

REBUILDING PUBLIC TRUST IN UK ADVERTISING

ADVERTISING
ASSOCIATION

IPA
Incorporated
by Royal Charter

I S B A



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From 'trust or bust' to 'trust is a must'



KEITH WEED

President, Advertising Association

"A brand without trust is just a product and advertising without trust is just noise."

This was my call-to-action when I set out my agenda as Advertising Association President three years ago. I'm convinced Public Trust was (and remains) the most critical, shared issue for our industry. Despite the healthy competitive nature which drives our industry forward, the Advertising Association is the place where we come together and tackle the big issues that matter for us all.

This is why the Advertising Association was tasked three years ago by the AA Council (which I have the honour of leading) to develop and implement a 'Trust Action Plan' to arrest the decline of public trust in advertising.

It began with my ultimatum – Trust or Bust – as the starting pistol, backed by the launch of the first Credos research findings at LEAD 2019. The Trust Working Group, ably chaired by Phil Smith and Paul Bainsfair, has driven the issue ever since.

Trust is complex and precious. Built up slowly over time, it can disappear much more rapidly; therefore earning trust and keeping it is an ever-constant and ever-changing challenge. As all the evidence shows, trust pays – with better returns on campaigns and better long-term value for the brands they support.

The new Credos research provides us again with brilliant insights on how our most important customer, the public, feels about advertising and the changes that have taken place since that first research back in 2018.

It is fascinating to see where the industry is excelling – particularly in our response to the pandemic and tackling inclusion – but concerning that some advertising techniques are problematic for people. The importance of creativity – creating advertising that people enjoy and find engaging has become even more important as the No. 1 positive driver of trust.

We know more about the drivers of trust – both positive and negative – in the UK than arguably any other major advertising market. Happily, having this knowledge does not mean we need complex solutions.

As Evan Davis, the BBC broadcaster said at LEAD 2019: 'To be trusted, you should do trustworthy things. Are you doing trustworthy things in your businesses?'

When this industry is at its best and most responsible, it is trustworthy and makes a valuable contribution to the UK, not just economically but on a societal level too.

Central to the long-term health of industry is the ASA. Its principles of 'Legal, Decent, Honest and Truthful' sit the heart of why consumers should trust advertising. Our self-regulatory body is highly effective in its role, and we need to be proud of that, respect it and support it.

The results of the ASA advertising campaign in Scotland show just what can be done if we communicate clearly and consistently how the ASA's role in regulating advertising in all channels improves the public's levels of trust. Everyone in our industry should consider what they can do to support the next iteration of this campaign as we roll it out UK-wide, as well as what they can do more generally to support the ASA and its work.

It is heartening to hear how the public has responded positively to advertising's output during the pandemic and also the steps we have taken to portray a more inclusive nation. Looking at the challenges coming our way, we should not underestimate the significance of the role advertising needs to play and how important it is that we are trusted.

The advertising we produce will help rebuild confidence as society recovers following the lockdowns of the pandemic. The work we make in the coming years will play a crucial role in helping the UK and international markets respond to climate change. And the way we recruit, retain and develop talent from all backgrounds will shape just how inclusive and successful that work is. All of this contributes to the public's view of our industry and ultimately how trustworthy we really are.

There is uncertainty ahead for this industry with government reviews of online advertising and sectors under scrutiny such as HFSS and gambling. However, the more we tackle this head on and take our responsibilities seriously, the greater contribution to the economy and to society we can make.

Building on what we have learned in the past three years, every single person in the industry can shape our future by supporting the ASA system and putting how we can improve the public's advertising experience at the heart of every campaign plan. It will deliver better returns for business and contribute to a more positive environment for advertising to work in.

A new course is set: Trust is a Must.

“ We know more about the drivers of trust – both positive and negative – in the UK than arguably any other major advertising market. ”

PROGRESS REPORT:

Arresting the decline of public trust in UK advertising



PAUL BAINSFAIR
Director General of the IPA

Joint chairs of the Trust Working Group



PHIL SMITH
Director General of ISBA

Our mission to rebuild public trust in advertising is ongoing.

This is why no matter where you work – whether at an agency or a brand, a media owner or a tech company – rebuilding public trust in advertising should be your top priority. We all share the same ambition. Building trusted brands is our bread and butter. Let's remind ourselves of where we were three years ago.

The journey began at the 2019 ISBA conference when we published our findings in '[Arresting the Decline of Public Trust in UK Advertising](#)'. Research undertaken by Credos helped us to establish the key drivers of public trust, both positive and negative, and we developed five critical industry-wide actions in The Trust Plan:

ACTION 1 We will reduce advertising bombardment

Bombardment is an umbrella term for interlocking areas of concern for the public about negative aspects of their advertising experience.

This includes two strands of work – support for the IAB's Gold Standard and to improve the digital advertising experience. Support for the Gold Standard has grown considerably since 2019 and the IAB have launched version 2.0 with additional criteria to help facilitate compliance with the GDPR and ePrivacy law. With 59 companies already certified to version 2.0 standards, including the likes of Sky, Twitter and YouTube, this initiative also has advertiser supporters on board including Unilever, Adidas, Tesco and Nationwide Building Society.

ACTION 2 We will reduce excessive frequency and re-targeting

The key to this action is 'excessive'. We conducted research among eight leading marketers, eight media owner leaders and eight media agency leaders. All agreed this was a problem. The very best advertisers and their agencies manage ad frequency and re-targeting very well, to reduce the risks of both being wasteful and irritating for the public. Some progress has been made to raise awareness of the issue, yet there is more to be done to reduce this issue across many media formats. Excessive frequency continues to be a key negative driver of public trust. The Trust Working Group did extensive work in this area and the results can be seen [here](#). In addition, ISBA promoted its 'Advertising Experience MOT' to its members, to help marketers and their agency partners assess how effectively they were managing this issue.

ACTION 3 We will ensure the ASA is 'best in class'

The ASA system and its role in ensuring all advertising is 'Legal, Decent, Honest and Truthful', wherever it appears, is the foundation stone of public trust in our industry. Rallying support behind the ASA's 'More Impact Online' 5-year strategy has been key, and we can report that there is good progress on this. We also committed to run a test campaign for ASA public advertising in Scotland, which the campaign research showed has had a remarkable impact on public trust. This is clearly one of the key levers to pull as we rebuild public trust in advertising.

ACTION 4 We will ensure that data privacy matters

This action focuses on ensuring the advertising industry is as responsible as possible in the use of the public's data. Progress on this has been slow, overshadowed by the ICO's enquiry into digital advertising, itself postponed due to Covid-19. However, data and e-privacy are still a key focus and workstream for our industry. We can also expect more intervention via the Government's online advertising review, the Digital Markets Unit and the review of GDPR. The proper, compliant and ethical use of the public's data is integral to their experience of advertising.

ACTION 5 We will show advertising can drive social change

Advertising's social contribution is a vital part of how the public judges our industry. Social contribution was the second-most important driver of public trust, both in the original research in 2018 and this has strengthened post-pandemic in the latest 2021 research. In January 2020, Credos published '[Ad Pays 8: UK Advertising's Social Contribution](#)', which shows the many possibilities for our industry to make meaningful contributions across many social issues. The latest studies show this remains the case – perhaps most obviously the vital health messaging work during the Covid-19 pandemic.

We do not and should not accept that decline is inevitable; positive action can make a real difference to the public's trust in advertising.

Public trust in the advertising industry has seen improvements since its 2018 low point. However, our relative position to other industries has not changed. We must aspire to improving our position in real terms, relative to other industries and return to the 'middle of the pack', where the AA's tracking data showed the industry a decade ago. The ASA test campaign shows that when we tell the public the powerful story of the quality of our regulatory system, we get marked improvements in trust, so there is a clear way forward.

By addressing the areas of systemic weakness and amplifying our strengths – especially in one of our key strengths, the ASA – we can continue to rebuild the public's trust in advertising.



Top 10 key findings

4

Bombardment is the most important driver of the public's distrust in advertising.



5

The significance of misleading and invasive advertising techniques (often scams or fraud) as a driver of distrust increased more than any other driver between 2018 and 2021 – mostly driven by younger consumers. It is now their number one driver of negative perceptions towards advertising.

8

However, **the number of people who believe that there is the right amount of advertising regulation has declined** by 7% over the past decade.

1

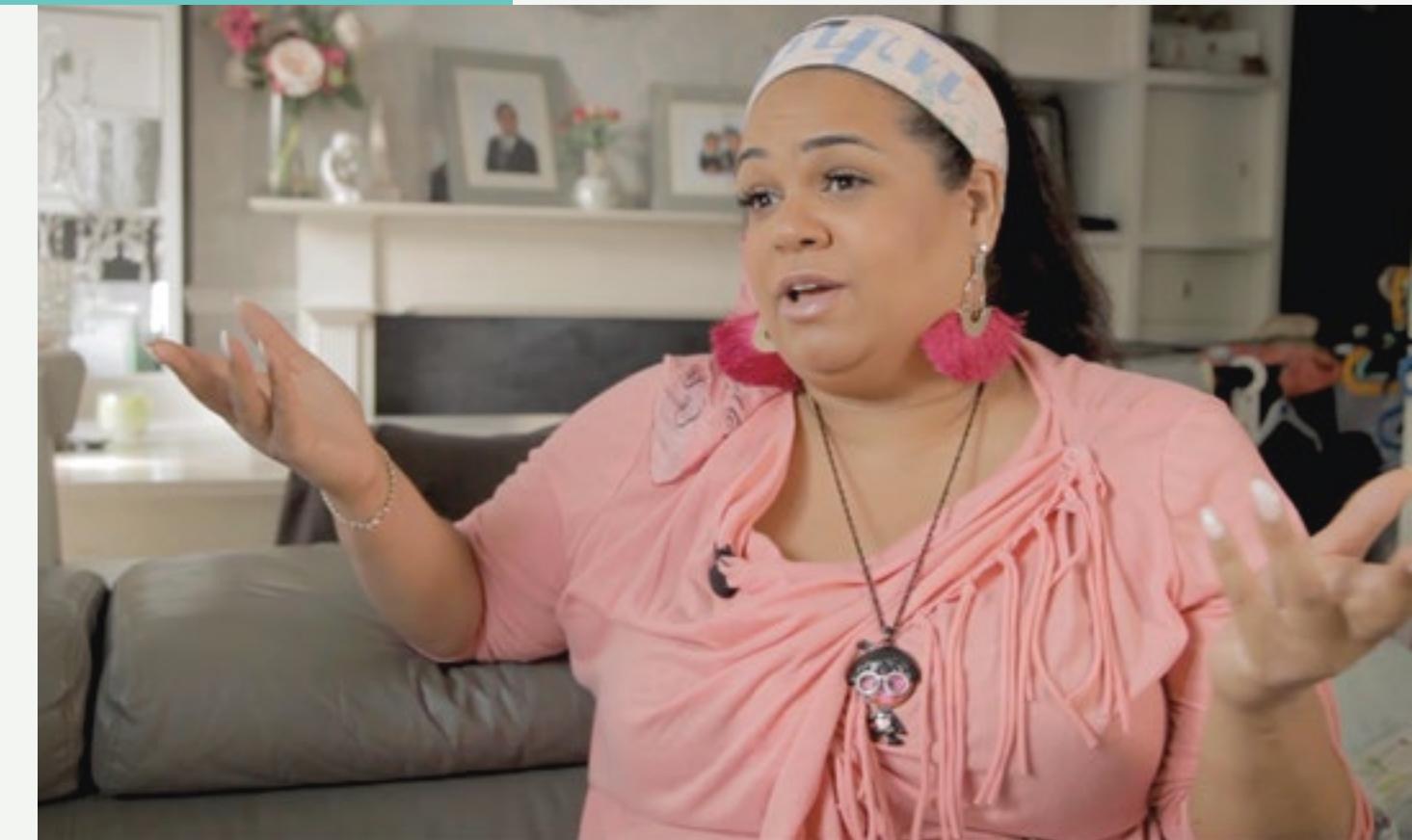
The public have a much broader definition of advertising than we in the industry do. Unfortunately, many of these additional "ads" are perceived negatively – which means that perceptions of legitimate advertising are being "polluted" by elements outside of our control.

2

The advertising industry is one of the least trusted industries that we have been tracking. Although public trust in advertising has been increasing in recent years (by 25% since the low point in 2015), it has also increased for the other industries tested.

3

The older you become, the less trusting of advertising you become – with older people (65+) consistently the least trusting and the young (18-24) the most trusting.



10

Those who recalled seeing the ASA's test campaign in Scotland were almost two-thirds (64%) more likely to trust the advertising industry than those who hadn't seen the campaign. Its success shows how a UK-wide ASA campaign could be used to further improve trust in advertising.

Executive summary

The purpose of this report is to provide an actionable and data-driven strategy for the advertising industry to take to improve public trust in advertising. It provides an overview of progress to date and how better awareness of the breadth of the ASA's regulation of advertising content could deliver strong improvements in public trust. There is a clear opportunity to extend on the ASA Scotland campaign and achieve similar results across the UK.

