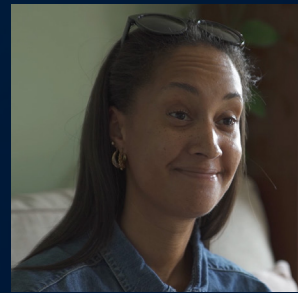
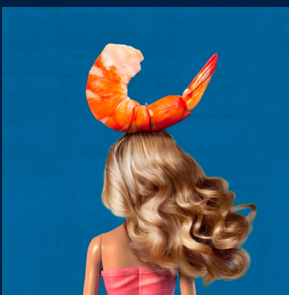


THE VALUE OF TRUST REPORT

Why trust in advertising matters



ADVERTISING
ASSOCIATION



CREDOS

UK Advertising's
Think Tank

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Co-chairs of the Advertising Association’s Trust working group

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Foreword



PAUL BAINSAIR
IPA Director General



PHIL SMITH
ISBA Director General

The 1920s in Britain was a decade of firsts. The first broadcast of BBC radio in 1922, followed a few years later by the first public demonstration of television in London. The first commercial flights by what would become British Airways took off to foreign shores and at home people could buy fridges for the first time. They could fill their new fridges with exciting new brands such as Wall's ice cream and Lucozade, then make themselves a Kenco coffee to take a break from it all.

The turn of the century and the run up to these exciting lifestyle and brand developments had already seen the formation of The Association of British Advertising Agents (that went on to become the IPA) and The Advertisers' Protection Society (the original name of ISBA). They realised that the success of their industry would be short-lived if the public did not trust the advertising that was increasingly surrounding them as consumer markets boomed. It was time for action! So, in 1926 the forerunners to the IPA and ISBA were founder members of the Advertising Association, which aimed to bring the industry together to work for the collective benefit of the industry and build greater trust in advertising.

Almost a century later, building people's trust in advertising remains a cornerstone of the Advertising Association's work. Since establishing the Trust Working Group in 2018, our aim has been to understand the drivers of public trust in advertising and work with our industry to increase that trust. When we started our work five years ago, there was surprisingly little existing research about trust in advertising in the UK or around the world. Now, through our work with Credos, we have a much deeper understanding of trust in advertising and what drives it for the British public.

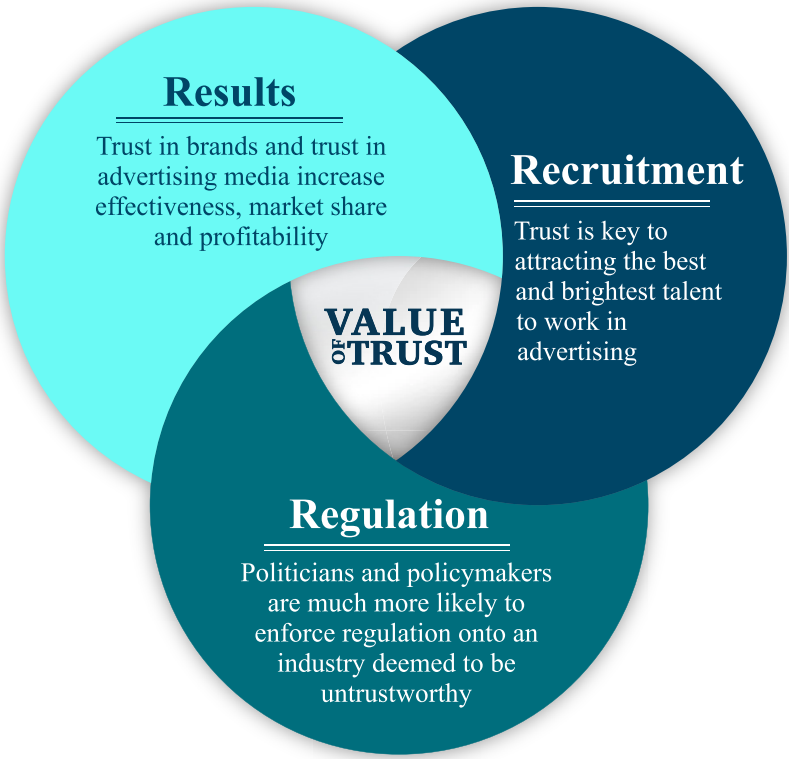
In what we hope is another notable first (even if not quite on the scale of radio or television) this insight-led report builds on our previous work and fully evidences the Value of Trust in advertising. It lays out what it means to business results, recruitment and regulation of our industry. It includes good news of positive progress in levels of trust in advertising, and the tools to understand how to improve trust in your campaigns, whether you are a media owner, brand or agency. It also sounds a warning to us all that we must not rest on our laurels; we must continue to do everything we can to improve the advertising experience and build even more trust in advertising.

Phil and Paul are co-chairs of the Advertising Association's Trust Working Group.



DAN WILKS
Director of Credos, Advertising Association

The 'three Rs' of trust



Executive Summary

“Trust or Bust!” Following years of long-term decline in public trust in advertising, that was the ultimatum put to the industry by the newly appointed AA President, Keith Weed CBE in 2019. Failure to arrest this decline would risk undermining the creativity, jobs, and value advertising brings to society – the industry had to work together. As one of the world’s most prominent advertisers, he knew how important trust was to the success of the brands and businesses dependent on advertising. This interdependence was summed up in another pithy phrase:

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

The AA's membership rose to the challenge; converging under the Trust Working Group, to firstly understand the drivers of public trust, and then to develop actions to improve the situation. Credos was tasked with the former, and we now have a much better understanding of what drives people to trust or distrust advertising, via our biennial Drivers of Trust research. In addition, our quarterly tracking provides a consistent measure of who trusts advertising and to what level.

But perhaps the first question we should have answered is why trust matters to those of us who work in the industry. After all, wouldn’t advertisers continue to spend and consumers continue to buy, regardless? Perhaps, if effectiveness wasn’t compromised or regulation didn’t intervene. But of course, it does matter. Public trust is intrinsic to advertising’s success, and increasingly so. This report, for the first time, evidences the value of trust in advertising to our industry and the future of our profession. We’ve identified three lenses, which we call ‘the three Rs’ of trust: results, regulation, and recruitment.

Results - trust in brands and trust in advertising media increases profits and overall effectiveness.

Regulation - politicians and policymakers are more likely to impose regulation on an industry deemed untrustworthy.

Recruitment - trust in our business, its values, and ways of working, is key to attracting and retaining the best and brightest talent to work in advertising.

So trust matters. And now we’re able to evidence it. But what of the level of trust itself? Is advertising any more trusted now than previously? The answer appears to be yes - the ‘Bust’ Keith warned of has been avoided, temporarily at least. The latest findings from the Advertising Association/ Credos Trust Tracking show trust in both the industry and the ads increased significantly in 2023. Though as we know, trust takes a long time to build and only a moment to lose, so we must remain focused on trust and keep working to improve it.

Trust in advertising is not homogeneous – there are significant nuances in the results, most notably by age. Young people are significantly more likely to trust advertising than older people. This is the only characteristic in the population where levels of trust consistently differ, and it is unique to advertising. Other industries tend to share similar levels of trust across age groups. The reasons for this are numerous, though the most evident appears to be what we’ve termed the 'generational digital divide', whereby levels of trust and distrust are similar across age groups for ‘traditional’ media, whereas older people are significantly more likely to distrust advertising in online media.

Now in its third iteration, our ‘Drivers of Trust’ research has sought to identify exactly what drives an individual to trust or distrust advertising. The results provide clear guidance on what we, the industry, can do. Simply put, make more enjoyable ads and bombard people less. In every year we’ve conducted the study, the enjoyment of ads is the single most important factor in dictating whether someone trusts advertising. Conversely, ad bombardment remains the number one driver of distrust.

As well as reaffirming why trust in advertising is important, this report suggests that progress has been made. There is certainly hope, and even perhaps some reward for the industry’s efforts. Though now, as ever, there is still much more to be done.

Value of Trust insights

01

Trust is now the second strongest driver of brand profitability. (Analysis of IPA Databank, Peter Field, 2024)

02

When, during the pandemic, advertisers moved away from trust as a priority in favour of increased short-term focus to defend sales, both profit margins and business effectiveness fell sharply. (Analysis of IPA Databank, Peter Field, 2024)

03

MPs that do not trust the advertising industry are five times more likely to support greater Government intervention to regulate advertising. (January MP Polling, YouGov/Credos, 2024).

04

People who saw or heard the recent ASA advertising campaign were twice as likely to trust both ads and the advertising industry than those who didn't. (ASA Ad Campaign 2023: Wave 5 results, ASA, 2024)

05

Over half (58%) of people that trust the advertising industry would be willing to work in it compared to just 15% of those that distrust it. That rises to 70% of 18-34-year-olds and 63% of people from ethnic minorities that trust the industry. (Advertising Association/Credos, Public Trust Tracker, Q1-Q4 2023)

06

Trust levels increased significantly in 2023 – the percentage of people trusting ads rose from 30% in 2022 to 36% in 2023. Over the same period trust in the advertising industry increased from 23% to 30%. (Advertising Association/Credos, Public Trust Tracker, Q1-Q4 2023)

07

For the first time since 2014, advertising is no longer the least trusted industry of those surveyed. (Advertising Association/Credos, Public Trust Tracker, Q1-Q4 2023)

08

In 2023, public trust increased across all advertising media channels. Predominantly driven by the young, seven of the eleven media channels measured recorded double digit growth in trust amongst 18-34-year-olds. (Advertising Association/Credos, Public Trust Tracker, Q1-Q4 2023)

09

Younger people are significantly more likely to trust advertising than older people. Exactly half (50%) of all 18-34-year-olds trusted the ads they see or hear. This falls to just 22% of those aged 55 and over. (Advertising Association/Credos, Public Trust Tracker, Q1-Q4 2023)

10

TV remains the most trusted media channel overall (41% trust), though trust in online channels has been increasing fast amongst the young, all of which recorded trust scores over 40% for the first time in 2023. (Advertising Association/Credos, Public Trust Tracker, Q1-Q4 2023)

11

Media socialisation underpins trust. The advertising we grew up and were socialised with seems to dictate how we consume advertising, how we react to it, and whether we trust it. (The Drivers of Trust, Craft/Credos, 2023)

12

The enjoyment of advertising is the number one driver of public trust in advertising. Simply put the more someone likes or enjoys an ad the more likely they're to trust it. Conversely, ad bombardment is the number one driver of distrust. (The Drivers of Trust, Craft/Credos, 2023)



01. *Results*

Trust in advertising increases profits and overall business effectiveness



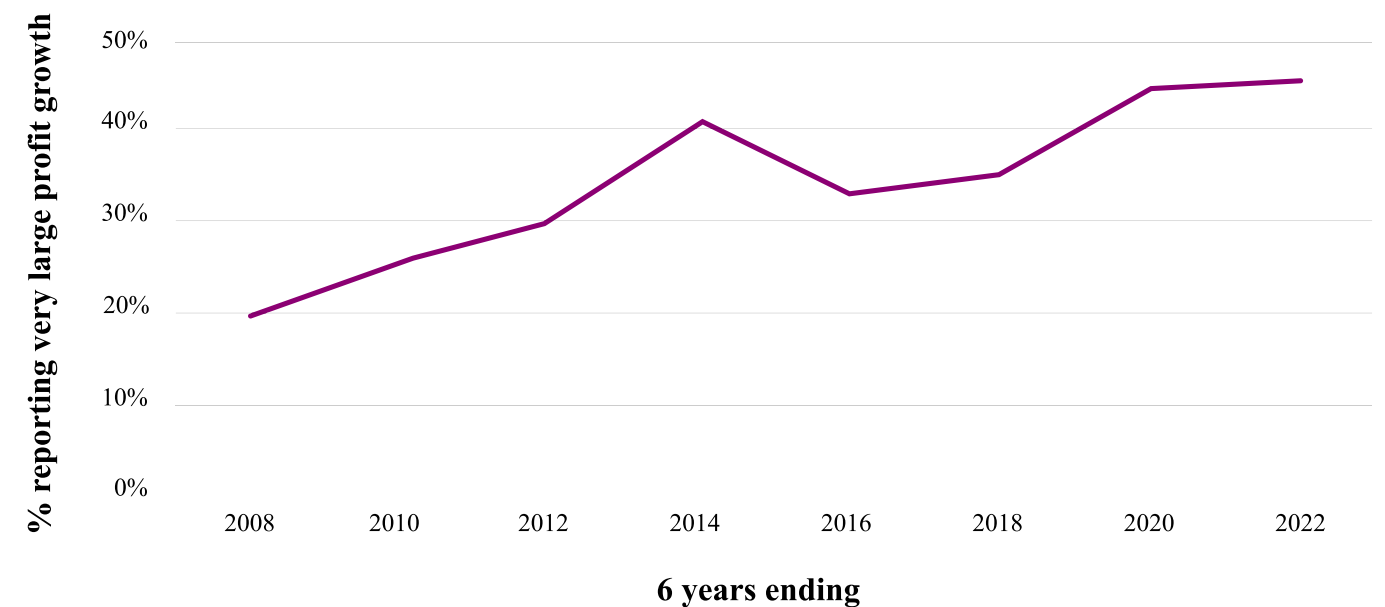
The growing importance of brand trust

Peter Field

The trust engendered in brands by their advertising is still widely overlooked as a brand metric, but it is an effectiveness issue that has grown strongly in importance in recent years.

The importance of trust has grown because, as the IPA data shows, since 2008, the relationship between building trust in a brand and achieving greater profit has strengthened considerably (see Figure 1).

