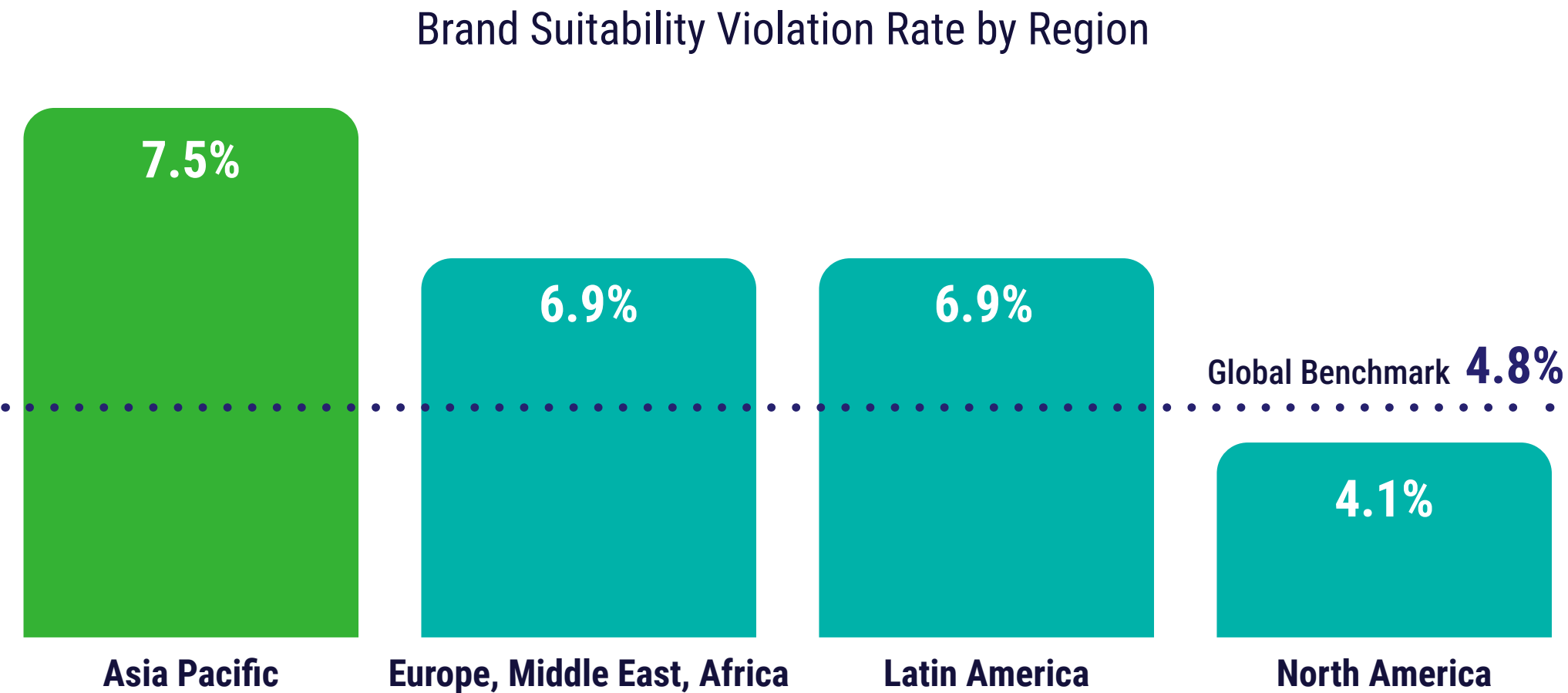


MEDIA QUALITY: BRAND SUITABILITY

Do Your Ads Appear in Content That’s Right for Your Brand?

A brand suitability violation occurs when a monitored ad serves — or was blocked from serving — within content that fails to meet the advertiser’s brand suitability settings.

Brand suitability is a challenge in Asia Pacific. Despite a modest year-over-year decline helped along by improvements in display media, the overall violation rate remains the highest of any global region DV measures.



Brand Suitability Violation Rate by Market

2025 vs. 2024

Australia/New Zealand	4.9% -5%
Hong Kong	10.3% +12%
India	8.2% +91%
Japan	9.9% -18%
Southeast Asia	4.9% -33%
Indonesia	5.7% -9%
Philippines	3.5% +24%
Singapore	5.5% -42%
Thailand	3.6% -56%
Vietnam	3.3% -60%
Asia Pacific	7.5% -3%
Global	4.8% -7%

MEDIA QUALITY: BRAND SUITABILITY

The Numbers Don't Lie

Marketers weighing whether pre-bid avoidance is worth the investment: look no further than DV's brand suitability violation rate. Globally, the rate in campaigns without DV protections is more than four times that of campaigns with protections in place.

As platforms scale, campaigns become more fragmented and AI adds new challenges, there are fewer guarantees that every impression will serve in suitable content. DV's pre-bid avoidance segments can provide peace of mind.

Brand Suitability Violation Rate by Campaign Protection Level

Unprotected



13.8%

Protected



4.8%

+189%

Unprotected vs. Protected Campaigns

The Industry-Leading Suitability Product

DV

DV Authentic Brand Suitability® lets advertisers create a centralised, highly customised set of content controls based on their own contextual needs, brand suitability definitions and reach-vs.-quality requirements.

