

nielsen
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TRUST IN ADVERTISING

SEPTEMBER 2020

SUBMITTED TO :



ADVERTISING STANDARDS COUNCIL OF INDIA (ASCI) & INDIAN SOCIETY OF ADVERTISERS (ISA)

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TARGET GROUP

- **Gender:** Male (50%) :Female (50%)
- **Age:** 18-25 years (33%), 26-40 years (33%), Above 40 years (33%)
- **SEC :** A(26%), B(30%), C (44%)



TOTAL SAMPLE COVERED

- **n =2002**



METHODOLOGY

- Computer Assisted telephonic interviews (CATI) considering above TG definition
- **LOI :** 10 mins Survey
- Pan India coverage (Metro + Urban Non-Metro + Rural)

- Metro (>4o lacs) ➤
- Urban Non-Metro (10 to 39 lacs) ➤
- Rural (< 10 lacs) ➤

Mumbai	Delhi	Kolkata	Chennai	Bangalore
Nashik	Lucknow	Patna	Vijaywada	Indore
Aurangabad & Navsari	Fatehgarh & Firozabad	24 Parganas & Madhubani	Belgam & Krishna	Mandasur & Khandwa
Udgir & Dessa	Shamli & Modi Nagar	Jehanabad	Palakkad	Betul

Note : Respondents from rural areas are recruited from centres/ surrounding villages where population is less than 1 lac

EXECUTIVE SUMMARY

EXECUTIVE SUMMARY

01

OVERALL TRUST IN ADVERTISING

- Around 8 in every 10 people exhibit trust in advertising across various media
- Trust levels have improved towards ads displayed on TV, Newspaper, Search Engine and Radio vs 2015

02

TRUST IN ADVERTISING BY DIFFERENT FORMS

- Ads on television and newspapers are the most trusted, whereas Text / SMS ads are the least trusted
- East Zone people show lesser trust in most forms of advertising, as compared to other Zones

03

TRUST IN ADVERTISING BY INDUSTRY

- Audience have displayed higher level of trust for ads from Educational Institutions and Home Care Products, whereas they don't show a lot of trust in Real Estate Advertisements

EXECUTIVE SUMMARY

04

CELEBRITY ENDORSEMENTS & ACTION TAKEN

- 70% people trust in advertisements endorsed by celebrities, however the trust is significantly lesser in the East Zone
- When people see any misleading content in an advertisement, they most likely discuss it with their family / friends or post it on Social Media. However, almost 1/3rd of the people do not take any action

05

ASCI AWARENESS

- Only 1/4th of the audience are aware about Advertising Standards Council of India (ASCI)
- In the Central Zone, the awareness is significantly lower

SECTION 1

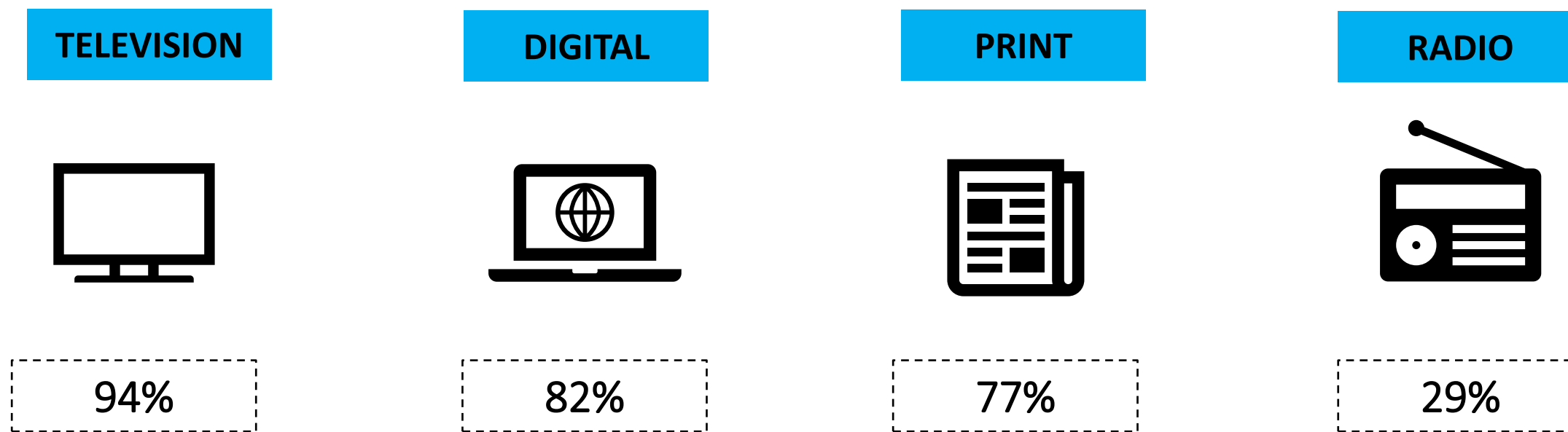
MEDIA USAGE FOR ADVERTISEMENTS

Let's understand various media types on which audience view / listen to / read ads...

Q: On which media types, do you generally view / listen to / read any advertisement? [MA]

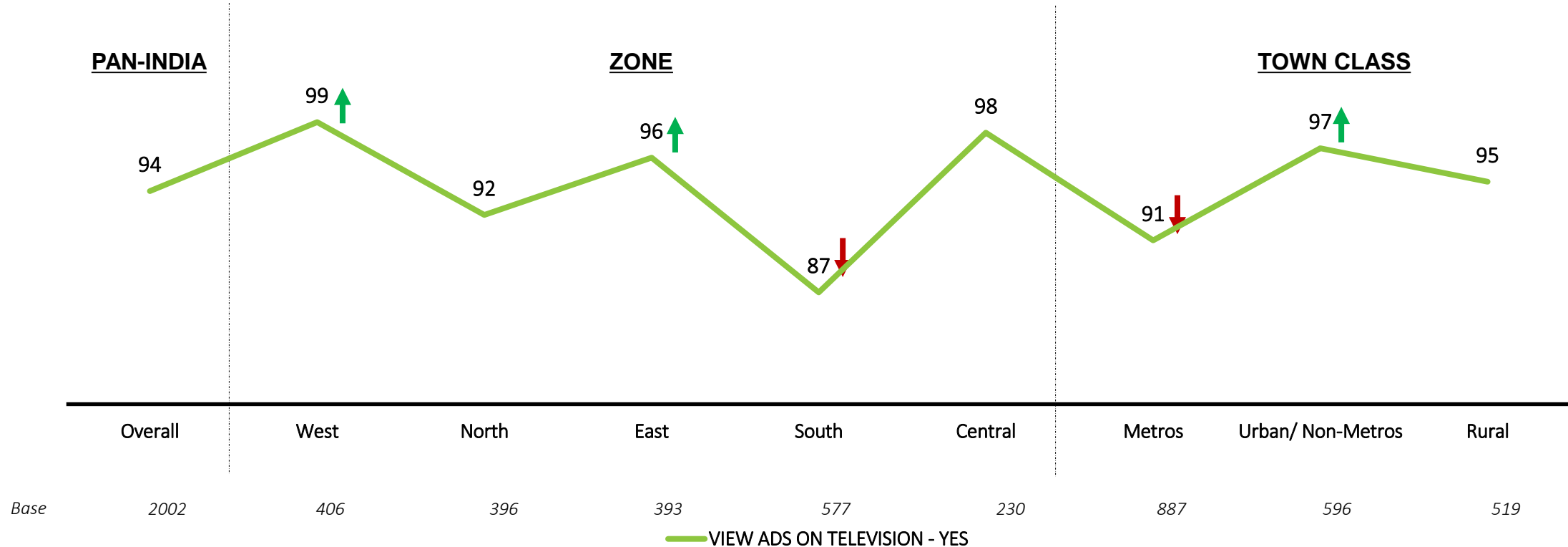
MEDIA USAGE FOR ADS

- TV is the most common medium used by audience for viewing advertisements. Almost 9 in every 10 people are viewing ads on TV followed by digital platforms (*such as Online / Social Media ads*)
- Radio is the least used medium amongst all platforms



VIEWERSHIP OF TELEVISION ADS

- Viewership of TV ads is significantly higher in the **West** and **East** Zone whereas its significantly lower among audience in **South** zone
- Pan-India, viewership of television ads is **significantly driven by Urban Non-Metro** Cities, while its significantly lower in **Metro cities**



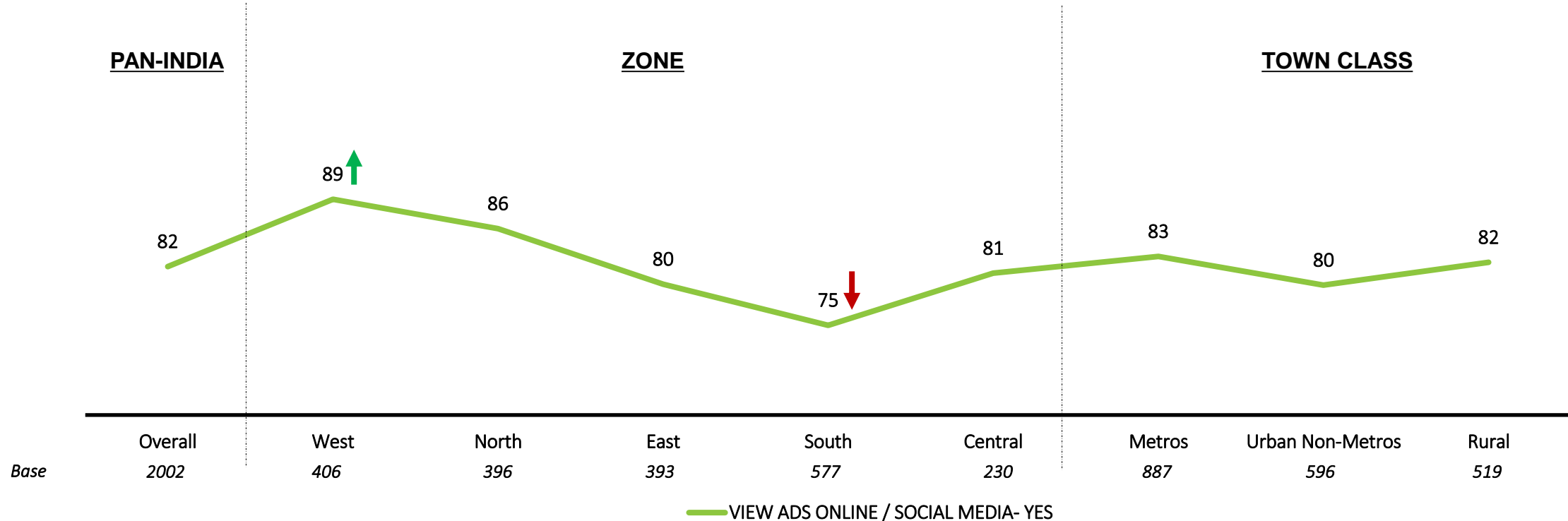
Significantly Higher / Lower than Overall