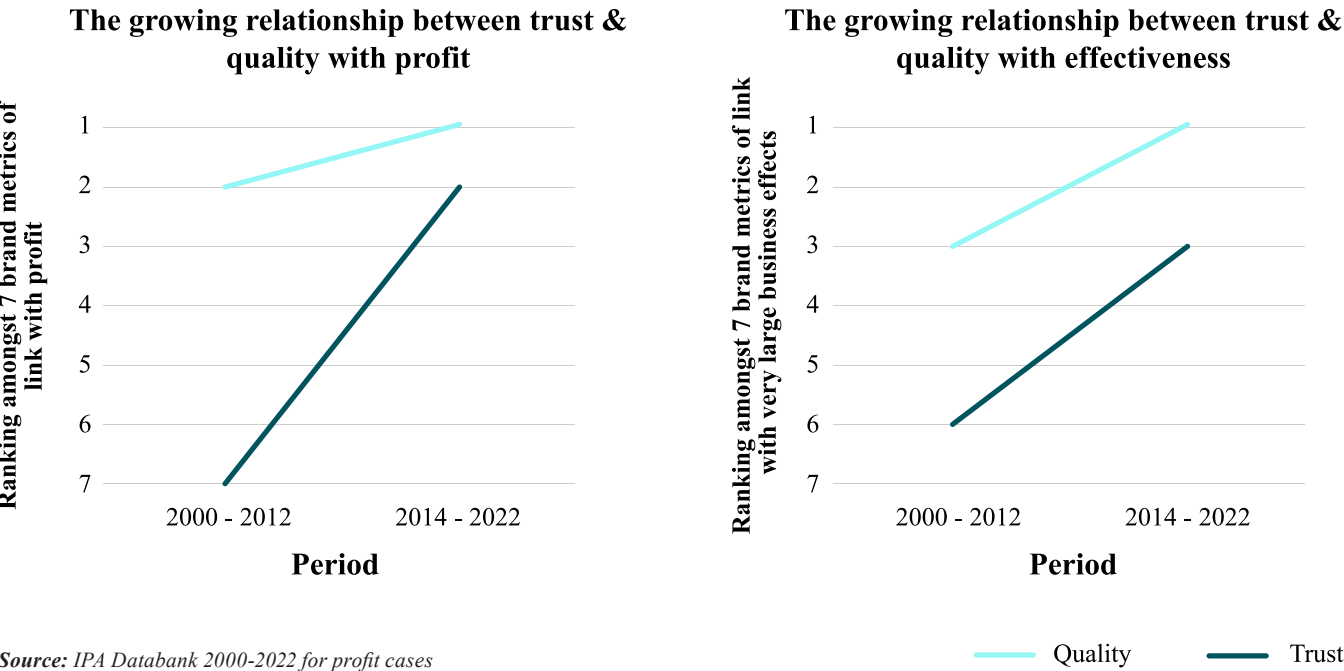
Figure 1: Percentage of IPA Databank cases with strong trust growth reporting strong profit growth



Twenty years ago, trust was the least important to profit growth of the seven brand metrics that the IPA monitors; today it is the second most important, beaten only by the perceived quality of the brand.

In the left-hand chart (see Figure 2), we can see the shift in the ranking of trust and quality amongst the basket of seven brand metrics (others being awareness, commitment, differentiation, fame, and image) in terms of their link with profit growth.

Figure 2: The growing relationship between trust and quality with profit and effectiveness



Quality, which has always been important to profit growth, has become even more so, increasing its ranking from second to first over the 22-year period that we are able to track the IPA data.

A consequence of this is the strengthening correlation between the scale of reported trust and perceived quality effects, which has risen from 0.46 to 0.56 over the two periods, suggesting that consumers are increasingly making assessments of the quality of any brand they might buy based on whether they trust that brand and its advertising. Given the importance of quality perceptions to pricing power and therefore profitability, it’s easy to see why trust has become so much more important.

A similar picture emerges (see the right-hand chart in Figure 2) when we look at the link with broad effectiveness, measured as shifts across a basket of six business metrics: sales, market share, customer acquisition, loyalty, pricing power and profit. Quality has risen in rank from third to first and trust has risen from sixth to third in terms of their link with broad effectiveness. So, whatever you may think generally about the absolute level of importance of trust in the mental availability of brands, it is clear that it has risen.

The IPA data suggest that the impact of trust on effectiveness has grown particularly strongly over the last five or six years, perhaps coinciding with the moment when society realised it had entered the era of ‘fake news’ and when many people ceased believing a lot of what they were reading. As long ago as 1964, Marshall McLuhan famously stated that “the medium is the message” and it is very apparent in the IPA data that this has become especially true in recent years.



Implications for advertising

The IPA data suggests that there are strong implications for the nature and placement of advertising if we wish to build trust in our brands.

Trust appears to be influenced by both media and creative choices, though the two are interconnected to a degree. For example, emotional creative strategies argue for audio-visual mass media, rational strategies argue for targeted performance media. So, whilst we know that different media channels have different impacts on trust effects¹, this may to some degree be connected with the kind of advertising that they tend to attract. We will not revisit the media channel findings here, but instead examine the impact of broad creative strategy on trust effects.

The most important facet of creative strategy from an effectiveness perspective, is whether the advertising is essentially emotional or rational in nature. The IPA data can examine the impact of each type of campaign on trust.

When comparing the average Extra Share of Voice (ESOV)² level of rational campaigns that built very large trust effects with that of emotional campaigns that did the same, the results are very revealing: from 2000-22, rational campaigns on average required 13.3% ESOV to build very large trust effects; for emotional campaigns the equivalent ESOV level was 0.0%. Converting this into annual extra budget requirement, on average, rational campaigns would require an additional £17 million to produce the same trust effect as emotional campaigns.

This means that emotional campaigns (and therefore the media channels that can deliver them most powerfully) are more efficient at building trust in brands than rational (information-based) campaigns.

There are other facets of creative strategy that can be explored in the context of trust effects, such as the use of testimonials or music – these will be the subject of ongoing research.

1. Signalling Success, house51/Thinkbox (2020)

2. Extra Share of Voice (ESOV) is a calculation based on Share of Voice (SOV). SOV refers to a brand’s relative share of advertising space in its category, calculated by dividing the total spend in the category by the amount of spend by an individual brand. ESOV is the difference between SOV and market share – a higher ESOV can drive mental availability and is therefore a key effectiveness budget metric.

The Covid-19 footnote

So far in this paper, for statistical robustness, we haven’t looked at any individual bi-yearly IPA data. But the marketing response to the uncertainty of the Covid pandemic serves as a useful warning of what happens when we abandon the pursuit of trust, as many brands did. To do this we need to compare the 2022 IPA data that captured campaigns over the 20-21 pandemic years, with the 2020 data covering the previous two years. Although the sample sizes are less robust, the differences are big, as we will see.

We can see the impact of Covid on campaign objectives very clearly amongst all IPA case studies (see Table 1). A strong decline in brand building objectives in general, exemplified by trust and quality objectives, which both fell sharply in adoption. Many business objectives also declined, most worryingly profit, with sales defence growing strongly – an objective known to be associated with poor performance. Sales defence manifests itself in growing short-term objectives and campaign durations, which leapt (as widely predicted). This also resulted in a jump in the share of budgets allocated to rational advertising (which almost doubled) and to channels that are not strongly associated with trust effects, such as social media and online video in general.

Table 1: The impact of Covid on campaign objectives

Objectives	2020	2022
Trust	27%	22%
Quality	43%	26%
Defence of Sales	27%	39%
Profit	46%	32%
% short-term campaigns	12%	33%

Source: IPA Databank, 2020 & 2022 for-profit cases.

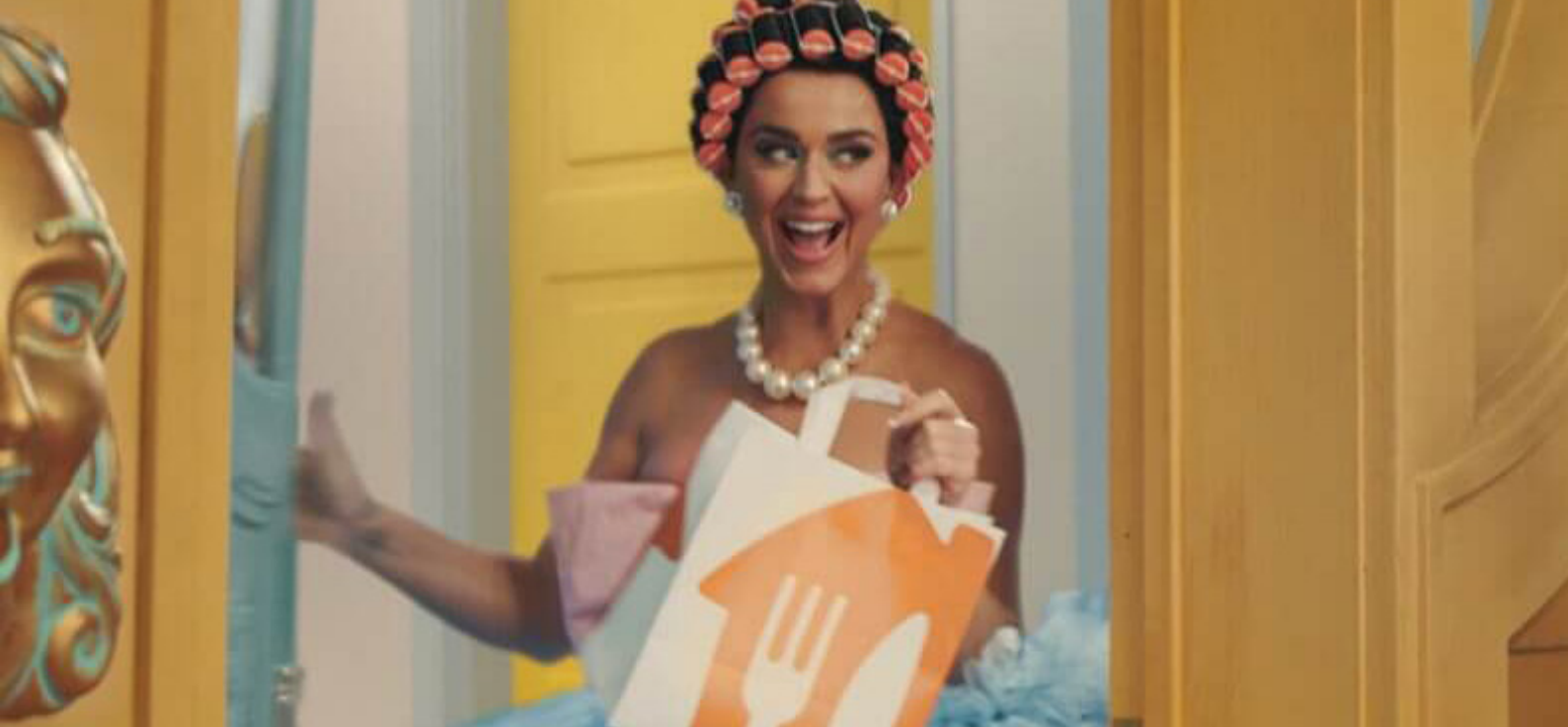
The inevitable consequences of this on outcomes were sharp reductions in quality and trust effects and in brand effects in general (which plummeted, see Table 2). Given the importance of these to business outcomes, it is not surprising that profit and business effectiveness in general also fell sharply, despite the modest and short-lived downturn that many sectors experienced.

Table 2: The impact of Covid on campaign outcomes

Outcomes	2020	2022
Trust	37%	13%
Quality	20%	9%
Brand effects	2.1	1.3
Profit	40%	23%
Business effects	1.7	1.1

Source: IPA Databank, 2020 & 2022 for-profit cases

Despite the Covid downturn being much less severe than the Global Financial Crisis of 2007-8 for most sectors, the loss of effectiveness recorded in the IPA data was considerably greater (by 50%). We can only explain this by the over-reaction of many marketers to the fear of recession and the effect this had on strategy (but not budgets which were resilient for IPA cases).



What is the value of trust to your business?

As a business which was founded on the universal principle of Truth Well Told, this is a non-negotiable for us and something very close to my heart.

Our mission is to build enduring brands, and help brands earn a meaningful role in people’s lives. We do this because people expect brands to have a purpose in the world beyond the products that they sell. A purpose that is cultural, societal or communal – and if they do, they’re more likely to buy from them as a result. Trust is the only driver to achieve that.

What will you do to help drive trust forward in 2025?

We will continue to prioritise transparent and honest messaging, showcase the agency’s commitment to social and environmental causes, use innovative approaches to provide clients with cutting-edge solutions and promote a culture of fearlessness, integrity, and accountability within the agency.

What is the value of trust to our industry?

We all know adverts and creative content have a significant impact on our people and society, and therefore we have a responsibility to be truthful and trustworthy so we can positively shape opinion and culture.

From an internal point of view. Those of us known for our integrity and reliability attract more clients and retain top talent. Talent is such an incredibly important one, as our people are our product. A strong reputation built on trust can differentiate an agency in a competitive market, leading to more creative and fruitful opportunities and industry recognition.



Polly McMorow
CEO, McCann

Conclusion

This analysis has shown that brand trust matters to the business performance of brands – and what happens when we walk away from defending it. This is now very relevant to the uncertain times businesses find themselves in, typified by a rekindling of short-term thinking and growth of use of those strategies and channels that don’t support trust. This does not bode well for brands’ financial performance, if nothing else. Ultimately, the winners will be the advertisers that commit to trust and make use of the strategies and platforms that support it.

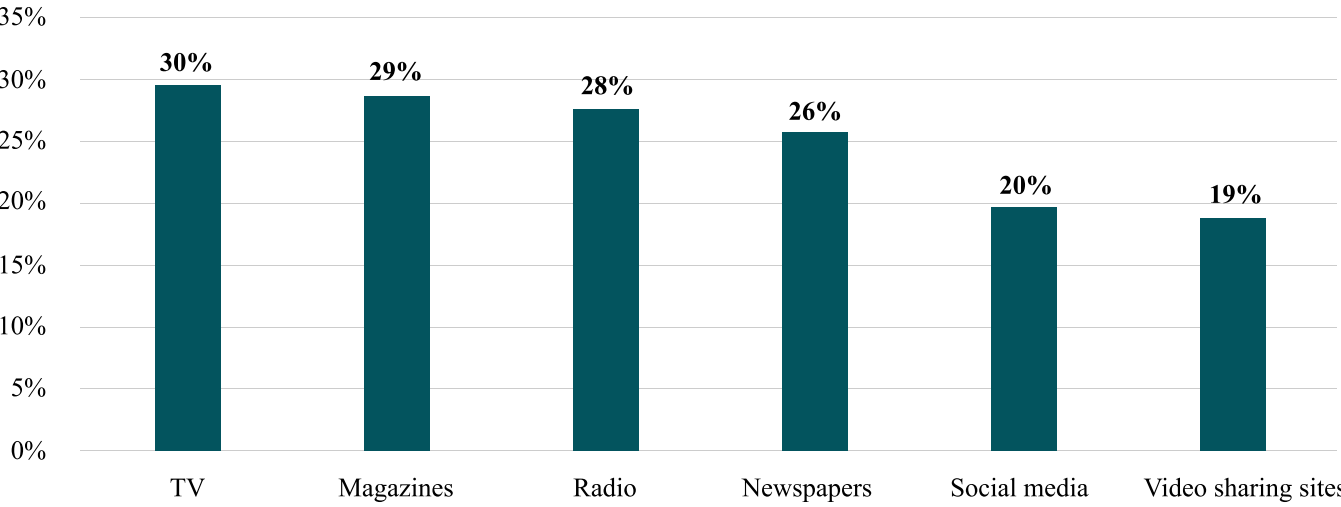
The halo effect of trusted media

There is a clear relationship between trust and media choices. Studies evidencing that advertising in trusted media has a significant halo effect³ on brands abound, increasing levels of trust in both the brand and the ad.