These controls automatically deploy on multiple platforms and campaigns, with perfect pre-bid and post-bid mapping.

With the most content categories, the most DSP integrations and the only fully matched pre-bid avoidance and post-bid suitability settings, it's the media effectiveness industry's best-in-class product.

100+

Unsuitable Content Categories

30+

DSPs

CASE STUDY

Publicis Media Malaysia

Ad delivery to brand-unsuitable sites plunged while click-through rate soared after the media agency activated DV Authentic Brand Suitability® on behalf of a social media platform client.

-75%

Delivery to Unsuitable Sites

MEDIA QUALITY: BRAND SUITABILITY

Suitability Showdown: Content Types

Asia Pacific opinions about the appropriateness of various types of content can differ from global opinions and between marketers and consumers.

Asia Pacific Marketers vs. Consumers

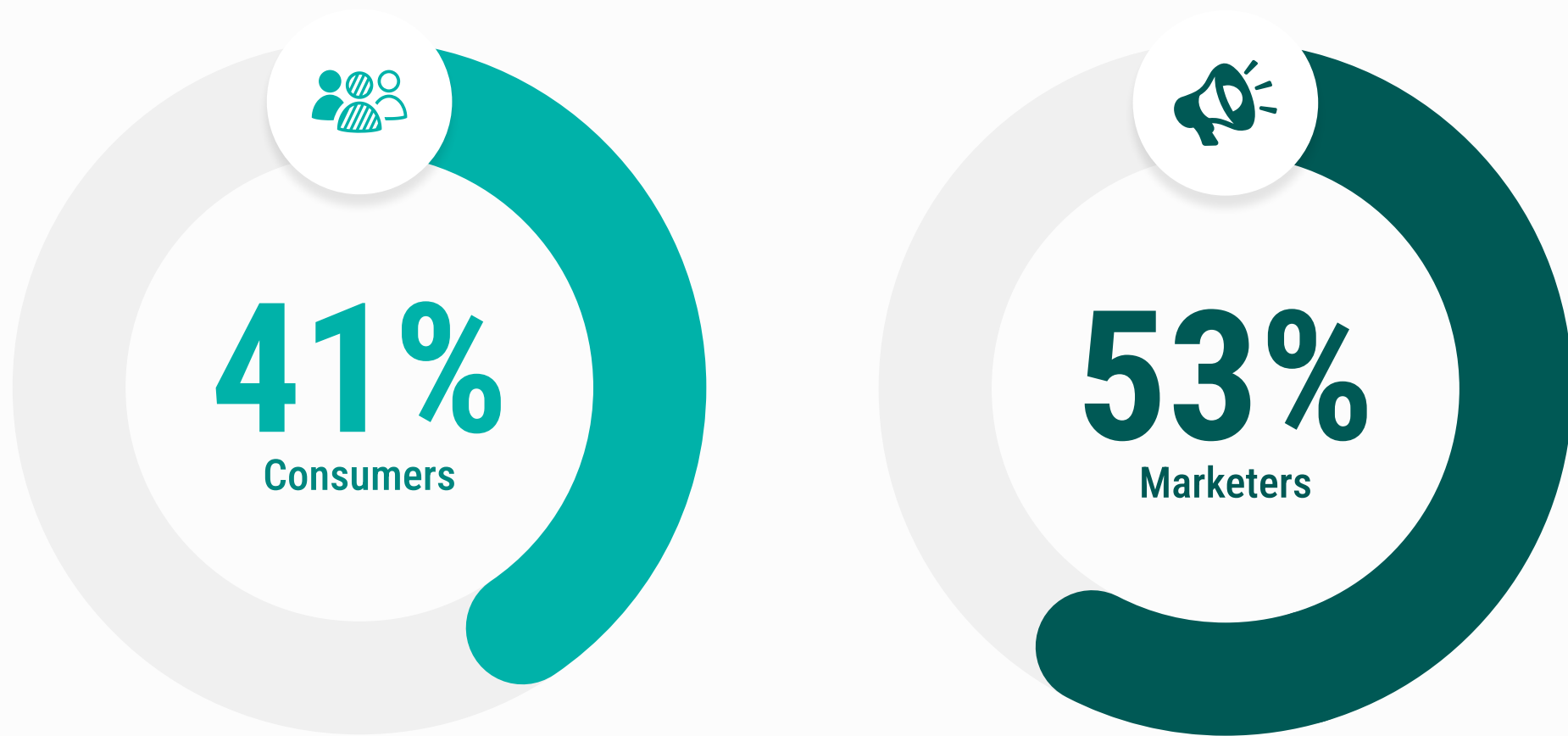
Asia Pacific marketers lean toward “suitable for ads” more than consumers do for all types of content.

Asia Pacific Marketers vs. Global Marketers

Asia Pacific marketers are more cautious than their global counterparts about advertising on sites or apps with “news content exhibiting inflammatory points of view.”

One thing everyone agrees on: Sites and apps with “fake, unreliable or unsubstantiated information” are a no-go.

Fake, unreliable or unsubstantiated information is unsuitable for ads.



MARKETERS VS. CONSUMERS How suitable are the following types of content?