Q: On which media types, do you generally view / listen to / read any advertisement? [MA]

All figures are in % except base

VIEWERSHIP OF DIGITAL ADS (ONLINE / SOCIAL MEDIA)

- For viewership of digital ads as well, **West** Zone is the significant contributor while **South** Zone continues to be the lowest contributor
- Notably, viewership of digital ads at **rural centres** is at par with that of metro



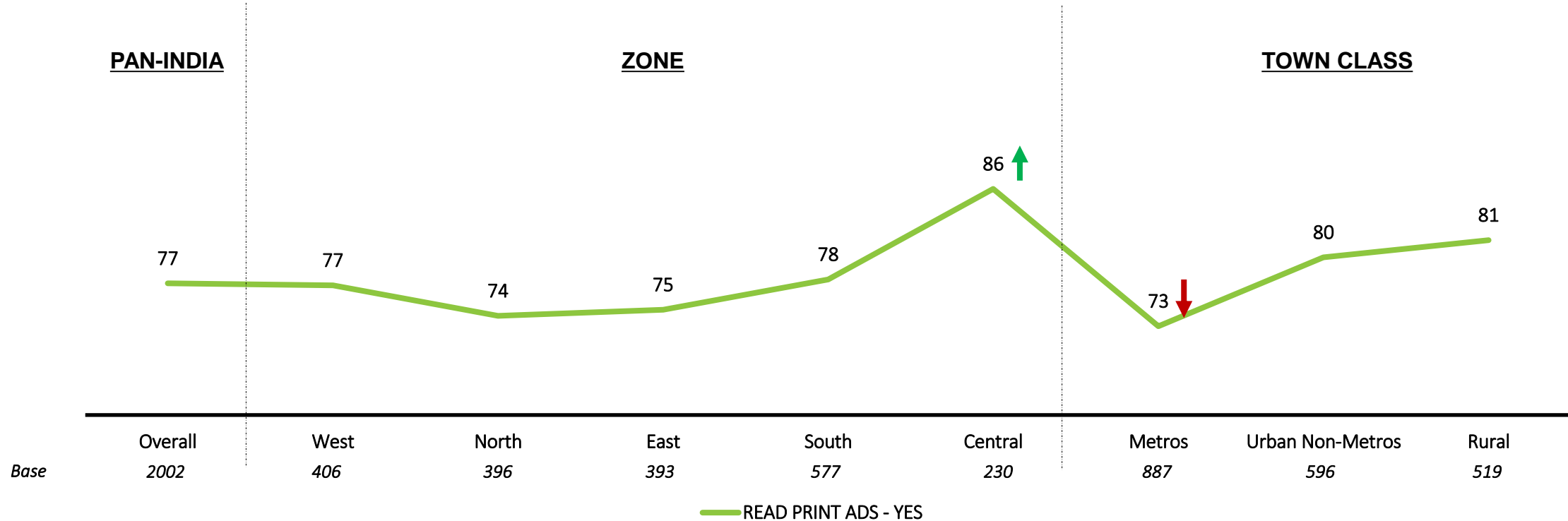
Significantly Higher / Lower than Overall

Q: On which media types, do you generally view / listen to / read any advertisement? [MA]

All figures are in % except base

READERSHIP OF PRINT ADS (NEWSPAPER / MAGAZINES)

- Readers of print ads in Magazines / Newspapers are significantly higher in **Central Zone** as compared to the rest of the country
- **Metro Cities in India have a significantly lower** ad readership of print medium than Urban/Non-Metro and Rural Cities



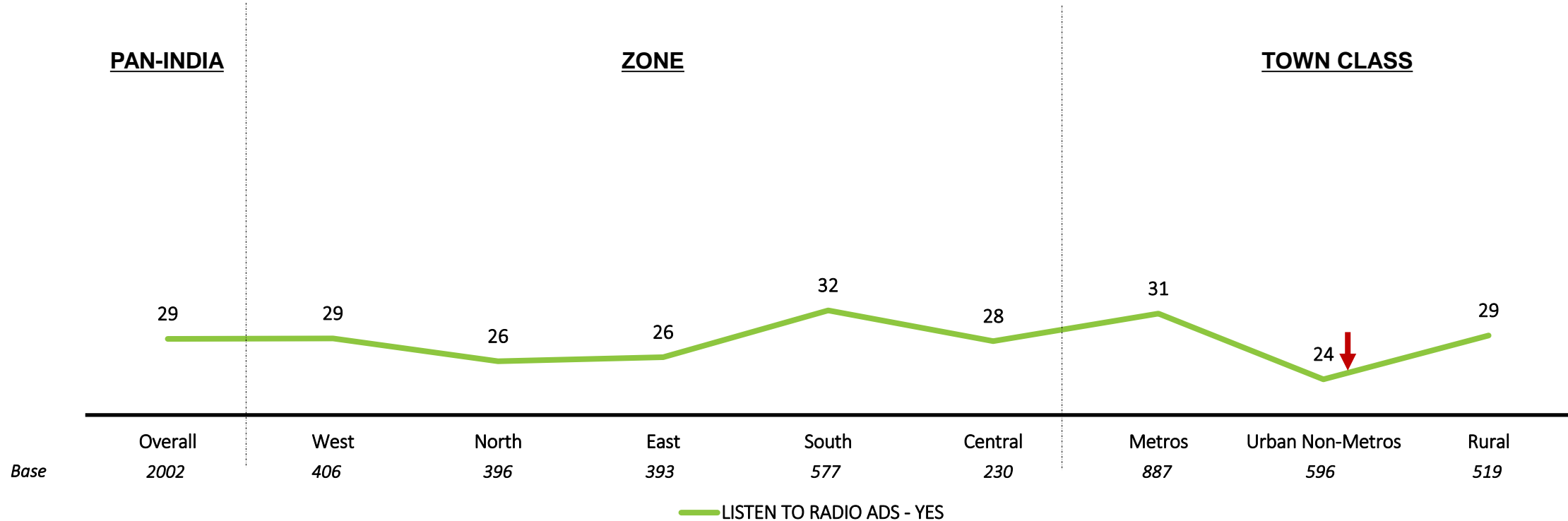
Significantly Higher / Lower than Overall

Q: On which media types, do you generally view / listen to / read any advertisement? [MA]

All figures are in % except base

LISTENERS OF RADIO ADS

- Interestingly, **South** Zone is inclined towards Radio for listening ads
- Listeners of advertisements on **Radio** are significantly lower in **Urban Non Metros** as compared to the rest of the Country



Significantly Higher / Lower than Overall

Q: On which media types, do you generally view / listen to / read any advertisement? [MA]

All figures are in % except base

SECTION 2

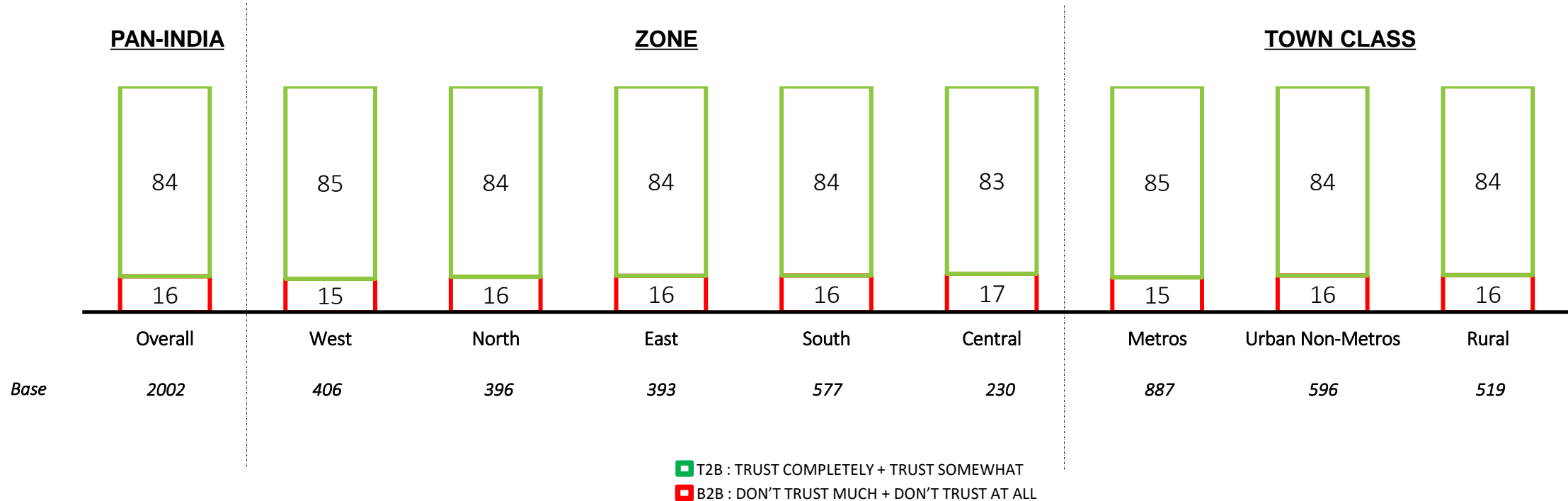
OVERALL TRUST IN ADVERTISING



Q: Thinking about media types including Print, Television, Digital, Radio, what is your overall trust level in advertisements? [SA]

OVERALL TRUST IN ADVERTISING (1/2)

- Almost **8 in every 10** people trust the ads displayed across various media
- The overall trust in advertising across different zones and town class of cities is more or less **consistent** with the National Average