Evidence for this strategy has been derived from the wide range of original public trust research that Credos has collected over the last decade. This suite of qualitative and quantitative research explores not only how the public views advertising, but also the factors and reasons behind their views. We believe that this collection of research constitutes the widest and most comprehensive review of trust in advertising anywhere in the world.



The headline finding from Credos' research is that public favourability and trust in advertising and the advertising industry have been in long-term decline – although there has been some improvement in recent years, it is in line with a wider improvement in trust seen in other industries. When compared to other industries, advertising is the least trusted, a theme that has been consistent since 2015 (when advertising was in the bottom third).

One of the most striking findings is how different trust in advertising is across different demographics. Specifically, older people (those 65+ years old) are particularly distrusting of advertising. By contrast, the young are more positive. Evidence from Credos' public tracking research indicates that advertising has a particular problem with the older members of the public – something that other industries do not have.

But like the advertising industry itself, such attitudes are dynamic, changing as have people's lifestyles and media habits over the past 18 months impacted by Covid-19. So, in 2021 we re-ran the Trust Drivers research that Credos carried out originally in 2018. This research highlights what factors (both positive and negative) drive trust in advertising and how they have changed over the past few years.



KEY DRIVERS OF PUBLIC TRUST IN ADVERTISING

POSITIVE DRIVERS

Creativity/Entertainment

Advertising that people find emotionally engaging, entertaining, and enjoyable.

Social contribution

Advertising that positively changes behaviours, promotes a good cause, or promotes a positive message.

Useful information

Advertising that helps consumers to make informed decisions on products or services.

Value exchange

Advertising that helps to fund services which allows them to be used for free by consumers (e.g., Facebook or ITV).

NEGATIVE DRIVERS

Bombardment

The feeling that advertising is everywhere, repetitive, and interrupting.

Suspicious advertising

Advertising that is misleading, dishonest, fraudulent, or intrusive. This includes scamming and other uninvited communications that we do not consider 'advertising', but that consumers do.

Vulnerable groups

Advertising that targets susceptible people (e.g. the elderly, people with addictions, children) or promotes products and services that are seen as problematic (e.g. gambling, payday loans).

Data privacy

Advertising that violates consumers' sense of privacy, typically through "suspicious" technological techniques (e.g. knowing what they've been searching for).

"Unhealthy" advertising

Refers to advertising for unhealthy foods or drinks (e.g. alcohol or foods high in fats, salts, or sugars)

Between 2018 and 2021, the relative importance of these drivers has largely remained constant. However, suspicious advertising has risen in importance. This has been largely driven by the young, making it the most significant negative driver for them, as well as a real worry to older people.

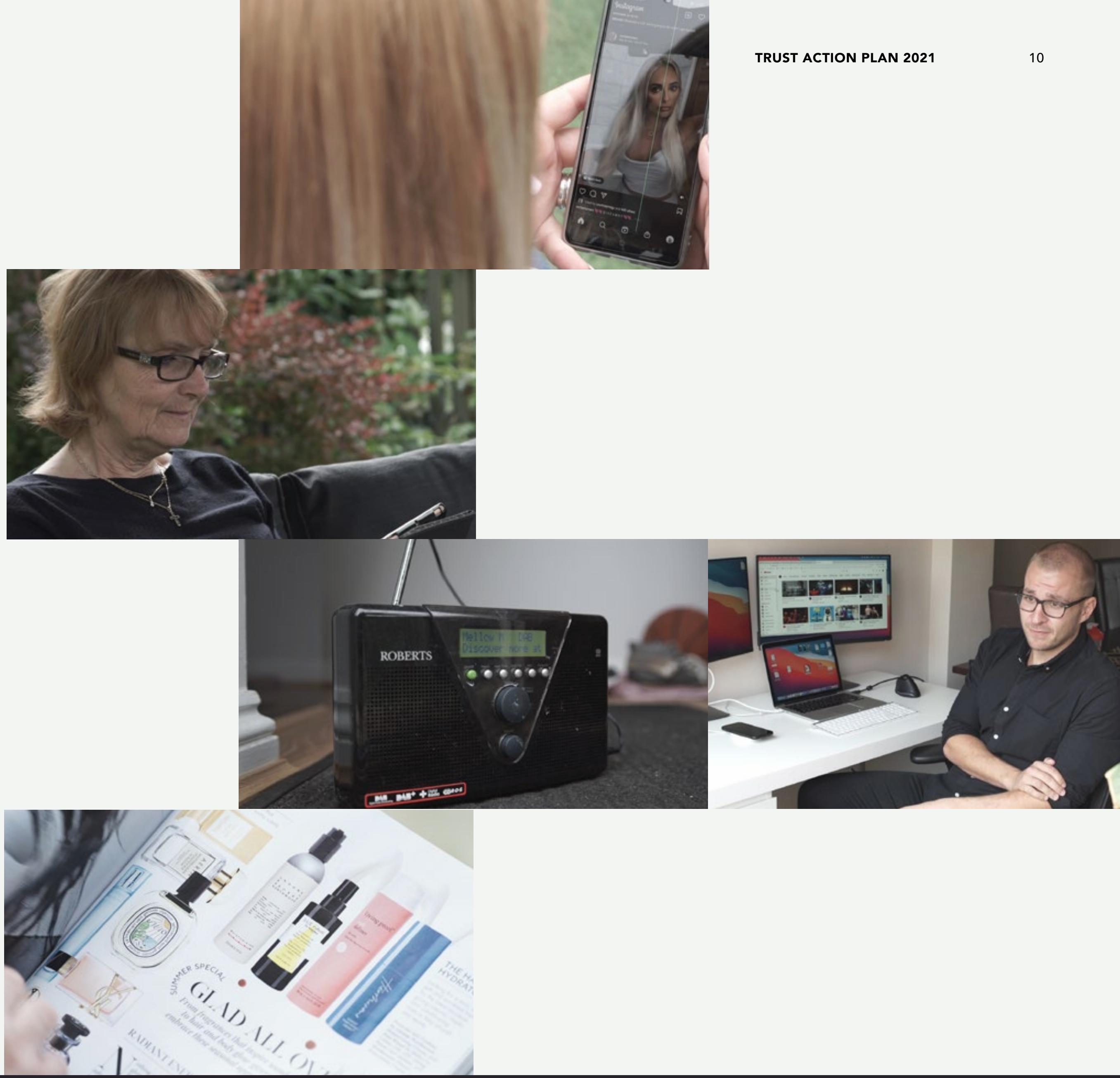
Another driver of trust in advertising is awareness of advertising regulation. Public tracking data has shown a consistent correlation between those who trust the advertising industry and those who believe that there is an appropriate level of regulation in advertising. Conversely, those who believe that there isn't enough regulation in advertising tend to be the most distrusting of advertising.

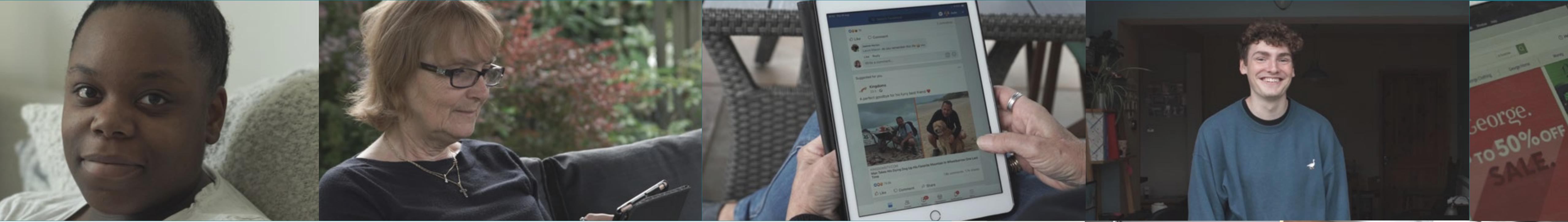
However, much like trust in advertising, the number of people who believe that there is the right amount of advertising regulation has fallen over the past decade. One of the reasons for this is that the public are generally unaware of the ASA, at least top-of-mind. It is not hard to see how this can directly lead to people believing that advertising isn't regulated enough, which negatively impacts their trust in it. However, research has shown that knowledge of regulations is one of the most effective levers for the industry to pull.

Based on this, to improve trust in advertising, the industry should act to improve awareness of the ASA, its scope and effectiveness. To accomplish this, Credos and the Advertising Association recommend a UK-wide advertising campaign promoting the ASA and advertising's commitment to effective self-regulation.

Results from the ASA's Scotland campaign shows its potential to have a highly positive impact. Those who saw the advert in Scotland were more aware of the ASA and were more trusting of advertising. Building on that success, we believe that by introducing a UK-wide campaign, the industry can take an active step towards increasing public trust in advertising across the UK.

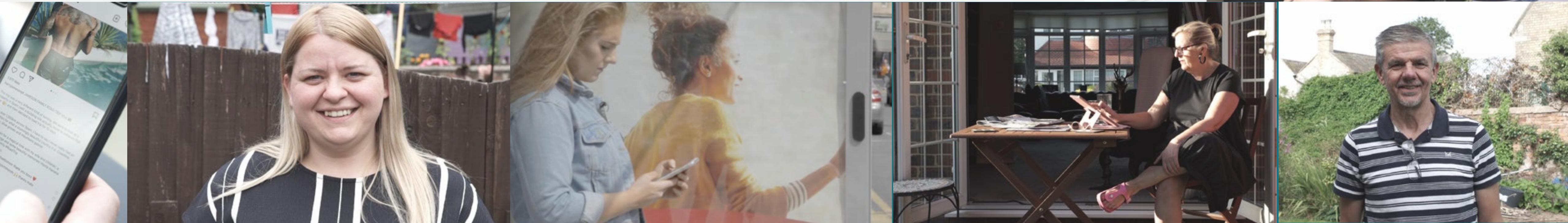
The following report lays out the evidence and rationale for this strategy.





SECTION 1

Understanding the decline of public trust in advertising



What is advertising?

The public have a much broader definition of advertising than we in the industry do. They believe that many interactions that the industry would not consider advertising are in fact advertising – and unfortunately many of these additional interactions garner negative sentiments among the public.

The interactions below highlight just how broad the public's view of advertising is:

- Displays in shop windows (71% of the public believe this is advertising)
- Sponsorship of sports teams (69%)
- Sample/freebie given to you on the street (65%)
- A promotion or sale inside a shop/store (64%)
- Sales calls to your mobile/landline (54%)
- Products at the shop/store checkout (50%)
- Packaging that a product comes in (43%)
- Discount codes (37%)
- Community bulletin board (36%)
- Friend/family member suggesting a product (21%)
- Person collecting for charity on the street (19%)

This disconnection obviously creates a problem as perceptions of UK advertising become "polluted" by elements the industry cannot control. Though not listed above, qualitative research undertaken by Credos revealed that 'scam' emails, texts and calls were negatively impacting their trust in advertising.

Being grouped with a variety of unregulated communications and interactions that are not advertising creates a perception for many that the advertising industry is immoral, unchecked and even illegal.

It's a very grey line, and that's the difficulty: this email that's honest advertising is next to one that's a scam, and how can I tell that from a header on the email? It's almost impossible.