Suitable Neither Unsuitable

Family and lifestyle



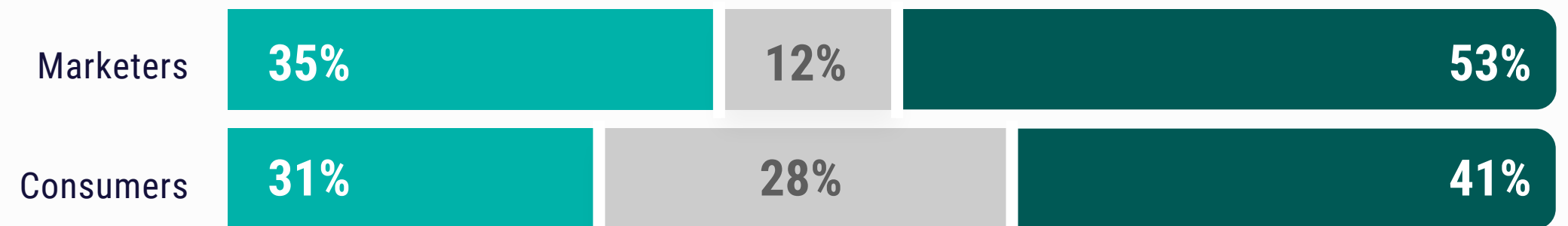
Arts and entertainment



Inflammatory news



Fake, unreliable or unsubstantiated information



MEDIA QUALITY: BRAND SUITABILITY

AI Slop Is All Around Us

Some marketers try to dodge low-quality AI-generated content by avoiding certain content categories they believe attract more slop than others.

But DV's post-bid content classification data reveals that AI slop shows up within many categories. Because the distribution is not predictable, we recommend avoiding AI slop universally. At DV, it's as simple as selecting the "Low-Quality GenAI" category in your advertiser profile.

In Asia Pacific, we find the highest volume of AI slop in the "Travel" content category.

Stop That Slop

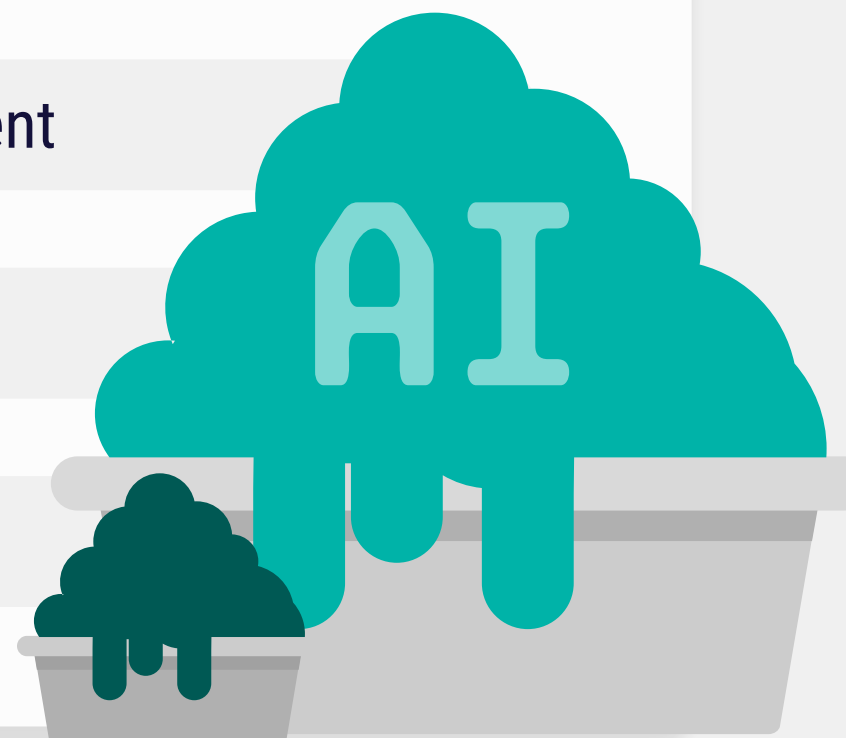
DV's AI SlopStopper™ is an AI fix for an AI problem. It identifies and blocks low-quality GenAI sites and content in real time to help protect your brand equity and your media spend, and to help ensure that your ads support legitimate publishers.

500M+

Impressions Blocked or Monitored, 1H 2026

The "Slop 10": Content Categories With the Most AI Slop

- 1 Travel
- 2 Technology and Computing
- 3 Violence
- 4 Sports
- 5 Vehicle Disasters
- 6 Youth Entertainment
- 7 Personal Finance
- 8 User-Generated Content
- 9 Video Gaming
- 10 Shopping





MEDIA QUALITY: DV AUTHENTIC AD

Was Your Ad Viewable, Brand Suitable, Fraud-Free and In-Geo?

In DV Pinnacle®, impressions that meet all four requirements are designated Authentic Viewable.

The overall Authentic Viewable Rate in Asia Pacific improved year over year. However, the region fell short of the global benchmark.

Southeast Asia is a different story. High market-level rates and significant year-over-year improvements, particularly in Vietnam, boosted the subregion’s Authentic Viewable Rate above the global average.

Authentic Viewable is a post-bid metric. In DV-protected campaigns, low quality inventory is often filtered out pre-bid, increasing the probability that any given impression will pass all four checks.

Although unprotected campaigns can produce Authentic Viewable impressions, the rate is much lower than in protected campaigns.