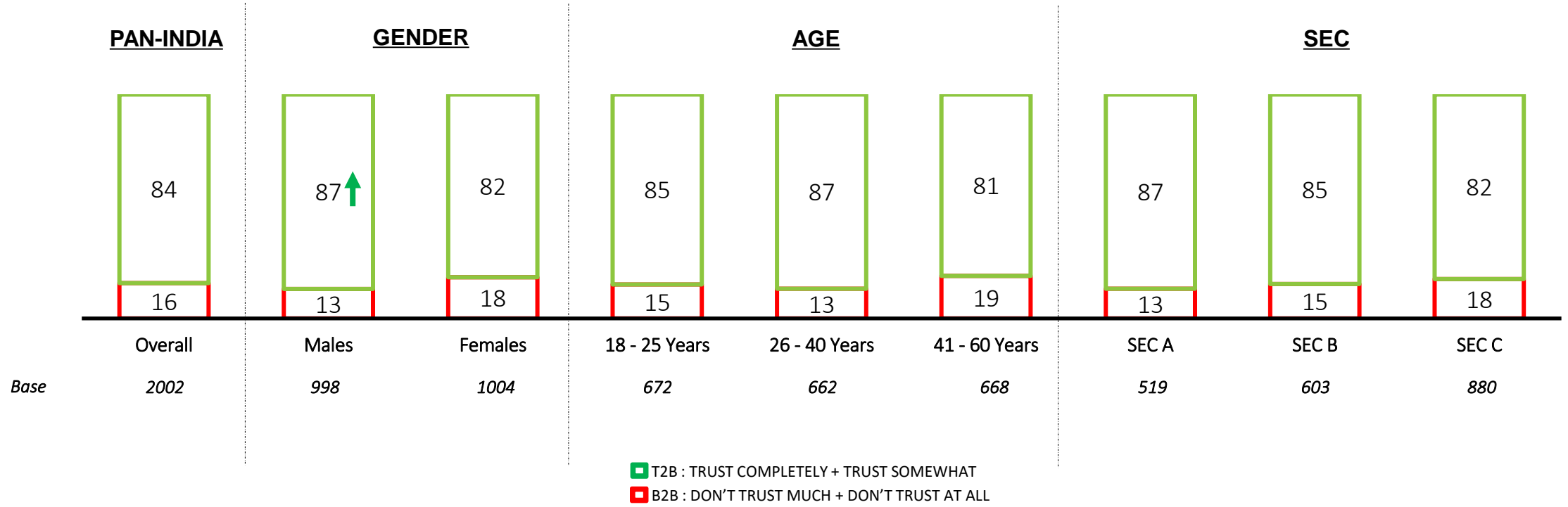
Significantly Higher / Lower than Overall

Q: Thinking about media types including Print, Television, Digital, Radio, what is your overall trust level in advertisements? [SA]

All figures are in % except base

OVERALL TRUST IN ADVERTISING (2/2)

- The overall trust in advertisements is driven by **Males , 26-40 YO and SEC A**



Significantly Higher / Lower than Overall

Q: Thinking about media types including Print, Television, Digital, Radio, what is your overall trust level in advertisements? [SA]

All figures are in % except base

SECTION 3

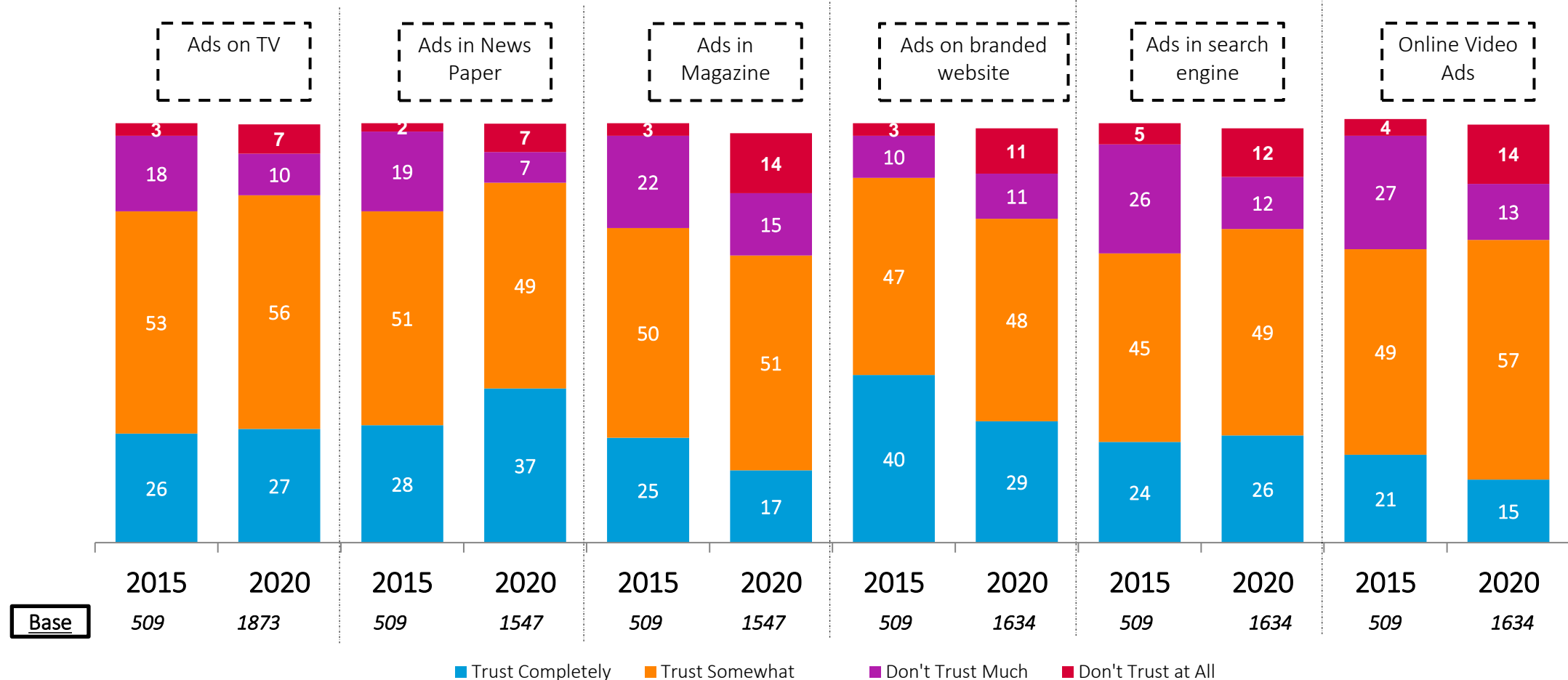
TRUST LEVELS IN DIFFERENT FORMS OF ADVERTISING



Q: Now I will read out certain forms of advertising, do let me know to what extent do you trust these forms of advertising? [SA]

OVERALL TRUST IN DIFFERENT FORMS OF ADVERTISING (2015 V/S 2020)

- The audience has shown improved trust levels in TV, Newspaper and Search Engine Ads in 2020 vis-à-vis 2015
- Trust levels in Magazine Ads and Branded Website advertisements has dropped as compared to 2015

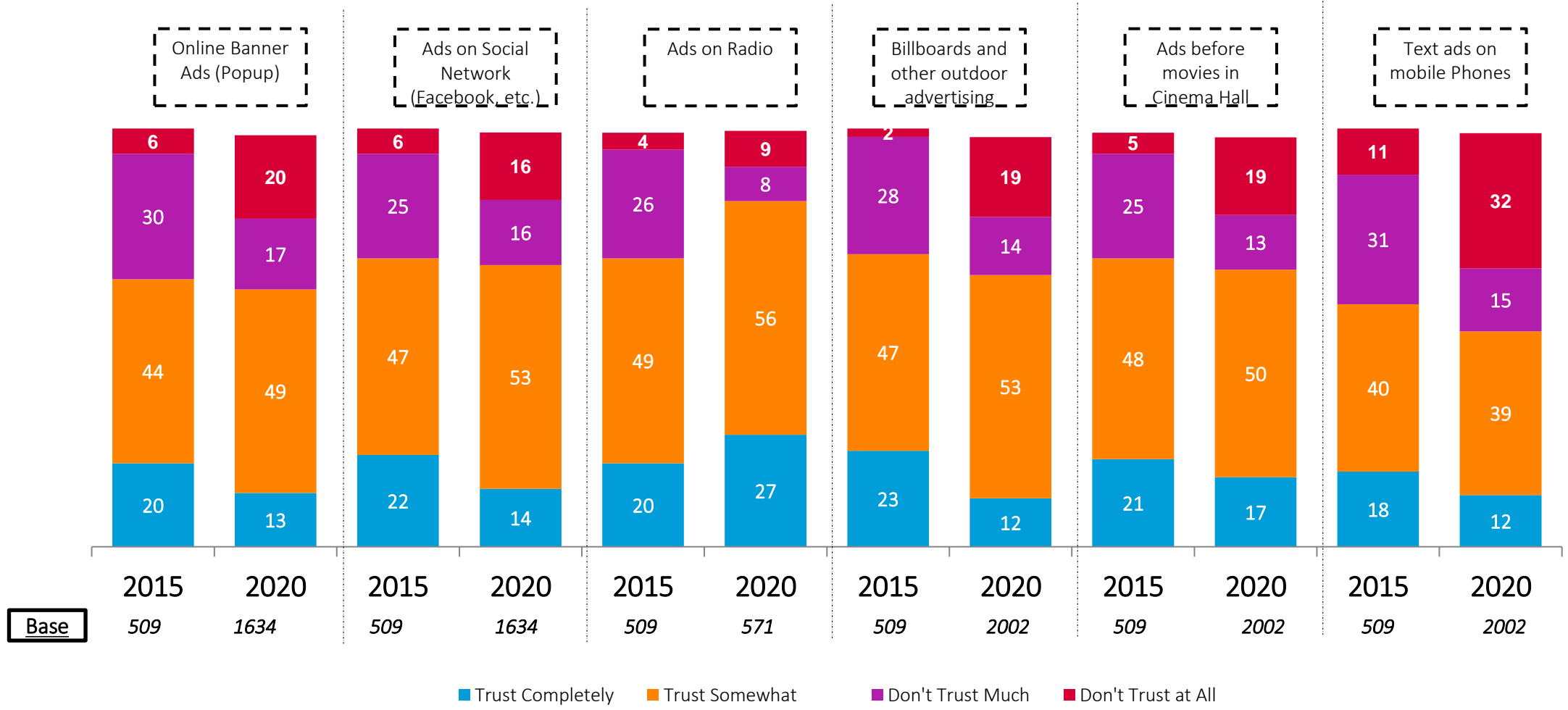


Q: Now I will read out certain forms of advertising, do let me know to what extent do you trust these forms of advertising? [SA]

All figures are in % except base

OVERALL TRUST IN DIFFERENT FORMS OF ADVERTISING (2015 V/S 2020)

- Over a span of 5 years, we can see that the audience listening to advertisements in 2020 on Radio has significantly increased their overall trust levels to that in 2015
- However, trust levels on text ads via SMS have largely dropped in these 5 years

