Maps as Social Utility

x eye square x horizon | horizon futures

Global Report

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The Transformation

From Point A to Social Connection

"How do I get from Point A to Point B?"

Map services as utilitaristic tools

"What is happening around me?"

Map services are becoming ecosystems for social connection and exploration

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The Digital Map has Changed

This research aims to unpack:

01

The Macro Shift
How maps evolved from navigation tools into daily social habits

02

The Social Canvas
How Snap Map leverages human connection to capture the destinationless consumer

03

The Commerce Catalyst
How an active exploration mindset increases ad openness, transforming digital pins into physical footprints

04

The Brand Playbook
Actionable strategies for modern marketers to bridge the "discovery-to-doorstep" funnel and convert passive browsing into foot traffic

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Comprehensive Approach to Understand User Behavior on Maps

Integrated Three-Phased Study

Maps in My Life Quant Study

- Survey to understand the daily value of maps
- 6,900+ global map users aged 13-44 in the US, CA, FR, GER, UK, KSA
- 3 maps covered: Google Maps, Apple Maps, Snap Map

In-Context Testing

- To understand the effectiveness of sponsored pins on utility vs. social-driven maps
- 11,000+ global map users aged 13-44 in the US, CA, FR, GER, UK, KSA
- 2 maps tested: Snap Maps and a competitor map

Post-exposure Testing

- To validate the long term effect of brand touchpoints
- Conducted 15 to 25 days after In-Context Testing phase
- 2,100+ global map users, between 13-44 in the US, CA, FR, GER, UK, KSA.
- 2 maps tested: Snap Maps and a competitor map

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What we found

Maps have evolved from intent to serendipitous discovery

Maps are no longer just for navigation – 64% of users use maps to actively explore new areas, tying directly with driving directions (62%). Furthermore, 70% enjoy browsing maps even when they have no specific destination in mind.

Snap Maps is the epicenter of serendipity and human connection

Built on human connection, Snap Map drives real-world exploration – 80% check Snap maps to see friend locations, and 29% prefer it over traditional maps for browsing local businesses, restaurants, and events.

Social Maps open doors for commerce and brand building

The 'find and explore' mindset on Social Maps increases openness to brand content, with 71% open to visiting a physical location after seeing it featured as a sponsored pin (led by dining, retail, and entertainment).

Promoted Places amplifies outcomes for brands

Snap Promoted Places creatives proved to be more likable than competitor sponsored pins, lifting metrics across across the purchase funnel, and amplifying overall performance when paired with Snapchat video.

Source: 2026 Maps as Social utility study by eye square, commissioned by Snap Inc. + Horizon Media

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The Evolution of Maps:
From intent to serendipitous discovery

Maps have woven themselves into the fabric of daily habits

71% feel that maps are important to their daily lives

55% state that it would have a significant impact on their lives if they couldn't use map apps

28% explicitly use maps as a way to connect with friends

Source: 2026 Maps as Social utility study by eye square, commissioned by Snap Inc. + Horizon Media, GLOBAL data
Total N=6,929.

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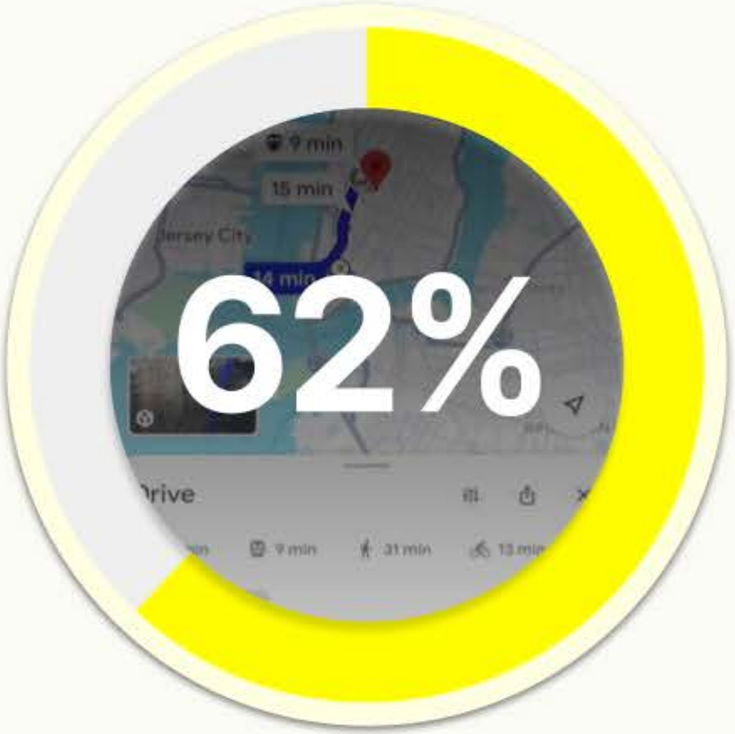
Serendipitous discovery now rivals intent

Use maps to actively explore new areas



Use maps for driving directions

Source: 2026 Maps as Social utility study by eye square, commissioned by Snap Inc. + Horizon Media, GLOBAL data
Total N=6,929.

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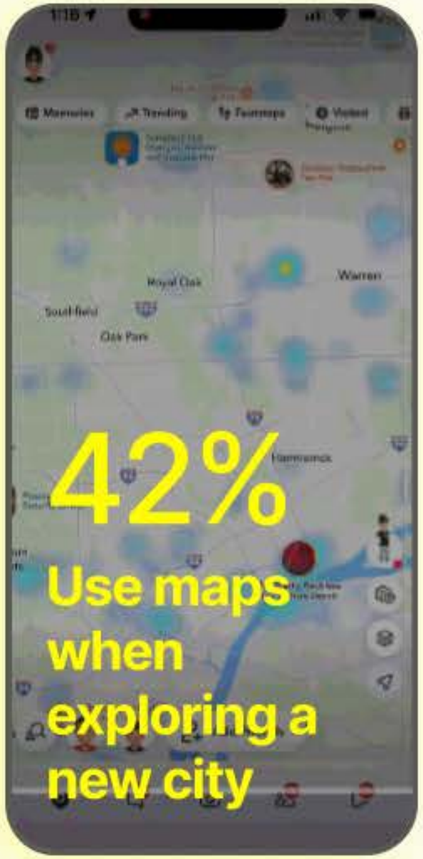
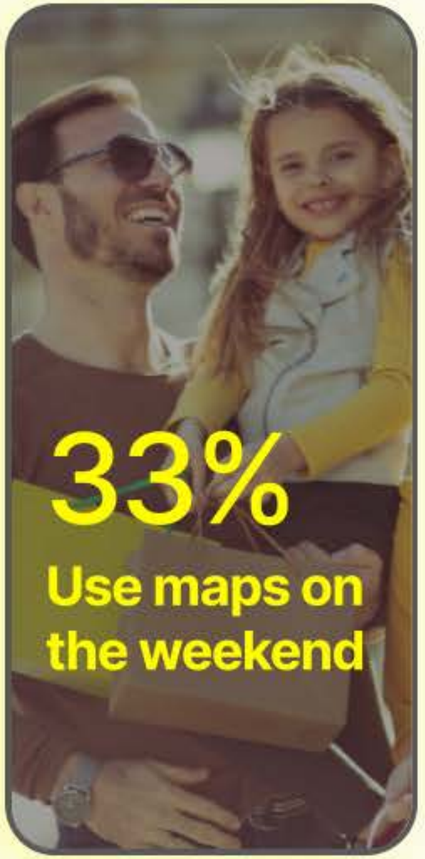
Maps have become a lifestyle tool

Where



When



Source: 2026 Maps as Social utility study by eye square, commissioned by Snap Inc. + Horizon Media, GLOBAL data
Total N=6,929.

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Mindset dictates the map platform

Users divide their mapping habits based on the need to execute a route or discover an experience

The Efficiency Engine
Google Maps

The undisputed benchmark for pure route optimization

89%

open Google Maps strictly when they want to get somewhere

84%

use it for operational efficiency

The Confident Traveler
Apple Maps

Anchored heavily in the emotional reassurance of travel

83%

reporting that it makes them feel more confident

78%

noting that it provides a sense of personal independence

The Social Explorer
Snap Map

Snap Map is the definitive hub for human connection and deciding where to go

80%

use it explicitly to see where friends are located

70%

use Snap Maps to feel more connected

Source: 2026 Maps as Social utility study by eye square, commissioned by Snap Inc. + Horizon Media, GLOBAL data
Google maps N=3,561; Apple maps N=3,368; Snap maps N=6,929.

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horizon futures

eye square

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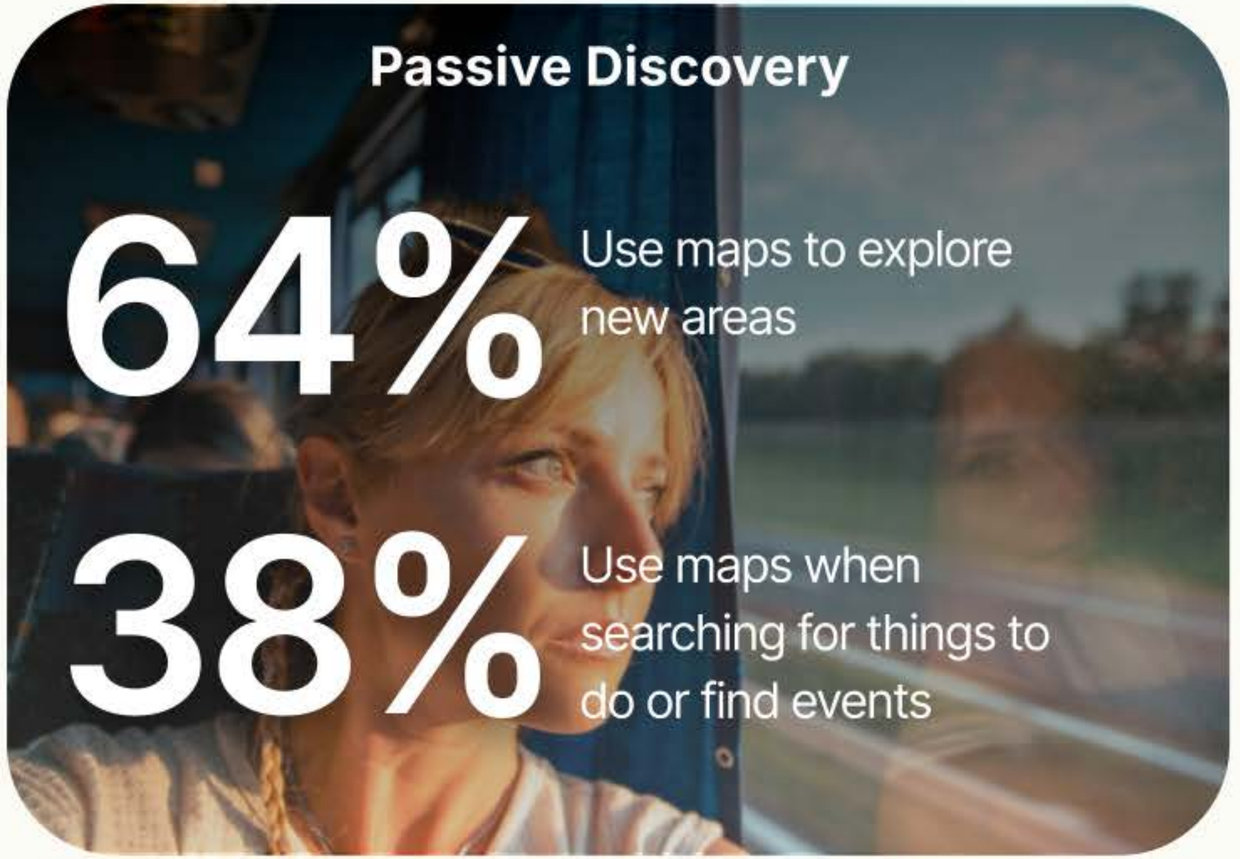
Map browsing is the new digital hangout

The Destinationless Journey

70% Enjoy browsing maps even when they have no specific destination in mind

49% Use maps to kill time

Passive Discovery



64% Use maps to explore new areas

38% Use maps when searching for things to do or find events

Source: 2026 Maps as Social utility study by eye square, commissioned by Snap Inc. + Horizon Media, GLOBAL data
Total N=6,929.