Most recently, Newsworks found that trust in advertised brands was 1.5× higher when seen on a news brand website compared to a non-news brand site, and this rose to 1.8× for newer, less established brands. The reason: advertising on a news brand helps to reduce the negative forces that act as a drag on brand trust. Consumers are less likely to question the competence of the brand when it advertises on a news brand site (30% less likely) and less likely to perceive buying or using the brand as a risk (20% less risky)⁴. Similarly, research by Magnetic identified a 64%-94% uplift in brand trust measures when advertising in magazine brands.⁵

Though very media specific, these studies suggest that the more trusted the media channel, the greater the likelihood of delivering brand trust. Looking across media, Thinkbox’s 2020 Signalling Success study revealed that brands advertising on TV, magazines and radio were perceived as most trusted to deliver on promises made in their advertising. The research found that advertising on video-sharing sites was least likely to deliver brand trust (see Figure 3).⁶

Figure 3: Trust to deliver on promises made in advertising



Source: Signalling Success, house51/Thinkbox (2020)

3. Trust. A Newsworks Report, Newsworks (2023)
4. Trust. A Newsworks Report, Newsworks (2023)
5. A Matter of Trust, Magnetic (2018)
6. Signalling Success, house51/Thinkbox (2020)

UK'S N°1 SKINCARE BRAND*

N°7

DON'T REGRET
JUST REVERSE

N°7 Future Renew
DAMAGE REVERSAL
SPF 40 Day Cream
Targets visible signs of skin damage
50 ml e 1.69 Fl. Oz.

N°7 Future Renew
DAMAGE REVERSAL
Night Cream
Targets visible signs of skin damage
50 ml e 1.69 Fl. Oz.

N°7 Future Renew
DAMAGE REVERSAL
Serum
Targets visible signs of skin damage
30 ml e 0.84 Fl. Oz.

N°7 Future Renew
DAMAGE REVERSAL
Eye Serum
Targets visible signs of skin damage
10 ml e 0.34 Fl. Oz.

*Email ukgb@boots.co.uk to verify. Recommended as part of a regime with daily SPF usage.

†Appearance of lines, wrinkles, uneven texture, firmness, skin tone evenness, radiance.

Boots

What is the one thing we could collectively do to improve levels of trust in 2025?

In short, deliver on what we promise consistently at every brand touch point and therefore make sure our actions line up always with what we are communicating. This also includes delivering clear, effective, and high quality creative that really engages with consumers in the most relevant channels.

Bombardment is the strongest driver of distrust – how can we address this as an industry?

As a brand, it is key that we all set clear parameters for ourselves and our agencies on the volume of communication to consumers. We have these in place, for example, on our Boots customer communications programmes. Ultimately, we must ensure that all comms are offering genuine value-driven content that help to build long term relationships with customers over short term gains.

Pete Markey
Chief Marketing Officer, Boots

What will you do to help drive trust forward in 2025?

We will continue to emphasise the key ingredients of trust, including the reliability of our services and products, transparency in all our communications, humanity, demonstrating empathy and inclusivity, and capability, by delivering high-quality experiences at every customer touchpoint.

Value of Trust: Why Trust in Advertising Matters / 15

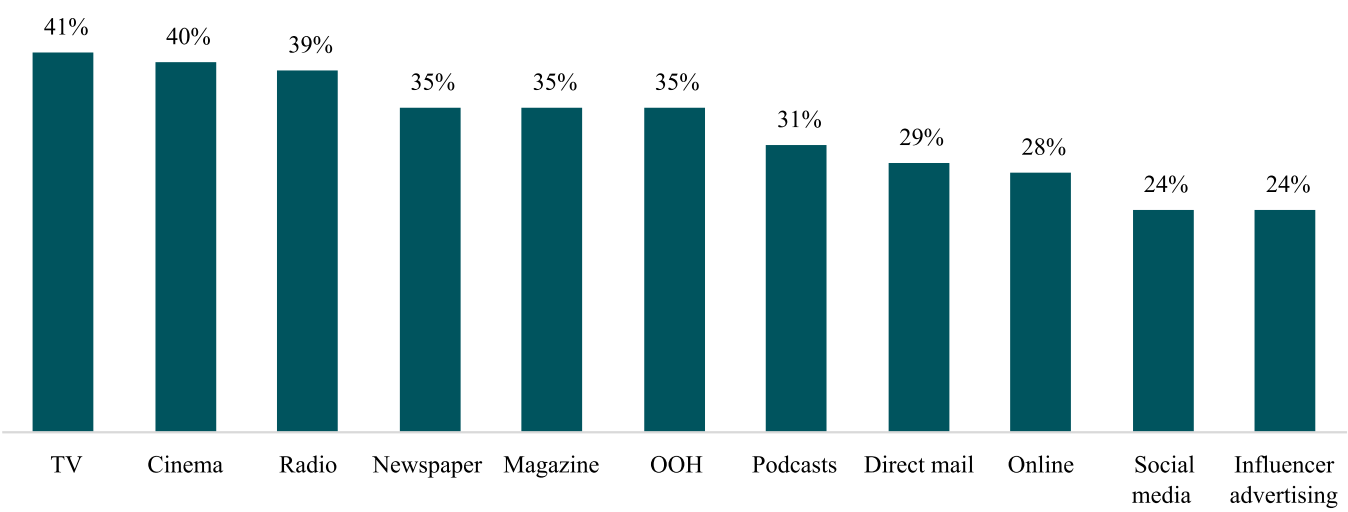


Trust varies by media channel

As shown in Figure 4, public trust in different advertising media varies significantly. In general, ‘traditional’ media channels are more trusted than online channels, this is reflected in all the studies linking brand trust and media channel to date. However, there are two key caveats to these findings:

- 1. Levels of trust vary significantly by age. Younger people are much more likely to trust online advertising channels, and at a similar level to that of other media. This is explored in detail in Chapter 4.
- 2. Online advertising is not an amorphous blob; it has many formats, incorporating several ‘traditional’ channels. For example, Kantar’s Media Reactions study found that Streaming TV ads have higher levels of average trust than many ‘traditional’ channels (ranked 8th of the 20 channels measured), as do influencer branded content and news websites⁷.

Figure 4: Public trust in advertising media channels - 2023



Source: Advertising Association/Credos, Public Trust Tracker (Q1-Q4 2023)



7. Media Reactions, Kantar (2021)

What is the value of trust to your business?

Each targeting decision we make, and each placement we book impacts how a brand is perceived and how trust is built with consumers. We recognise the privileged position that we have, creating transformational media plans that connect brands to potential customers, and this is a responsibility that we take seriously.

What is the value of trust to our industry?

Against the backdrop of AI and fake news, it’s never been more important to take the time to unpack the drivers of trust across the advertising industry, and to consider how we can push harder to deliver work that recognises the positive drivers of trust and mitigates the negative. The Advertising Association’s work across the last few years has been invaluable to both agencies and clients, in helping to support decision-making across product portfolios, creative work and media channel investment.

What will you do to help drive trust forward in 2025?

Understanding the drivers of trust is a crucial part of the long-term success of our clients’ advertising campaigns. Across media planning and activation at OMG, we take particular note of the negative drivers – bombardment, vulnerable groups and data privacy – and will continue to build ethical, privacy-first campaigns that are crafted around minimising excess frequency as standard.

Vicky Fox
Chief Planning Officer, OMG UK

02. *Regulation*

Ads. We keep
them in check.
Whether you
love them or
hate them.



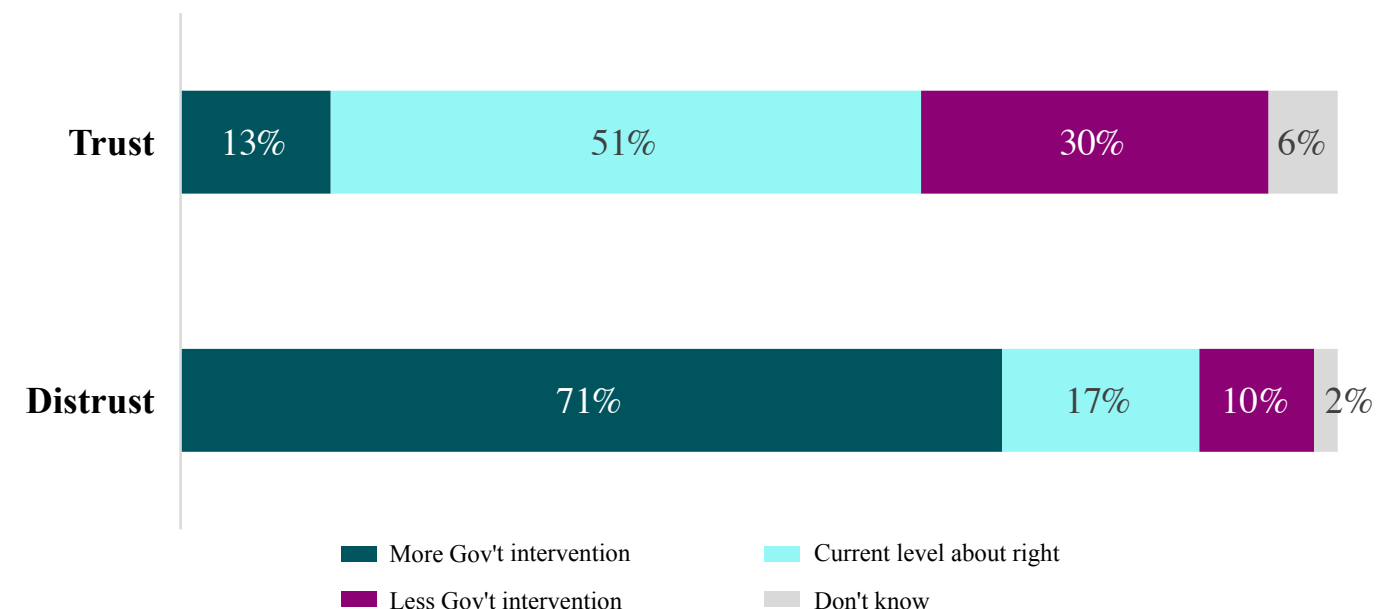
Distrust increases support for government intervention

Established more than 60 years ago, the Advertising Standards Authority (ASA) is the largest and best resourced advertising self-regulatory system in the world.

It is an innovator in pursuit of high standards and is widely considered to be the global gold standard. With responsibility for all forms of commercial advertising, it has recently launched the Active Ad Monitoring system, harnessing AI to monitor millions of online ads per year. Trust in the advertising industry is essential to ensuring that the ASA can continue to effectively regulate all commercial advertising on behalf of the industry and for the benefit of consumers.

Recent polling conducted by YouGov on behalf of Credos⁸ found that MPs who do not trust the advertising industry are five times more likely to support government intervention to regulate advertising. Figure 5 shows that 71% of MPs who distrust the advertising industry support more direct government intervention to regulate advertising, compared to just 13% of those that trust the industry.

Figure 5: Percentage of MPs that support more or less direct government intervention to regulate advertising – trust the advertising industry vs distrust the advertising industry



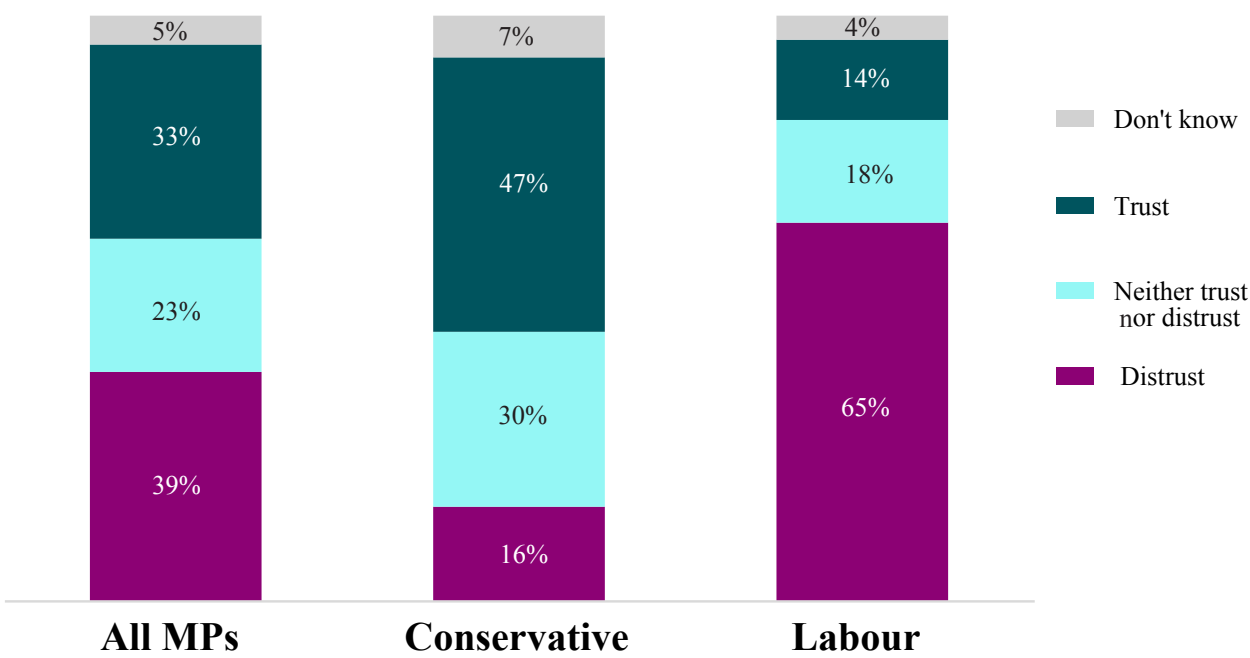
Source: January MP Polling, YouGov/Credos (2024). Based on a representative sample of 107 MPs

Of those MPs that distrust the industry, two thirds (66%) believe there is too little regulation and over half (57%) feel that existing regulations are ineffective in ensuring ads do not mislead, offend or harm the public. Similarly, distrusting MPs also tend to perceive the advertising industry to be irresponsible (69%) and neither transparent nor open (75%).