MALE, 55-64

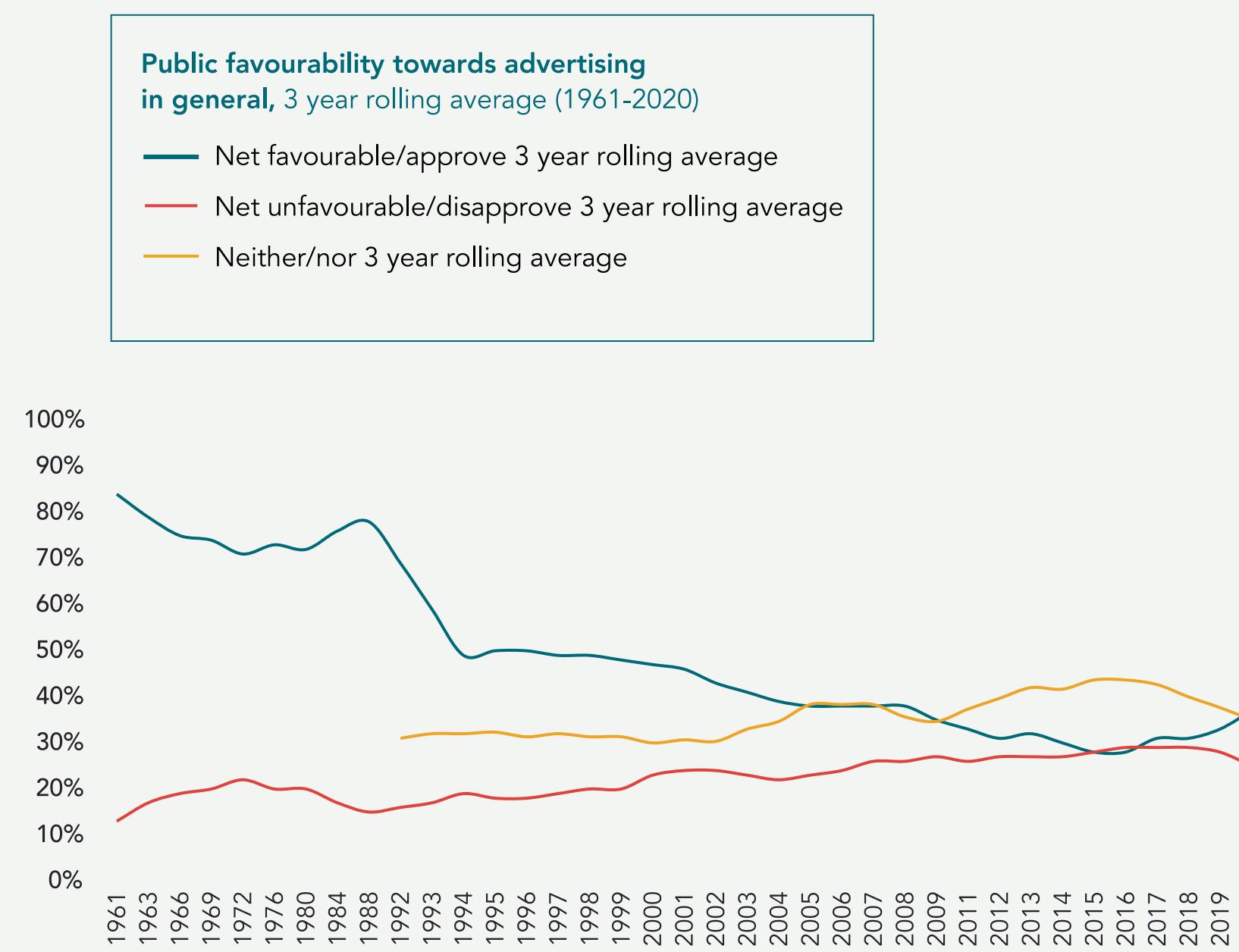
I am very concerned by suspicious advertising as it may seem genuine but could be fake or sell my data to third parties. Throughout Covid, this has been on the rise and while I can usually decipher between suspicious advertising and normal advertising, it can be very hard to distinguish between them.

MALE, 25-34

Measuring the decline of public trust and favourability towards advertising

Credos and the Advertising Association have been measuring the general public's favourability (a proven proxy for trust¹) towards advertising in general for many decades. Even though the question has changed over the years², data going back to 1961 shows that the public have become less favourable towards advertising in general – though in recent years this has improved slightly.

Figure 1 below shows how favourability towards advertising in general has tracked over the years, looking at 3 year rolling averages.



1. Evidence from Credos' public tracking study shows that trust and favourability are highly correlated.
 2. 1961 – 1992: In general, do you approve or disapprove of advertising?; 1993 – 2009: How do you feel about advertising in general?; 2010: How favourable or unfavourable are your impressions of adverts and advertising in general?; 2012 – 2020: How do you feel about advertising in general?

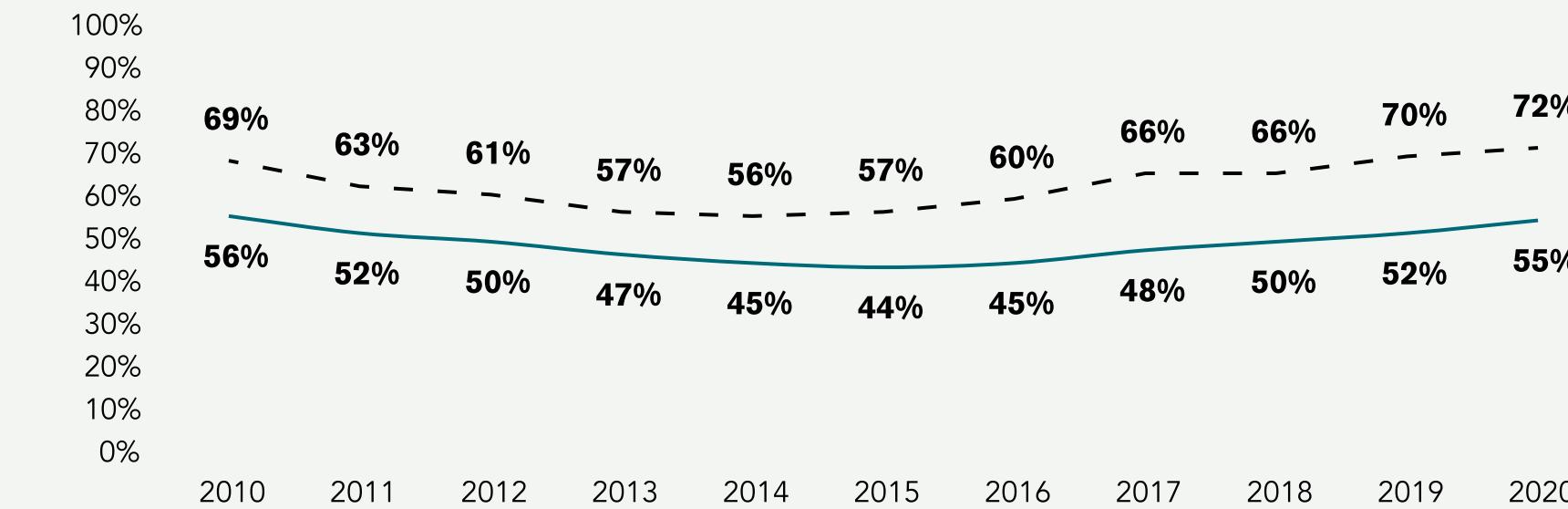
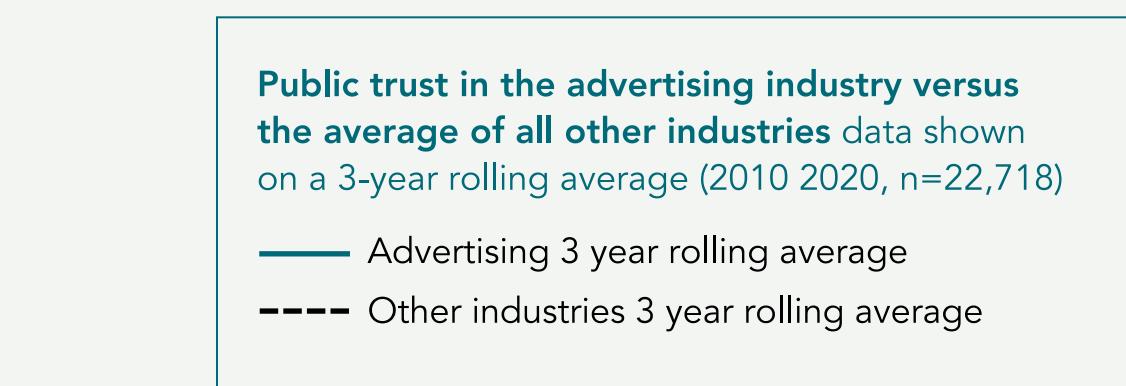
3. Industries tested in 2020: Advertising, banking/finance, retail/shopping, music, telecommunications/mobile technology, gaming, energy, media.

In more recent times, Credos has been tracking the public's trust towards the advertising industry, comparing it against a list of other industries³. Encouragingly, trust towards the advertising industry has improved in recent years, reaching its highest point in 2020 (55% trusting the industry to at least some extent).

However, the other industries that we are being compared to have seen a similar improvement, and thus advertising's relative position hasn't changed – with the gap between the average of all other industries tested and the advertising industry at around 17% since 2017.

Figure 2 below shows how the advertising industry compares to the average of all other industries when looking at the 3 year rolling averages.

All in all, there is unmistakable evidence to show that advertising has a clear public trust problem. If we are to try and fix this issue, we first need to understand how different members of the public view advertising and the industry. The following section discusses the standout demographic determinate when it comes to public perceptions of advertising, and that is age.

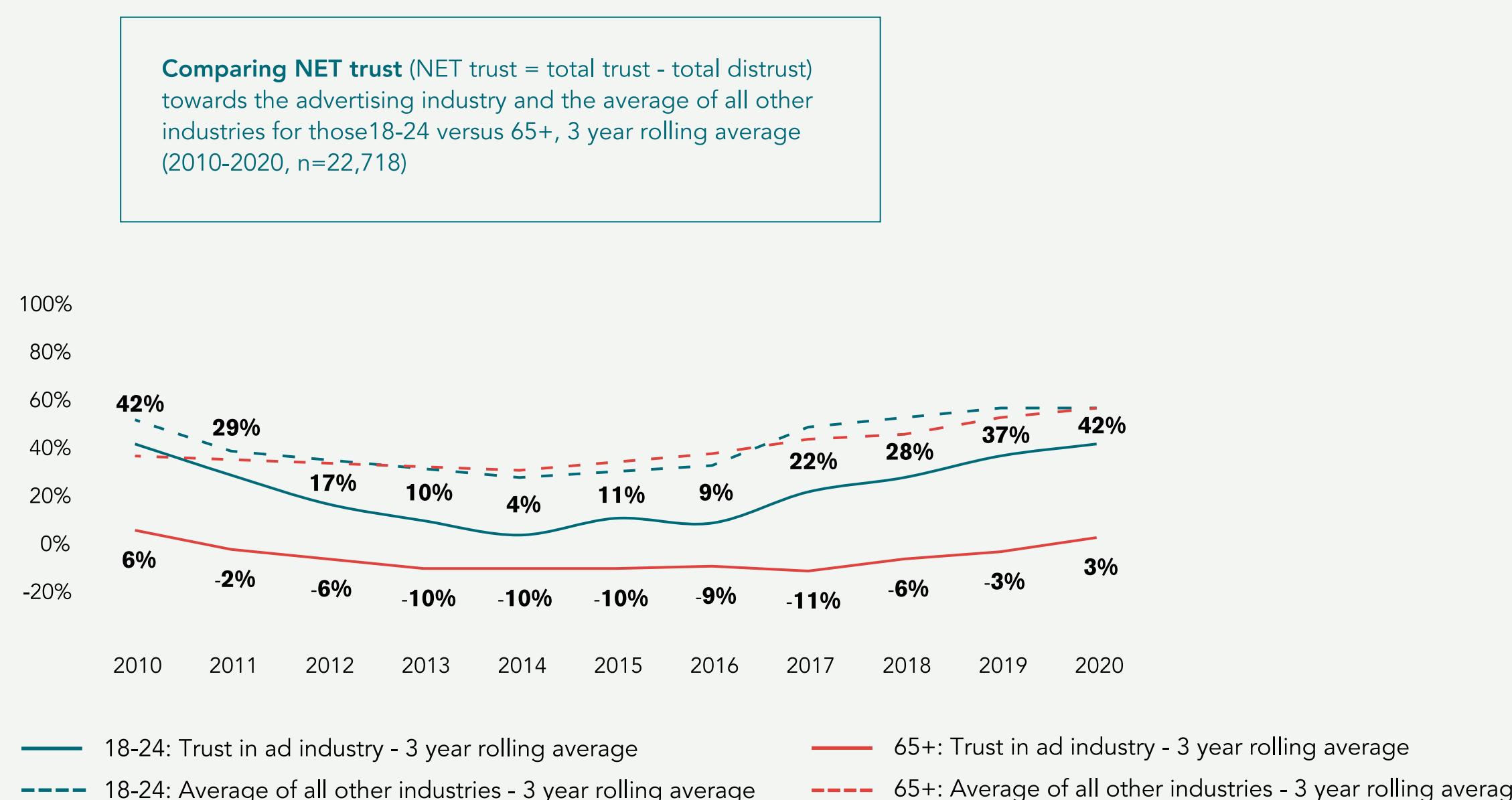


Age matters

Even though we can see a clear trend of declining trust and favourability towards the advertising industry and advertising in general, it is not a homogenous picture.