64 out of 100

open web display and video ads monitored by DV in Asia Pacific were Authentic Viewable.

Authentic Viewable Rate by Campaign Protection Level

Unprotected



Protected



+29%

The Authentic Viewable Rate is materially better for protected campaigns.

Authentic Viewable Rate by Market

2025 vs. 2024

Australia/New Zealand	70% –
Hong Kong	65% +6%
India	71% -2%
Japan	44% +6%
Southeast Asia	75% +4%
Indonesia	82% +4%
Philippines	80% +1%
Singapore	67% +6%
Thailand	81% +7%
Vietnam	77% +12%
Asia Pacific	64% +4%
Global	73% +4%



MEDIA QUALITY: ATTENTION

Who's Paying Attention?

Attention metrics reflect the likelihood that a consumer was exposed to and engaged with your ad. It's useful information that helps guide campaign optimisations.

Attention isn't a simple or one-size-fits-all measurement. The circumstances that can affect attention include the product or service advertised, the channel and device where the ad appears, the ad's format and size, and the time of year.

How DV Quantifies Attention

The DV Attention Index™ helps ensure accurate, meaningful comparisons. An index of 100 represents the global average. Higher and lower numbers indicate how much better or worse an impression performed against that benchmark.

Asia Pacific outperforms on attention. Its rate is well above the global average and the highest of all measured global regions, with an especially high exposure rate.

This is excellent news for advertisers: DV research indicates that attention metrics are effective proxies for campaign performance.

DV Attention Index Components

Exposure

118

Engagement

108

DV Attention Index by Ad Format

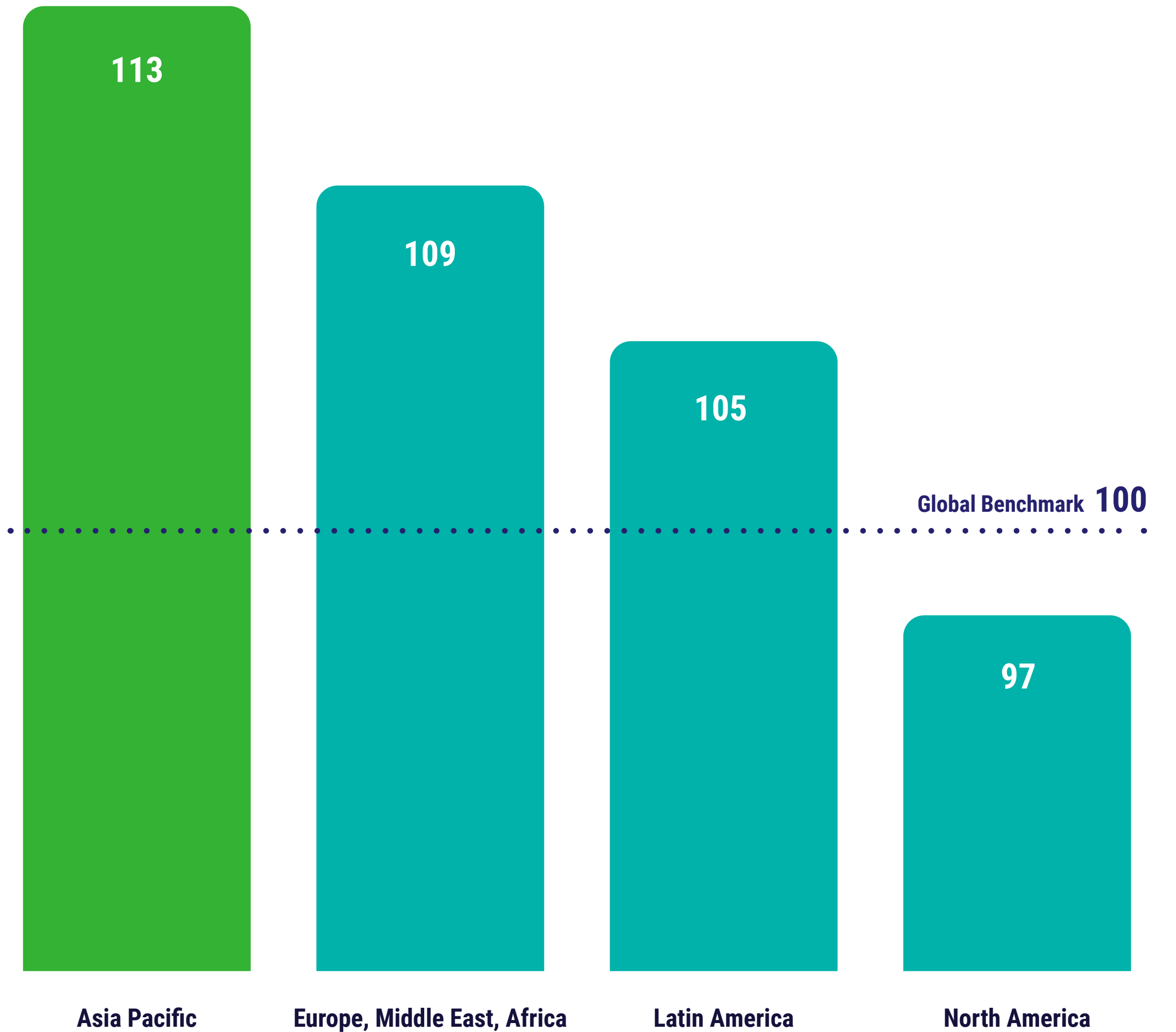
Video

132

Display

107

DV Attention Index by Region



MEDIA QUALITY: ATTENTION

These Ads Command Attention

As shown on the previous page, video performed extremely well, led by strong performance on desktop devices. Display’s excellent results were bolstered by mobile app performance.