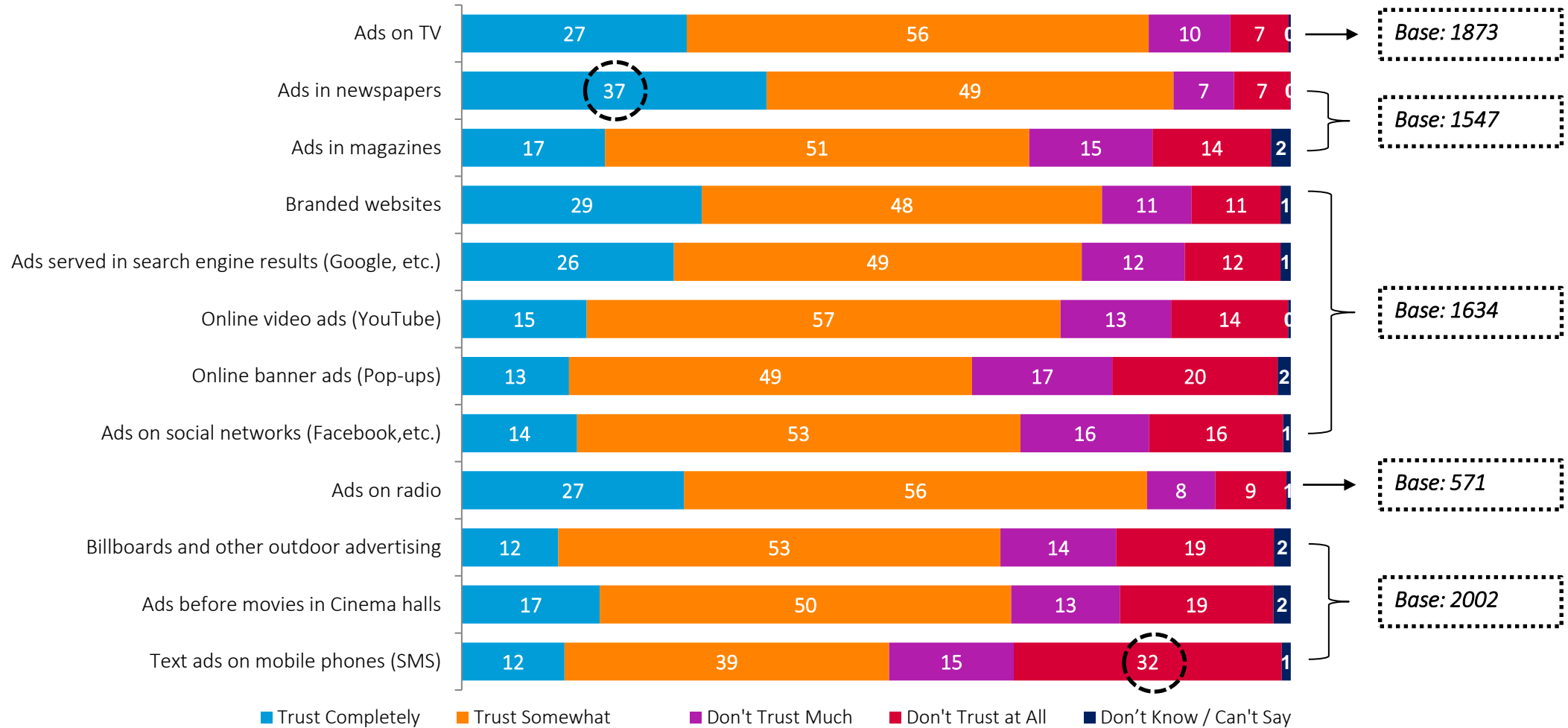


Q: Now I will read out certain forms of advertising, do let me know to what extent do you trust these forms of advertising? [SA]

All figures are in % except base

OVERALL TRUST IN DIFFERENT FORMS OF ADVERTISING

- Large number of people are completely trusting ads published in **newspapers**, whereas they don't seem to have a lot of trust **text / SMS ads on Mobile phones**

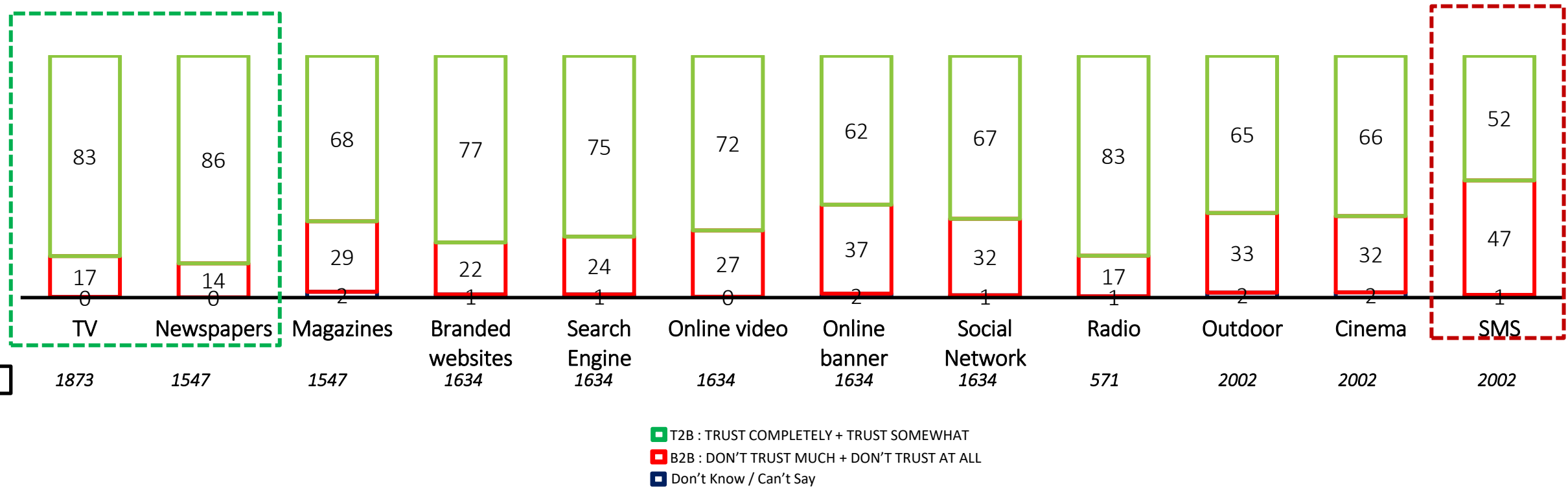


Q: Now I will read out certain forms of advertising, do let me know to what extent do you trust these forms of advertising? [SA]

All figures are in % except base

OVERALL TRUST IN DIFFERENT FORMS OF ADVERTISING

- Newspaper (86%) appears to be the most trusted form of advertising closely followed by TV (83%) and Radio (83%)



Significantly Higher / Lower than Overall

Q: Now I will read out certain forms of advertising, do let me know to what extent do you trust these forms of advertising? [SA]

All figures are in % except base

SECTION 4

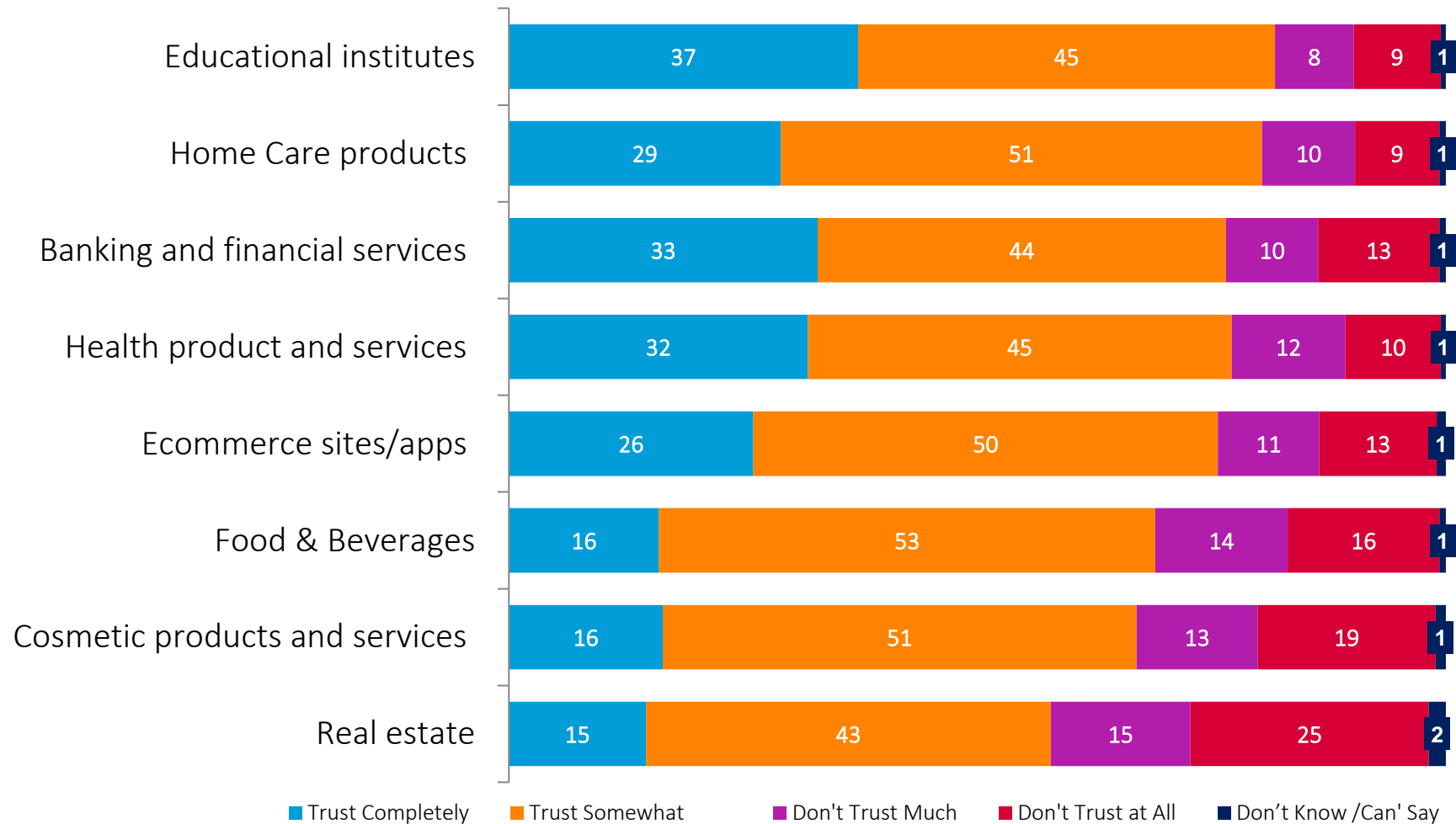
TRUST LEVELS IN ADVERTISING – BY INDUSTRY