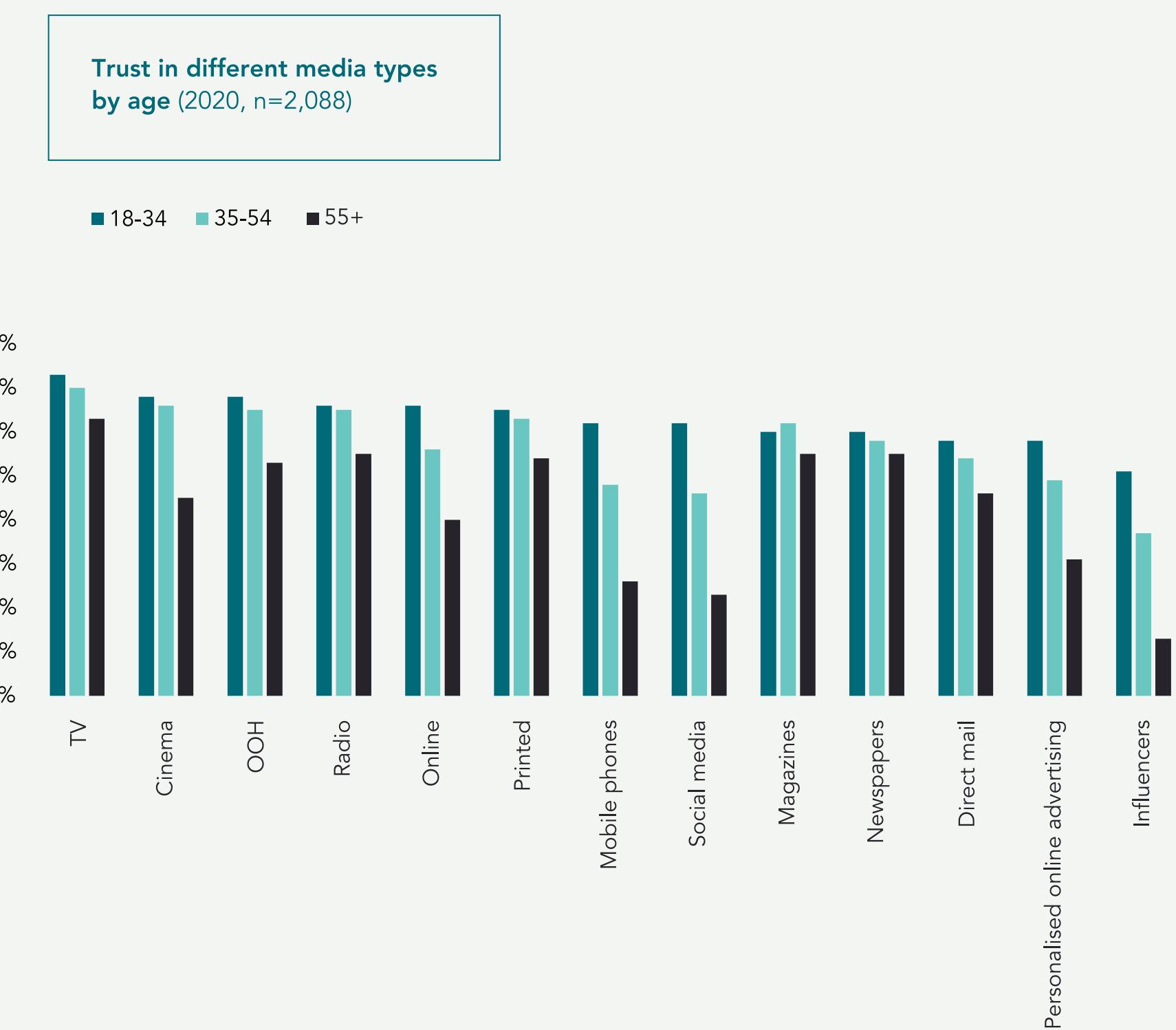
In fact, perceptions of advertising differ markedly across age. Specifically, the youngest (those 18-24 years old) have consistently been the most trusting and positive towards the advertising industry. By contrast, older people (those 65+ years old) have been the least trusting and most negative.

Unfortunately, the trend of the old being more negative doesn't extend to the other industries tested. When looking at the average of all other industries, both the old and the young have similarly positive perceptions. The advertising industry stands out as a unique case with both the old, and to a lesser extent even the young, more negative towards it (in comparison to the other industries). **Figure 3** below shows how the NET trust towards the advertising industry and average of all other industries compares for those 18-24 and 65+ on a 3 year rolling average.



Unsurprisingly, the trend of older people being the least trusting extends to trust in different advertising media types. Older people are consistently the least trusting of different advertising media types, while the young are the most trusting – a difference particularly apparent when considering the newer advertising media, where a real generational digital divide exists. On average though, the older you become, the least trusting you become.

Figure 4 below shows how across the range of advertising media types tested, the young are the most trusting.



In addition, the old are more concerned about topics in advertising (specifically advertising to children, alcohol advertising and digital enhancement) and are unsurprisingly the least convinced that there is enough regulation in advertising.

In a nutshell, older people have a problem with advertising that the young do not share. This is concerning given the aging population of the UK and the purchasing power of the older generations. In fact, it is estimated that 40% of UK adults are aged over 55⁴⁵.

As lifespans have increased, the number of older people working past traditional retirement ages is also growing. More wealth is being concentrated in the older age groups, who increasingly drive the economy. The International Longevity Centre UK estimates that by 2040, people over 50 will contribute to 63% of all spending in the UK⁶. In terms of advertising and the industry, this means that the least trusting and most concerned demographic is the most valuable to brands. Understanding how we can address their concerns has been a central interest for Credos and the Advertising Association.

Overall, whether you look at the total population, or at the old, there is a real concern that trust towards advertising is too low. Understanding what levers we, as an industry, can pull to improve trust in advertising is of real importance.



4. Statista - United Kingdom: Median age of the population from 1950 to 2050.
 5. Office for National Statistics – National life tables – life expectancy in the UK: 2017-2019.
 6. International Longevity Centre UK.

Understanding what drives trust in advertising

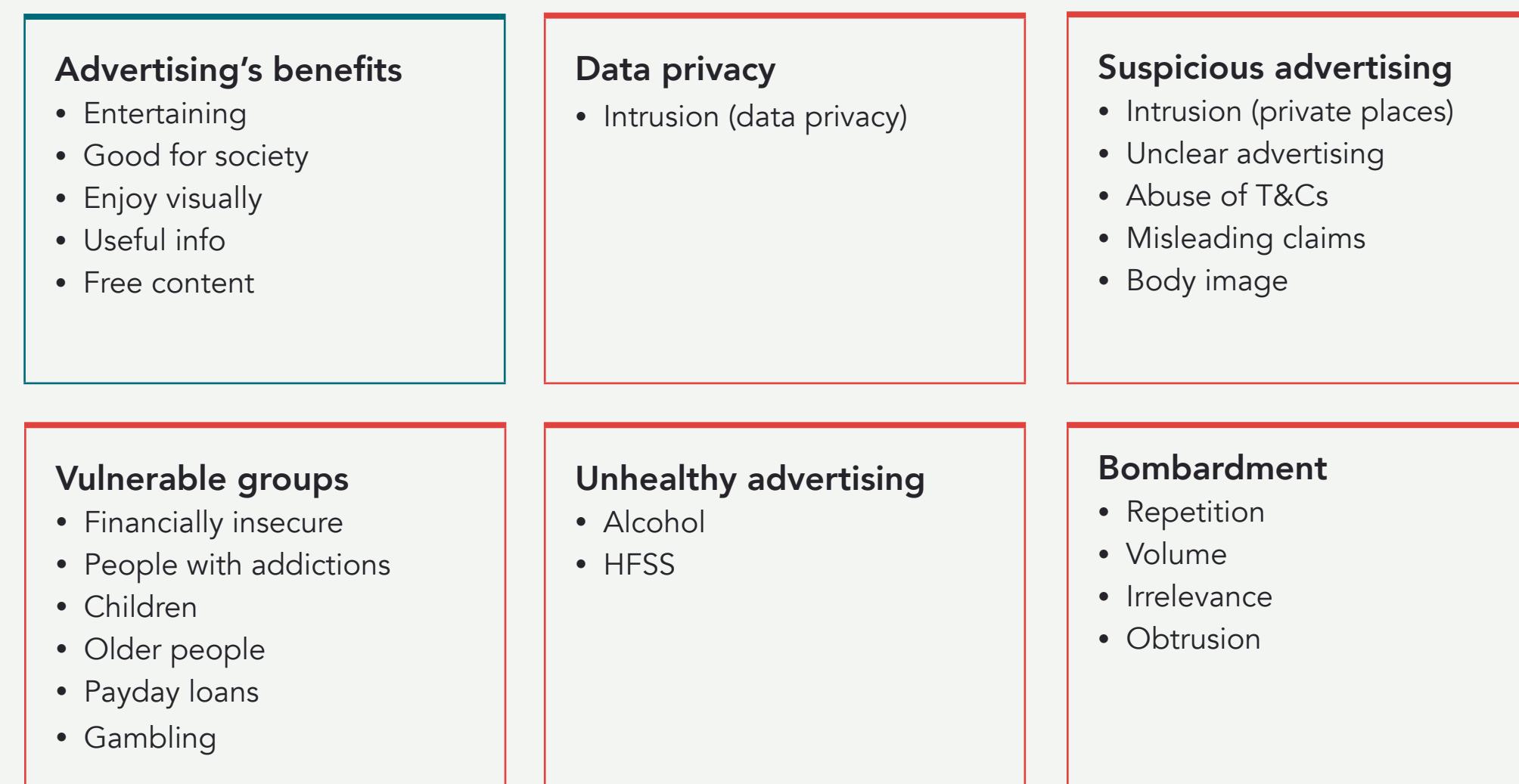
In 2018, Credos developed a model to understand the drivers of public trust in advertising and the causes of the long-term decline.

The same team replicated this model in April 2021 to determine whether there have been any changes over time, to probe the impact of the pandemic, and to explore whether age affects the trust model. The research, conducted by independent research agency, True Stories, had two stages:

- The first quantified and then applied statistical analysis to the general public's perceptions of advertising to identify which factors affect people's perceptions of advertising the most.
- The second used a mix of qualitative methods to develop our understanding of the factors identified in the first phase through personal reflections and reactions.

More on the method of this research can be found in Appendix 2.

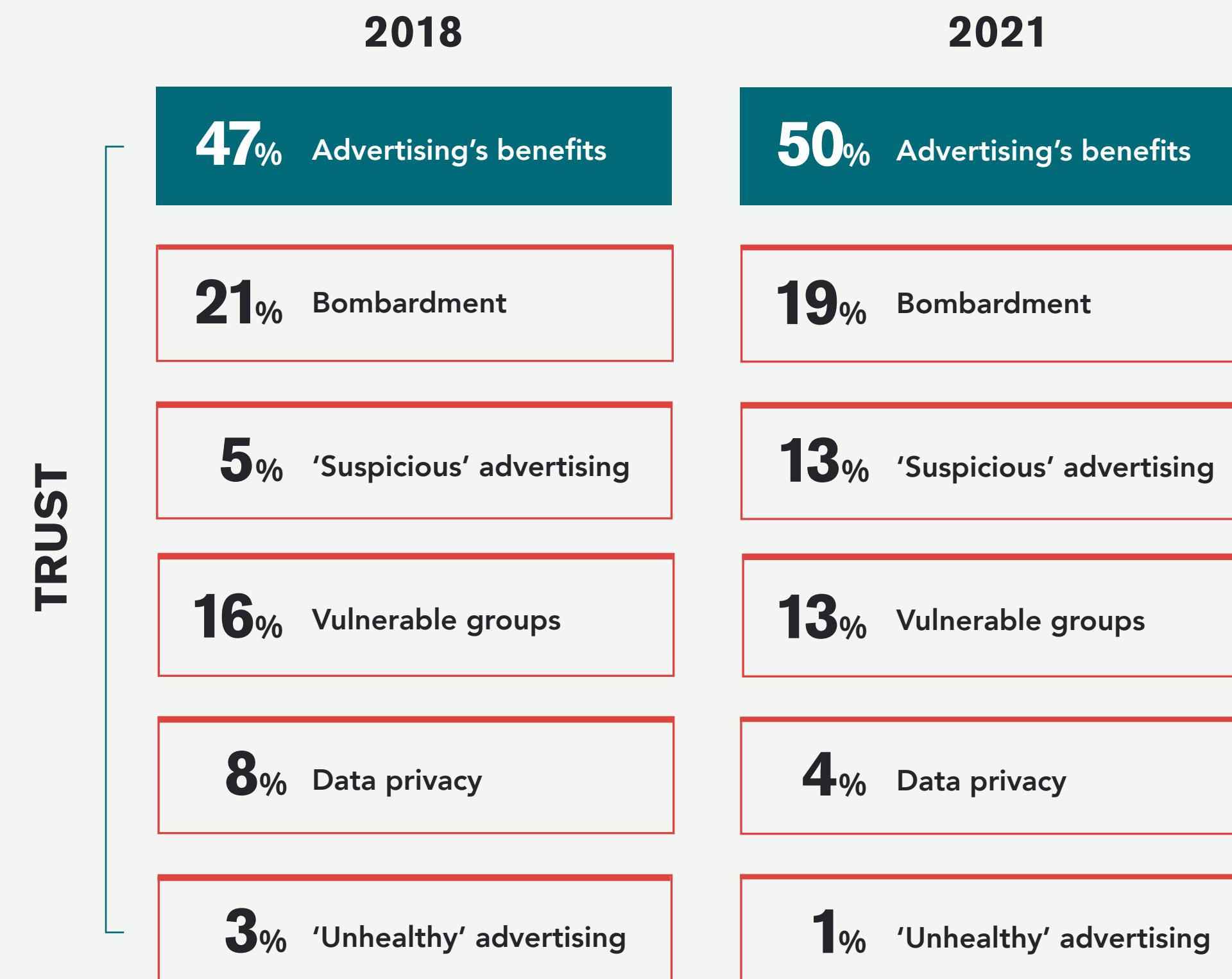
The 2018 research identified six clusters of drivers - some positive, driving trust in advertising and some negative, driving distrust. These same six clusters were also identified in 2021 as shown below:



These six clusters were then ranked in terms of their overall impact on the public, with scores indicating the relative importance of each cluster in determining someone's level of trust.