Stark findings indeed, which begs the question – what proportion of MPs do trust advertising? Overall, 39% of MPs surveyed trust the advertising industry, 33% distrust it and a further 23% neither trust nor distrust the industry. However, levels of trust differ significantly between the two major Westminster parties (see Figure 6), almost two thirds (65%) of Labour MPs do not trust the advertising industry, that's four times the equivalent figure for the Conservatives (16%).

⁸ January MP Polling, YouGov/Credos (2024). Base on a representative sample of 107 MPs.

Figure 6: Percentage of MPs that trust or distrust the advertising industry



Source: January MP Polling, YouGov/Credos (2024). Based on a representative sample of 107 MPs

The make-up of Parliament has changed significantly since the survey was conducted. Many rank-and-file Labour MPs are new to the House, and are starting from a position of distrust in regards to advertising. Therefore, increasing the awareness, understanding and ultimately trust in the advertising industry and our self-regulatory system is of paramount importance.

Public awareness of the ASA is also key

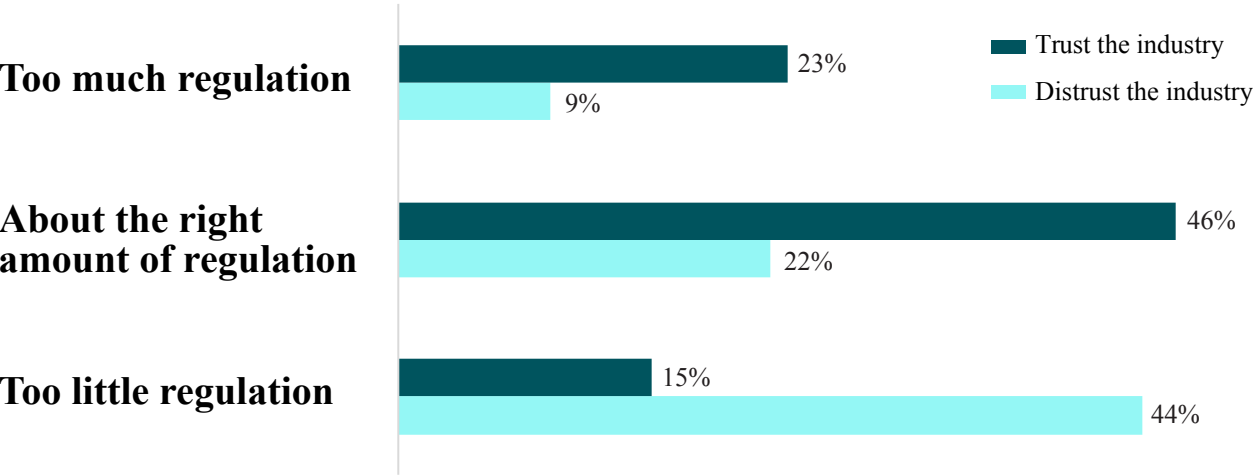
Increasing public, as well as MP awareness of the ASA and the role it plays in ensuring all UK ads are ‘legal, decent, honest, and truthful’ is critical. Afterall, the presence of ad related complaints and issues in MP’s ‘post-bags’ can directly lead to calls for greater advertising regulation.

From Credos’ decade-long public trust tracking, 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.

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. And in turn, help to positively shape public opinion.

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

Figure 7: The correlation between trust in the advertising industry and views on advertising regulation



Source: Advertising Association/Credos, Public Trust Tracker (Q1-Q4 2023)

Advertising’s ‘silver bullet’? Possibly...

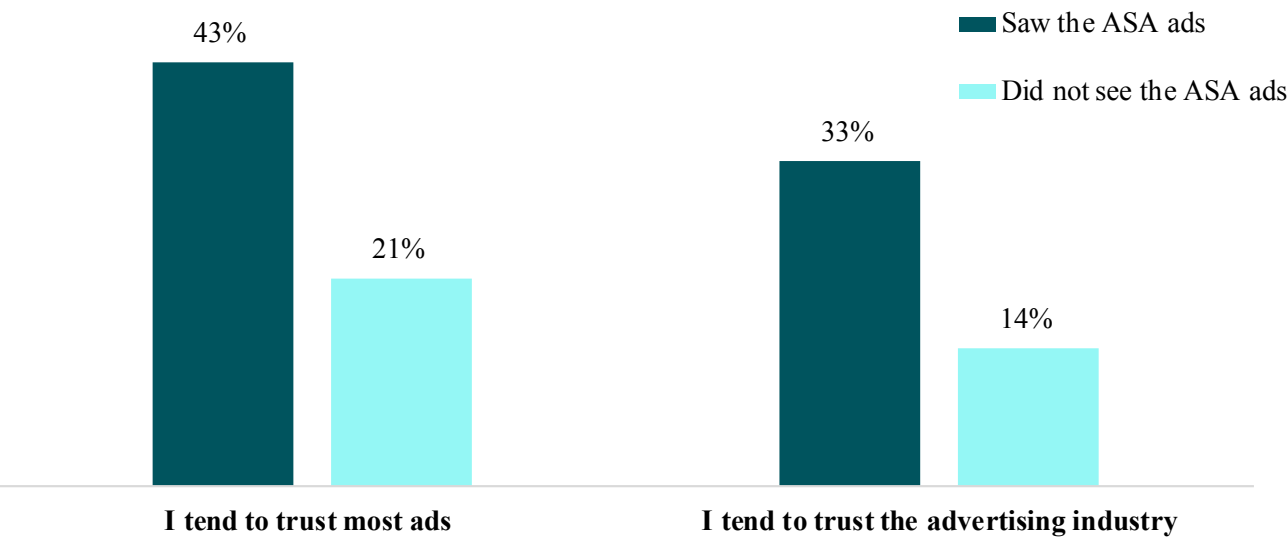
Following a hugely successful pilot campaign in Scotland in 2020, the ASA has now conducted two UK-wide advertising campaigns that aimed to:

- 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 ads in all media, including those appearing online and in social media are regulated.

Made possible through the generous support of UK media owners, 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.

The campaign has been a huge success. The post-Autumn 2023 campaign results reveal that those who saw/heard the ASA campaign are twice as likely to trust both ads and the advertising industry than those who didn’t (see Figure 8). Given that more than a third (36%) of UK adults recall seeing/hearing the ASA ads, the impact of the campaign is considerable.

Figure 8: Trust in ads and the advertising industry post-Autumn 2023 ASA campaign – those that saw the ASA ads vs those that didn’t



Source: ASA Ad Campaign 2023: Wave 5 results, ASA (2024)

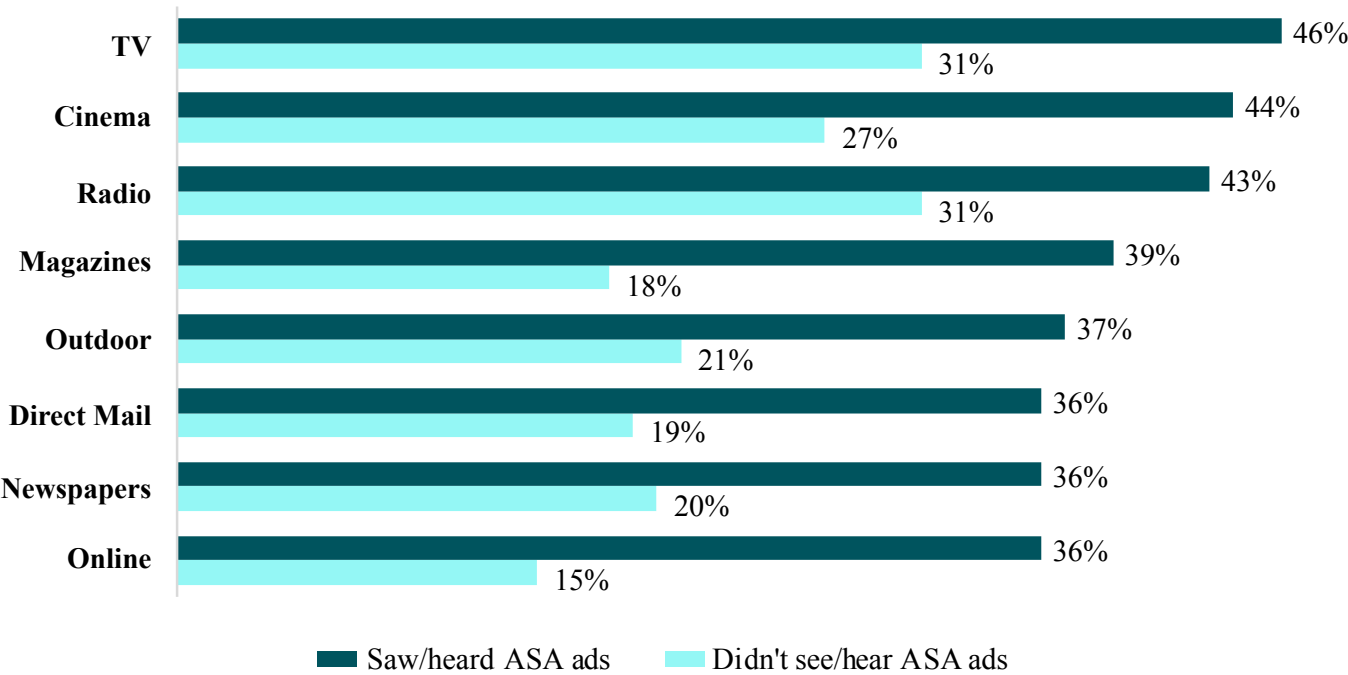
In addition, people who saw/heard ads for the ASA were considerably more trusting of ads across all media channels. As shown in Figure 9, direct mail (19 percentage points) recorded the largest increase in trust levels, followed by online and outdoor, although the increases were remarkably consistent across all media.

The ASA's post campaign research provides clear evidence that advertising the ASA and its remit can not only lead to increased awareness of the ASA, but also trust in the industry itself and the ads we produce. As we'll later highlight in Figure 11, public trust in both the advertising industry and the ads themselves increased significantly between 2022 and 2023, a rise at least partly attributable to the ASA Campaign.

Regression analysis applied to the Advertising Association/ Credos Public Trust Tracker shows recall of the ASA campaign to be the factor most strongly correlated with driving trust over this period. It was twice the level of other factors measured, including recognition of advertising's role in driving creativity, social impact, and supporting sustainability.

Of course, there is no silver bullet for increasing trust in advertising but raising public awareness of the ASA comes close. With the third wave of the ASA's campaign having launched across the UK in September 2024, this will build on residual recognition and further bolster trust.

Figure 9: Trust in advertising media channels post-Autumn 2023 ASA campaign – those that saw the ASA ads vs those that didn't



Source: ASA Ad Campaign 2023: Wave 5 results, ASA (2024)

Reassure

the public that advertising
is a regulated industry.

We regulate ads
across all media,
including online.

Because every
little helps.



Advertising Standards Authority
asa.org.uk

So the ASA
regulates UK ads,
including online?
Oooh yes.



Communicate

the fact there are strict rules
in place to ensure people are
protected from misleading,
harmful or offensive ads.

Advertising Standards Authority
asa.org.uk

Raise Awareness

of the ASA and the fact
that ads in all media,
including those appearing
online and in social media
are regulated.

We regulate UK ads,
wherever you see or
hear them.

Because we, too,
are by your side.



03. *Recruitment*

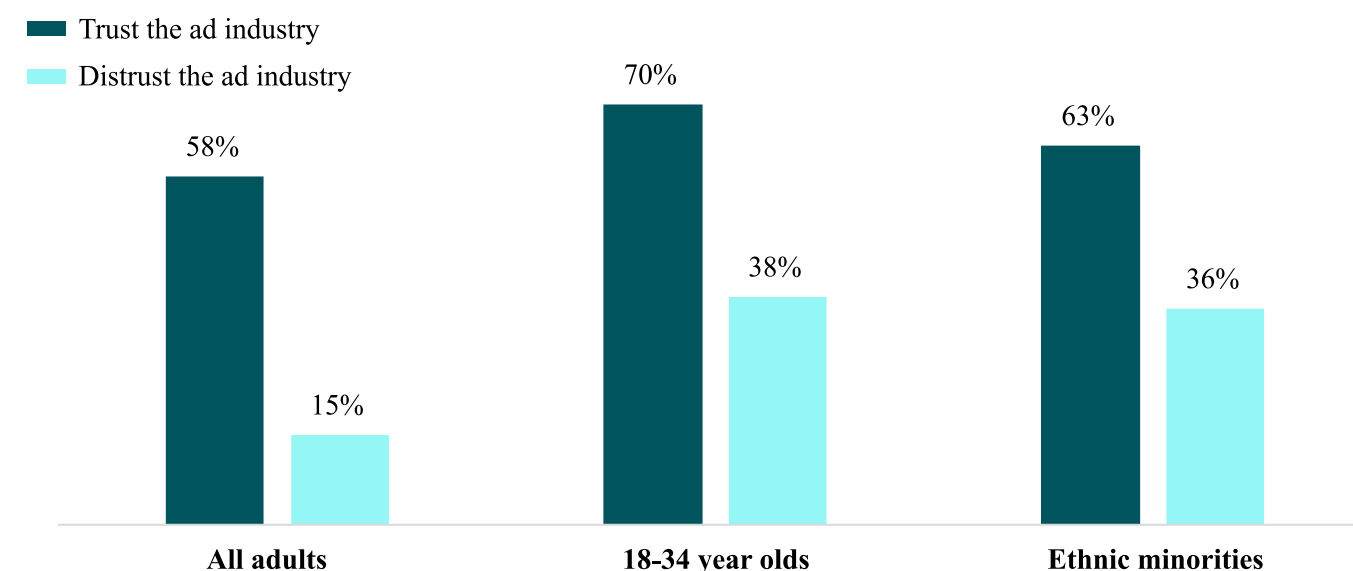
Working in a trusted industry

The relationship between employers and employees is changing. No longer are a permanent position and a good salary the sole requirements of a potential employer.