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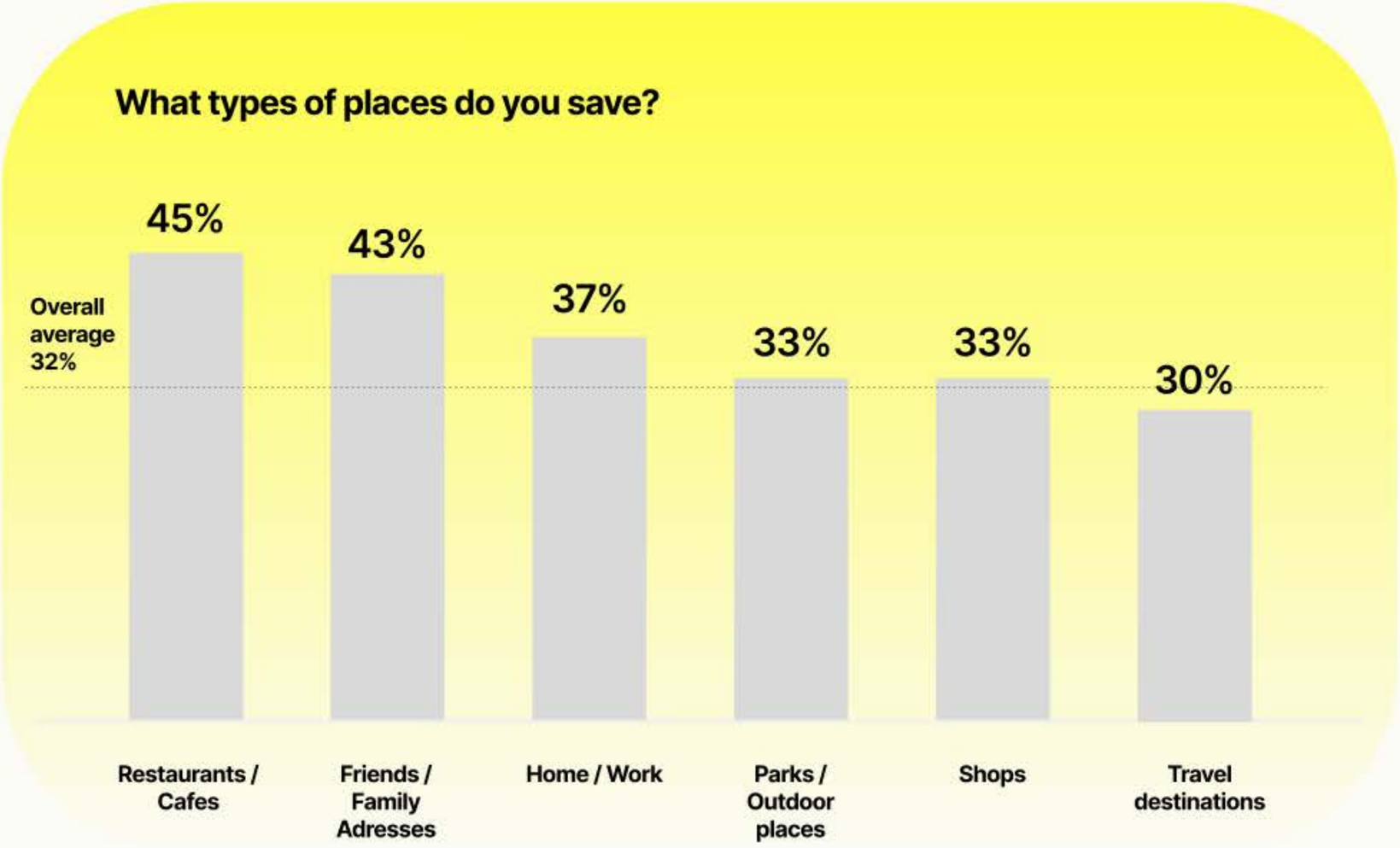
Saved locations on maps drive social influence



68%

Send Interesting places they discover on map directly to others

57%

Regularly share their favorite saved locations

Source: 2026 Maps as Social utility study by eye square, commissioned by Snap Inc. + Horizon Media, GLOBAL data
Total N=6,929.

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Brand Takeaway

Market for the mindset, not just the map:
Discovery is now part of every map journey. Brands must move beyond utility maps to reach consumers on social maps where they browse, discover, and decide where to go.

Snap Map:
The epicenter of serendipity,
connection, and social utility

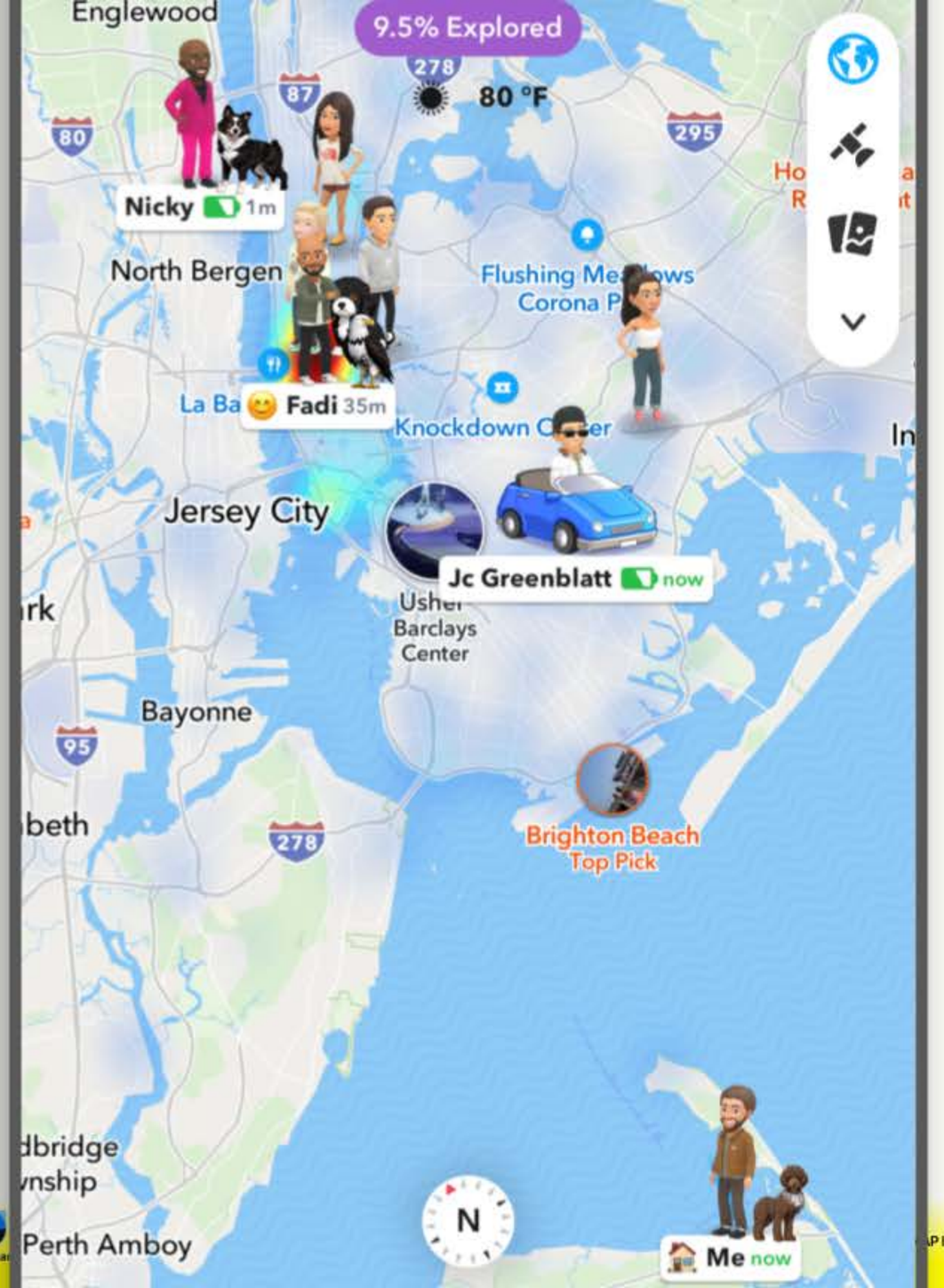
Snapchat is for serendipitous discovery

68%

open Snap Map with absolutely no predetermined destination

2.9x

More likely to discover their favorite place on Snapchat than other platforms



Source: 2026 Maps as Social utility study by eye square, commissioned by Snap Inc. + Horizon Media, GLOBAL data
Total N=6,929.

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Snap maps are built on human connection

Friend Finding

76%

Consult Snap maps to see exactly where their friends are.

Social Sharing

73%

Use Snap maps to broadcast their location with friends and others.

Social Proofing

60%

Use Snap maps to see what people are posting about a location before showing up.

Real World Connection

27%

Use it to directly coordinate face-to-face meetups.

Source: 2026 Maps as Social utility study by eye square, commissioned by Snap Inc. + Horizon Media, GLOBAL data
Total N=6,929.

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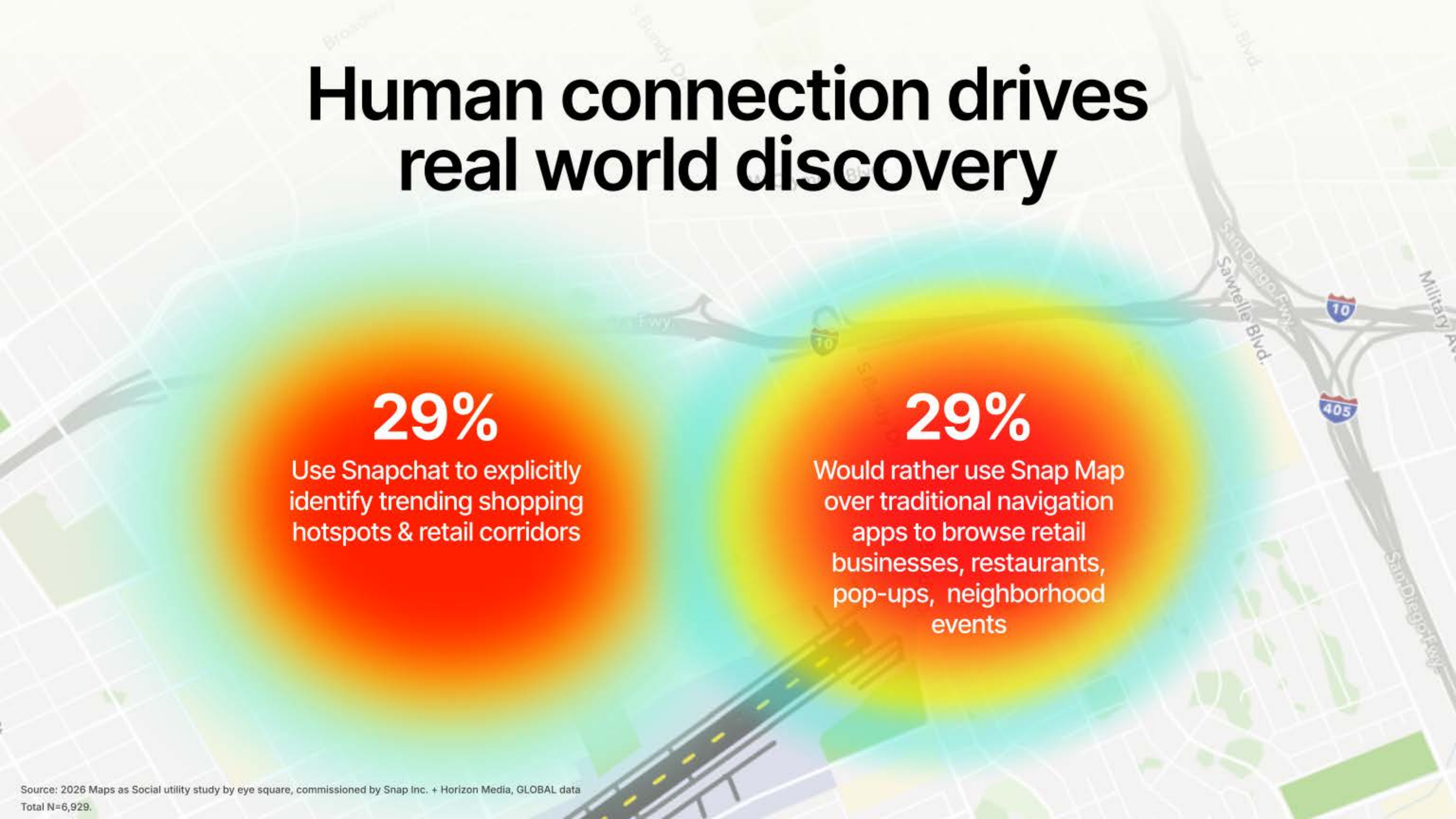
Human connection drives real world discovery



29%

Use Snapchat to explicitly identify trending shopping hotspots & retail corridors

29%

Would rather use Snap Map over traditional navigation apps to browse retail businesses, restaurants, pop-ups, neighborhood events

Source: 2026 Maps as Social utility study by eye square, commissioned by Snap Inc. + Horizon Media, GLOBAL data
Total N=6,929.