The region’s robust exposure and engagement helped boost scores for restaurant, technology and retail verticals.

DV Attention Index Top Verticals

Restaurants			
	Attention 135	Exposure 140	Engagement 130
Technology			
	Attention 124	Exposure 126	Engagement 122
Retail, Home and Fashion			
	Attention 112	Exposure 118	Engagement 106

Methodology

DV Authentic Attention® for open web is comprised of proprietary metrics that measure how effectively a monitored ad captures and maintains user attention.

To begin, DV analyses and scores 50+ impression-level exposure and engagement data points.

Exposure quantifies the presentation of the ad through metrics, including viewable time, share of screen, video audibility and others.

Engagement quantifies user interaction with the ad, including eye tracking, touches, screen orientation, video playback and others.

Exposure, Engagement and Attention overall are indexed to a global average that is updated daily.

[See the full methodology](#)

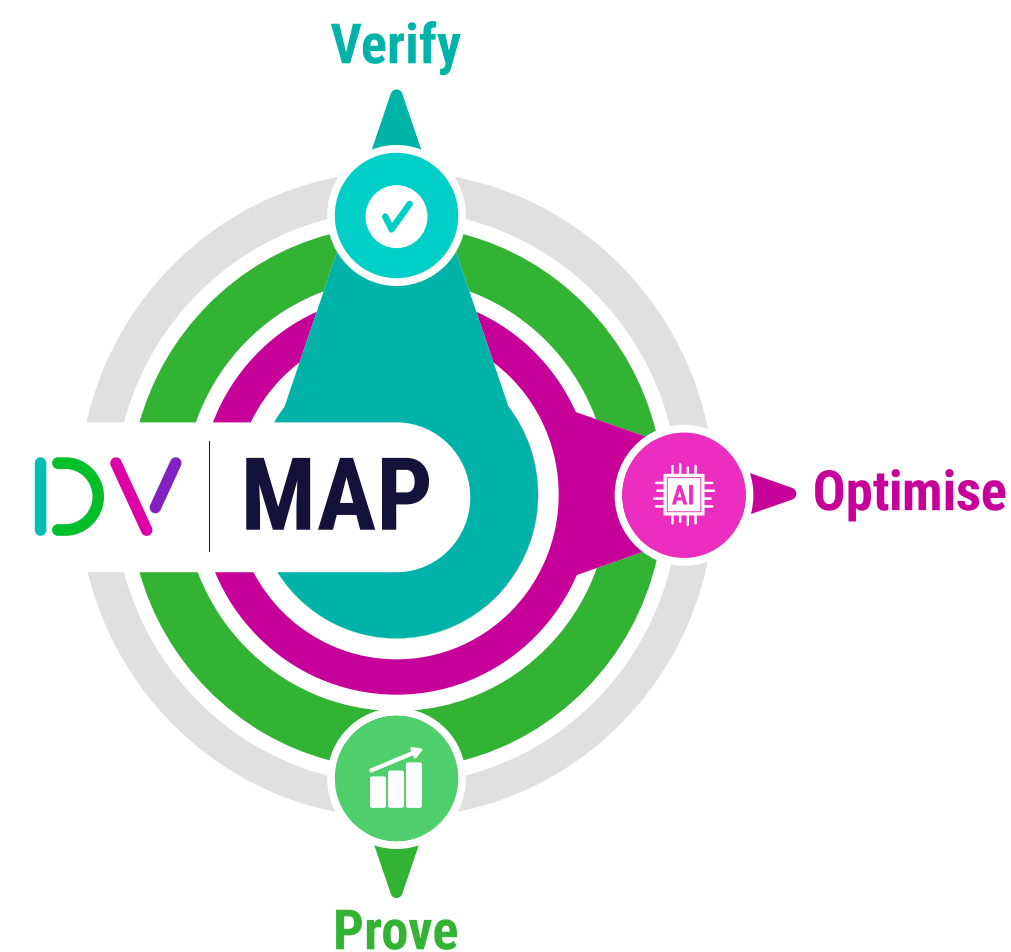
The DV Media AdVantage Platform

The DV Media AdVantage Platform

DV MAP™ pulls together DV's vast capabilities into an all-in-one platform for digital advertising planning and execution.

This report focuses on our Verify offerings, which include or address:

- Fraud**
- Viewability**
- AI Verification**
- Brand Suitability**
- Contextual Segments**
- Attention**



Introducing DV Neura

AI agents are transforming the ways marketers access data, manage workflows and make decisions.



DV Neura™, the fully embedded cognitive engine behind DV MAP, is built for this new reality.

Powered by DV's massive proprietary data and comprehensive, durable integrations with the open web, social, streaming TV and retail media platforms, DV Neura brings trusted intelligence into every layer of campaign planning and execution.