Younger generations are reassessing what it means to work in a world where many of the traditional incentives are seen as either unattainable or redundant. Many workers now expect their employers to be purpose driven, inclusive, flexible, and more than ever, trusted. Of the institutions measured in the Edelman Trust Barometer 2024, 'my employer' is the only one still trusted by people in the UK (77% of people trust their employer). Business (48%), NGOs (47%), Media (31%) and the Government (30%) are no longer trusted by most people.⁹ In turbulent times, as trust in the institutions of our society crumbles, people are turning to their employers as somewhere they can place their trust.

It is therefore imperative that UK advertising and the businesses operating within it are trusted in the eyes of the public. Our ability to recruit and retain the very best talent depends on it. As shown in Figure 10, 58% of people that trust the advertising industry would be willing to work in it compared to just 15% of those that distrust it. Reassuringly, amongst those that trust the industry, the proportion willing to work in advertising jumps to 70% of 18-34-year-olds and 63% of people from ethnic minorities. As the industry looks to recruit the next generation, and increasingly from diverse backgrounds, it would do well to remember the impact of trust on the available talent pool.

Figure 10: Percentage of people who would consider working in advertising – those that trust vs distrust the advertising industry



Source: Advertising Association/Credos, Public Trust Tracker (Q1-Q4 2023)

⁹ Edelman Trust Barometer; Edelman Trust Institute (2024)

For those people that trust the advertising industry, an opportunity to learn (39%) was the most frequently cited reason to consider working in advertising. For 18-34-year-olds, pay (31%), and the opportunity to learn (31%) were the two most important factors, closely followed by a good work-life balance (30%).

As can be seen in Table 3, the reasons for joining the advertising industry are evenly spread and highlight some of the challenges the industry faces in attracting people. Even amongst those that claim to trust the industry, just one in five (22%) 18-34-year-olds would work in advertising to join a well-regarded industry and even fewer to work in a purpose-driven, ethical industry (17%).

Table 3: Main reasons that people would consider working in advertising – those that trust the ad industry only

	All adults	18-34
Opportunity to learn	39%	31%
Meet new people/join a community	34%	28%
Pay	33%	31%
Interested in advertising and the skill set	33%	23%
Good work-life balance	32%	30%
A good long-term career	30%	23%
Join a well-regarded industry	24%	22%
Work in a purpose driven, ethical industry	20%	17%

Source: Advertising Association/Credos, Public Trust Tracker (Q1-Q4 2023)

Returning to the Edelman Trust Barometer, the emerging expectation now placed on prospective employers becomes clear as job seekers increasingly scrutinise whether CEOs speak out on controversial issues. When considering a job, over half (56%) of UK employees expect the CEO to speak publicly about controversial issues they care about. This is higher than equivalent feelings in Germany (54%), the U.S. (51%) and Japan (47%). Transport yourself back 20, even 10 years - how many people would have considered this when job hunting then? Even the idea of it seems fanciful.

Globally, employees are also more likely to work for a company that publicly supports and demonstrates commitment to societal issues including human rights (14.5× more likely), climate change (8× more likely), and racial justice (8× more likely). The greater need for purpose in potential employers is certainly being driven by younger generations though cross-generational views may not be as different as expected. When considering a job, 8 in 10 (78%) Gen Z and Millennials want the opportunity to do work that will shape the future in some meaningful way, falling to 71% of 43-58 year olds and 65% of those aged 59+. ¹⁰ These societal issues are important to all ages, and are perhaps surprisingly high amongst older groups.

Disparate issues ranging from house prices, to the pandemic, to climate change, and more besides have coalesced to fundamentally change what people expect from work and from their employers. Trust is now a core offer of prospective employers and industries looking for the best talent in an increasingly competitive labour market. To ignore the importance of trust in this respect is to limit the available talent pool, of all ages, and curtail the future success of your business and the wider advertising and marketing industry.

10. Edelman Trust Barometer; Special Report: Trust at Work, Edelman Trust Institute (2023)



What is the one thing we could collectively do to improve levels of trust in 2025?

I think we have made real progress here; however, it goes without saying that trust in industry has to be a collective effort. The more we come together as industry across multiple opportunities and issues, the more we can improve trust collectively. Put simply, we are greater than the sum of our parts.



What action has your business taken to deliver trusted advertising?

We have multiple controls in place to ensure that advertising is trusted on Meta though the most fundamental relate to the way our auction works. The total value of an ad is partially decided in the auction by what we call ‘ad quality’. This is determined by many factors, including analysis of people viewing or hiding ads and assessments of low-quality attributes e.g. sensationalised language, click bait etc. This contributes to a better, more trusted experience for all our users.

Bombardment is the strongest driver of distrust – how can we address this as an industry?

Meta have developed many functions to allow both users and advertisers to control for advertising bombardment. Ultimately however, we believe that data wins the argument and more robust meta-analyses are needed for the buy-side to understand and mitigate the impact of excess frequency across channels. The trade body community is critical to this work.

Nick Baughan
Director of Global Agencies, Meta

04.

What we know about trust

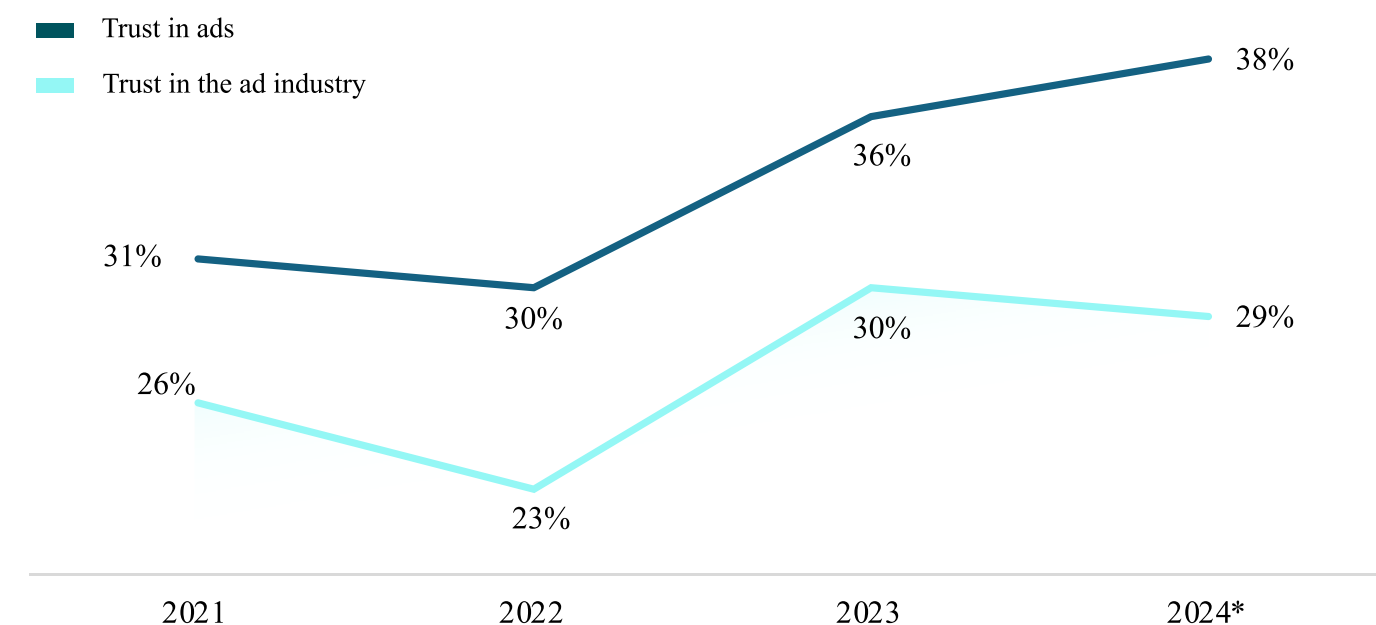
Trust on the rise

The Advertising Association and Credos have measured public sentiment towards advertising for over 30 years.

Positive sentiment towards advertising is significantly lower now than when first measured in 1993, and although trust has improved slightly since its nadir in 2015/16, 2023 recorded a significant uplift. Public trust in advertising is on the rise.

On a quarterly basis, Credos tracks two core measures of public trust in advertising: the first is trust in the ads that people see and hear; the second relates to trust in the advertising industry. As shown in Figure 11, levels of trust in both the ads and the industry increased significantly in 2023. The half-year 2024 data suggests that trust in ads has continued to rise, whilst trust in the advertising industry has remained constant¹¹.

Figure 11: Public trust in ads and the advertising industry 2021-2024



Source: Advertising Association/Credos, Public Trust Tracker (Q1-Q4 2023)

**Data refers to the first half of 2024 only*

11. Only year on year changes of +/- 2% are statistically significant.

What is the value of trust to our industry?

Whilst its hard to put a value on trust, we can begin to feel its importance if we imagine what would happen in its absence: a nightmare. Advertising is a genuine source of competitive advantage, a driver of key growth for brands today and in the future, and a way to support positive behavioural changes in society. Rebuilding and maintaining trust in advertising is essential to securing the future contribution it yields, and to ensuring the fabulous creative and media industries in the UK continue to flourish.

What is the one thing we could collectively do to improve levels of trust in 2025?

Develop advertising that feels like it's a welcome, enjoyable, and valuable part of people's lives, not an unwelcome disruption or interruption. Make ads that will delight the audience they are targeting and not to please the people commissioning or creating them.

Lynne Deason
Head of Creative Excellence, Kantar

What action has your business taken to deliver trusted advertising?

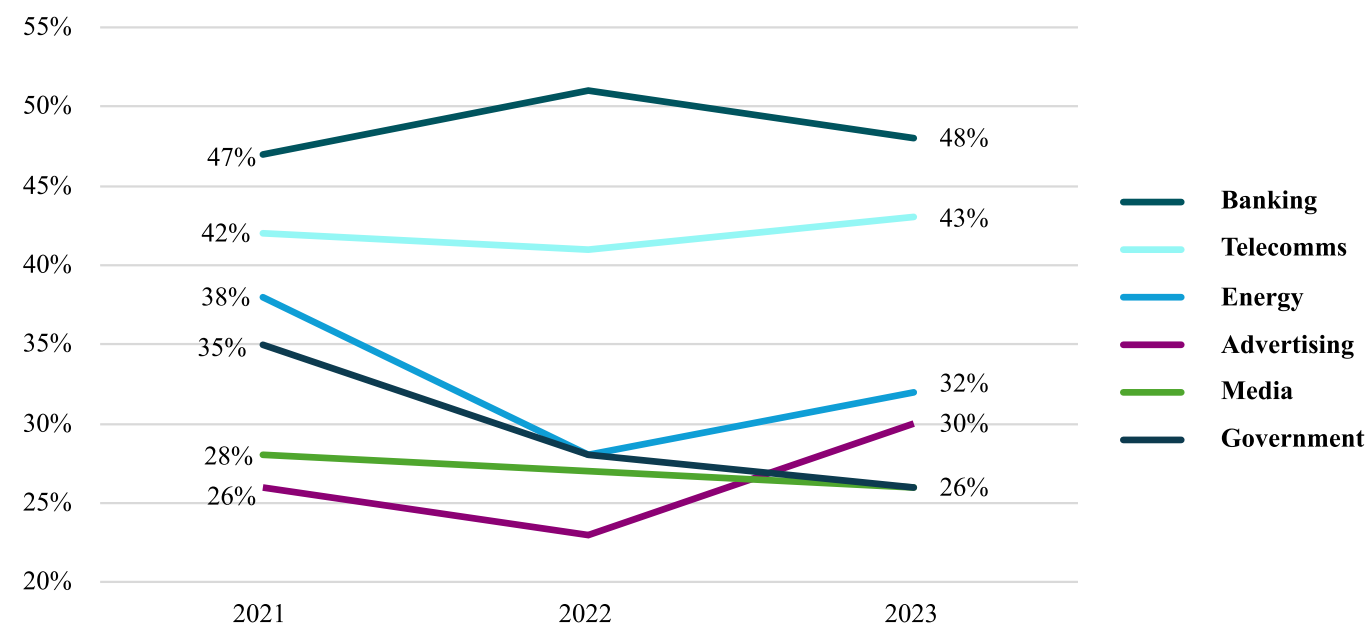
The Works – our partnership with the Advertising Association and Marketing Week, which looks at ads that are loved by the public and are highly effective – was borne to help the industry create advertising that builds trust across all media contexts. It's bursting with inspirational examples – and how to tips and tricks.



The proportion of people that currently trust the ads that they see and hear (36%) is significantly higher than those that distrust them (29%), whilst another third (33%) of people neither trust nor distrust the ads they consume.

If we look at trust in the advertising industry, for almost a decade advertising has been the least trusted industry of those we survey. But in 2023, for the first time since 2014, advertising was no longer the least trusted industry, overtaking both the Government and the media industry (see Figure 12).