Shared discoveries ignite a WOM network effect

57%

actively share their favorite saved locations on Snap Map with others

Top actions consumers were prompted to do after seeing a friend or trending location on Snap Map

1. Share location with others
2. Look at map
3. Saved location or screenshot
4. Messaged friend about the location

Source: 2026 Maps as Social utility study by eye square, commissioned by Snap Inc. + Horizon Media, GLOBAL data
Total N=6,929.

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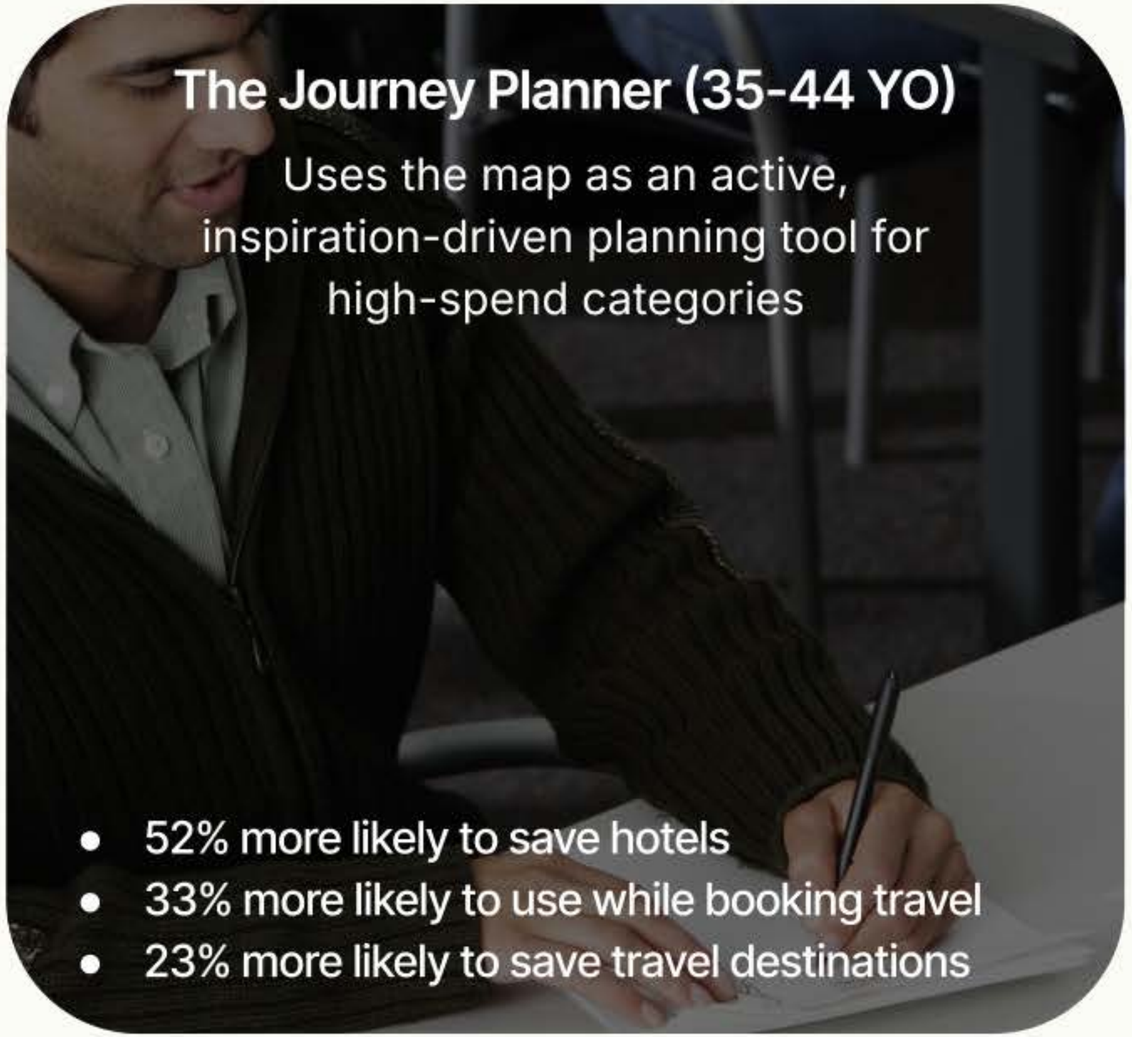
Two distinct archetypes ground the Snap Map audience

The Real-Time Socializer (13-17 YO)

Deeply integrated into their real-time peer groups and local ‘vibe’ checking

- 25% more likely to search for things to do
- 23% more likely to save their friends and families address
- 17% more likely to message friends about a trending location



The Journey Planner (35-44 YO)

Uses the map as an active, inspiration-driven planning tool for high-spend categories

- 52% more likely to save hotels
- 33% more likely to use while booking travel
- 23% more likely to save travel destinations

Source: 2026 Maps as Social Utility study by eye square, commissioned by Snap Inc. + Horizon Media, GLOBAL data. 13–17 YO (N=1,699) comparisons are against 18–44 YO (N=5,230); 35–44 YO (N=1,686) comparisons are against 13–34 YO (N=5,243). All indicated differences are statistically significant at the 90% confidence level.

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Brand Takeaway

Shift from search utility to social discovery: By leveraging social maps like Snap, brands can capitalize on foot traffic fueled by human connection and serendipitous discovery, especially among the Real-time Socializer and Journey Planner

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Brand Opportunity:

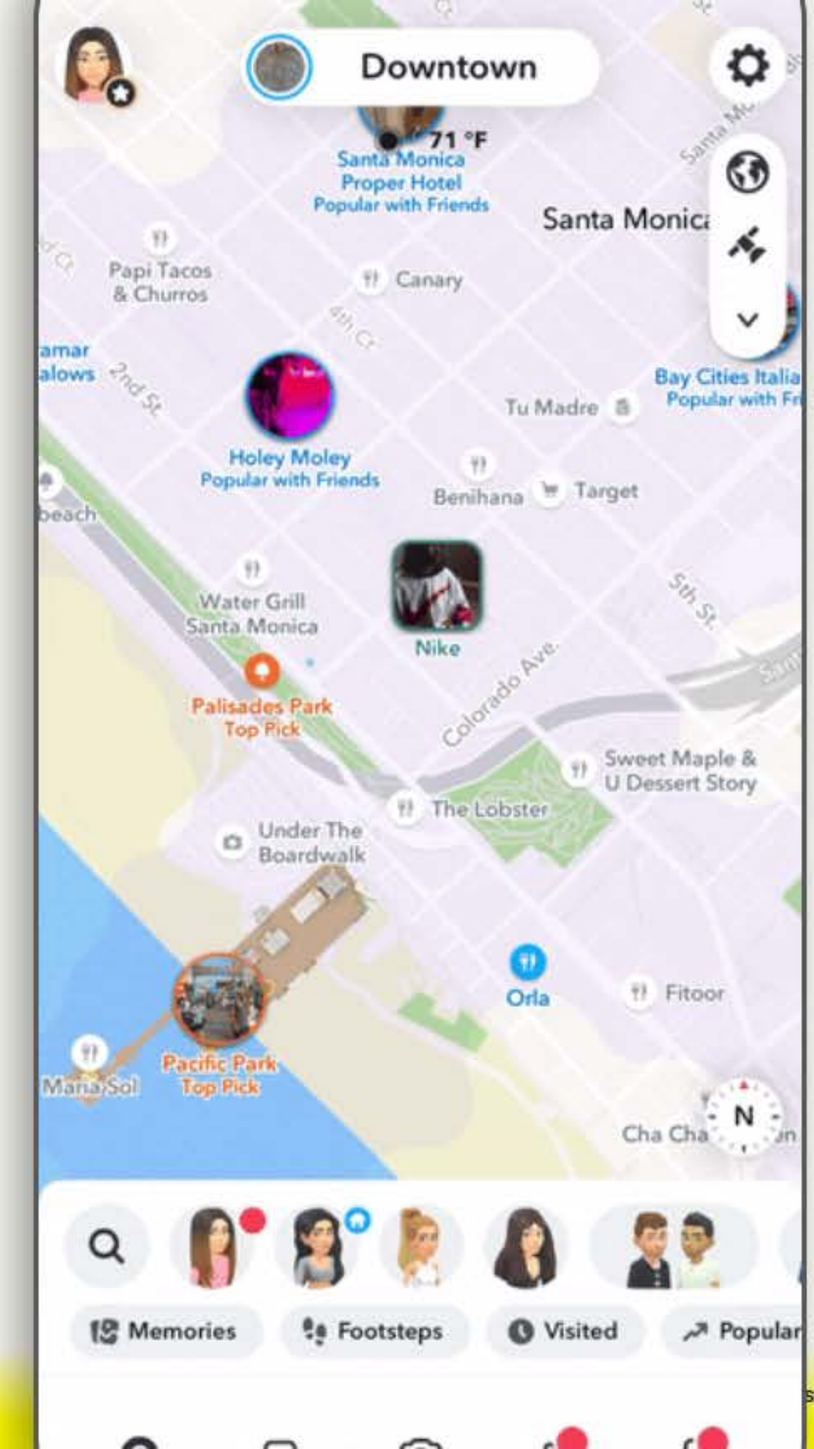
Social Maps open doors for commerce and brand building

“Find and explore” mindset on Social Maps garners high openness to brand content

71%

are open to visiting a physical location after seeing it featured as a sponsored pin

I am looking for ideas › I discover places › I explore options › I make better decisions



Source: 2026 Maps as Social utility study by eye square, commissioned by Snap Inc. + Horizon Media, GLOBAL data
Total N=6,929.