Built on the transparency, trust, accountability and tangible results you expect from us, DV Neura sets a new standard in the industry.

How DV Neura Harnesses AI

Media Intelligence

DV's hybrid AI architecture combines LLMs, specialised machine learning models and deterministic rules for more accuracy and less waste.

Adaptive Performance

AI-powered algorithmic bidding optimises spend. Multi-touch attribution and incrementality measurement deliver performance insights.

Open Connectivity

Optional secure access for third-party agents via APIs, MCP integrations and AdCP support is designed for seamless interoperability.

Agentic Execution

Autonomous agents can plan, inform and improve campaign execution with guardrails defined by the advertiser.

[Learn more about DV Neura](#)

Methodology

Data Notice

Unless otherwise noted, all data in this report is DV proprietary post-bid data filtered to this region. While directionally accurate, reported numbers may not represent the full scope of DV’s protection. DV post-bid monitoring and blocking technology records violations that occur after an ad impression has been purchased. However, DV’s capabilities also include pre-bid technology, which prevents bidding on unsuitable impressions, thereby stopping violations from occurring. An additional layer of protection for video impressions, DV Video Filtering, prevents impressions from serving before they fully load, further reducing violations.

Unless otherwise noted, comparative data points are year-over-year comparisons for data spanning January 1 to December 31, 2025, versus the same time period a year prior.

This report is comprised of DV tag-based data from the open web.

As a point of comparison to DV global customer campaigns, DV created a test campaign with no protections and collected monitoring data for the full year spanning January 1 to December 31, 2025.

To derive wasted spend estimates, DV multiplies total violations by a cost per mille (CPM) of \$3.

Definitions

AI ingests and analyses vast amounts of data to learn language, logic and patterns. This allows it to “understand” a user’s prompt and do what the user is asking.

An **AI agent** (or “agentic AI”) goes a step further. It can make decisions and execute complex tasks, such as processing a merchandise return or building a travel itinerary.

DV Authentic Attention® for open web is comprised of proprietary metrics that measure how effectively a monitored ad captures and maintains user attention. DV analyses and scores 50+ impression-level exposure and engagement data points. “Exposure” quantifies the presentation of the ad through metrics including viewable time, share of screen, video audibility and others. “Engagement” quantifies user interaction with the ad, including eye tracking, touches, screen orientation, video playback and others. Exposure, Engagement and Attention overall are each indexed against a global average that is updated daily.

Generative AI (or “GenAI”) can autonomously create written and visual content based on a user’s prompt.

A **Protected Campaign** is a DV customer advertising campaign that includes some or all pre-bid protections, some or all post-bid protections, or some or all of both.

An **Unprotected Campaign** has no DV protections.

Sapio Survey Methodology

DV contracted with Sapio Research for consumer and marketer surveys. Sample data was collected from online partner panels. The interviews were conducted by Sapio Research in February 2026 using an email invitation and online survey.

Consumers

Sapio surveyed 22,000 consumers from 21 countries in the following regions: Asia Pacific (Australia/New Zealand, India, Indonesia, Japan, Philippines, Singapore, Thailand, Vietnam); Europe, Middle East and Africa (France, Germany, Italy, Netherlands, Saudi Arabia, Spain, United Arab Emirates, United Kingdom); Latin America (Brazil, Colombia, Mexico) and North America (Canada, United States). The survey outcomes are referenced throughout this report, cited as the opinions of consumers.

Marketers

Sapio surveyed 2,020 marketing and advertising decision-makers from 25 countries in the following regions: Asia Pacific (Australia/New Zealand, India, Indonesia, Japan, Philippines, Singapore, Thailand, Vietnam); Europe, Middle East and Africa (Austria, France, Germany, Italy, Netherlands, Poland, Saudi Arabia, Spain, Switzerland, United Arab Emirates, United Kingdom); Latin America (Brazil, Colombia, Mexico); and North America (Canada, United States). The survey outcomes are referenced throughout this report, cited as the opinions of marketers or advertisers.

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 degree 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.

Appendix

Marketer Questions

How concerned are you about using the following AI-related advertising practices? Serving ads next to low-quality generative AI content										
	APAC	Australia	India	Indonesia	Japan	New Zealand	Philippines	Singapore	Thailand	Vietnam
Not at all concerned	12%	11%	12%	4%	8%	12%	7%	14%	21%	20%
Not very concerned	28%	30%	21%	24%	32%	15%	18%	41%	26%	39%
Somewhat concerned	41%	47%	46%	51%	42%	41%	32%	34%	33%	34%
Very concerned	20%	12%	21%	20%	18%	32%	43%	11%	21%	7%

How concerned are you about using the following AI-related advertising practices? Serving ads next to high-quality generative AI content										
	APAC	Australia	India	Indonesia	Japan	New Zealand	Philippines	Singapore	Thailand	Vietnam
Not at all concerned	18%	14%	15%	27%	13%	9%	11%	30%	35%	25%
Not very concerned	38%	48%	21%	51%	47%	32%	20%	39%	35%	45%
Somewhat concerned	30%	27%	34%	20%	35%	35%	36%	23%	26%	20%
Very concerned	14%	11%	30%	2%	5%	24%	32%	9%	5%	9%