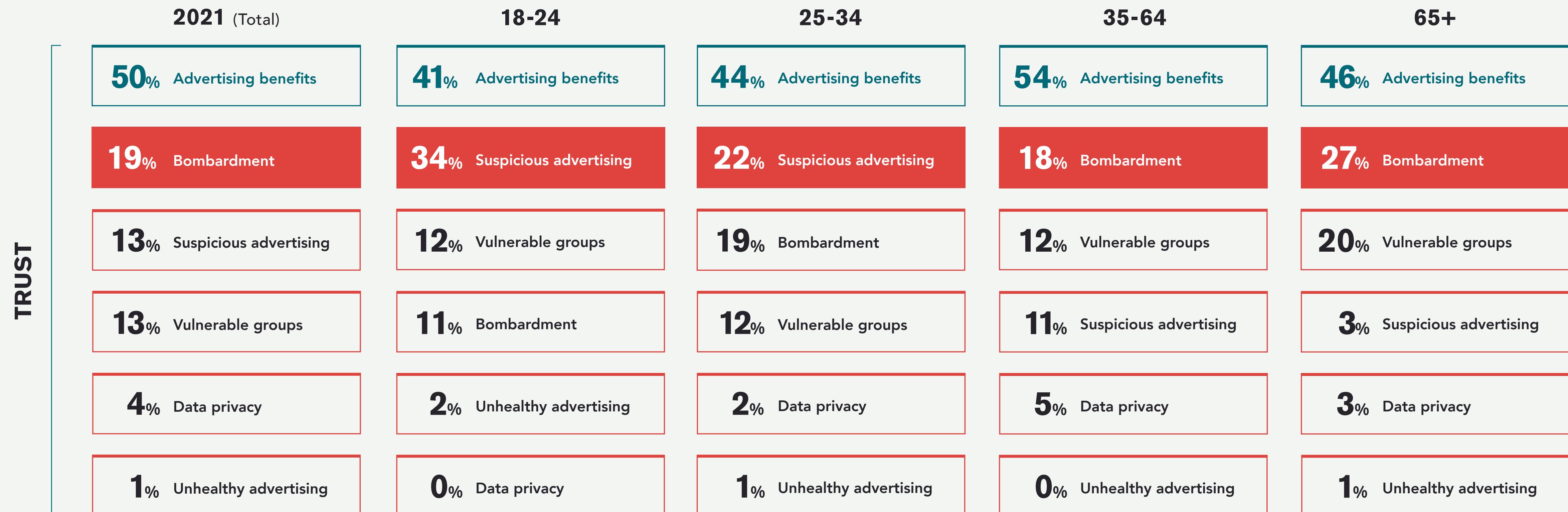
As shown in [Figure 5](#) below, the ranking of factors in 2021 remained largely consistent with that of 2018.

The positive aspect of advertising's benefits remains the number one driver of trust in advertising, followed by the first negative, bombardment. The most significant change since 2018 is that suspicious advertising has become a much more important factor in terms of driving consumers' overall distrust in advertising. The importance of vulnerable groups, data privacy and unhealthy advertising have all reduced slightly.



Interestingly, the increase in importance of suspicious advertising has been driven by the younger age groups and is now the most important driver of distrust in advertising (i.e. excluding advertising's benefits) of trust in advertising for those aged 18-34. Whereas data privacy is hardly cited by these groups, suspicious (often scam or fraudulent) advertising has become their chief concern. Bombardment remains the most important negative driver of trust for the older age groups.

Figure 6 below shows the importance of each factor in driving trust in advertising by age, 2021.

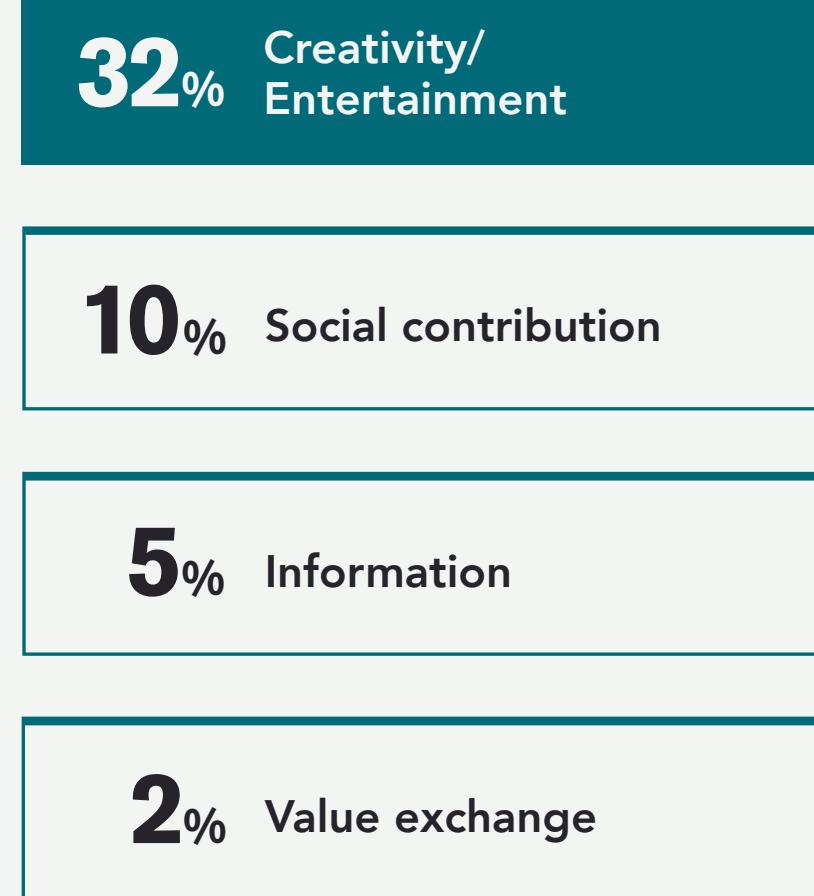


Unpicking the drivers of trust

Importance score in driving trust 50/100⁷



POSITIVE DRIVERS



In aggregate, perceptions of advertising's benefits were found to have the most significant influence on trust in advertising. This factor includes everything people said they like about advertising, such as its provision of useful information on products and services, its role in funding media and the internet and how it educates, entertains, and even changes society for the better.

The following section will detail the positive and negative drivers of trust in advertising based on their importance scores. Importance scores indicate the relative importance of each component in driving trust. The higher the score, the more important it is in driving trust positively or negatively. All scores are out of 100.

⁷. Figures may differ to totals due to rounding.

32
/100

1. CREATIVITY/ENTERTAINMENT

As in 2018, creativity/entertainment remains the most significant driver of trust in advertising. The more someone likes or is entertained by an advert the more likely they are to trust it. Engagement and enjoyment appear to trump factual claims or argument in creating the aura of goodwill that engenders trust. Many of our qualitative participants were keen to reinforce the continued importance of creating advertising that genuinely entertains and inspires its audience.

The UK advertising industry is very good at making you laugh, sometimes the advertisement is better than all the programs they show on TV.

MALE, 55-64

I think UK advertising should be more inspiring, bring hope, dreams, motivation, and a positive mindset as they play big role in people's mood, desire to thrive and optimism.

FEMALE, 45-54

10
/100

2. SOCIAL CONTRIBUTION

After creativity/entertainment, social contribution⁸ was the most significant driver of trust in advertising. This included the provision of information which is both good for society and represents society in a positive way. There was recognition of advertising's efforts to improve the representation of diverse groups in recent years, although there was some feeling that more could be done on the environment and tackling climate change.

Adverts have gotten better at representing society in positive ways. I think that a lot of thought has gone into representation of diverse families and people's appearances in recent years.

FEMALE, 45-54

I'm no Greenpeace advocate or 'tree hugging vegan' I'm just an average Joe who has decided that we are killing our planet at an alarming rate and advertising could actually be a major tool in changing that... if they wanted to be.

FEMALE, 45-54

Advertising's role in delivering public health information was also seen as a major benefit. The pandemic provided the UK advertising industry with a platform to serve the entire UK population with vital health information during a time of (inter)national crisis, in what was, for many, quite literally a matter of life or death. Our qualitative research suggests that advertising's role during the crisis was key to increasing the importance of advertising's benefits in driving trust between 2018 and 2021.

I think the UK advertising industry is good at providing the general public with health information, which has been shown with the recent NHS adverts encouraging people to take the vaccine.

FEMALE, 35-44

At the moment public health adverts are really good, giving helpful information to us all especially in the current Covid situation.

MALE, 55-64

⁸. More information on the social contribution of advertising can be found in Credos' Advertising Pays 8: The Social Contribution of Advertising report (2020).

Understanding the drivers of distrust

Importance score in driving distrust 50/100

3. OTHER POSITIVE DRIVERS

Also important in driving trust in advertising, though to a much lesser extent, were the provision of useful information on products, services, deals/offers etc (5/100 importance score) and the value exchange (2/100 importance score). Regarding the value exchange there seems to be some contradiction between recognition and trust. A third of consumers stated that they regularly came across advertising that allowed them to watch/listen to content without paying for it. However, as indicated by the importance score, the impact that had on whether the individual trusted advertising or not was minimal.

NEGATIVE DRIVERS

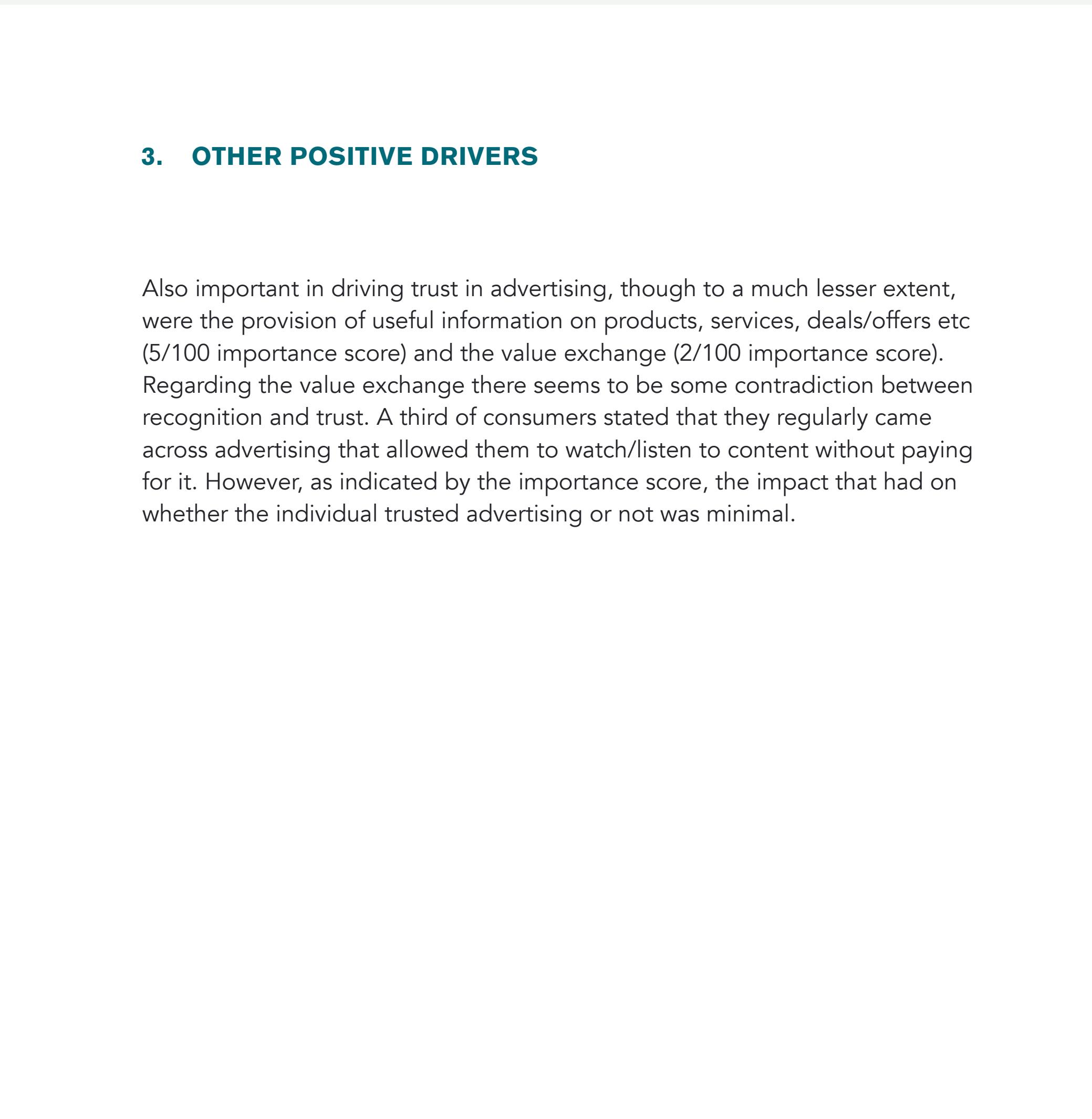
19% Bombardment

13% Vulnerable groups

13% 'Suspicious' techniques

4% Intrusiveness

1% 'Unhealthy' advertising



19
/100

1. BOMBARDMENT

Among the drivers of distrust in advertising, bombardment recorded the highest importance score overall (though not among our younger respondents), meaning that those individuals who identified bombardment as an issue were most likely to also distrust advertising.