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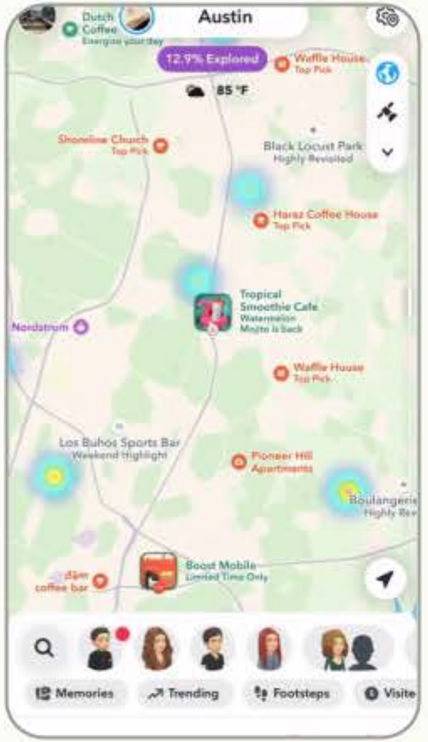
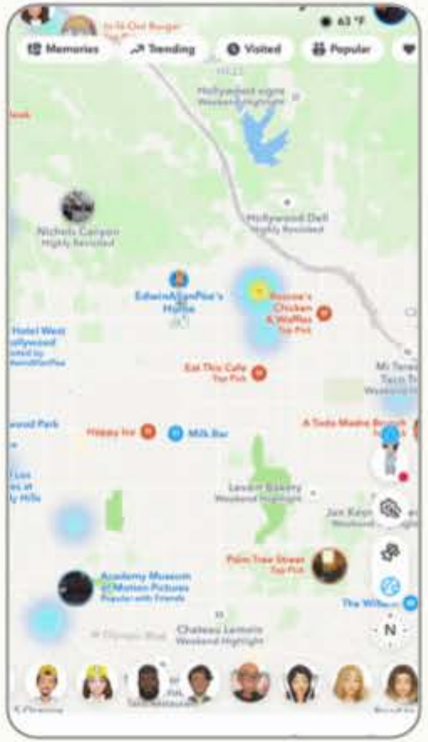
Consumers embrace map ads across lifestyle categories

% who ranked a category as their top 3 for sponsored pins



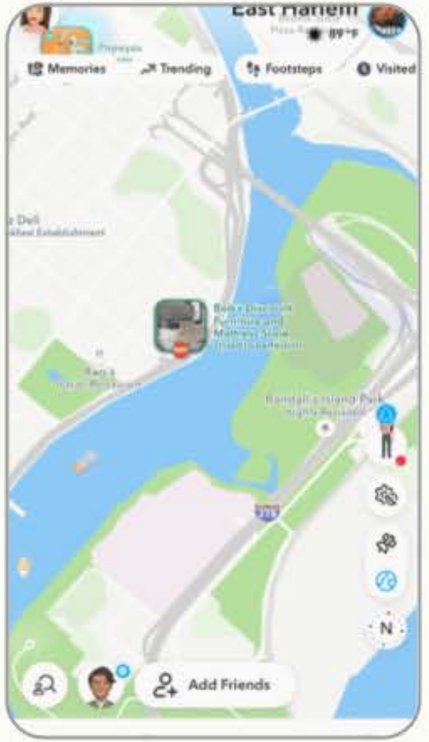
44%

RESTAURANTS



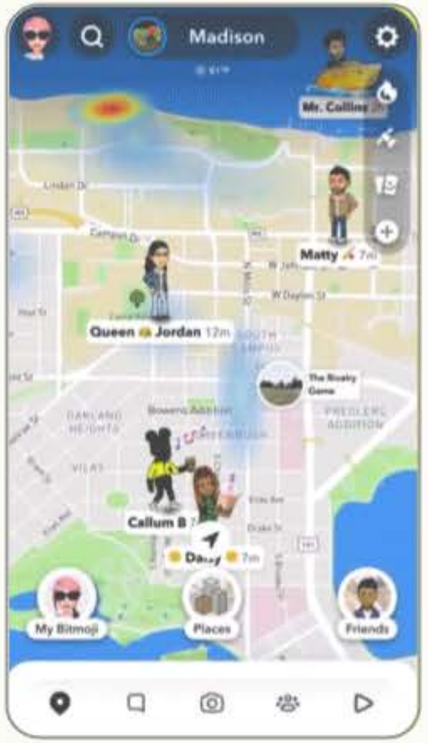
36%

ENTERTAINMENT



31%

RETAIL



30%

TOURIST ATTRACTIONS

Source: 2026 Maps as Social utility study by eye square, commissioned by Snap Inc. + Horizon Media, GLOBAL data
Total N=6,929.

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Seeking high utility brand messaging that makes their lives easier

% of consumers interested in brand messaging type

Directions, "Get Me There" Prompts	76%
Practical Info Alerts	73%
Local Event Promotions	73%
New Store Opening Nearby	73%
Personalized Location Recommendations	72%

Source: 2026 Maps as Social utility study by eye square, commissioned by Snap Inc. + Horizon Media, GLOBAL data
Total N=6,929.

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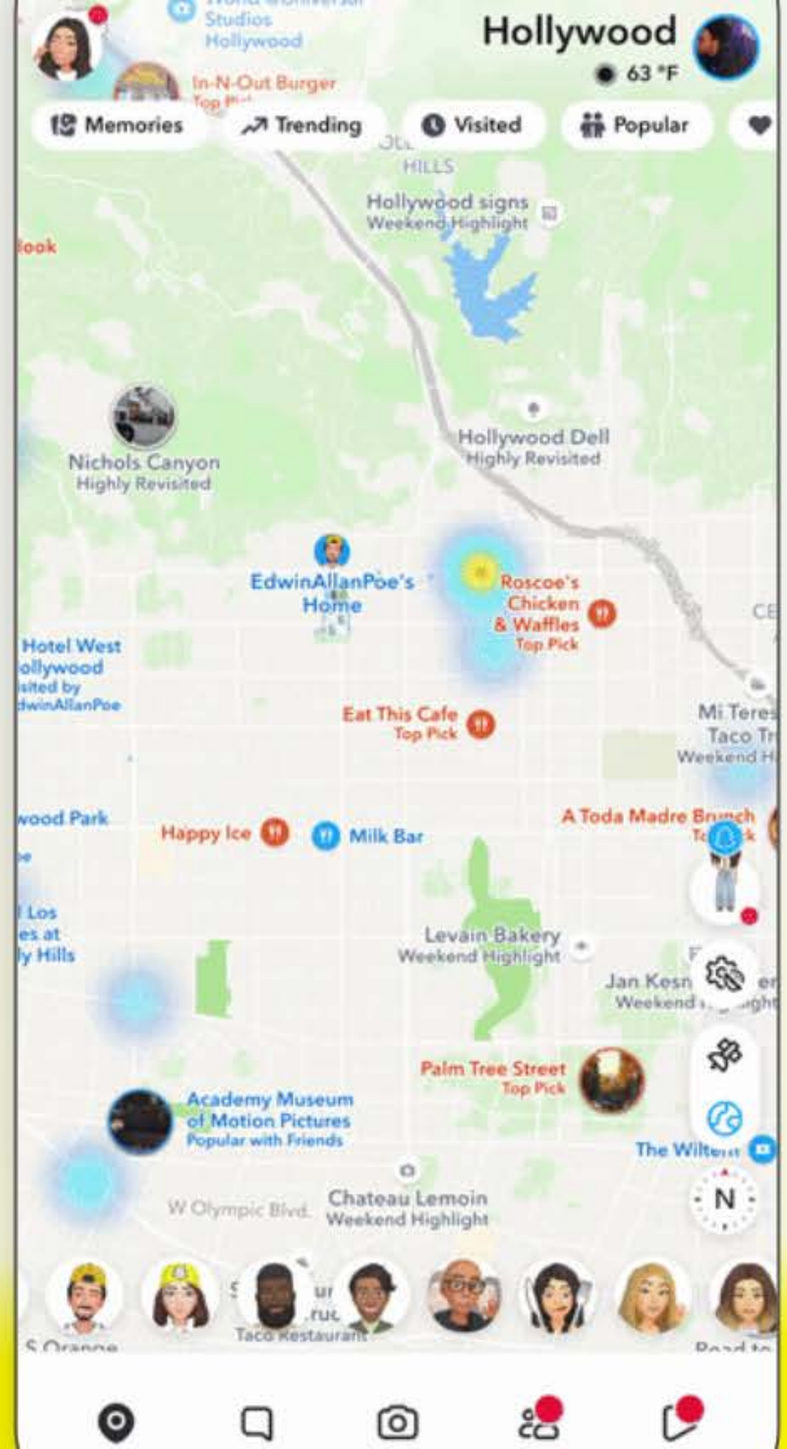
To understand Social Map ad effectiveness, we put Promoted Places to the test

Key questions:

1. How do Sponsored Pins on Social Maps perform (Promoted Places on Snap Maps) vs. Sponsored Pins on Utility maps?
2. What's the impact of adding Promoted Places to a video buy on Snapchat?



Visually Boosted Presence

Your location is visually boosted on Snap Map as a sponsored pin

Enriched Brand Experience

The experience is enhanced with brand content and creative storytelling

Deeper Exploration

Users can continue to explore through the Place Profile and Snap Ad experience

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What we tested

Controlled testing using an experimental design survey to measure the impact of map ads on branding KPI (Total N = 11,020)

Sixteen brand verticals:
QSR, Entertainment, Apparel Retail, Shoe Retail, Luxury Apparel, Retail, Sportswear Retailers, Luxury Watches, Premium Apparel, Jewellery, Coffee Shops, Home Textiles, Entertainment, Pharmacy, Fitness Centres, Telco

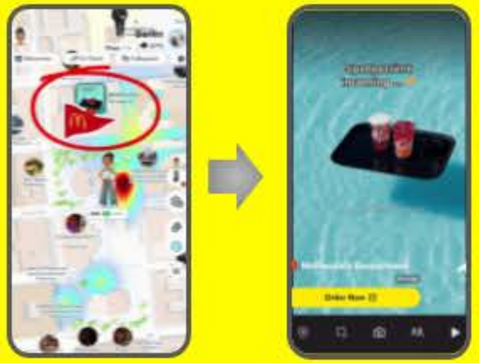
Promoted Places
On Snapchat Map

Promoted Places was injected into the Snap Map

Snapchat Video
On Snapchat Spotlight

Video ad was injected into Spotlight feed

Synergy
On Snapchat Map + On Snapchat Spotlight



Exposed to Promoted Places + Snapchat video

Sponsored Pin
On Utility Map

Promoted Pin injected into Utility Map

Example Ads: McDonald's

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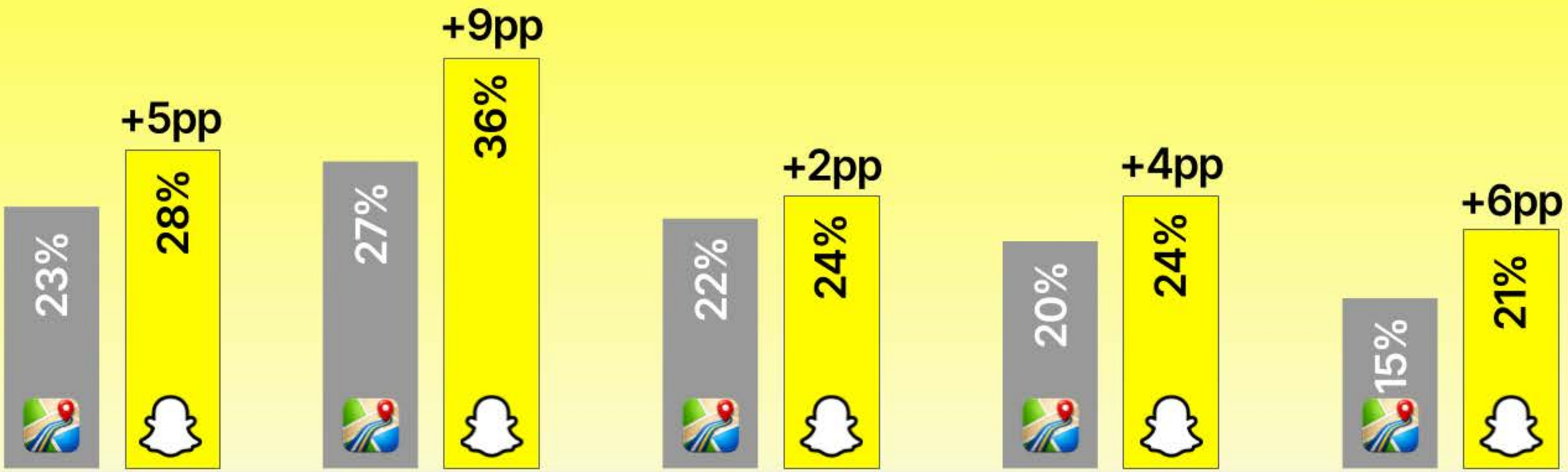
Promoted Places creatives were more likeable

Evaluation of Sponsored Pins



Source: 2026 Maps as Social utility study by eye square, commissioned by Snap Inc. + Horizon Media, GLOBAL data
Promoted Places (Snap Map) N= 12,505, Sponsored Pin (Utility Map) N= 11,020. Percent point (pp) differences are significant (90% CL).
Base: Sponsored Pin (Utility Map).