How concerned are you about using the following AI-related advertising practices? Leveraging AI solutions to build ad copy/creatives										
	APAC	Australia	India	Indonesia	Japan	New Zealand	Philippines	Singapore	Thailand	Vietnam
Not at all concerned	17%	6%	12%	27%	9%	18%	7%	36%	33%	25%
Not very concerned	36%	45%	15%	51%	43%	32%	30%	36%	42%	39%
Somewhat concerned	33%	44%	44%	20%	43%	29%	25%	16%	21%	23%
Very concerned	14%	5%	29%	2%	5%	21%	39%	11%	5%	14%

How concerned are you about using the following AI-related advertising practices? Serving ads within AI platforms										
	APAC	Australia	India	Indonesia	Japan	New Zealand	Philippines	Singapore	Thailand	Vietnam
Not at all concerned	14%	5%	10%	16%	6%	12%	14%	30%	23%	30%
Not very concerned	35%	41%	25%	40%	43%	29%	16%	41%	47%	34%
Somewhat concerned	35%	44%	36%	31%	45%	35%	32%	20%	23%	25%
Very concerned	16%	11%	29%	13%	6%	24%	39%	9%	7%	11%

Which of the following would make you feel more comfortable about serving ads within AI platforms? Select top three										
	APAC	Australia	India	Indonesia	Japan	New Zealand	Philippines	Singapore	Thailand	Vietnam
Ability to review or approve creatives generated by AI	41%	38%	42%	51%	39%	38%	45%	32%	49%	34%
Verified brand safety and suitability controls	38%	35%	35%	47%	32%	18%	48%	45%	49%	45%
Reliable measurement and attribution of ad performance	36%	35%	39%	36%	39%	32%	32%	20%	47%	39%
Clear data privacy and compliance safeguards	35%	33%	30%	40%	33%	38%	36%	59%	28%	25%
Flexibility to pause, adjust, or exclude placements	33%	35%	36%	31%	32%	18%	27%	41%	44%	30%
Transparent reporting on where ads are served	33%	33%	33%	29%	38%	18%	34%	48%	23%	27%
Third-party verification of impressions and engagement	29%	35%	28%	29%	27%	29%	23%	25%	21%	48%
Control over contextual or content targeting	28%	27%	37%	31%	17%	26%	27%	25%	19%	39%
Nothing would make me feel more comfortable	1%	3%	-	-	3%	6%	-	-	-	-

Consumer Questions

What are the most common ways AI is used in your daily life? Select top three									
	APAC	Australia	India	Indonesia	Japan	Philippines	Singapore	Thailand	Vietnam
Researching various topics (e.g., recipes, meal plans, holidays)	52%	55%	46%	61%	57%	60%	48%	42%	47%
Work-related use	43%	36%	48%	46%	34%	43%	47%	35%	46%
Virtual assistants such as AI chatbots	39%	33%	36%	46%	30%	50%	30%	32%	51%
Online shopping	31%	29%	41%	30%	19%	26%	30%	41%	29%
Health and fitness tracking	24%	24%	32%	19%	18%	26%	22%	27%	26%
Smart home devices	23%	29%	31%	18%	10%	24%	21%	19%	26%
Itinerary planning	21%	14%	18%	18%	19%	12%	29%	30%	24%

For which of the following, if any, do you use AI agents? Select all that apply									
	APAC	Australia	India	Indonesia	Japan	Philippines	Singapore	Thailand	Vietnam
Researching various topics (e.g., recipes, meal plans, holidays)	53%	49%	56%	59%	47%	65%	47%	46%	54%
Work-related use	46%	35%	58%	49%	30%	50%	44%	41%	50%
Virtual assistants such as AI chatbots	38%	33%	52%	33%	21%	39%	32%	48%	37%
Online shopping	33%	28%	47%	29%	18%	38%	26%	33%	36%
Health and fitness tracking	33%	17%	35%	48%	20%	28%	21%	36%	44%
Smart home devices	31%	21%	32%	26%	22%	26%	37%	37%	38%
Itinerary planning	27%	21%	37%	26%	16%	26%	21%	33%	29%
I do not use AI in my daily life	7%	16%	4%	4%	15%	6%	10%	3%	1%

Roughly how frequently do you use AI tools or platforms? Select one									
	APAC	Australia	India	Indonesia	Japan	Philippines	Singapore	Thailand	Vietnam
Several times a day	35%	25%	49%	35%	23%	35%	29%	32%	43%
Several times a week	37%	36%	31%	41%	40%	38%	40%	38%	35%
A few times a month	17%	24%	14%	15%	24%	16%	21%	18%	13%
Once every few months	4%	6%	3%	3%	5%	4%	5%	4%	4%
Less often than this	5%	6%	2%	6%	5%	5%	4%	4%	5%
Never	1%	2%	1%	1%	3%	2%	1%	3%	1%

To what extent do you believe you can tell content has been AI-generated? Select one									
	APAC	Australia	India	Indonesia	Japan	Philippines	Singapore	Thailand	Vietnam
Always	16%	8%	28%	19%	4%	21%	9%	19%	18%
Most of the time	33%	32%	36%	37%	15%	42%	27%	33%	40%
Sometimes	33%	40%	25%	36%	25%	29%	48%	33%	30%
Rarely	9%	10%	7%	5%	21%	5%	10%	8%	6%
Never	3%	3%	2%	1%	12%	1%	2%	2%	2%
Unsure	6%	8%	3%	2%	24%	2%	5%	5%	4%