Q: Now I will read out certain industry types one by one. Do let me know to what extent do you trust the advertisements by these industry types? [SA]

OVERALL TRUST IN ADVERTISING – BY INDUSTRY

- Ads by **Educational institutes** have grabbed relatively higher trust among others
- On the other hand, audience have depicted lower trust towards **Real Estate** ads



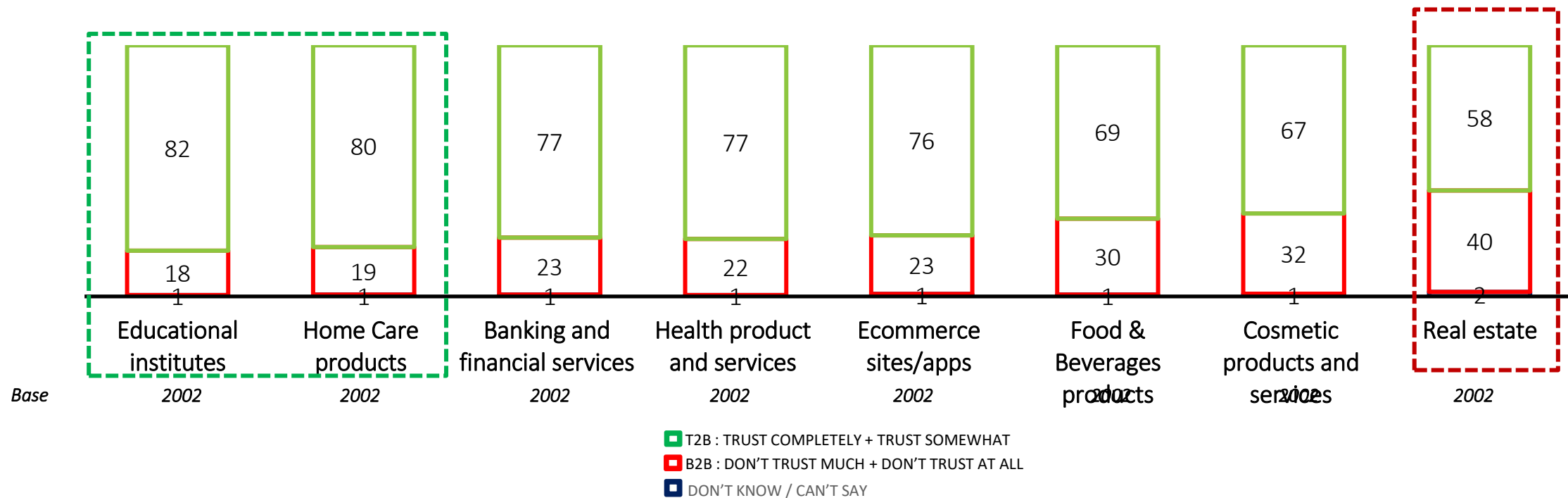
Base: 2002

Q: Now I will read out certain industry types one by one. Do let me know to what extent do you trust the advertisements by these industry types? [SA]

All figures are in % except base

OVERALL TRUST IN ADVERTISING – BY INDUSTRY

- Respondents have shown higher trust towards advertisements for educational institutes (82%) and home care products (80%)
- Real estate advertisements faced a dent in their trust levels



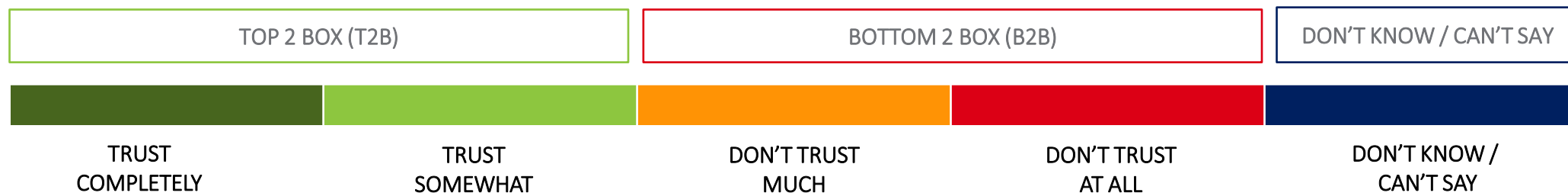
Significantly Higher / Lower than Overall

Q: Now I will read out certain industry types one by one. Do let me know to what extent do you trust the advertisements by these industry types? [SA]

All figures are in % except base

SECTION 5

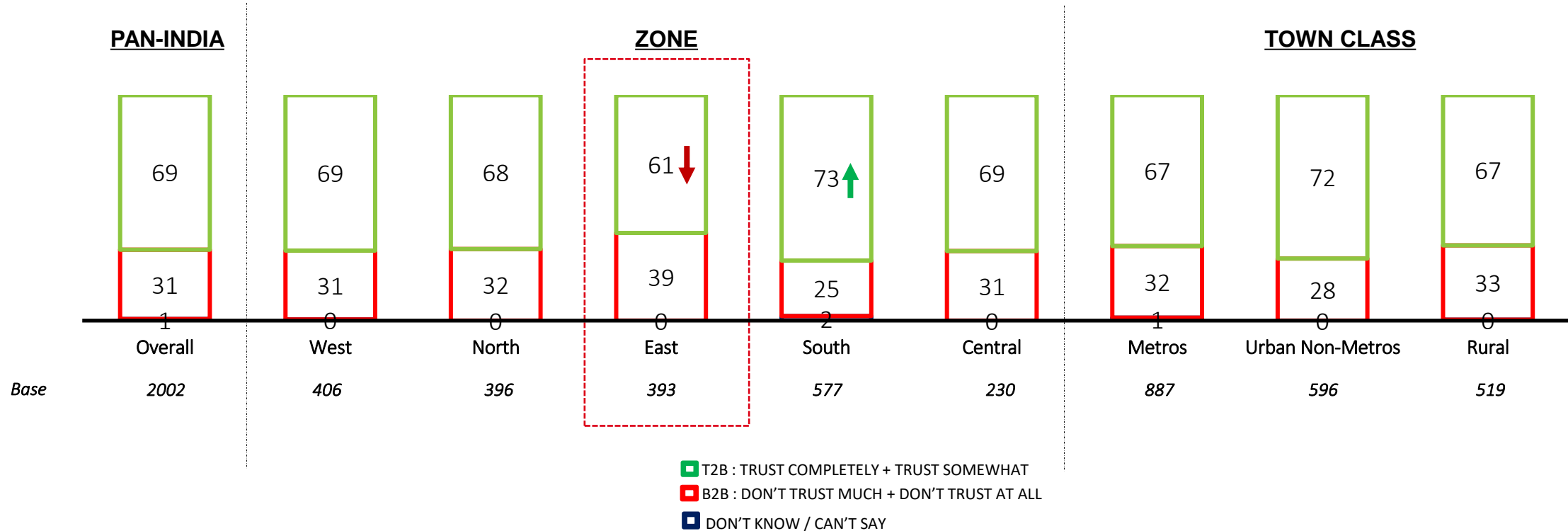
TRUST LEVEL IN ADVERTISEMENTS ENDORSED BY CELEBRITIES



Q: To what extent do you trust the advertisements endorsed by celebrities? [SA]

TRUST IN ADS ENDORSED BY CELEBRITIES

- 7 out of 10 people have depicted trust in Ads endorsed by celebrities; Trust levels are largely driven by South Zone
- Whereas dwellers of **East Zone** continues to show significantly lesser trust in celebrity endorsed ads



Significantly Higher / Lower than Overall

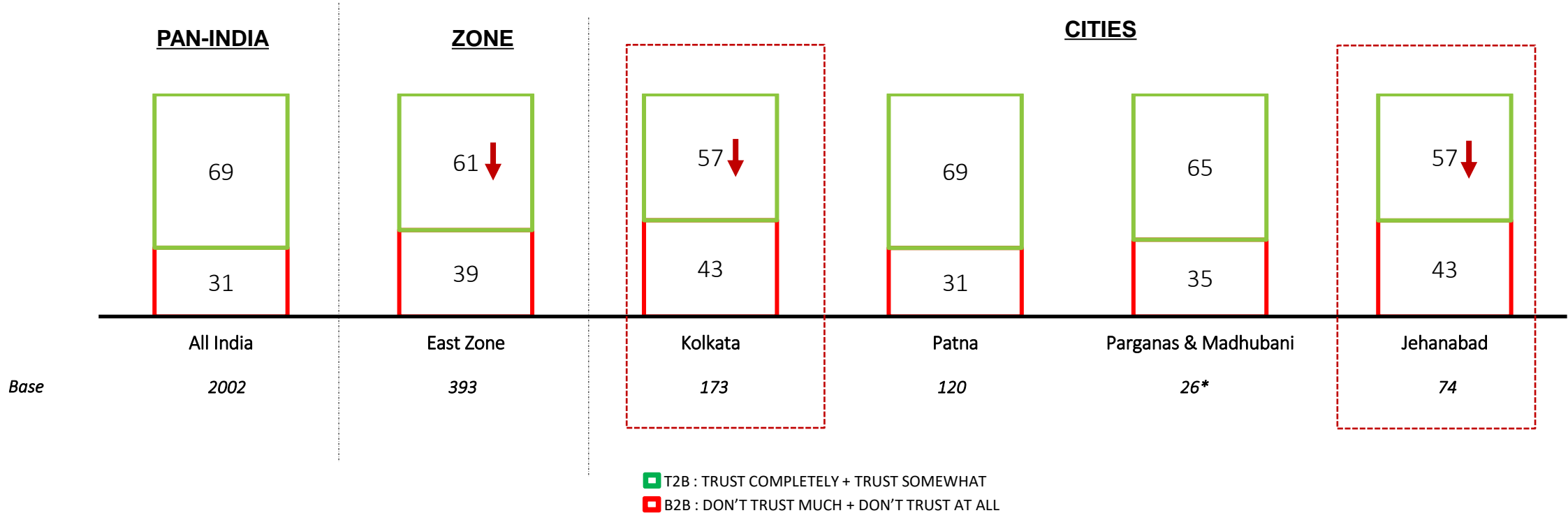
Q: To what extent do you trust the advertisements endorsed by celebrities? [SA]

All figures are in % except base

TRUST IN ADS ENDORSED BY CELEBRITIES – EAST ZONE

Let us see which cities in East Zone are bringing the trust level down...