Sponsored pins on utility map

Promoted places on snap map

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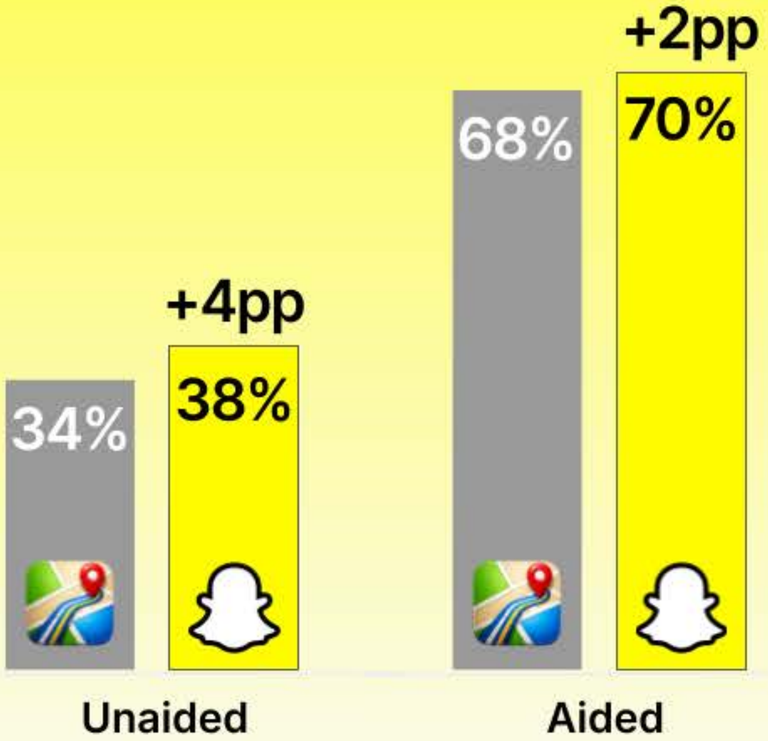
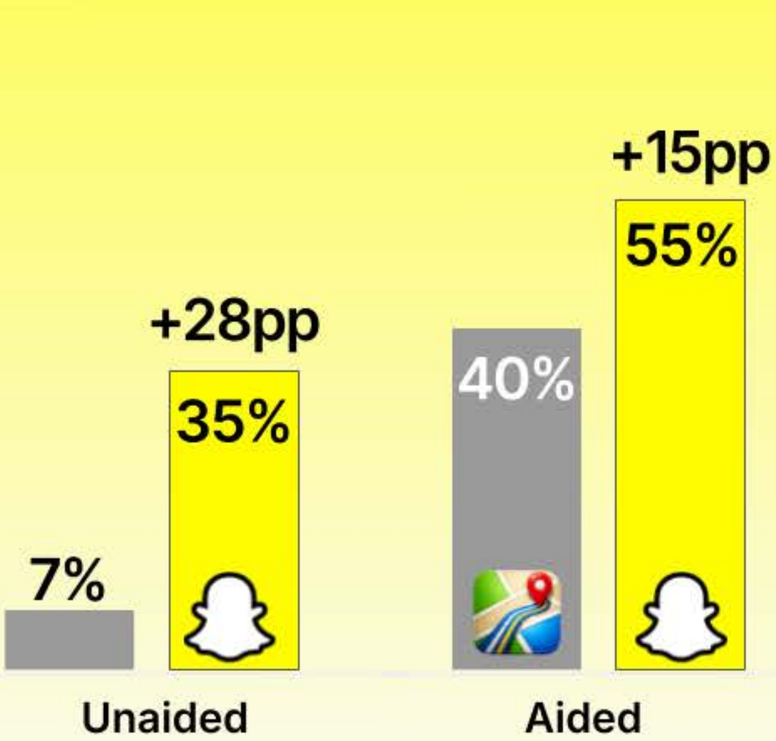
Promoted Places outperformed across upper funnel metrics

Brand Awareness



Ad Recall



Source: 2026 Maps as Social utility study by eye square, commissioned by Snap Inc. + Horizon Media, GLOBAL data
Promoted Places (Snap Map) N= 8,318, Sponsored Pin (Utility Map) N= 11,020. Percent point (pp) differences are significant (90% CL).
Base: Utility Map.

Sponsored pins on utility map

Promoted places on snap map

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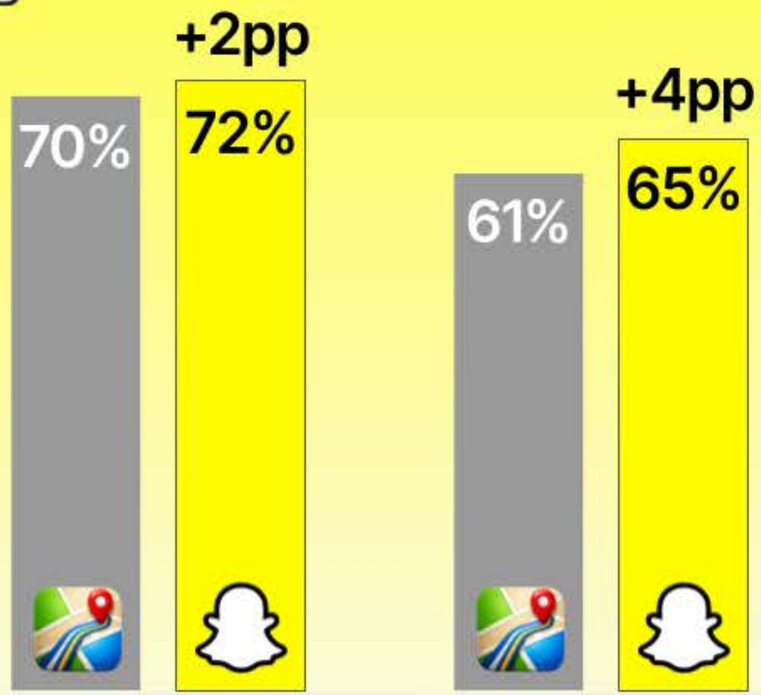
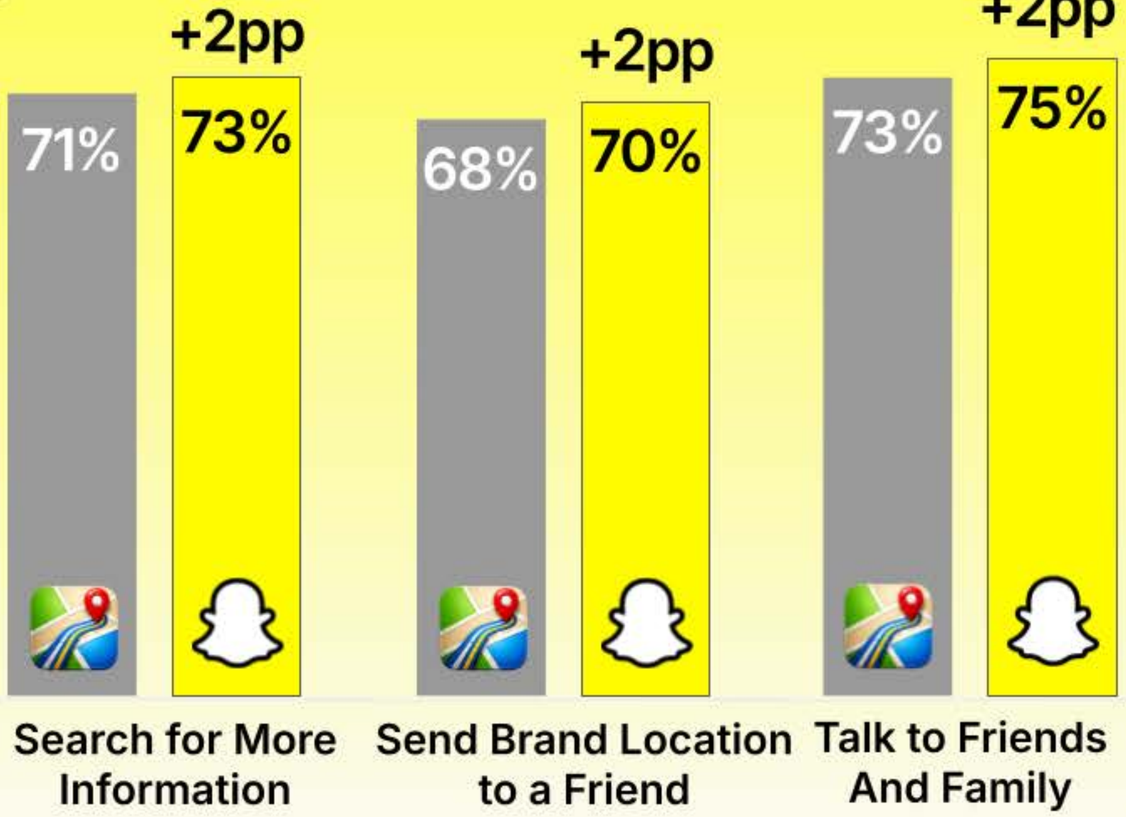
Also successfully driving lower funnel metrics & activation

Purchase Intent



Activation



Source: 2026 Maps as Social utility study by eye square, commissioned by Snap Inc. + Horizon Media, GLOBAL data
Promoted Places (Snap Map) N= 8,318, Sponsored Pin (Utility Map) N= 11,020. All depicted differences are significant (90% CL).
Base: Utility Map.

Sponsored pins on utility map

Promoted places on snap map

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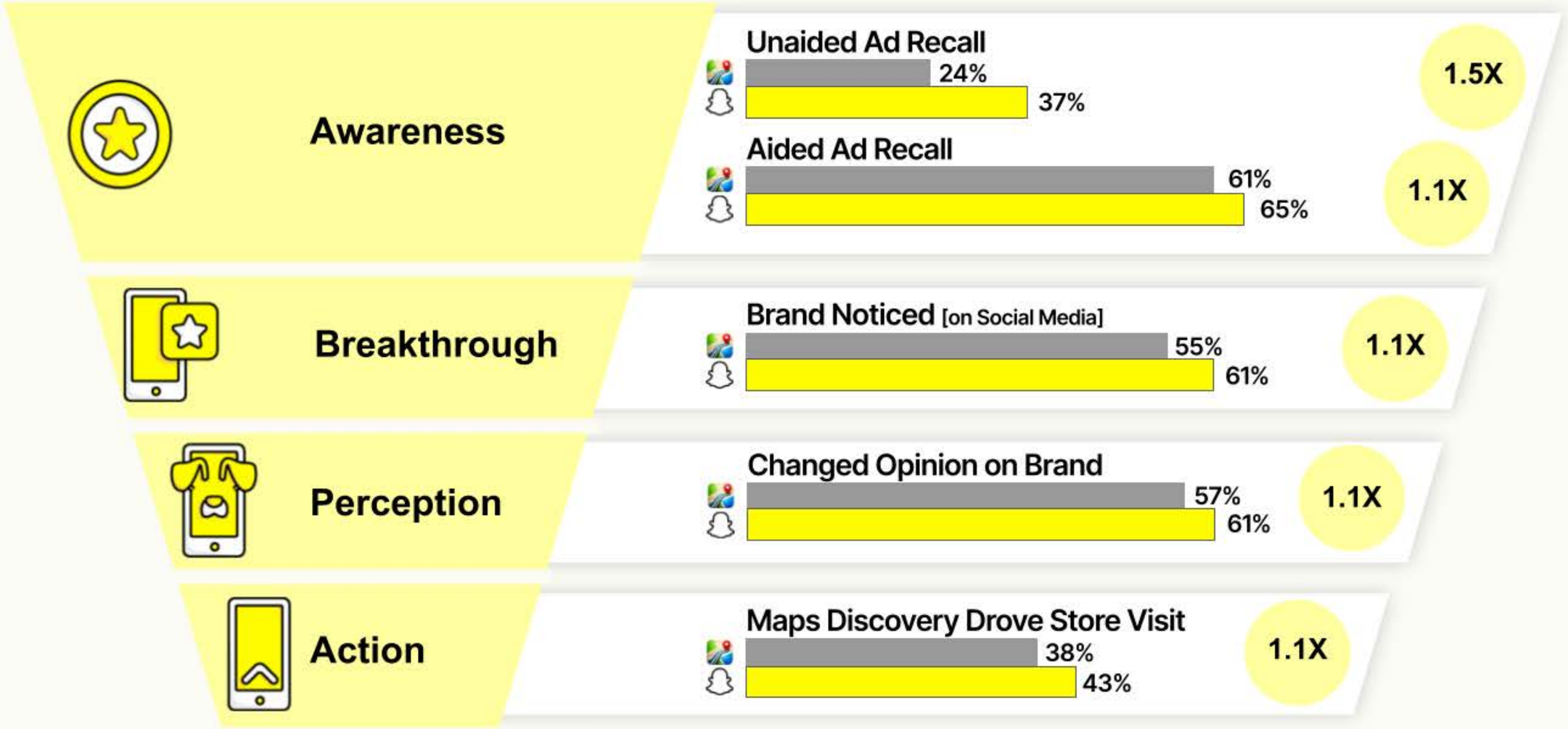
Promoted Places drove brand impact 14-25 days post-exposure



Source: 2026 Maps as Social utility study by eye square, commissioned by Snap Inc. + Horizon Media, GLOBAL data
Promoted Places (Snap Map) N= 1,671, Sponsored Pin (Utility Map) N= 2,182. All depicted differences are significant (90% CL).
Base: Utility Map.