This factor has four components – repetition (6/100 importance score) was the component most likely to impact trust in advertising followed by irrelevance (5/100), volume (5/100) and obtrusiveness⁹ (4/100).

As shown in Figure 6, for those aged over 65, bombardment is much more important in driving trust than for younger generations – scoring 27/100 in importance compared to 11/100 for 18–24-year-olds. In addition, older people (65+ years) were significantly more likely than younger people (18-34) to be bothered by ads that delay or interrupt what they are trying to do (50% vs 39% respectively) and by the general volume of advertising (42% vs 35%).

I sometimes feel that advertising is less trustworthy at the moment as advertisers are desperate to attract attention in an increasingly saturated advertising world.

FEMALE, 55-64

Every time you look at a screen you get bombarded with adverts. TV, YouTube, FB...everywhere!

FEMALE, 45-54

In comparison to 2018, bombardment has decreased in terms of its importance in driving distrust in advertising (2018: 21/100; 2021: 19/100 importance score). This slight decrease indicates that public perceptions of bombardment may be getting better. However, it is still the most important negative driver, so more work is needed.

After bombardment, suspicious advertising and vulnerable groups were the most important factors in driving distrust in advertising.

⁹. Distinct from intrusiveness, obtrusiveness refers to advertising which was felt to unfairly delay or disrupt the user experience.

13
/100

2. SUSPICIOUS ADVERTISING

Suspicious advertising includes a range of issues which broadly fall into one of two groups:

1. Intrusiveness – advertising that infringed upon consumers' privacy
2. Misleading – advertising which made consumers feel they were being misled or manipulated

The importance of suspicious advertising in driving distrust in advertising increased more than any other factor between 2018 and 2021. As previously noted, this increase was driven largely by younger consumers as suspicious advertising is now the number one negative driver for those aged 18-34 (see Figure 6).

Participants in the qualitative phase felt that increased concerns around intrusiveness were predominantly driven by unsolicited email marketing and calls or texts to their mobile/landline. Something largely seen as an annoyance when from legitimate companies, this became more sinister for many in the form of fraudulent communications. This drew significant ire and frustration from both sides of the generational divide. Examples provided by participants included both:

- Legal (albeit annoying) marketing communications (e.g., unsolicited emails from bonafide companies trying to market their products)
- Fraudulent marketing communications, or "scams" (e.g., phishing emails, bitcoin-related scams) which many believe have proliferated since the onset of the pandemic.

I think the issue here is where you sign up or something and they sell your data to someone else and next minute you have loads of emails coming into your inbox.

MALE, 25-34

I get apoplectic when emails arrive saying your bank account or credit card has been compromised. Act immediately by ringing the number on the screen. Some people fall for this type of scam and end up losing their life savings.

MALE, 65-74

More advanced technology makes this possible unfortunately, along with the selling of data. I get so many spam emails now and I never signed up for anything dodgy or clicked on dodgy adverts, so my data must have been sold on somehow.

MALE, 25-34

Over the past few years, the calls have been constant despite me telling them their info is wrong. Texts saying your TV License was not paid, or your credit card has been used in Madrid and you need to call this number urgently.

MALE, 65-74

13
/100

2. SUSPICIOUS ADVERTISING CONTINUED

Misleading advertising was often felt to be directly attributable to social media and perhaps goes some way to explaining the growth in importance of this factor in impacting trust for younger consumers. Advertising on social media was associated for many with misleading or false claims alongside advertising that was unclear or even disguised.

Advertisements and sponsorships by influencers often seem to be quite misleading, whether that's done intentionally or it's because the influencers are not well enough informed about what they can and should be saying or showing and how they should be doing it.

MALE, 18-24

I struggle at times to believe the advertising through social media. There are less regulations and people can post what they like.

FEMALE, 35-44

The rise in digital advertising has definitely led me to trust less what is being advertised. Anyone can now advertise with extremely limited budgets. Means you get very questionable products being advertised.

MALE, 35-44

I tend to trust advertising less on social media just because anyone can advertise on it, and you are always hearing stories about fake websites and people that have lost money through them.

MALE, 55-64

Despite this there was also widespread recognition that digital platforms are taking action to counter misleading advertising and make it easier for consumers to report or block advertising they are unhappy with.

It's definitely become easier.... like, I'd know how to report an advert I don't like on Instagram; and I probably wouldn't have known how to do that a few years ago.

MALE, 18-24

I feel advertising is more trustworthy than before on a whole as it is more regulated - an example being that influencers need to disclose that their post is an advert and paid partnership which makes it very easy to distinguish between paid for and genuine content.

MALE, 25-34

13
/100

3. VULNERABLE GROUPS

The vulnerable groups factor includes gambling advertising, payday loan advertising, and advertising which is felt to 'unfairly' target vulnerable groups, including children, the elderly, the financially insecure and people with addictions. This factor was almost twice as important in driving distrust for the over 65s than younger age groups. However overall, the importance of this factor in driving distrust decreased between 2018 and 2021. There were notable decreases in the proportion of consumers feeling 'bothered' by advertising related to payday loans (55% in 2018 down to 47% in 2021), people who are financially insecure (50% to 44%) and children (40% to 35%).

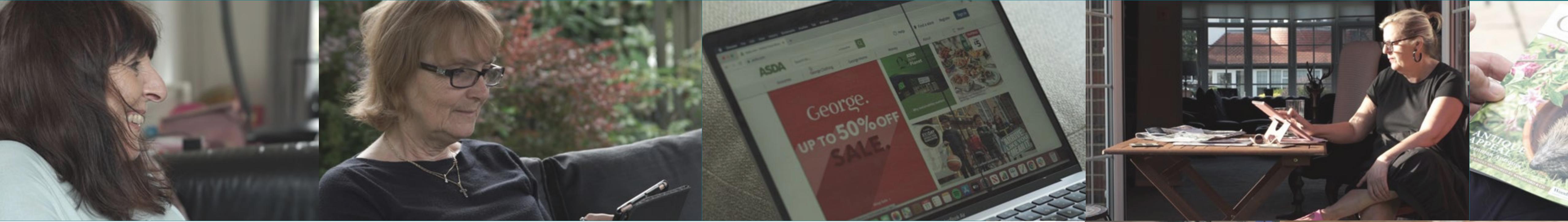
OTHER NEGATIVE DRIVERS

Data privacy, meaning the use of personal data in a way which makes people feel uncomfortable, was identified as a factor in driving consumer distrust in advertising in both 2018 and 2020. However, in those intervening years the importance of this factor in driving distrust has halved (see Figure 5). The reasons behind this change are unclear though there was a clear sentiment among some participants that consumers are simply becoming more accustomed to the benefits of online advertising and the data sharing required to inhabit this world.

I think targeted advertising is good because change is good, and people need to be less resistant to change. It's happening so why not embrace it? I understand the idea of, 'Oh, Big Brother's watching, we've got Alexa, it can hear you talking, and on your Instagram', but it's very clever technology, and if you want to use these apps you have to sign their privacy notice anyway, accept their cookies. And for me, I'd much rather it be targeted on things I enjoy over getting things that are absolutely irrelevant to me.

MALE, 25-34

Unhealthy advertising for HFSS food and drink products and alcohol formed their own factor driving distrust in advertising though the impact was low and had decreased since 2018 – falling from an importance score of 3/100 in 2018 to just 1/100 in 2021.



SECTION 2

What can we do to improve public trust in advertising?



As this report highlights, we know a lot about the public's views of advertising and the advertising industry. But how can we, as the advertising industry, learn from this data to actually influence trust in advertising?

Based on the drivers research previously mentioned, we know what the public does and doesn't like about their current advertising experience. This research presents the best cases for what we as an industry can do to increase public trust in advertising.

1. Combat scams and fraudulent advertising

Suspicious advertising was the driver with the largest increase in importance between 2018 and 2021, with much of the increase being driven by the young. This means that the public are more likely to believe that there has been an increase in frauds and scams – typically on digital platforms (though not limited to only digital).

This may not be 'advertising' as we recognise it – legitimate and regulated by our Codes and the ASA – but people see it as advertising and can feel that it pollutes the whole stream of marketing communications, to the obvious detriment of the industry.

In order to fix this, the industry needs to increase pressure on government and other regulators, over and above the ASA, to take more forceful action to reduce misinformation, monitor and eliminate fraudulent advertising, and establish more safety programs to protect consumers. In addition, it will be important to educate the public as to what steps they can take to avoid and tackle fraudulent or scam advertising.

2. Reduce bombardment

Bombardment was the most important negative driver in 2021, especially among the old (the most negative demographic). By bombarding consumers, we are overloading them with adverts and making them fatigued and annoyed. This means that moving forward, consumers are going to do everything they can to avoid advertising. This is a cross-media issue that contains many market challenges for brands and advertisers.

Bombardment is wasteful as well as irritating for consumers. To reduce bombardment, the industry should focus on improving the public's advertising experience. In terms of media planning and buying, the AA's Trust Working Group developed clear guidelines, from interviewing leaders from marketing, media owners and media agencies. These guidelines are [here](#).

3. Make advertising more creatively rewarding.

Creativity is the leading positive driver of trust in advertising. Research has consistently shown that more creative and emotionally engaging advertising is more effective¹⁰. We also know that creative and entertaining advertising drives profitability and overall brand trust¹¹. However, research from across the industry has shown that creativity has been declining in recent years¹².

Clients and agencies need to prioritise making adverts that people enjoy, as well follow the industry best practice on media planning and buying referenced above. System 1's research has shown that emotional advertising leads to brand growth, and they recommend that advertisers should be putting more of their budgets into creating more creative and emotionally engaging advertising^{13 14 15}.

If we enjoy an ad we are more likely to remember it, willingly watch it again, share it, talk about it, repeat it. The idea that ads are better if they are enjoyable, and especially if they are popular, seems to have 'gone out of fashion' a lot!¹⁶

However, a more immediate and tangible way that we can improve trust in advertising is to educate the public about advertising's effective regulatory system and how it protects them. Evidence shows that this is partly because it demonstrates to the public that the industry is responsible and outward facing. Such evidence was found in part by analysing a decade's worth of public tracking data (with over 20,000 respondents), with results showing the importance of regulations on trust.