Figure 12: Public trust by industry, 2021-2023

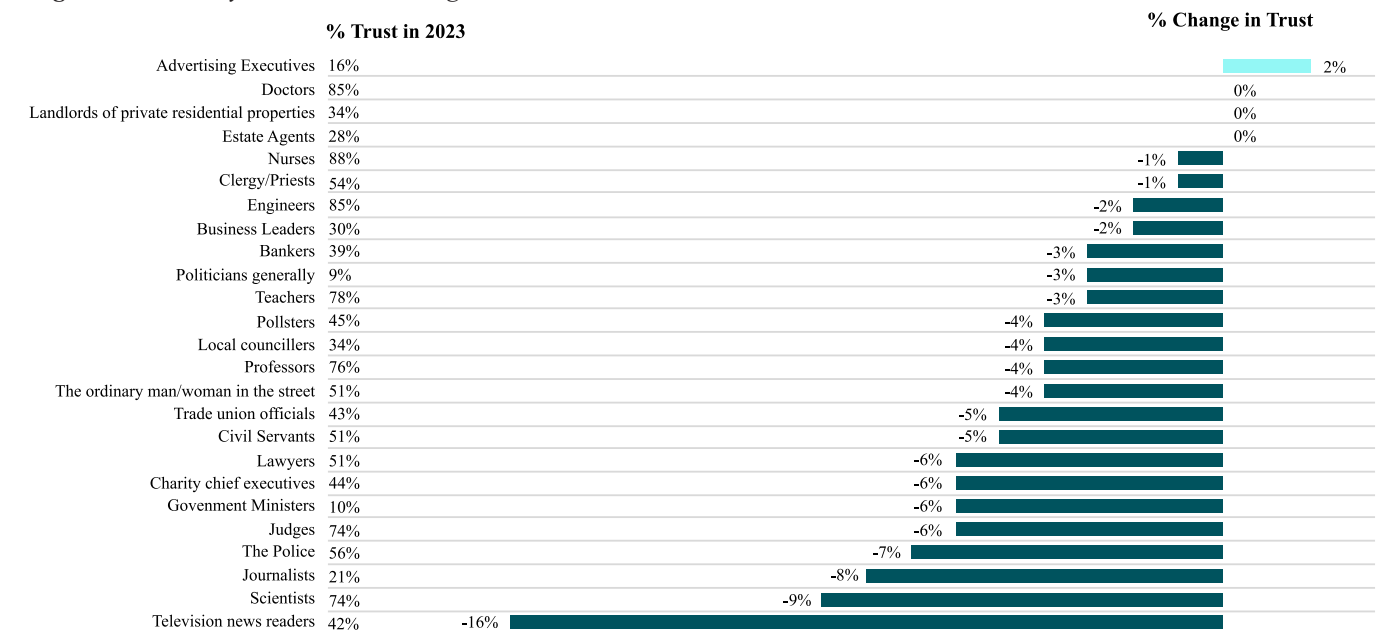


Source: Advertising Association/Credos, Public Trust Tracker (Q1-Q4 2023)

Trust in these industries tends to move together - when one goes up, they all go up and vice versa, driven by macro-economic impacts rather than industry-specific effects. However, over the period highlighted in Figure 12, whilst trust in most industries seems to be constant or in decline, trust in advertising has increased. This suggests that whatever is driving increased trust in advertising in 2023 is at least partly industry specific.

This is also supported by data from Ipsos' latest Veracity Index. 'Advertising executive' is no longer the least trusted profession amongst those surveyed. Granted, it has only been replaced at the bottom by politicians, and Government ministers but, as shown in Figure 13, advertising executives were the only profession to have increased levels of public trust between 2022-2023.

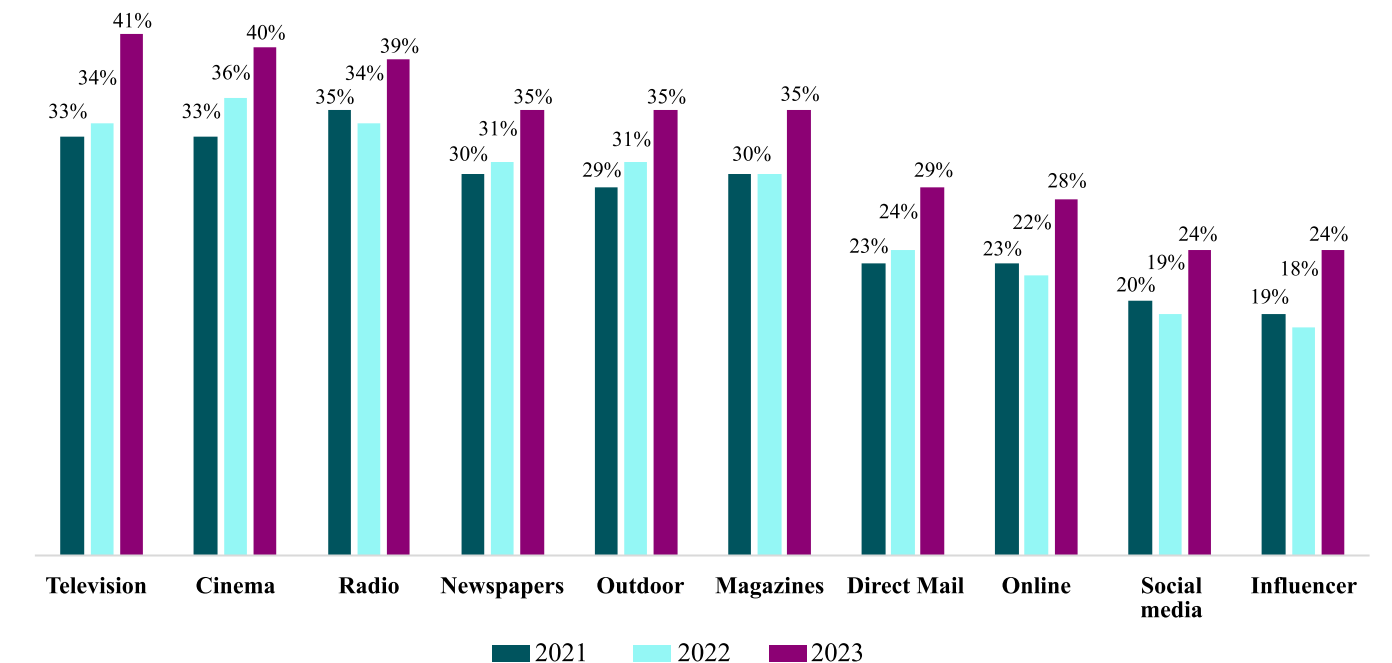
Figure 13: Veracity Index 2023 – change in trust, 2022-2023



Source: Veracity Index 2023, Ipsos (2023)

And it's not just trust in the ads and the advertising industry that has increased. Figure 14 shows that in 2023, significant gains in trust were made across all advertising media channels. Trust in TV increased the most between 2022-2023 (7%), though increases were consistent across all media, and as we will see in the next section, there are fascinating variations by age.

Figure 14: Public trust in different advertising media, 2021-2023



Source: Advertising Association/Credos, Public Trust Tracker (Q1 2021 -Q4 2023)

Why has trust increased?

The reasons for increasing trust across all aspects of advertising are varied, complex and very difficult to measure. The evidence certainly suggests that industry-specific drivers are at play rather than solely macro-economic ones. These drivers may include but are not limited to:

- A very strong Christmas for advertising in 2023
- An improved ad experience in many areas including influencer advertising and Broadcaster Video on Demand (BVOD)
- An enhanced role for brands and their communications as bastions of stability and trust in a turbulent world – globally, Business remains the only ‘trusted’ institution in Edelman’s trust barometer and in the UK, is now more trusted than NGOs, the Government and Media¹².
- And of course, as evidenced in Chapter 2, the cumulative impact of a sustained ASA advertising campaign.

In future years, will 2023 be considered the year when advertising turned it around, the year when trust was recovered? We wait with bated breath for the full-year 2024 findings though half-year results show that higher trust levels have been maintained.

What is the value of trust to our industry?

Advertising can only function effectively if the public has a high degree of trust with what they are being told and being sold. I wouldn't just say that trust has a high value, it is greater than that, it is essential.

The enjoyment of ads is the strongest driver of public trust – how can the industry ensure more people enjoy more ads?

Too many ads today look down and lecture the audience, we keep telling the people who buy our products and services how to behave or feel. Ads need to be entertaining above every other factor. They should not be about social engineering or political ideology, if we continue to ignore this the public will silently ignore what we are doing and saying.

What action has your business taken to deliver trusted advertising?

Every single ad on broadcast TV or streamed on ITVX is Clearcast approved.



Simon Darglish
Deputy Managing Director, Commercial, ITV

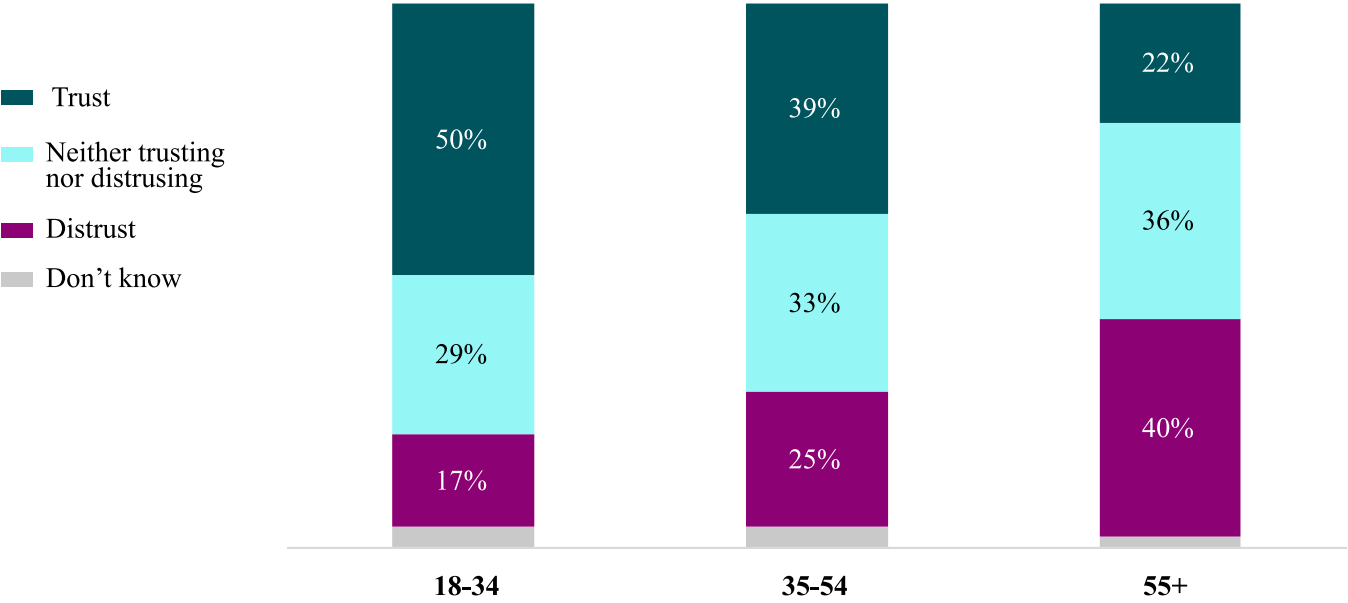


A generational digital divide

The big difference in the population when it comes to trust in advertising is by age. Younger people tend to trust advertising much more than older people, who in turn are much more likely to distrust advertising. It is the only demographic where such variation in trust exists. This pattern has been true since we began tracking trust in 2010 and is remarkable in its consistency. It is also seemingly unique to advertising; other industries tend to share similar levels of trust across age groups.

Figure 15 highlights the difference in trust between young and old. In 2023, exactly half (50%) of all 18-34-year-olds trusted the ads that they see or hear. This falls to 39% for 35-54-year-olds and further still, to just 22% of those aged 55 and over. Conversely, distrust in ads more than doubles from just 17% of 18-34-year-olds to 40% in those 55 and over.

Figure 15: Public trust in ads by age, 2023



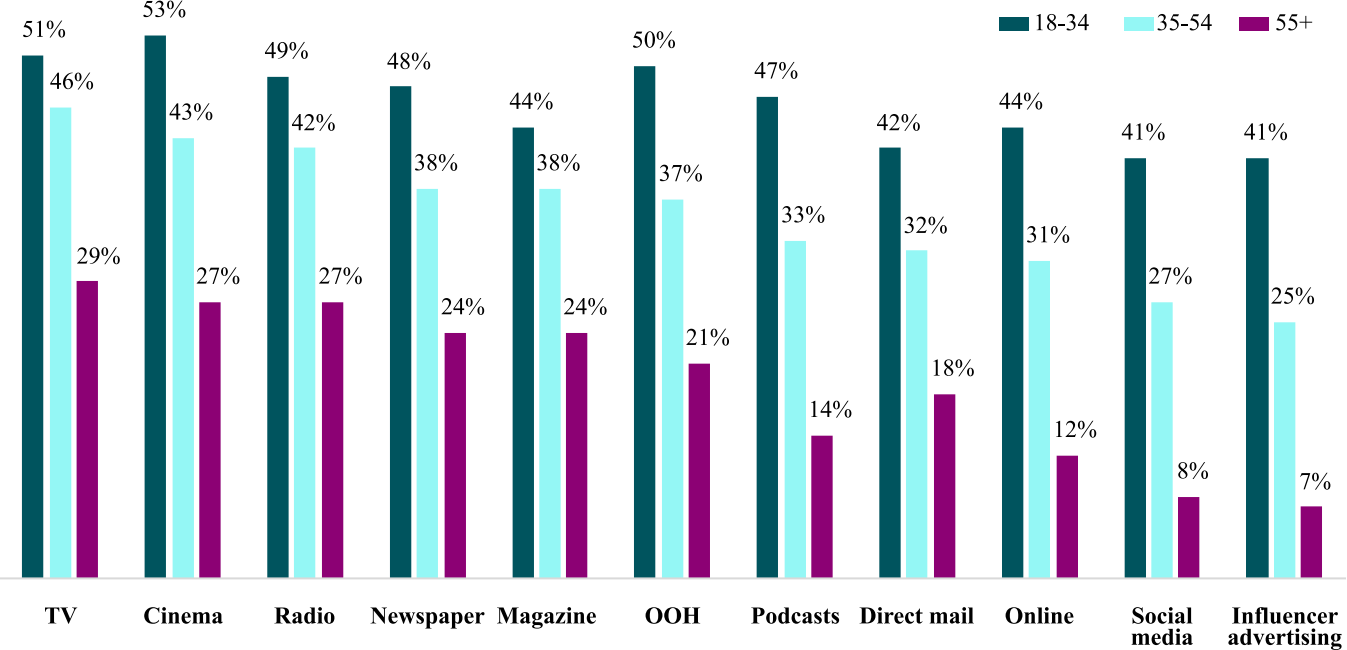
Source: Advertising Association/Credos, Public Trust Tracker (Q1 2023 - Q4 2023)

12. Edelman Trust Barometer, Edelman Trust Institute (2024)

We might point to several reasons for differing trust levels by age, but our research shows the most evident is different attitudes towards different media. A generational digital divide exists whereby levels of trust and distrust are similar across age groups for ‘traditional’ advertising media, whereas older people are significantly more likely to distrust online advertising media.