How, if at all, would each of the following impact your perception of a brand? The brand using AI to create ads that look polished and professional									
	APAC	Australia	India	Indonesia	Japan	Philippines	Singapore	Thailand	Vietnam
Very positively	16%	9%	29%	24%	3%	20%	12%	17%	16%
Somewhat positively	31%	20%	36%	39%	10%	39%	34%	32%	37%
No impact	34%	36%	22%	26%	57%	20%	37%	36%	36%
Somewhat negatively	11%	15%	9%	9%	17%	11%	11%	12%	8%
Very negatively	8%	20%	4%	3%	13%	10%	6%	4%	4%

How, if at all, would each of the following impact your perception of a brand? The brand using AI to create ads that look low-quality, uncanny, or strange									
	APAC	Australia	India	Indonesia	Japan	Philippines	Singapore	Thailand	Vietnam
Very positively	11%	6%	24%	14%	2%	11%	7%	15%	12%
Somewhat positively	19%	11%	26%	20%	7%	21%	18%	24%	22%
No impact	28%	29%	22%	22%	43%	21%	28%	33%	28%
Somewhat negatively	19%	17%	15%	24%	21%	21%	23%	13%	18%
Very negatively	23%	36%	12%	21%	27%	26%	24%	15%	20%

How, if at all, would each of the following impact your perception of a brand? Ads for the brand appearing next to high-quality AI-generated content									
	APAC	Australia	India	Indonesia	Japan	Philippines	Singapore	Thailand	Vietnam
Very positively	15%	8%	30%	20%	3%	17%	10%	16%	14%
Somewhat positively	32%	19%	37%	39%	11%	43%	31%	34%	38%
No impact	34%	38%	20%	27%	59%	20%	38%	37%	35%
Somewhat negatively	12%	17%	8%	11%	15%	12%	14%	9%	9%
Very negatively	8%	19%	5%	3%	11%	9%	6%	4%	5%

How, if at all, would each of the following impact your perception of a brand? Ads for the brand appearing next to low-quality or spam-like AI-generated content									
	APAC	Australia	India	Indonesia	Japan	Philippines	Singapore	Thailand	Vietnam
Very positively	10%	6%	23%	12%	2%	11%	5%	13%	11%
Somewhat positively	18%	10%	25%	21%	5%	21%	18%	24%	21%
No impact	29%	32%	23%	25%	42%	24%	28%	29%	28%
Somewhat negatively	18%	16%	13%	21%	21%	19%	24%	15%	17%
Very negatively	24%	36%	16%	21%	30%	26%	25%	18%	23%

How do you feel about ads being shown within AI platforms? Select one									
	APAC	Australia	India	Indonesia	Japan	Philippines	Singapore	Thailand	Vietnam
Very positive	23%	9%	45%	32%	6%	25%	13%	28%	29%
Somewhat positive	30%	17%	31%	35%	16%	41%	36%	33%	34%
Indifferent	30%	41%	15%	26%	54%	21%	32%	28%	28%
Somewhat negative	10%	14%	7%	6%	14%	9%	13%	8%	6%
Very negative	7%	19%	3%	2%	10%	5%	7%	4%	4%

Would seeing any of the following ads within AI platforms impact how you feel about the brand being advertised? Ads highly relevant to the chat									
	APAC	Australia	India	Indonesia	Japan	Philippines	Singapore	Thailand	Vietnam
Positively impact my perception	42%	27%	58%	57%	15%	60%	38%	44%	39%
No impact on my perception	44%	51%	31%	37%	67%	31%	48%	47%	42%
Negatively impact my perception	14%	23%	12%	6%	17%	9%	13%	10%	19%

Would seeing any of the following ads within AI platforms impact how you feel about the brand being advertised? Ads irrelevant to the chat									
	APAC	Australia	India	Indonesia	Japan	Philippines	Singapore	Thailand	Vietnam
Positively impact my perception	25%	13%	40%	24%	8%	31%	20%	34%	28%
No impact on my perception	46%	46%	38%	45%	61%	37%	44%	52%	50%
Negatively impact my perception	29%	41%	23%	31%	31%	31%	36%	15%	22%

Would seeing any of the following ads within AI platforms impact how you feel about the brand being advertised? Ads alongside negative/sad chats									
	APAC	Australia	India	Indonesia	Japan	Philippines	Singapore	Thailand	Vietnam
Positively impact my perception	23%	12%	37%	27%	7%	27%	18%	33%	27%
No impact on my perception	44%	44%	36%	46%	55%	37%	46%	45%	39%
Negatively impact my perception	33%	45%	26%	28%	39%	36%	36%	22%	34%

Would seeing any of the following ads within AI platforms impact how you feel about the brand being advertised? Ads alongside highly personal chats									
	APAC	Australia	India	Indonesia	Japan	Philippines	Singapore	Thailand	Vietnam
Positively impact my perception	29%	15%	46%	31%	7%	41%	27%	37%	28%
No impact on my perception	43%	43%	33%	41%	63%	35%	45%	46%	42%
Negatively impact my perception	28%	42%	21%	28%	30%	24%	28%	17%	31%



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