As Gary Bennet, Lead Econometrician at ComRes said:

The analysis we have conducted clearly shows that the general public's perceptions of self-regulation and the responsibility of the advertising industry are the key factors in driving their favourability towards advertising.¹⁷

GARY BENNET, LEAD ECONOMETRICIAN

10. Les Binet and Peter Fields. The Long and the Short of It: Balancing Short and Long-Term Marketing Strategies (2013).

11. Analysis of the IPA Database conducted by Peter Fields for Credos (2021).

12. Karen Fraser. Creativity, Ad Experience and Effectiveness (2021).

13. Karen Fraser. Ibid.

14. Peter Fields. The Crisis in Creative Effectiveness (2019).

15. Orlando Wood. Lemon: How the advertising brain turned sour (2019).

16. Paul Feldwich. Why does the Pedlar Sing (2020).

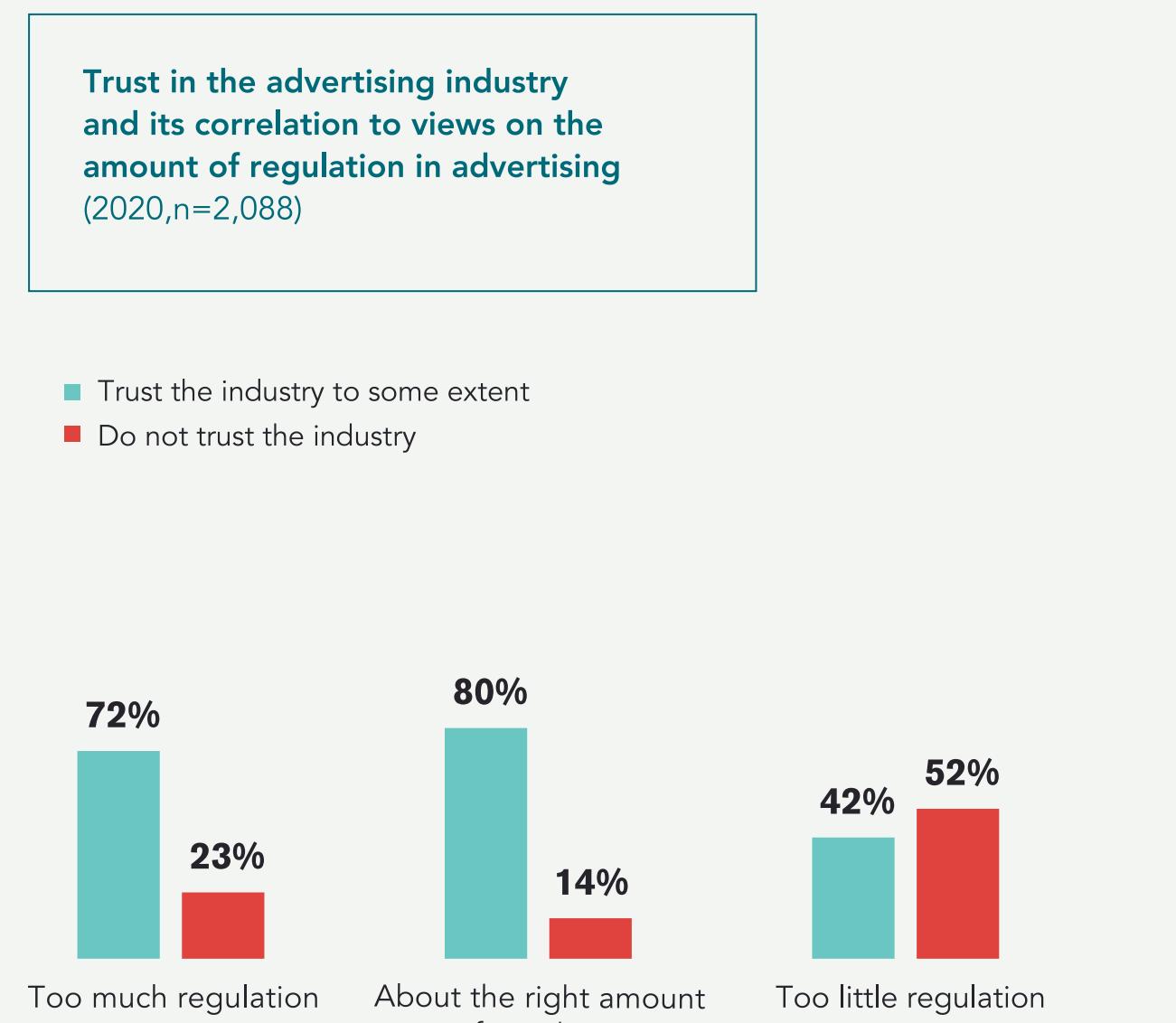
17. Gary Bennet, Lead Econometrician at ComRes, 2018.

Supporting the ASA to drive trust

From Credos' decade-long public tracking research, we know that those who do not trust the advertising industry say that there isn't enough regulation. Conversely, those who trust the advertising industry are more likely to believe that there is the right amount of regulation (it's worth noting this is closely followed by there being too much regulation in advertising)¹⁸.

This correlation makes sense and illustrates how having a well-recognised and effective regulatory organisation can help to prove the industry's responsibility to the public. In turn, this will help to positively shape public opinion.

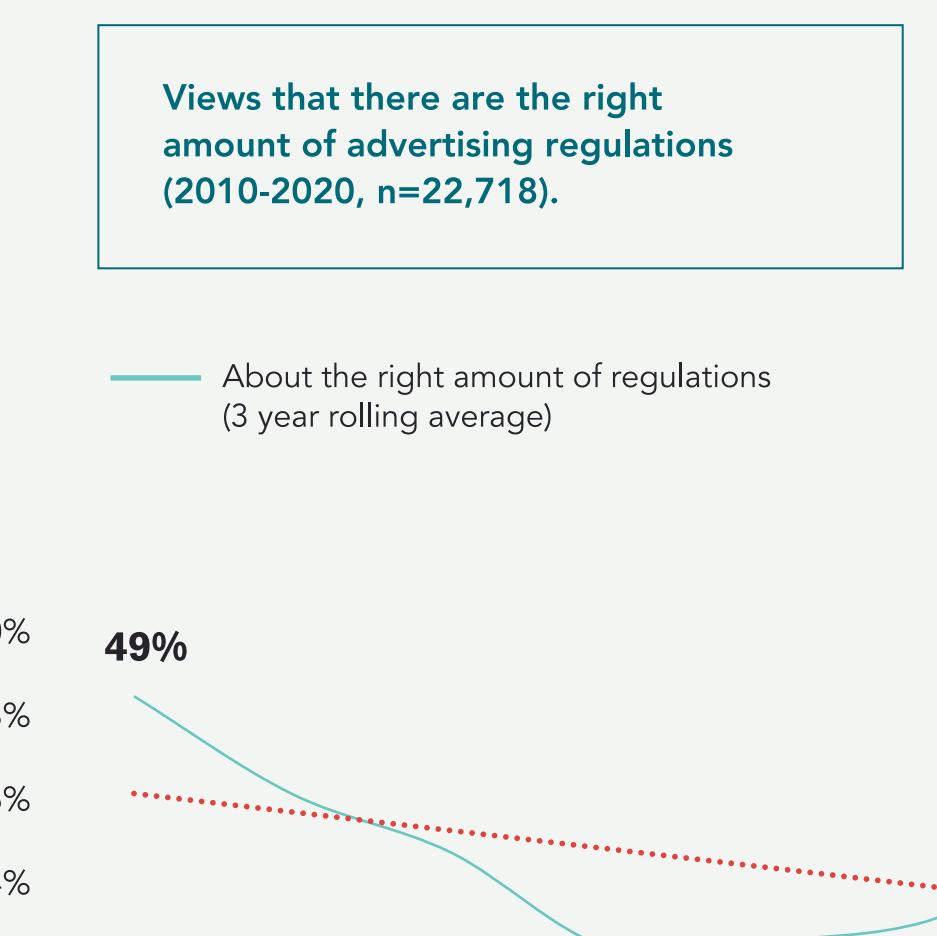
Figure 7 below shows how trust in the advertising industry correlates with views on the amount of advertising regulation.



18. Credos 2020 public tracking data (n=2,088).

However, there is a catch. Mainly, that the public have become less and less likely to believe that there is the right amount of regulation in advertising. As can be seen in Figure 8, those believing that there is the right amount of regulation in advertising have been declining over the past decade.

Figure 8 below shows the decline in responses saying that there is the right amount of regulation in advertising from 2010-2020.



This is obviously a problem for the industry, but it also helps to paint a picture of what can be done to improve public trust in advertising – mainly, educating the public as to the effectiveness of the ASA and the current regulatory system.

Advertise the ASA

One of the roadblocks to using knowledge of the current regulatory system to improve trust is awareness of the ASA. From Credos' tracking research, we know that spontaneous awareness of the ASA is low (12% in 2020). The public are also unaware of what the ASA's remit is (68% unaware of the phrase "Legal, Honest, Decent, Truthful" in 2020¹⁹). In addition, 40% of the public don't know that the ASA regulates online adverts.

Through our qualitative research (referenced in Section 1), we were able to follow up with those who were unaware of the ASA and tell them more about how the ASA regulates adverts. This directly led to an increase in positive perceptions towards the industry – with many saying that they felt more could be done to promote the ASA²⁰.

No, I had never heard of them [the ASA] before but I think it's really good that there is a regulator to ensure adverts are adhering to regulations.

FEMALE, 35-44

I have never heard of ASA before. I feel safer and happier knowing that they exist, I think they could do some advertising themselves to ensure the public are aware of them.

FEMALE, 35-44

¹⁹. Credos 2020 public tracking data (n=2,088).
²⁰. True Stories qualitative research (2021).

Even those who had heard of the ASA felt that more could be done to raise its profile and communicate its remit.

Yes, I have heard of the ASA, but it doesn't always come to mind straight away, as it's not something people really talk about and it's never advertised anywhere, it's one of those things you would have to Google to find out what to do!

MALE, 55-64

I have heard of the ASA; I was not fully aware of what their role is, but I understand that they oversee and regulate the content of adverts, but I don't know the rules or criteria that they apply to that. Being aware of it makes me feel that there is some form of control to protect the consumers from inappropriate or substantially inaccurate products or services. How many of the general public really know what the ASA is there to do? Perhaps that should be advertised on TV so that people know they have somewhere to go to find out more info or make a complaint.

MALE, 55-64

Based on the evidence above, there is a clear call for more public-facing communications, not only promoting the ASA, but also emphasising the effectiveness of the current system of regulations by showing the public evidence of what the ASA is doing for them.

Promote the image of the advertising industry as responsible and create greater visibility of the mechanisms by which the industry self-regulates and ensures that ads do not mislead the public.

GARY BENNET, LEAD ECONOMETRICIAN AT COMRES, 2018

If people knew of the numbers [of adverts taken down by the ASA] they would have more trust in the advertising industry.

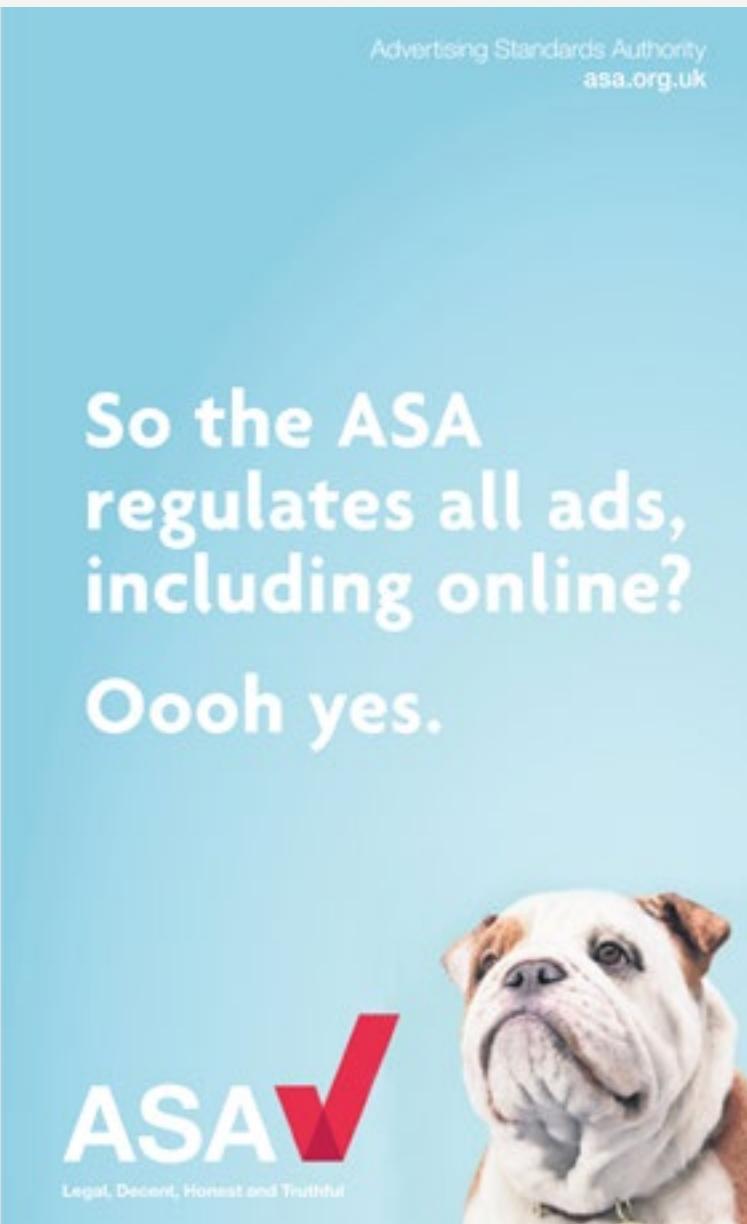
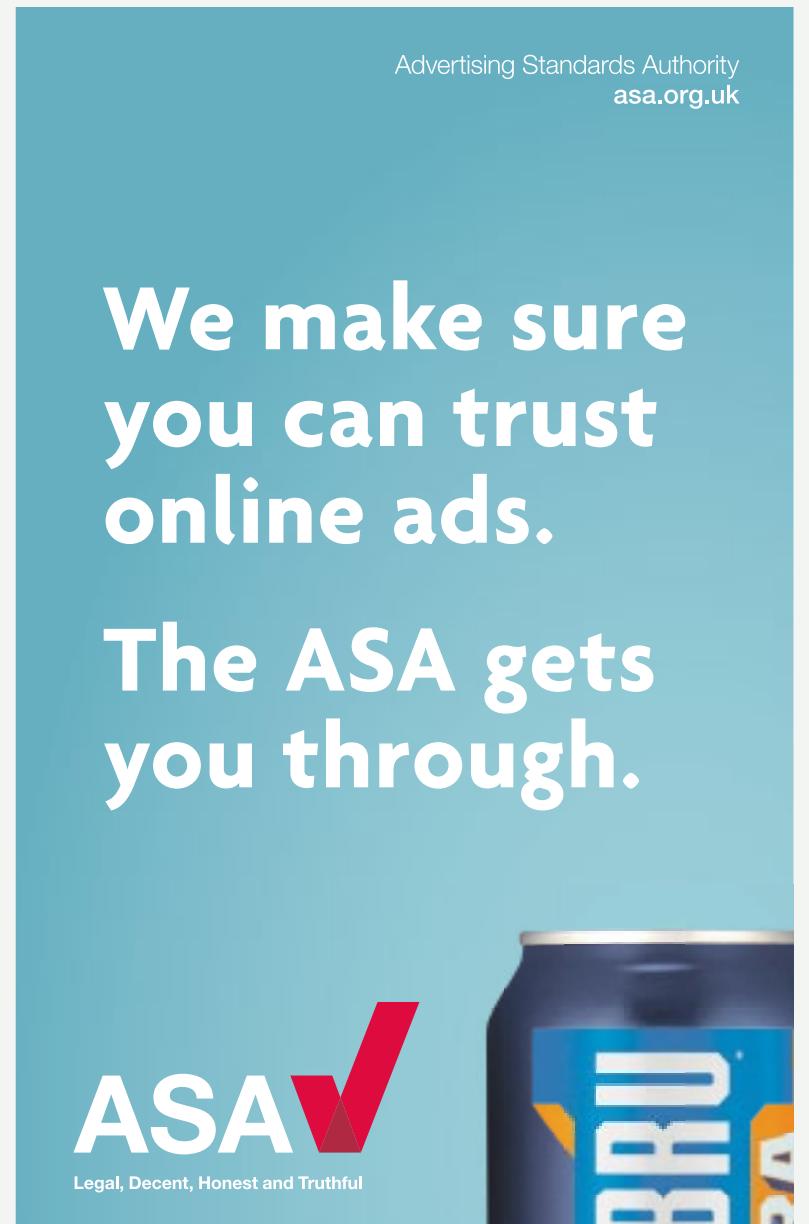
FEMALE, 35-44