- In East zone, **Kolkata** and **Jehanabad** are pulling down the trust levels for ads endorsed by celebrities



Significantly Higher / Lower than Overall

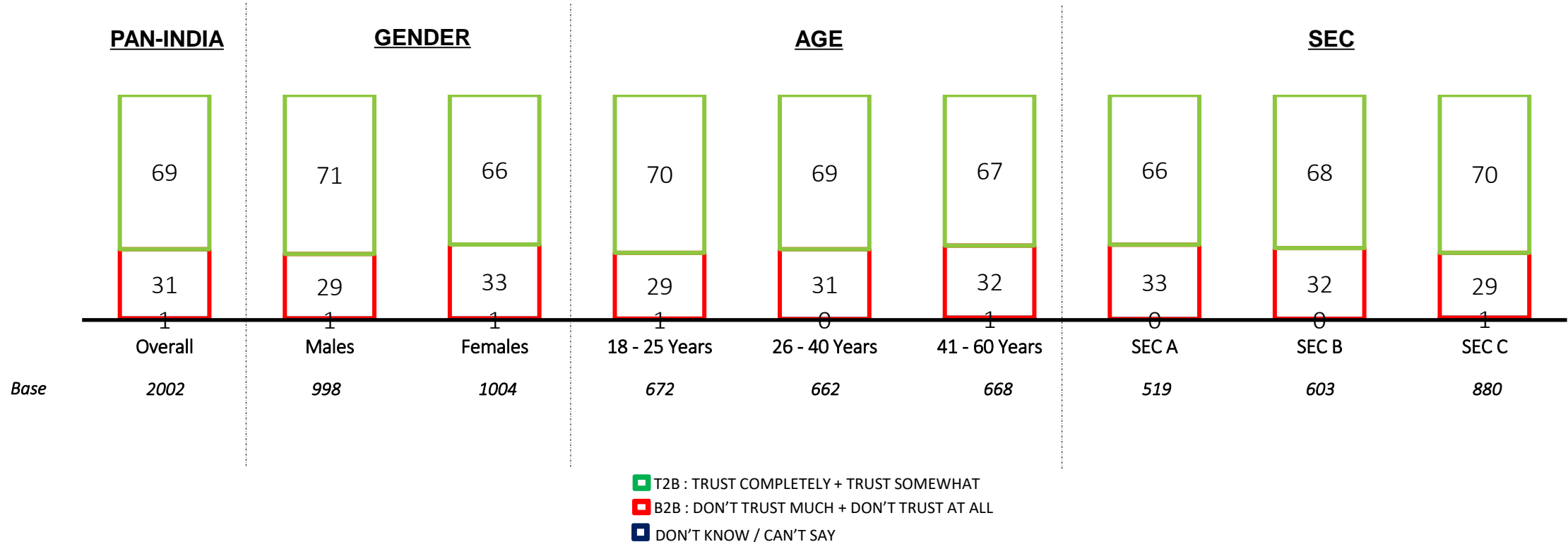
Q: To what extent do you trust the advertisements endorsed by celebrities? [SA]

* Caution: Low Base

All figures are in % except base

TRUST IN ADS ENDORSED BY CELEBRITIES

- Trust levels in ads endorsed by celebrities amongst Males & Females as well as people from different age groups and Socioeconomic Class are more or less in line with the National Average



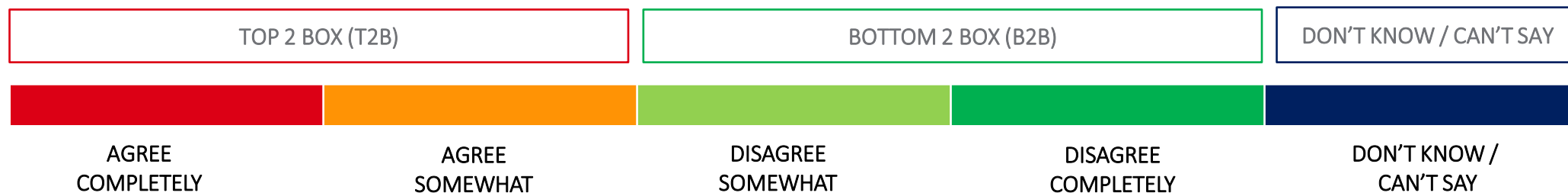
Significantly Higher / Lower than Overall

Q: Now I will read out certain forms of advertising, do let me know to what extent do you trust these forms of advertising? [SA]

All figures are in % except base

SECTION 5.2

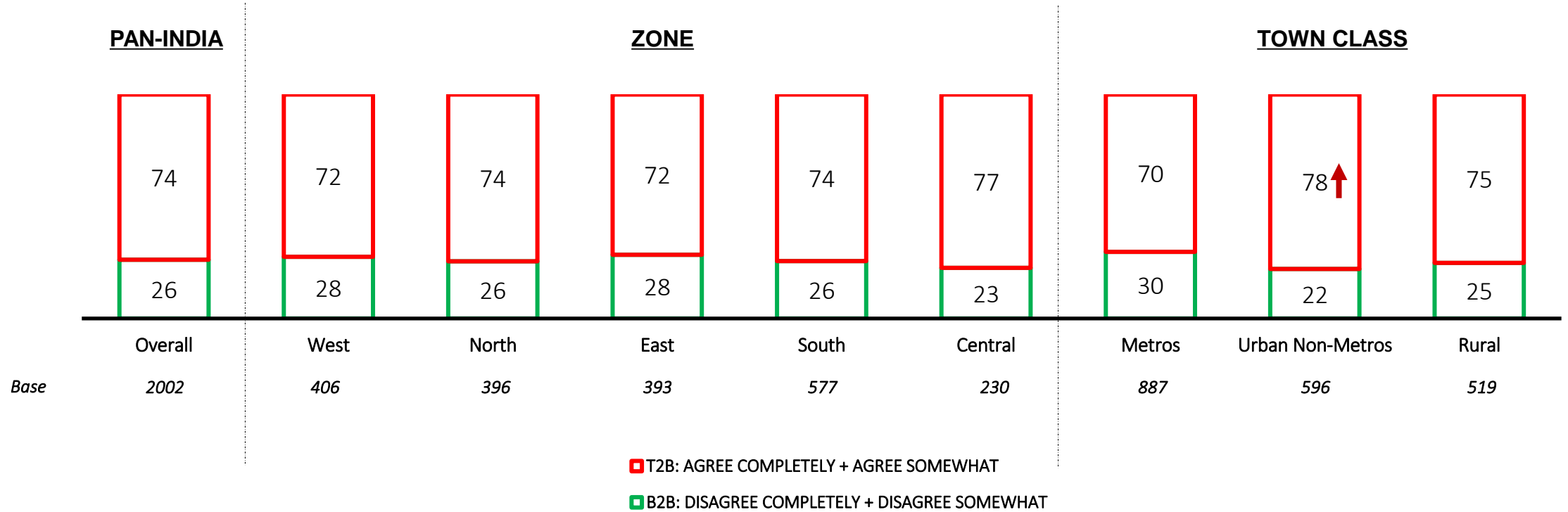
INDECENCY IN ADS



Q. To what extent do you agree/ disagree that Advertisements in India are indecent and vulgar particularly in portraying the women?

EXTENT OF AGREEMENT ON VULGARITY IN ADS

- Worth noting that, a large chunk of people agrees to vulgarity and indecency in Ads which is particularly higher in non-metros



↑↓ Significantly Higher / Lower than Overall

Q: To what extent do you agree/ disagree that Advertisements in India are indecent and vulgar particularly in portraying the women?

All figures are in % except base

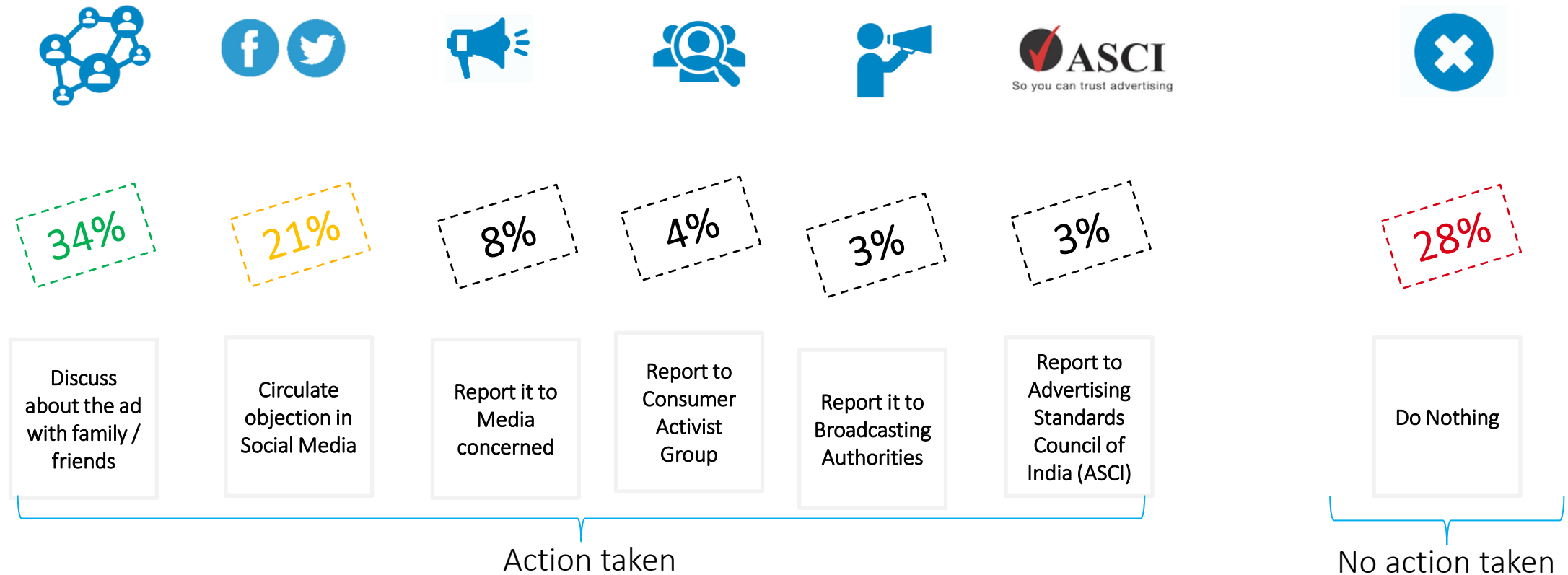
SECTION 6

ACTION TAKEN ON A OBJECTIONABLE OR MISLEADING ADVERTISEMENT

Q: What action do you take if come across any objectionable or misleading claim in an advertising ? [SA]

ACTION TAKEN ON A MISLEADING ADVERTISEMENT

- Whenever people come across any objectionable claim or any misleading advertisement, they **mostly discuss it with their family / friends (34%)**.
- Many of them also prefer **not to do anything (28%)**, while some of them circulate their objection on **Social Media (21%)**.