Figure 16 shows the levels of trust in each advertising media in 2023, broken down by age. There is a level of consistency in the trust of 18-34-year-olds across media, whereas those 55 and over simply do not trust advertising on the internet.

Figure 16: Public trust in advertising media channel by age, 2023

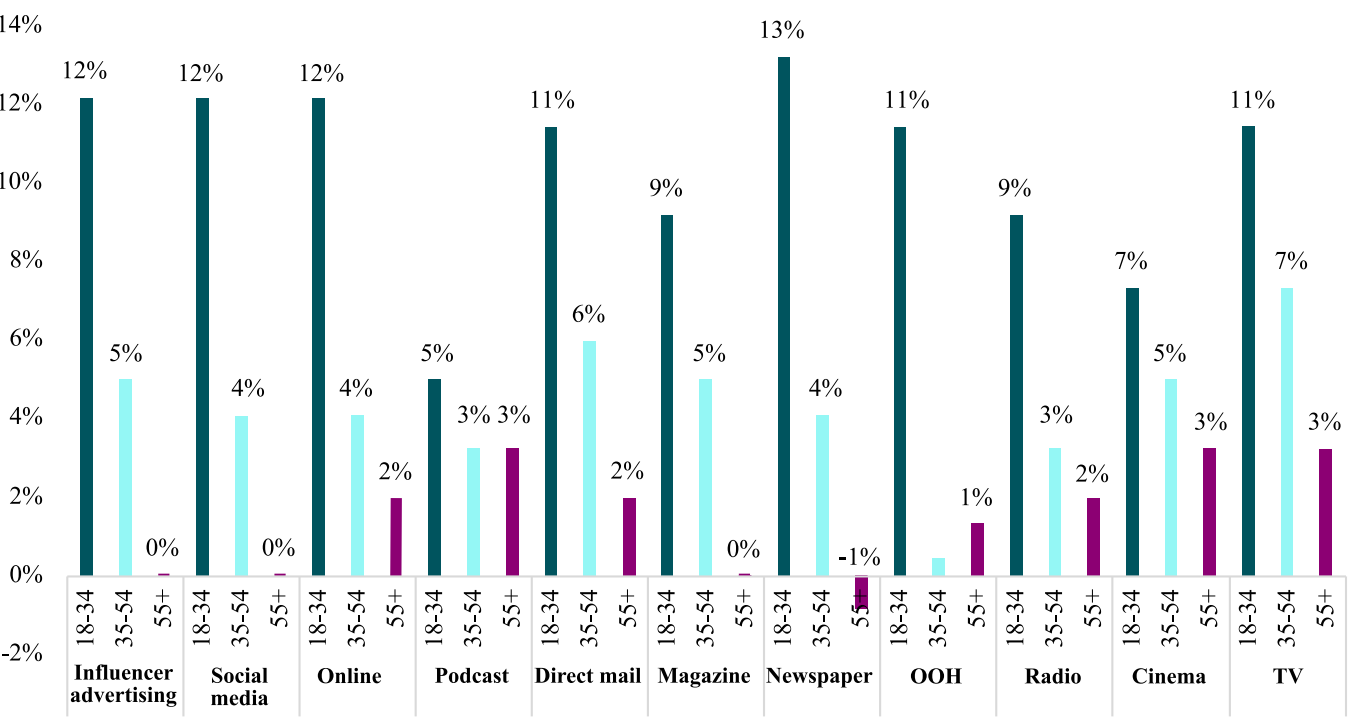


Source: Advertising Association/Credos, Public Trust Tracker (Q1 2023 - Q4 2023)

Not only is trust higher amongst 18-34-year-olds across all media channels, but they are also largely driving the 2023 increase in trust levels. As shown in Figure 17, 18-34-year-olds recorded double digit growth in trust levels across seven of the eleven media channels. Trust in newspapers (13%) secured the largest bounce amongst the young, followed by influencer advertising, social media, and online (all 12%), emphasising the growing trust in online channels for this age group. Though trust levels did rise across media channels at all ages (with the exception of newspapers for those 55 and over) the increases were much smaller for 35-54-year-olds and those 55 and over.

TV remains the most trusted media overall (see Figure 14), retaining significant levels of trust in the youngest age group (51%). However, trust in online channels has been increasing quickly amongst the young, all of which recorded trust scores over 40% for the first time in 2023 and are now comparable with trust in ‘traditional’ channels.

Figure 17: Percentage difference in trust in advertising media between 2022 & 2023 – by age



Source: Advertising Association/Credos, Public Trust Tracker (Q1 2022 - Q4 2023)

It is clear that young and old have very different perceptions of advertising, largely driven by differing attitudes to media. Though the difference is so stark, and unique to advertising, that something more fundamental must be driving it. Something beyond the cynicism of old age or a distaste for modern technology. That something is media socialisation, which underpins everything we know about trust. It dictates how we consume advertising, how we react to it, and whether we trust it.

Older people grew up and were socialised in a ‘static’ largely unchanging media world. For them, the deal between advertiser and consumer was clear and remained the same: adverts paid for content, the consumer knew what to expect and when to expect it, they recognised the brands that were being advertised. Adverts were not targeted. This is what anchors older people’s expectations and attitudes towards advertising even if they are heavy online users.

When consuming online advertising, the deal between advertiser and audience is less obvious for older people - what is content and what is advertising, and when they can expect to encounter it are all less obvious - hence lower levels of trust despite relatively high levels of engagement.

Meanwhile, ‘digitally native’ younger people (under around 35 years of age) have grown up in a world supplemented by ever-changing and developing web-based media. Costs of entry for advertisers are lower, there are many more brands advertising, and more unknown, or non-heritage brands. Targeting and personalisation are in-built into the model. Young people largely feel at ease and familiar in this new advertising world and their levels of trust align accordingly.

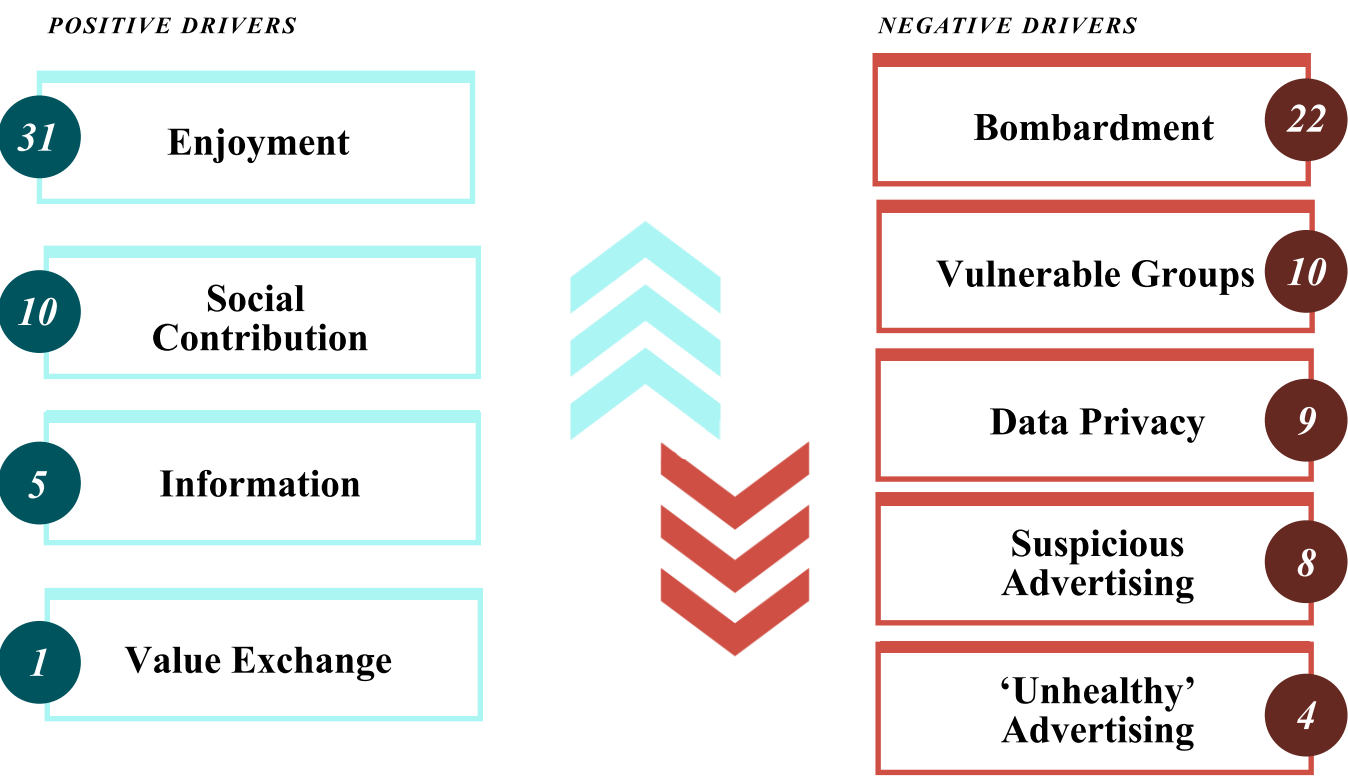
The changes that advertising has undergone in the past decade suggest this is a generational effect, not an age/lifestyle one. As such, those who are younger now likely won’t ‘grow up’ to adopt the attitudes of their elders. Their expectations will remain set by the media world in which they were socialised. Only time will tell.

Understanding what drives public trust in advertising

We’ve established that public trust in advertising is on the rise following significant increases in 2023, that have continued into 2024. But what drives an individual to trust or distrust advertising? In 2018, Credos developed a model to answer this question¹³. This model has since been replicated in 2021 and 2023, identifying the same nine clusters of drivers every time - some positive, driving trust in advertising and some negative, driving distrust.

These nine drivers were then ranked in terms of their overall impact on the public, with scores indicating the relative importance of each driver in determining someone’s level of trust. As shown in Figure 18, the enjoyment of the ads that people see and hear is the most important driver of trust, followed by the most prominent negative driver, bombardment. The social contribution that advertising can provide, advertising to vulnerable groups, concerns around data privacy, and suspicious advertising were also important drivers. The information advertising provides, as well as ‘unhealthy’ advertising (i.e., alcohol and food high in fat, salt & sugar) and the value exchange all also impacted trust but to a lesser extent. These findings have remained fairly consistent between 2018-2023.

Figure 18: Key drivers of public trust in advertising in 2023



Source: The Drivers of Trust, Credos/Craft (2023)

13. Details on the method of this research can be found in the Appendix.

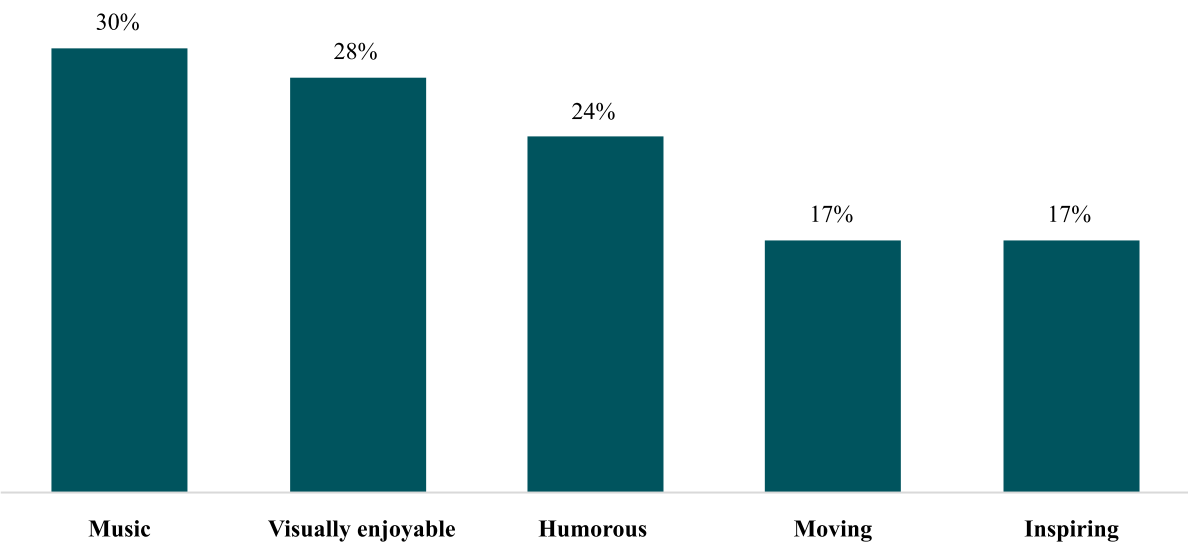
The drivers of trust in advertising

1. Enjoyment (31/100)

The quality of advertising in terms of its creativity, entertainment value and emotional engagement is more important than any other factor in driving public trust. Simply put, the more someone likes or enjoys an ad, the more likely they are to trust it.

Figure 19 highlights the five core pillars of enjoyment in ads as identified in the research. One or more of these five pillars is required for an ad to be enjoyable. Of ads that people enjoy, music is the most regularly encountered, while ads that are moving or inspiring are encountered the least. There is a clear message for industry here – enjoyment is the strongest driver of trust in advertising, and yet so few people are regularly seeing or hearing ads they enjoy in some way.

Figure 19: The percentage of people regularly encountering the following elements of enjoyable ads



Source: The Drivers of Trust, Credos/Craft (2023)

2. Social contribution (10/100)

After the enjoyment of ads, social contribution 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. Though not necessarily front of mind for consumers, when prompted, the vast majority recognise the important role that advertising has to play, most notably regarding diversity and inclusion, public health messaging and, increasingly, environmental sustainability.

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 (1/100 importance score). Regarding the value exchange, there seems to be a lack of awareness of the role advertising plays in providing free access to content. Just a third (33%) of consumers stated that they regularly came across advertising that allowed them to watch/listen to content without paying for it.