Building on the success of the ASA Scotland test campaign

Starting in September 2020, the ASA, with the generous support of UK and Scottish media owners, launched a multimedia advertising campaign that aimed to:

- Reassure the public that advertising is a regulated industry
- Communicate the fact there are strict rules in place to ensure people are protected from misleading, harmful or offensive ads
- Raise awareness of the ASA and the fact that we regulate ads in all media, including those appearing online and in social media.

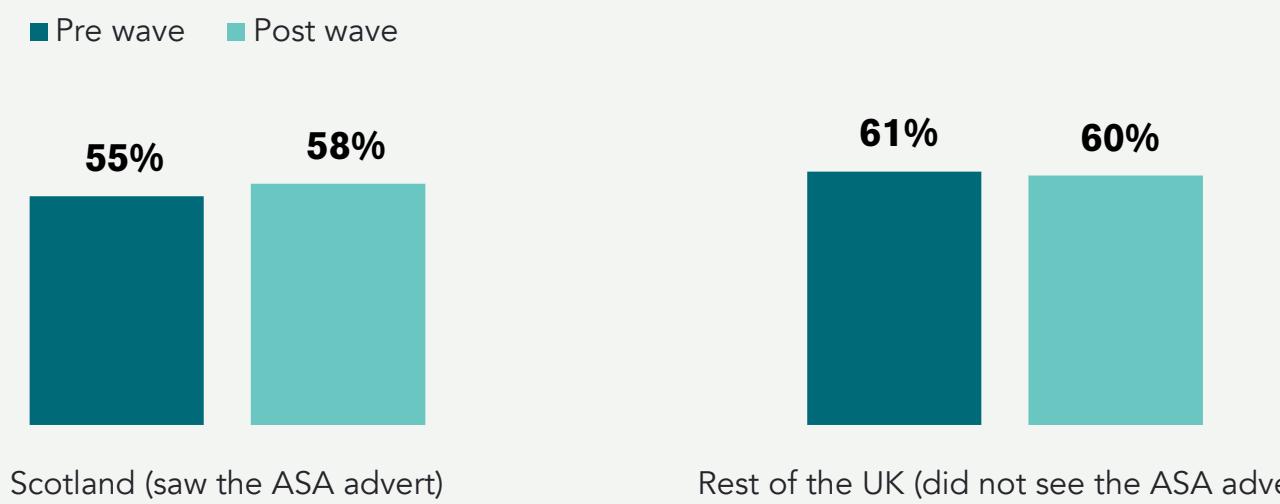
The campaign featured already popular advertising icons and properties, with the ASA seal of approval, letting people know that the ASA had checked and regulated the adverts.



Post campaign research from the ASA found that a third of Scottish adults recalled seeing the advert when prompted (10% spontaneously recalled it), with more remembering the TV adverts than other media types (when shown them).

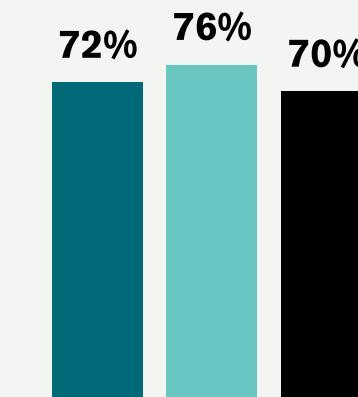
In addition, awareness of the ASA was slightly higher in Scotland versus the pre campaign research. In fact, when looking at the rest of the UK (England, Wales, and Northern Ireland), for those who did not see the advert, during this same time, awareness of the ASA went down by 1%.

Figures 9 and 10 show how awareness of the ASA and its remit compare during the pre and post campaign research.

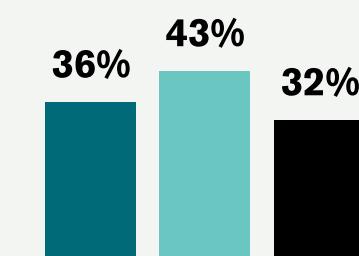


Knowledge of the ASA's remit:
ASA post campaign research
Source: BMG/ASA - Post campaign, March 2021

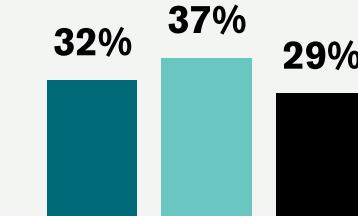
■ All adults ■ Saw/heard ASA ads ■ Didn't see/hear ASA ads



The ASA can force an advert to be removed if it is deemed misleading, offensive or harmful



The ASA regulates a company's own advertising claims on their own website



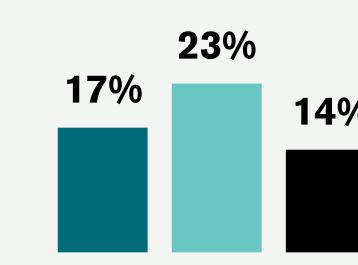
ASA regulates advertising on social media sites

Post campaign analysis also found that those who remembered seeing the campaign were more likely to trust the advertising industry than those who didn't. This is probably the most striking result as it directly shows a positive correlation between seeing the advert and trusting the industry – which is exactly what it was intended to do.

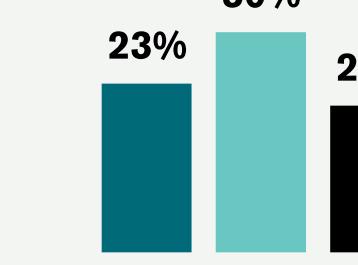
Figure 11 below shows how campaign recall correlates to trust in the advertising industry.

Trust in the advertising industry:
ASA post campaign research
Source: BMG/ASA - Post campaign, March 2021

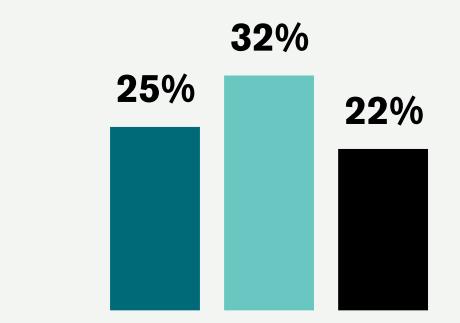
■ All adults ■ Saw/heard ASA ads ■ Didn't see/hear ASA ads



Trust in the ad industry



'I tend to trust most adverts'



'Generally speaking, I feel positively towards advertising'

The ASA research supports the claims made previously that advertising the ASA and its remit can not only lead to increased awareness of the ASA, but also trust in the industry. Showing the public that there is someone watching over their advertising experience, can lead to greater trust in advertising overall. The next step now is to roll the campaign out across the UK.

Guy Parker, CEO of the ASA, said:



From the delivery of an impactful, fun creative thanks to the talented team at Leith, famous brands allowing us to 'borrow' their iconic straplines, Medicom Edinburgh lending us their planning/buying expertise and media owners generously donating their space and airtime, our ad campaign has been a great success. And running it exclusively in Scotland has given us important insights into public attitudes, awareness and trust in the ASA, as well as the advertising industry more broadly, findings we've been able to benchmark against the UK. Our pilot shows us that increasing awareness leads to increasing trust in the ASA, which leads to increasing trust in advertising. And it reminds the public of ads they love. We're now looking forward to rolling the campaign out across the UK as we continue to reassure the public that advertising across media is regulated by the ASA, working hard to protect them from misleading, harmful or offensive ads, wherever they appear.

GUY PARKER, CEO OF THE ASA

About the Trust campaign

The Advertising Association established a Trust Working Group in 2018 to address the decline in public trust in advertising, under the joint chairmanship of Paul Bainsfair, Director General of the IPA, and Phil Smith, Director General of ISBA.

The working group has broad and senior representation from industry bodies including the News Media Association, Professional Publishers Association, Data & Marketing Association and the Internet Advertising Bureau as well as from ITV, Channel 4, Google, Facebook, Royal Mail, the ASA and the chairs of Front Foot and Credos. It regularly reports on its progress to the Advertising Association's Council, chaired by President, Keith Weed, with a mission to bring about system change through individual action. It launched its Trust Action Plan at the 2019 ISBA Annual Conference with five actions designed to create a system change in advertising.

The actions are as follows:

ACTION 1
We will reduce advertising bombardment

ACTION 2
We will reduce excessive advertising frequency and re-targeting

ACTION 3
We will ensure the ASA is "best in class"

ACTION 4
We will ensure that data privacy matters

ACTION 5
We will show that advertising can drive social change



Since the launch of this plan, the group has continued to publish research on the issue of trust. Its work includes Advertising Pays 8: UK Advertising's Social Contribution, published in January 2020, which measured the contribution of advertising to UK society. Since then, it has continued to track this vital contribution during industry's response to Covid-19.

It has also published Improving The Public's Advertising Experience – The Advertisers' Role which includes a new Advertising Experience MOT from ISBA for any advertiser looking to safeguard the consumer, avoid advertising bombardment and wasted investment.

The Advertising Association's mission to rebuild public trust in advertising continues.

To join the drive to address public trust in advertising, please contact us at aa@adassoc.org.uk

Thanks to the Trust Working Group

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This report is brought to you by Credos, the UK advertising industry's think tank. We produce research and insights about advertising's impact on society, culture and the economy.

Credos is committed to an honest appraisal of advertising, identifying its shortcomings as well as its positive features, so that the industry can address its findings.

We are grateful to the members of the Advertising Association and the Front Foot network who help to fund the work that Credos undertakes.



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Appendix

Appendix 1: 2010-2020 Public trust quantitative tracker

From 2010-2020 ComRes surveyed a nationally representative sample of 22,718 British adults online.

Sample by age:

- 18-24: 2,636
- 25-34: 3,829
- 35-44: 3,874
- 45-54: 3,993
- 55-64: 3,356
- 65+: 5,030

Appendix 2: 2021 Trust drivers research method

Stage 1: Method

- Online survey of a nationally representative sample of 2,010
- Factor analysis used to identify six overarching factors
- Regression analysis used to identify the impact of those factors on overall trust in advertising
- Data weighted to ONS figures by age, gender, and region/nation

Stage 2: Method

- 48 people selected for 7 days of digital tasks including:
 - advertising diary to capture unprompted experiences and perceptions
 - prompted tasks to ensure we cover the relevant issues
- 12 people selected for 90 minutes filmed doorstep interviews to further probe experiences and perceptions captured at stage 1.

Research by Credos for the Advertising Association

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