Sponsored pins on utility map

Promoted places on snap map

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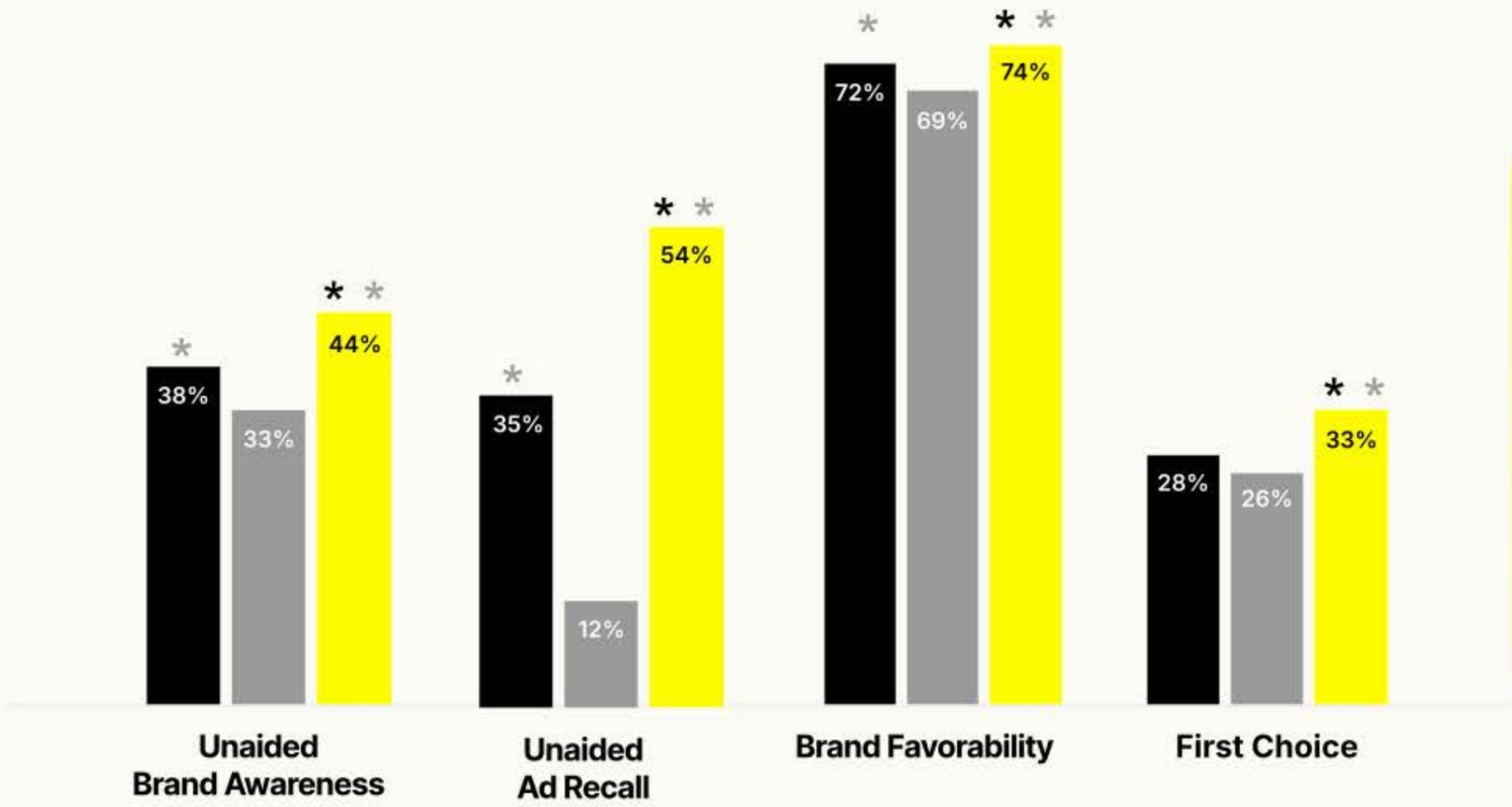
Adding Promoted Places to the mix amplifies brand outcomes on Snapchat



Source: 2026 Maps as Social utility study by eye square, commissioned by Snap Inc. + Horizon Media, GLOBAL data
Promoted Places (Snap Map) N= 8,318, Snapchat Video (Spotlight) N= 8,353, Synergy [Promoted Places + Snapchat Video] N= 8,339.
Asterisks indicate significant differences (90% CL).
Black Asterisk: base: Promoted places (Snap Map); Gray Asterisk: Base: Snapchat Video (Spotlight)

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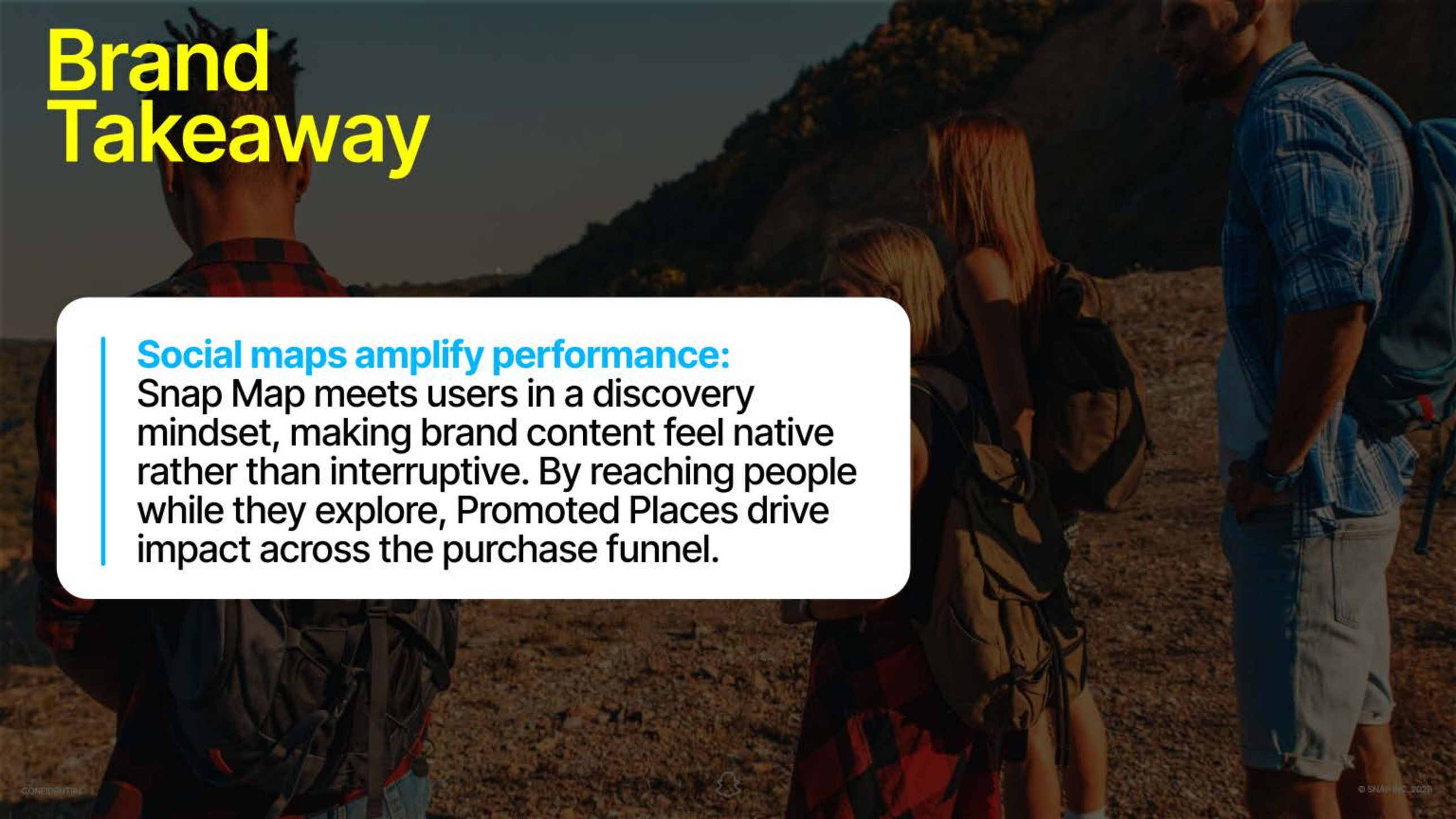
Brand Takeaway



Social maps amplify performance:
Snap Map meets users in a discovery mindset, making brand content feel native rather than interruptive. By reaching people while they explore, Promoted Places drive impact across the purchase funnel.

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The Brand Playbook for Social Maps

Shift from passive pins to purchase-driving experiences

01

Engineer serendipity, don't just buy search

Map marketing is shifting from intent-based SEO to passive discovery. Optimize for visual serendipity. A pin must be an invitation, not just a logo.

02

Turn foot traffic into measurable social proof

A cluster of friend avatars at a location is more powerful than any ad. Brands should incentivize check-ins, list saves, and pin shares to create a ripple effect.

03

Use native utility as the creative concept

Ads on social maps succeed when they function as a service. Replace traditional ad copy with hyper-localized utility.

04

Bridge "Discovery-to-Doorstep"

The map reaches consumers who are mobile and ready to spend. Trigger dynamic, time sensitive offers to convert passive browsing into immediate real-world foot traffic.

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Thank you!