Q: What action do you take if come across any objectionable or misleading claim in an advertising [SA]

Base: 2002

All figures are in % except base

SECTION 7

AWARENESS ABOUT ASCI

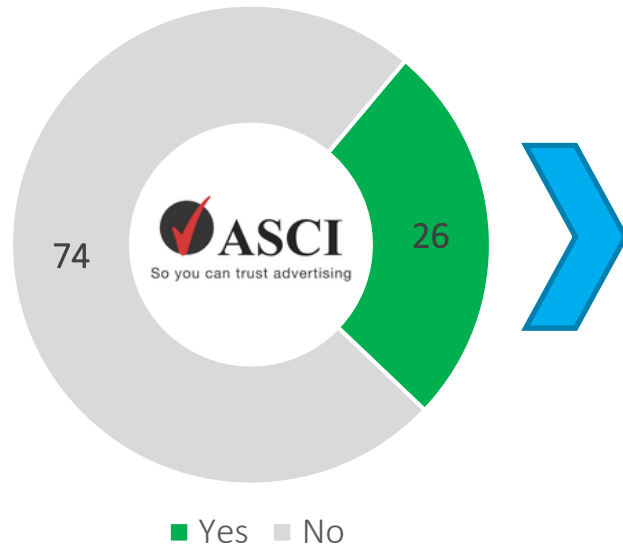


Q: There is an organization called Advertising Standards Council of India (ASCI) which seeks to ensure that advertisement conforms to its Code for Self-Regulation and the protection of the interest of consumers. Have you ever heard about Advertising Standards Council of India (ASCI) organization? [SA]

AWARENESS ABOUT ASCI

- Only 1/4th of the audience are aware about ASCI.
- Awareness is significantly higher in **Males** while significantly lower in **Central Zone and Females**

Awareness about ASCI



	Zones					Town Class		
	West	North	East	South	Central	Metro	Non-Metro	Rural
Base	406	396	393	577	230	887	596	519
Awareness	23	25	28	30	20 ↓	29	25	24

	Gender		Age			SEC		
	Males	Females	18-25 Y	26 – 40 Y	41 – 60 Y	SEC A	SEC B	SEC C
Base	998	1004	672	662	668	519	603	880
Awareness	30 ↑	22 ↓	27	28	24	30	24	25

Overall Base: 2002

↑ ↓ Significantly Higher / Lower than Overall

• Q: There is an organization called Advertising Standards Council of India (ASCI) which seeks to ensure that advertisement conforms to its Code for Self-Regulation and the protection of the interest of consumers. Have you ever heard about Advertising Standards Council of India (ASCI) organization? [SA]

SECTION 8

LANGUAGE OF ADVERTISEMENT

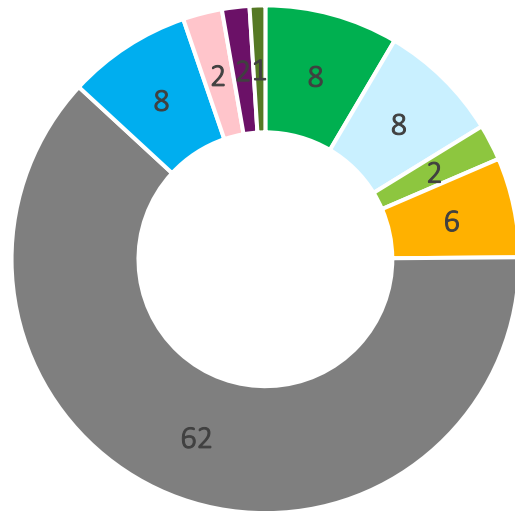
Q: In which language do you mostly see/listen/read the advertising?

Q: Which is the second-mostly language in which you see/listen/read the advertising?

PRIMARY LANGUAGE OF ADVERTISEMENT

- Hindi is the most preferred language for watching Ads in India.
- Due to the higher inclination towards regional languages, Ads in Hindi are relatively less preferred in East and South regions.

PRIMARY LANGUAGE OF ADVERTISEMENTS



- English
- Tamil
- Marathi
- Kannada
- Hindi
- Bengali
- Telugu
- Malayalam
- OTHERS

	Zones					Town Class		
	West	North	East	South	Central	Metro	Non-Metro	Rural
Base	406	396	393	577	230	887	596	519
%	75	89	53↓	28↓	92	45↓	80	71

	Gender		Age			SEC		
	Males	Females	18-25 Y	26 – 40 Y	41 – 60 Y	SECA	SEC B	SECC
Base	998	1004	672	662	668	519	603	880
%	59	65	62	61	63	62	62	62

Overall Base: 2002

Q: In which language do you mostly see/listen/read the advertising?

Q: Which is the second-mostly language in which you see/listen/read the advertising

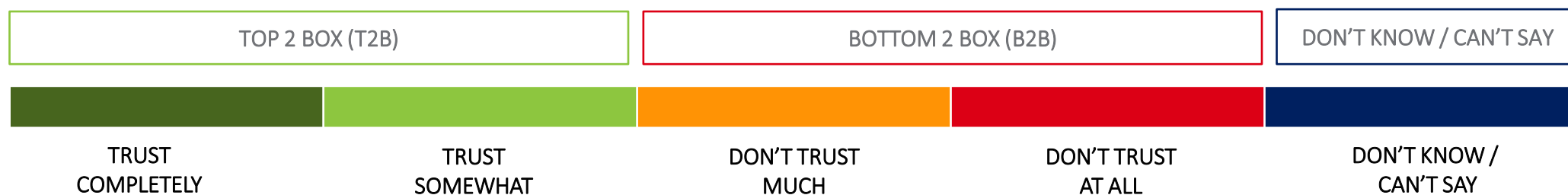
↑↓ Significantly Higher / Lower than Overall

All figures are in % except base

APPENDIX

SECTION 3.1

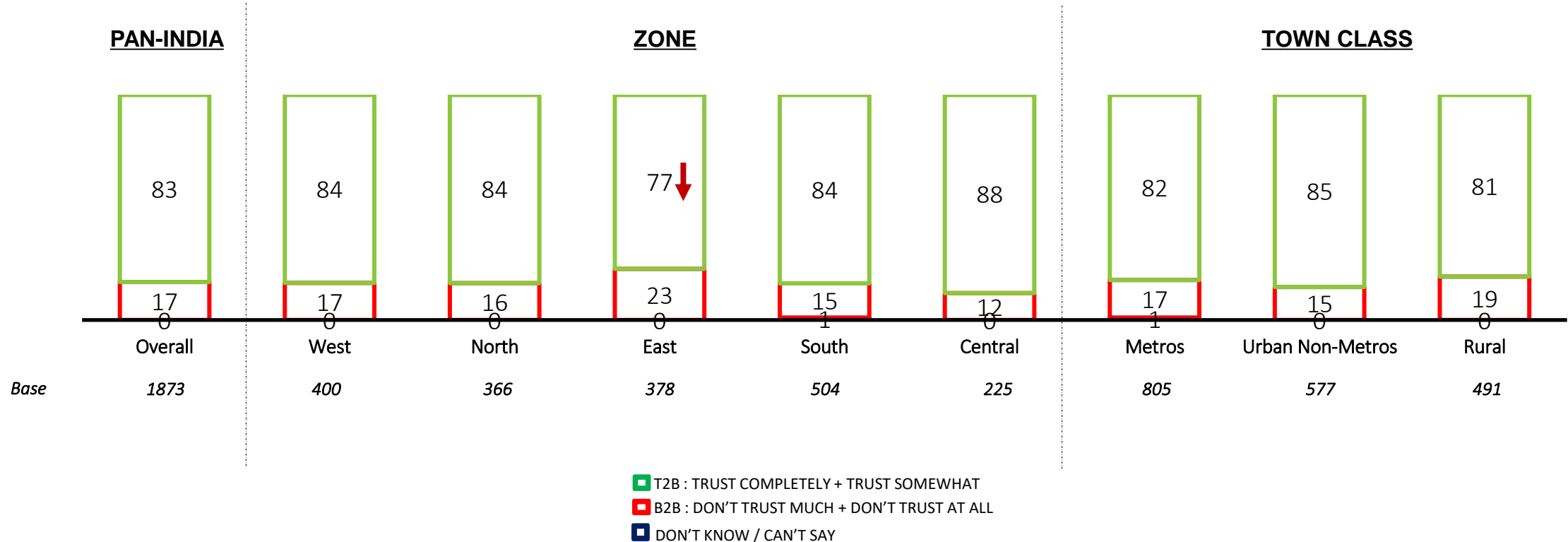
LET'S DEEP DIVE INTO TRUST IN DIFFERENT FORMS OF ADVERTISING ...



Q: Now I will read out certain forms of advertising, do let me know to what extent do you trust these forms of advertising? [SA]

TRUST IN ADS ON TELEVISION

- TV is the second most trusted form of advertising after Newspaper
- However, dwellers of East region show significantly lesser trust in television ads than other zones



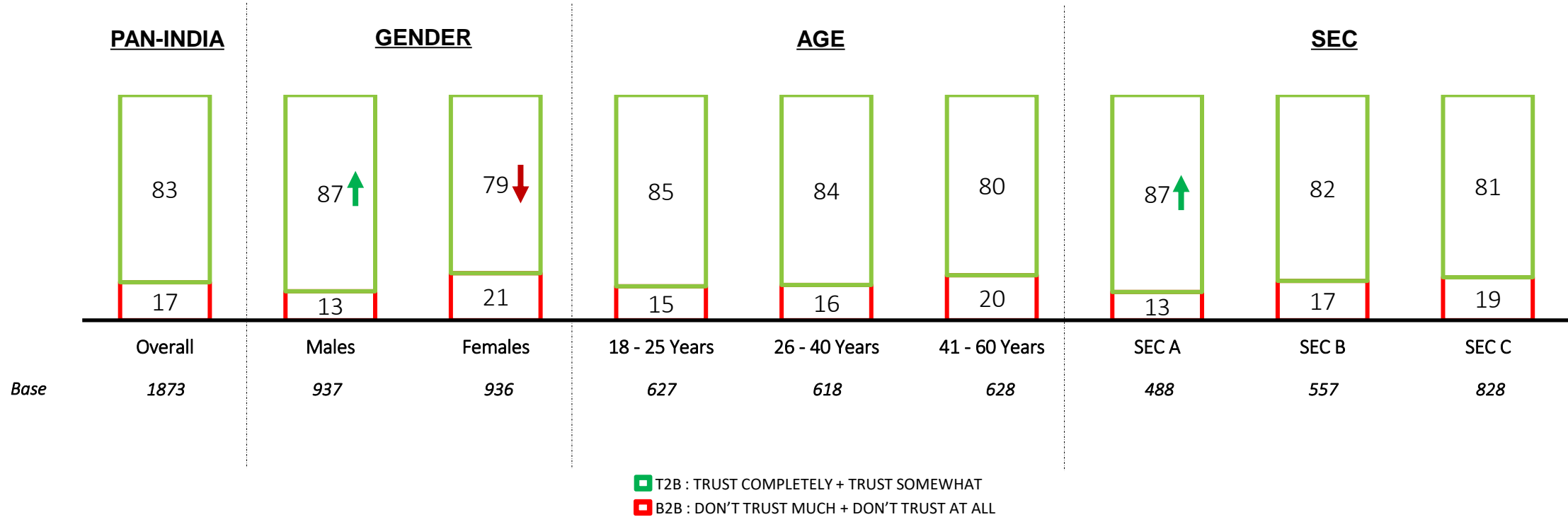
Significantly Higher / Lower than Overall