The drivers of distrust in advertising

1. Bombardment (22/100)

Those people that identify ad bombardment as an issue are the most likely to distrust advertising. It has consistently been the number one driver of distrust by some distance in each of the 2018, 2021, and 2023 studies. However, in 2023 it also became the most important driver for 18-34-year-olds, marking a significant change from 2021.

When asked to rank the four components of bombardment in order of annoyance, respondents clearly identified obtrusion – the delay or interruption of the content experience – as the biggest source of annoyance. This was followed by repetition, volume and irrelevance (see Table 4).

Table 4: The four components of ad bombardment

Bombardment	
1	Obtrusion - advertising that delays or interrupts what you are trying to do
2	Repetition - advertising that you've seen/heard too many times and feels repetitive
3	Volume - the amount of advertising you come across generally
4	Irrelevance - advertising that isn't relevant to you personally

Source: The Drivers of Trust, Credos/Craft (2023)

The rank order of the four components remains the same regardless of age, however the nature and level of annoyance changes. Obtrusion is most annoying for 18-34-year-olds, and largely explains why bombardment is now such an issue for this age group. For older people, interruption by advertising has always been accepted as part of the deal. But not so for younger people. They are less used to being interrupted, and feel they are being interrupted more now than previously on the platforms they use most.

Repetition on the other hand is most annoying to older people who are subject to a smaller pool of advertising and are therefore more affected by it. Likewise, volume is more of an issue for older people, having witnessed what they perceive to be an explosion of advertising in their lifetime. Irrelevant advertising is the lowest annoyance across all ages. Most consumers simply accept that not all advertising will be relevant to them, but many also understand the ‘deal’ whereby more relevant advertising means more targeting driven by what some perceive as intrusions into their privacy.

What is the value of trust to our industry?

Consumers need to believe the ad industry is acting in their best interests, doing what’s right and treating their personal data responsibly. How we show up both as individual companies and as the industry as a whole plays an important role in shaping consumer perception of advertising, which we know in turn has a direct impact in how consumers receive and interpret marketing messages.



Dyana Najdi
Managing Director, UKI Partners & Specialists, Google

Bombardment is the strongest driver of distrust – how can we address this as an industry?

Bad ads are bad for everyone. Though they come in many shapes and sizes, bad ads lead to a common outcome — a degraded online experience. We want to deliver ads that are engaging for users without being annoying or difficult to interact with, so we've developed editorial requirements to help keep ads appealing to users. It's the collective responsibility of the industry to address the key factors driving bombardment, including volume, repetition and obtrusiveness.

What will you do to help drive trust forward in 2025?

With AI top of mind for many, we are focused on building AI technology in a way that is safe and responsible. That’s why, in 2016, we published our AI principles and governance procedures, and engaged from the start with governments and communities. We share responsible AI toolkits and practices and what we’re learning with others - and we report every year about progress on how we implement AI principles in practice. We coordinate with the government, private sector, academia and civil society - pursuing our approach of being bold, responsible and together.

2. Vulnerable groups (10/100)

The importance of advertising to vulnerable groups in forging distrust in advertising is largely being driven by older age groups, recording relatively little impact for 18-34-year-olds. Concerns in this area, where they exist, have two facets:

- i. Advertising which is felt to ‘unfairly’ target vulnerable groups e.g., children, financially insecure, addicts. Concern varies significantly by category and from person to person, being closely linked to individual worldview.
- ii. Much more widespread are views held in relation to web-based advertising that divide along generational lines. Younger people worry that the old are not digitally savvy enough to spot online scams and what is/isn’t advertising. Conversely, older people worry about impressionable youngsters exposed to misleading advertising on social media.

3. Data privacy (9/100)

Though understanding of the technical workings around data consent and control are minimal, there is a widespread, though vague, sense of unease. Consumers seem to feel that they are not in control of their own data and what happens to it, and aren’t sure that they truly have given their consent for their data to be used in quite the ways that they suspect it might be.

4. Suspicious advertising (8/100)

Suspicious advertising tends to refer to advertising malpractice and includes a variety of issues ranging from hidden ads and misrepresentation right through to fake ads and scams.

In 2021, the failure of many influencers to be open and transparent when promoting products was a significant driver of distrust amongst the young. However, by 2023, increased consumer savvy, alongside action taken by the ASA, tech platforms, and the influencer industry itself to increase transparency have greatly reduced concerns in this area. This clearly illustrates how quickly public perceptions can and do change, and the impact that decisive industry-led action can make.

However, the advertising of bogus, counterfeit, or low quality products on social media remains a universal concern. Most associated with the health, fitness, and wellbeing categories, or with digital ‘get rich quick’ schemes, this tends to impact younger people simply because they encounter it more.

Perceived to have increased considerably during the pandemic, scam communications significantly impact trust in advertising across all age groups. Almost one in five (19%) people see advertising and scams as one and the same, making no distinction between legitimate brand advertising and those from nefarious sources. Even those who make the distinction between genuine ads and scams can still have their views of advertising subtly coloured by the similarities between them. For those of us working in the industry, the distinction is clear and obvious but that isn’t the case for many people, and crucially, they look to us to act on their behalf.

5. ‘Unhealthy advertising’ (4/100)

Unhealthy advertising for HFSS food and drink products and alcohol formed their own factor driving distrust in advertising though the importance was relatively low.



What is the value of trust to your business?

Trust is a business imperative, we’re guardians to some of the UKs, some of the world’s biggest brands, yet creativity, by definition, is about taking leaps into the new. The deep integrity and care required, as well as the inevitable risk, is a volatile mix. Trust between any agency and their client partner must therefore be baked-in.

What is the value of trust to our industry?

We’re dead without it, we’ve let big tech become the answer for more than a decade and our product suffered, we let our output be questioned by procurement and our bank balance suffered, we turned up too often on our audience’s screens unfiltered and they suffered. The Ad Association and their partners have been working hard to ensure the industry course corrects.

What will you do to help drive trust forward in 2025?

We think trust and creative value are interdependent so we’re going to deliver more influential work that is built for the real world – in the organisations we partner, with the consumers we reach and ultimately on our client’s business.

Sarah Jenkins
Chief Operating Officer, Saatchi & Saatchi





STEPHEN WOODFORD

CEO, Advertising Association

In conclusion

The Value of Trust programme exists to provide robust evidence of what drives public trust, why this matters and to take actions that can improve this. Improving trust benefits our industry, supporting the commercial success of advertising and protecting the freedom to advertise from unnecessary regulation. This programme offers our members the knowledge and tools to help improve the advertising experience and drive better business results through increased levels of trust. I have three key takeaways as you consider the Value of Trust and how it can ultimately help your organisation.

1. Creative engagement really matters.

The public enjoy engaging, creative ideas as much as they ever did – it is the number one driver of people’s trust and favourability towards advertising.

It also correlates highly with business success. Great stories, characters, music, humour and reflections on modern Britain that land compelling brand and behavioural insights make advertising stand out for all the right reasons. If this sounds like a broadcast-centric view of the creativity, it’s not. It is a checklist for every kind of campaign in every media, from TV to social media, from direct mail to digital outdoor. Effectiveness data echoes this repeatedly, from the peerless IPA Effectiveness Databank to the work of brilliant research companies like Kantar and System 1.

Is it naive to think this can be applied in every piece of work that is produced? Recent discussions in our Trust Working Group and with our members have highlighted how the ‘brand versus performance’ divide is being seen as increasingly irrelevant. As our President, Alessandra Bellini noted from her time at Tesco, ‘we expect our performance-oriented campaigns to build our brand and our brand activity to drive performance,’ a sentiment echoed by other leading marketers such as our Front Foot Chair, Pete Markey, CMO of Boots. This ‘divide’ should no longer be a barrier to creating the best creativity possible at every touchpoint.

2. Bombardment is a real and worsening problem. We must improve the advertising experience.

Bombardment is a word that came from our research and was used time and again by respondents – it is the public’s biggest negative driver of trust. How can we reduce the obtrusion, repetition, volume and irrelevance that people report, that can drive people to use ad blockers or other techniques of ad avoidance?

We are seeing the younger age group complain about this most, which is especially worrying, as younger people are generally the most positive about advertising overall.

It is for all actors in the advertising ecosystem to play their part in tackling these bombardment issues and ensure the media experience of advertising is as positive as possible, and wasteful and irritating excessive exposure is minimised.

3. Higher ASA awareness is a major driver of trust.

We need to build on the proven success of the ASA advertising campaign.

The latest Credos research highlights that awareness of the Advertising Standards Authority is low but when the public are made aware of the breadth and rigour of what it does, they have much greater trust in advertising. The IPA’s Paul Bainsfair describes this as the industry’s equivalent of the ‘bobby on the beat,’ a reassuring reminder that there are rules enforced that ensure advertising is ‘legal, decent, honest and truthful.’ Tracking the results of the recent multimedia campaigns for the ASA showed that those aware of the ads were twice as likely to trust advertising they had seen - an astonishing result. We are delighted that the third wave of this campaign launched in September 2024. The ASA campaign has tremendous support from leading media owners and brands, and I want to thank every company that has committed to supporting this vitally important work. Please do get in touch with us if you can support future waves of the campaign.

How much people trust advertising will always be a challenge that is inherent in the nature of our work – to promote brands and businesses - but trust was higher in past decades. The latest findings that trust is improving are encouraging and we must keep building on this. Improving the advertising experience, through a better creative and media experience, will not only improve trust but drive better business outcomes too.

We will continue to report on progress and once again we’ll be doing another research deep dive into the drivers of public trust in 2025, so watch out for more on this vital challenge next year.

Finally, our thanks to all the people and businesses that have supported and contributed to our work on public trust, through our Trust Working Group, the media owners and agencies who support the ASA campaign and all our other initiatives. Trust is on the rise and let’s keep building on it.

Appendix - Methodology

This appendix provides a brief overview of the methods used to produce key data sources referenced in this report. For further detail please contact: credos@adassoc.org.uk

IPA Trust Analysis Methodology

The data source is the IPA Databank – the confidential data submitted alongside entries to the biennial IPA Effectiveness Awards competition. The period covered by most of the analysis is 2000-2022, comprising just over 600 cases. The data captured includes a comprehensive range of campaign inputs (such as strategy, media choices and brand circumstances) and campaign outcomes (such as business effects and brand effects).

The measures of business effects are: profit, sales, market share, penetration, loyalty and price sensitivity. Case study authors assess these measures on a four-point scale of magnitude: only top-box scores (i.e. ‘very large’) are used to identify high performers. These metrics are mostly measured over a period of at least a year and are therefore more indicative of long-term success. In this analysis they are also coalesced into one metric – the number of business effects, which represents a broad measure of effectiveness that is relatively independent of the particular objectives of the campaign.

The importance of an individual brand metric is assessed by its ranking amongst the basket of seven brand metrics in terms of their link with business metrics. Firstly profit – here we are ranking the chance that a campaign that created strong Trust or Quality effects would also generate strong profit effects, amongst campaigns achieving strong effects for the other brand metrics (awareness, commitment, differentiation, fame and image, being the other five). The second ranking – for effectiveness – ranks the average number of very large business effects achieved by campaigns that created strong Trust or Quality effects amongst those that achieved other strong brand effects.

Rational and Emotional campaigns are defined by the case study authors on the basis of how the campaign was judged principally to have worked (based on market research evidence).

Excess share of voice (ESOV) is defined as share of voice minus share of market and is the critical budget metric for growth because it relates to brands’ mental availability: the rate of market share growth is generally proportional to ESOV. In this paper we have examined the average ESOV level of rational campaigns that built very large trust effects with that of emotional campaigns that did the same, to develop comparable costs of trust. This is to circumvent the considerable average budget difference between rational and emotional campaigns (9.9% ESOV vs. 1.9% from 2014-22) which renders direct comparisons invalid. In order to measure the cost of trust more reliably, we have used all case study data back to 2000, which is likely to dilute the impact of the developments of recent years. Nevertheless, the relative cost of trust of each approach powerfully reveals the extent to which it matters which we choose.

Short-term campaigns are those that ran and were evaluated within a window of six months.

Campaign objectives are those identified as primary objectives by case study authors.

YouGov/Credos MP polling, 2024

- All questions asked were developed by Credos.
- YouGov completed online interviews with a representative sample of 107 MPs between 4th-26th January 2024.
- All results are based on a sample and are therefore subject to statistical errors normally associated with sample-based information.
- Results for MPs are weighted by party, gender, electoral cohort, and geography to give a sample that is representative of the House of Commons.
- Based on a 95% confidence level results are correct to +/- 9%.

Advertising Association/Credos Public Trust Tracker, Q1 2021 – Q2 2024

- All questions asked were developed by Credos.
- Kantar conducts online self-completion surveys on a quarterly basis. Exact dates change every year but broadly align to:
 - Q1 – 1st week of February
 - Q2 – 1st week of May
 - Q3 – 1st week of August
 - Q4 – 1st week of DecemberEach quarter receives c.600 responses, providing c.2,400 unique responses annually.
- Based on a 95% confidence level, with the following margin for error: n500 +/- 4%; n1000 +/- 3%; n2000 +/- 2%.
- Invitations to complete the questionnaire are e-mailed to a panel of adults who have agreed to take part in online research.
- To ensure the measurability, balance and robustness of the sample, our omnibus sample structure is built using a number of reliable resources and methods:
 - Quotas are interlocked by gender/age
 - Sample is stratified by region, social grade – non-interlocking
- Weighting also applied on:
 - i. Interlocking gender/age *
 - ii. Social grade of chief income earner *
 - iii. Region – government region *
 - iv. Terminal age of education *
 - v. Household size – source: TGI

* Source:PAMCo 2022 - Print only

The Drivers of Trust, Credos/Craft, 2023

Stage 1 of the research was completed by Credos in April 2023. Stage 2 was completed by Craft between May-July 2023.

Stage 1: Method

- Online survey of a nationally representative sample of 2,002.
- Factor analysis used to identify the 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

- 30 people selected for 7 days of digital tasks including:
 - i. advertising diary to capture unprompted experiences and perceptions
 - ii. prompted tasks to ensure we cover the relevant issues
- 9 people selected for 45 minute Zoom interviews to further probe experiences and perceptions captured in the diary phase.


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