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Appendix

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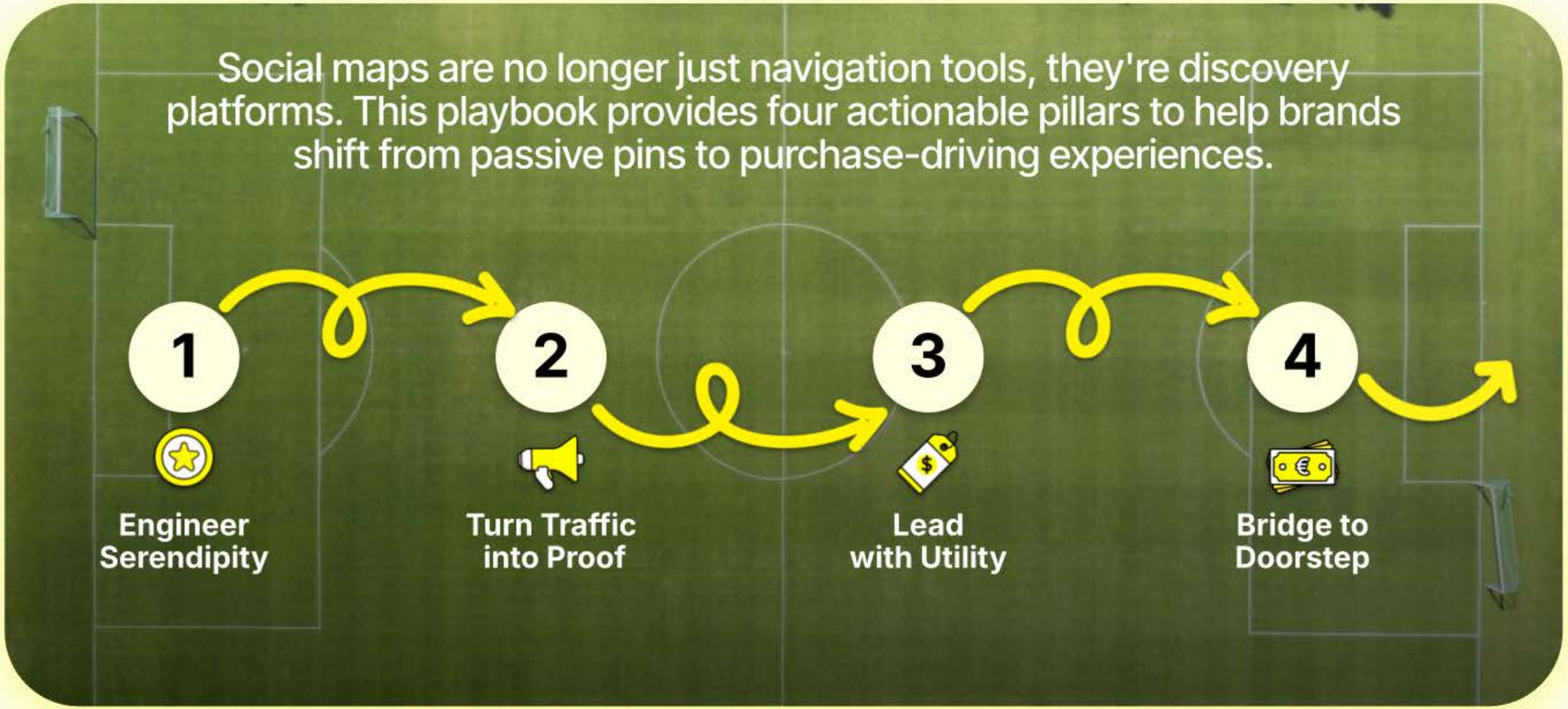
The Brand Playbook for
Social Map

The Brand Playbook for Social Maps



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Engineer serendipity, don't just buy search

THE INSIGHT

Map marketing is shifting from intent-based SEO ("pizza near me") to **passive discovery**. The goal isn't just to be found: it's to be stumbled upon

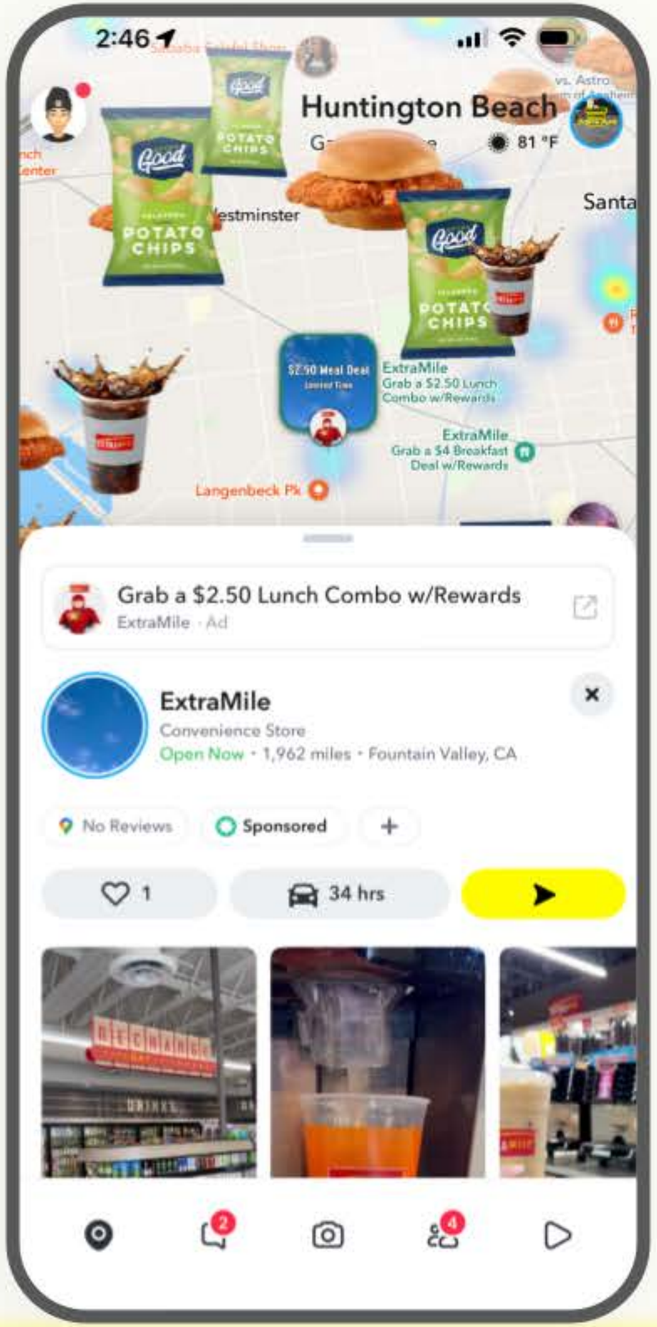
THE ACTION

Optimize for **visual serendipity**. A pin must be an invitation, not just a logo.

73%
Agree that maps helped them discover places they never knew existed

Snap promoted pins are
1.3X
easier to notice versus competitor maps

70%
are interested in seeing limited time offers / flash sales on their map service



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Turn traffic into measurable social proof

THE INSIGHT

A cluster of friend avatars at a location is **more powerful** than any ad. A brand's location isn't just an address; it's a **social hub**.

THE ACTION

The creative brief isn't about impressions; it's about **engineering social proof**. Brands should incentivize check-ins, list saves, and pin shares to create a ripple effect

76%

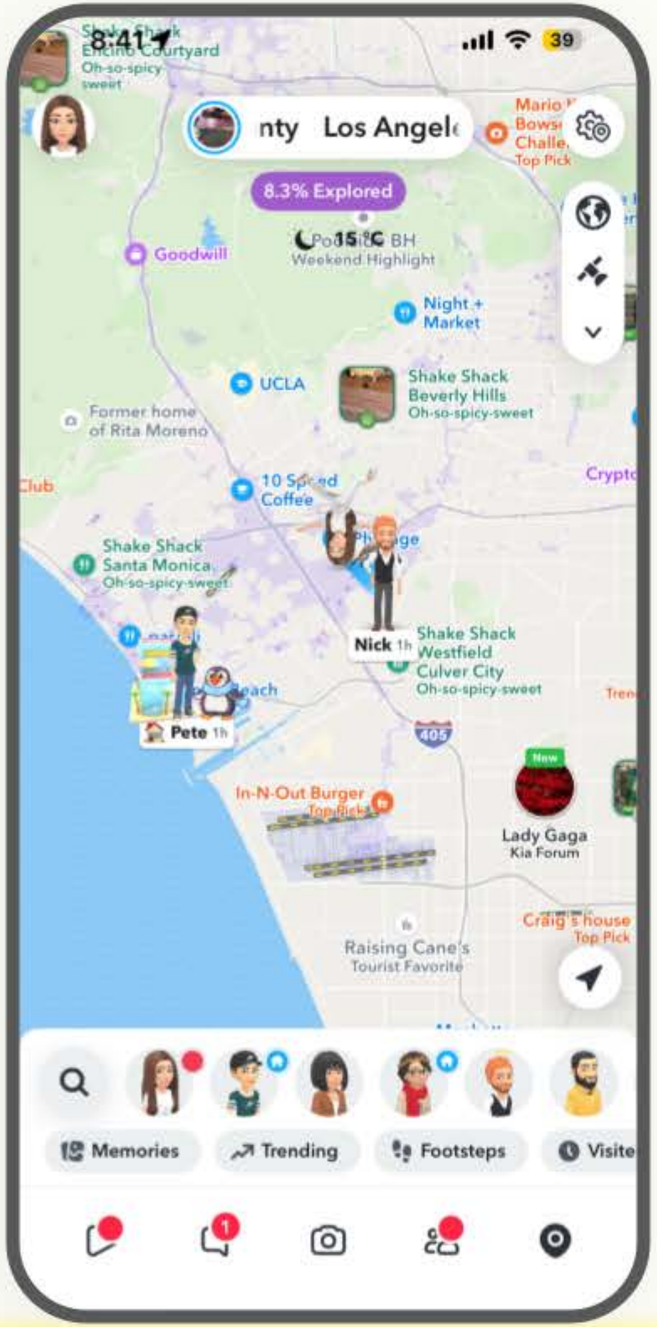
Of Snap users consult snap map to see exactly where their friends are

60%

Of Snap users check the snap map to see what others post about a location

57%

Of Snap users share their favorite saved locations



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Use native utility as the creative concept

THE INSIGHT

Ads on social maps succeed when they function as a service. Thoughtful map content makes a brand feel more helpful and innovative.

THE ACTION

Replace traditional ad copy with hyper-localized utility. Don't say, "Try our new coffee." Say, "You're 3 blocks away, we have no line, and here's a button for walking directions."

76%

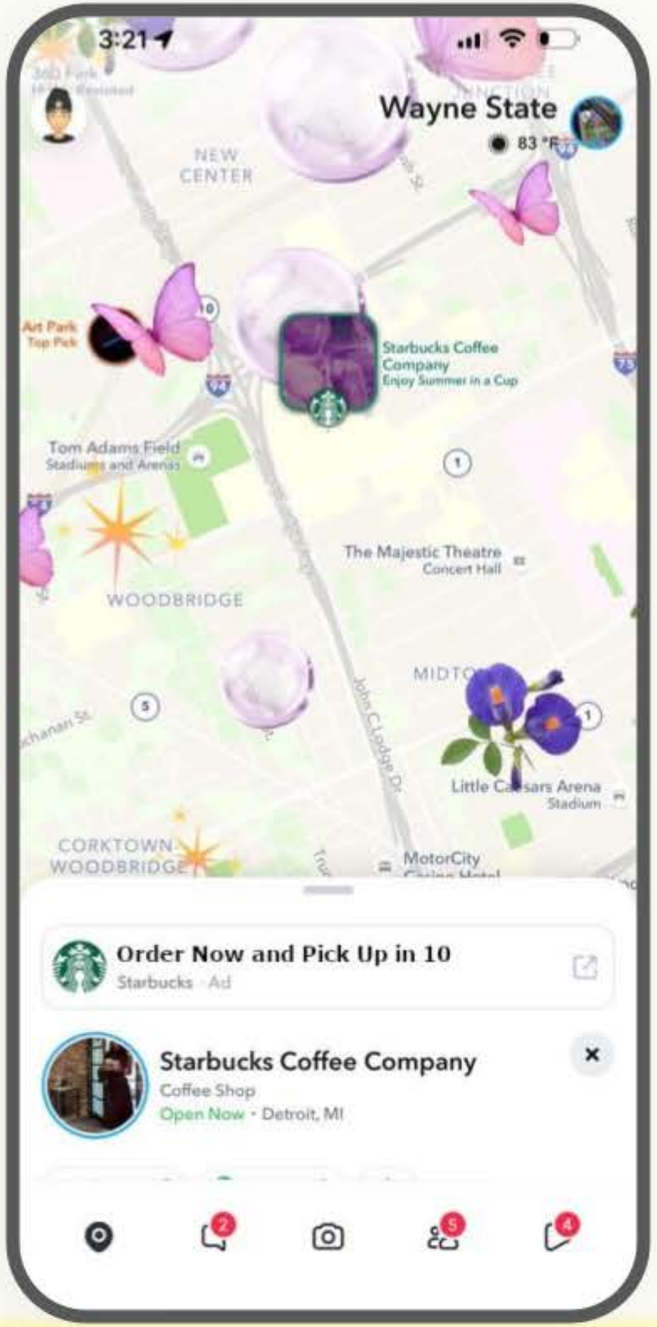
would like to see "directions and get me there" ads

72%

would like to see personalized recommendation ads

73%

would like to see local event promotion ads



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Bridge the “Discovery-to-Doorstep Funnel”

THE INSIGHT

The map offers the **shortest marketing funnel** in existence, reaching consumers who are mobile and **ready to spend**.

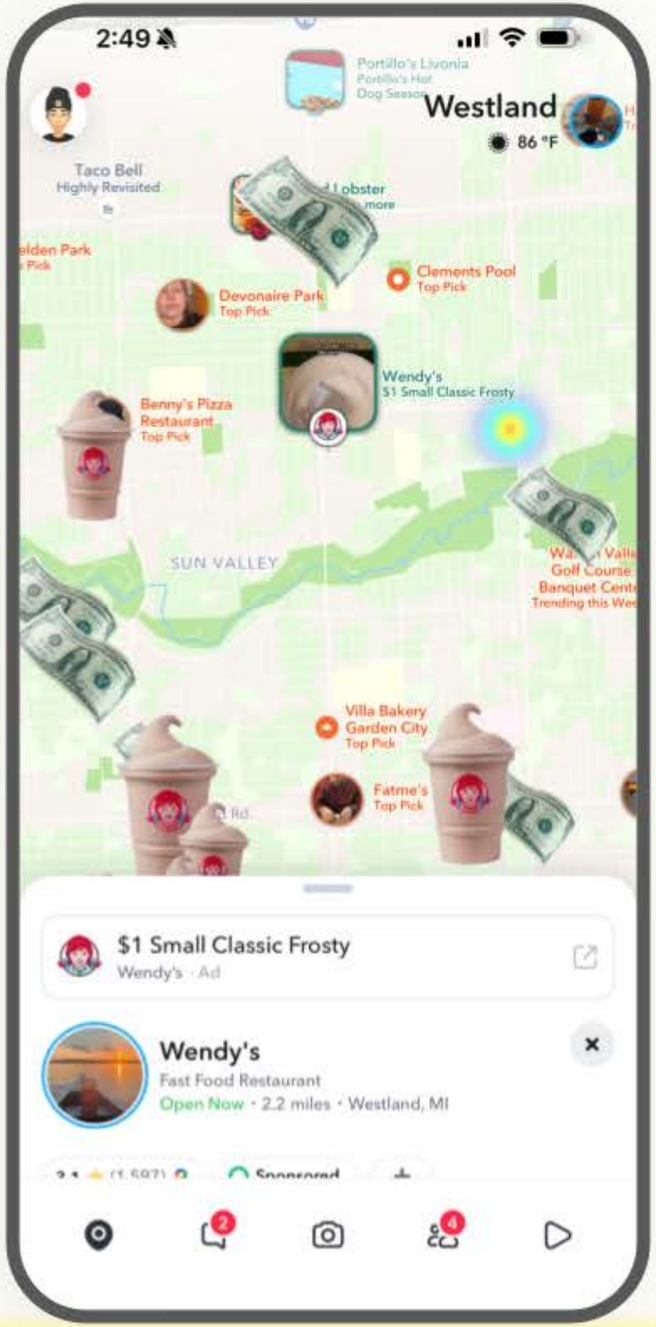
THE ACTION

Trigger dynamic, **time-sensitive offers** (e.g. coupons, flash sales) to convert passive browsing into immediate, **real-world foot traffic**.

1.1X
stronger unaided awareness for Snap promoted pins compared to competitor

5.0X
higher unaided ad recall on Snap Maps vs. competitor

1.1X
higher motivation to visit a store after seeing Snap promoted pins vs. competitor



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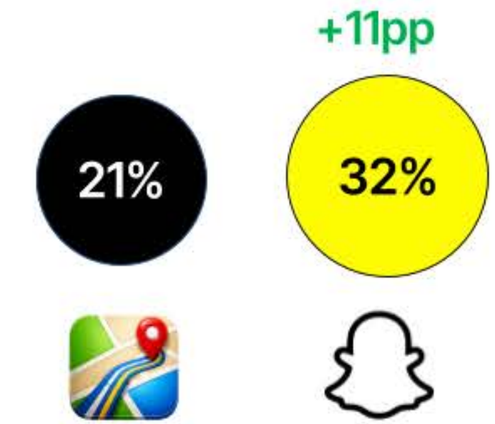
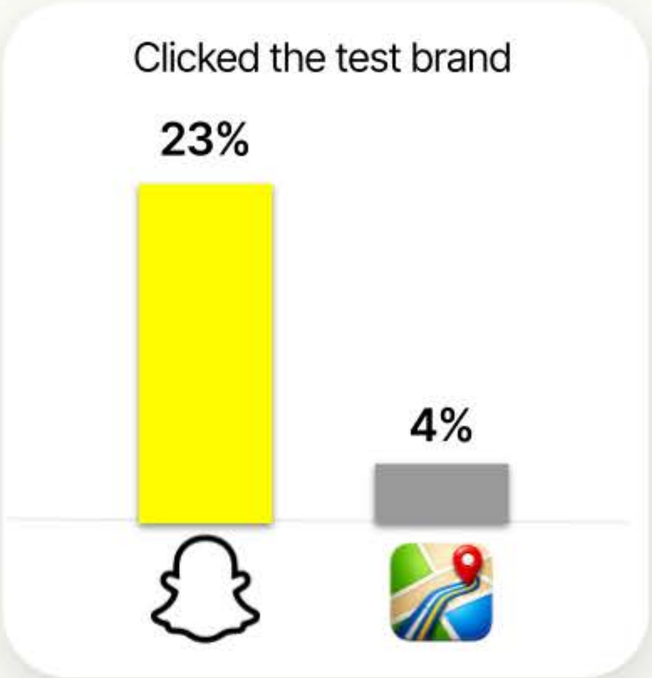
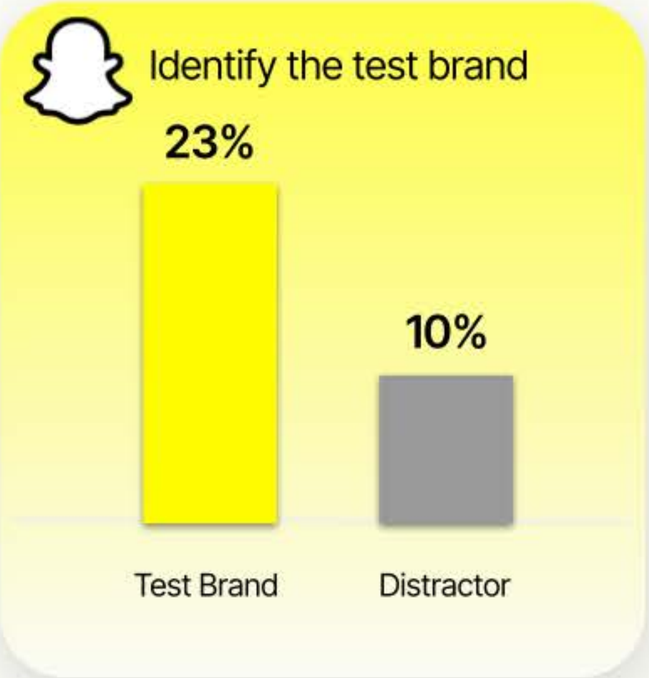
Behavioral data confirms promoted places creatives were more likeable

Test Brand Pins Visibility



Click Rates





Sponsored pins on utility map

Promoted places on snap map

Source: 2026 Maps as Social Utility study by eye square, commissioned by Snap Inc
Snap Map N= 8,318, Utility Map N= 11,020. Percent point (pp) differences are significant (90% CL). Base: Utility Maps.

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The Real-Time Socializers (13-17 YO)

They are deeply integrated into their real-time peer groups and location checking

29%

more likely to save shops on maps

17%

more likely to message friend about a trending location

14%

more likely to check if friends are at retail location / restaurant

Source: 2026 Maps as Social Utility study by eye square, commissioned by Snap Inc. + Horizon Media, GLOBAL data. 13–17 YO (N=1,699) comparisons are against 18–44 YO (N=5,230). All indicated differences are statistically significant at the 90% confidence level.

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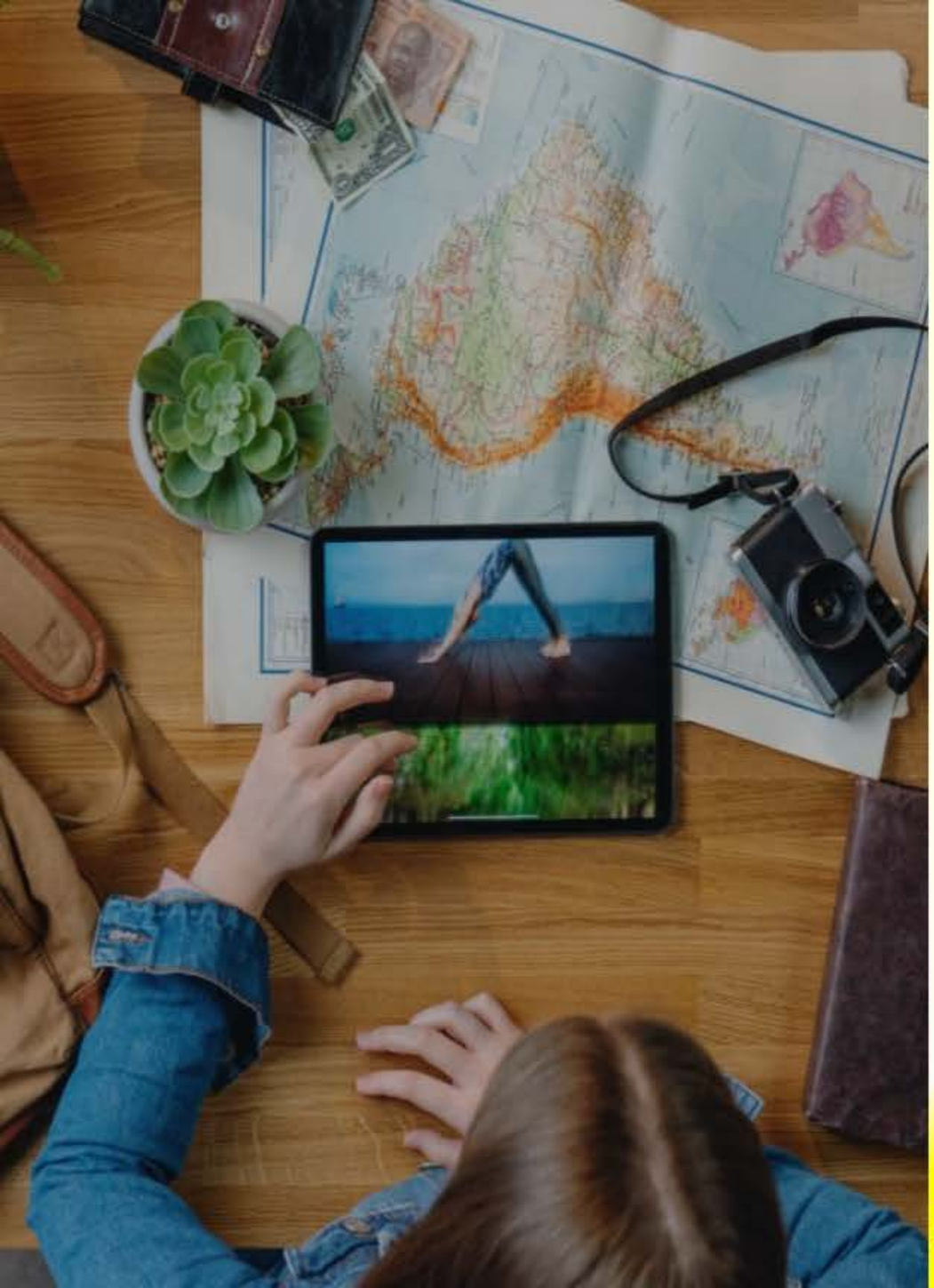

The Journey Planners (35-44 YO)

The group uses the map as an active, inspiration-driven planning tool for high spend categories

52%

More likely to use maps to save hotels

33%

More likely to use maps while booking travel

23%

More likely to use maps to save travel destinations

23%

More likely to use maps to find restaurants / cafes

Source: 2026 Maps as Social Utility study by eye square, commissioned by Snap Inc. + Horizon Media, GLOBAL data.
35–44 YO (N=1,686) comparisons are against 13–34 YO (N=5,243). All indicated differences are statistically significant at the 90% confidence level.

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