Q: Now I will read out certain forms of advertising, do let me know to what extent do you trust these forms of advertising? [SA]

All figures are in % except base

TRUST IN ADS ON TELEVISION

- **Males** exhibit significant higher trust in TV ads than females
- Even **SEC A** respondents are substantially trust TV ads



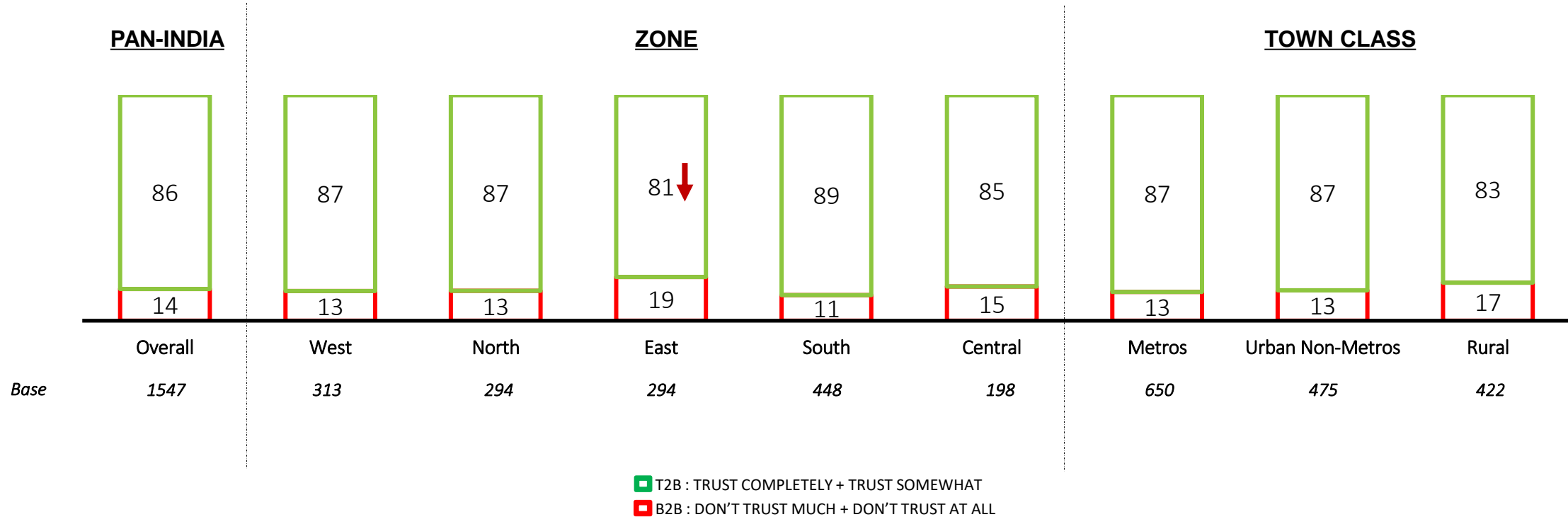
Significantly Higher / Lower than Overall

Q: Now I will read out certain forms of advertising, do let me know to what extent do you trust these forms of advertising? [SA]

All figures are in % except base

TRUST ON ADS IN NEWSPAPERS

- As compared to other forms of advertising, respondents have shown relatively higher trust in Newspaper ads
- Having said that, **East** region indicates considerably lower trust in newspaper ads



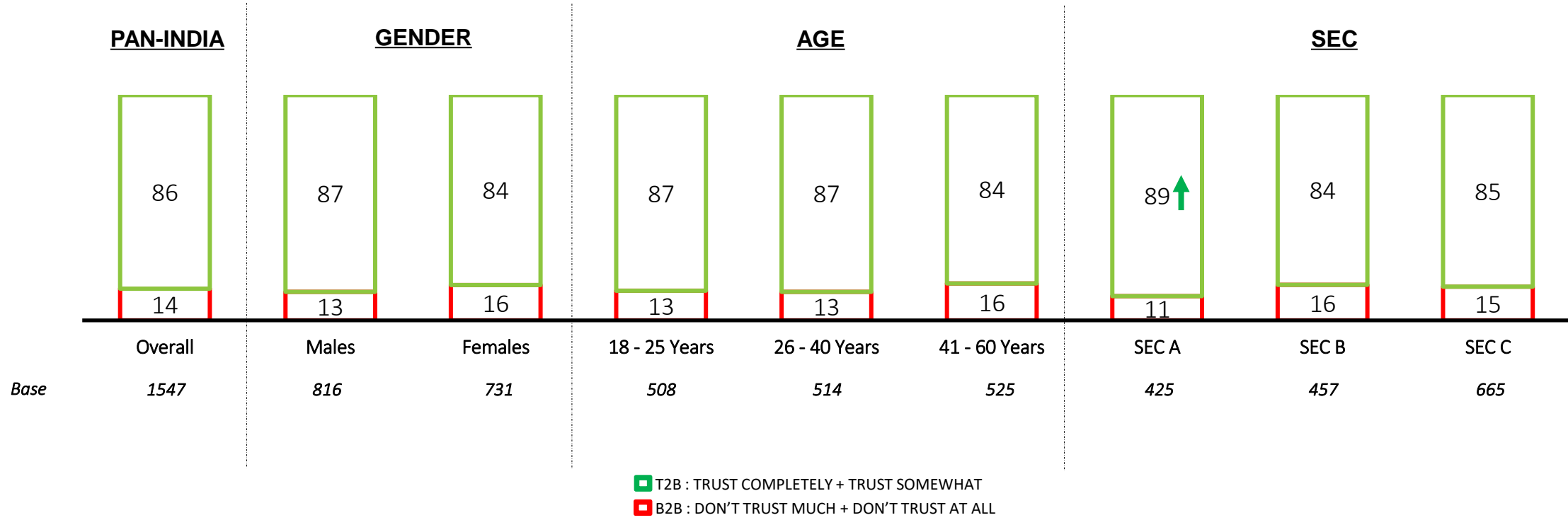
Significantly Higher / Lower than Overall

Q: Now I will read out certain forms of advertising, do let me know to what extent do you trust these forms of advertising? [SA]

All figures are in % except base

TRUST ON ADS IN NEWSPAPERS

- SEC A responds are depicting higher trust in newspaper ads among others



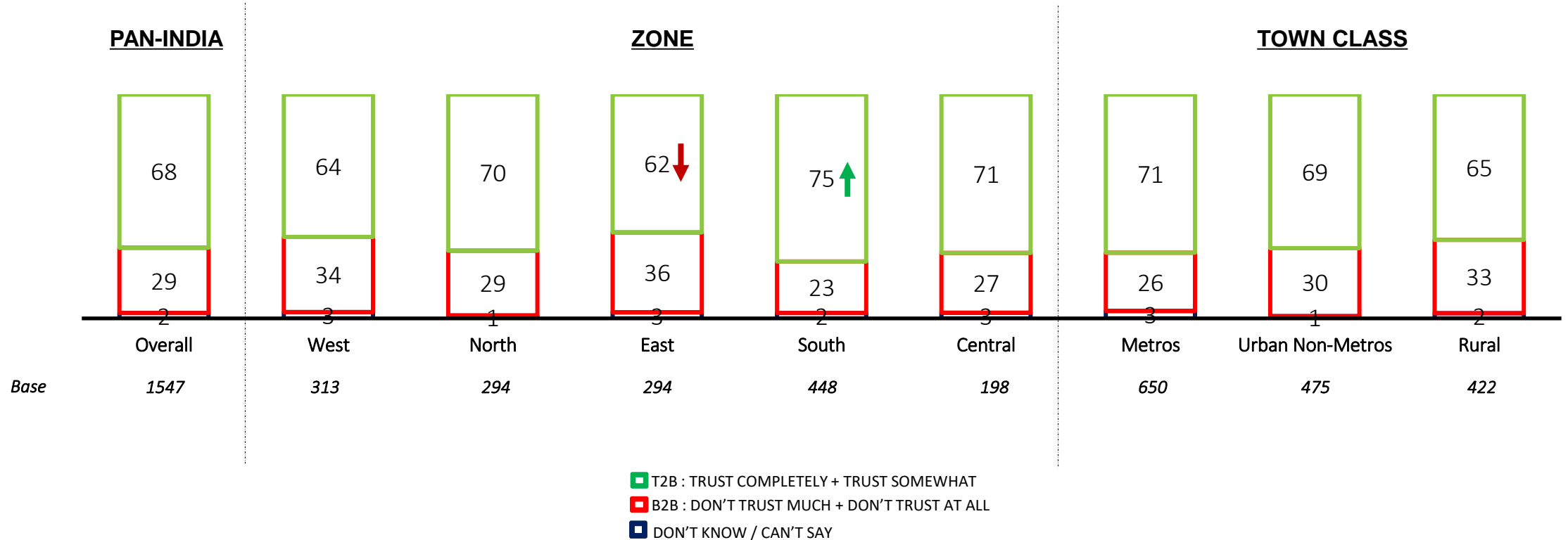
Significantly Higher / Lower than Overall

Q: Now I will read out certain forms of advertising, do let me know to what extent do you trust these forms of advertising? [SA]

All figures are in % except base

TRUST ON ADS IN MAGAZINES

- At an overall level, 2/3rd of the respondents exhibit trust in magazine ads which is particularly driven by residents of **South** zone.
- However, **East** region is lacking trust in magazine ads similar to ads in newspaper and TV



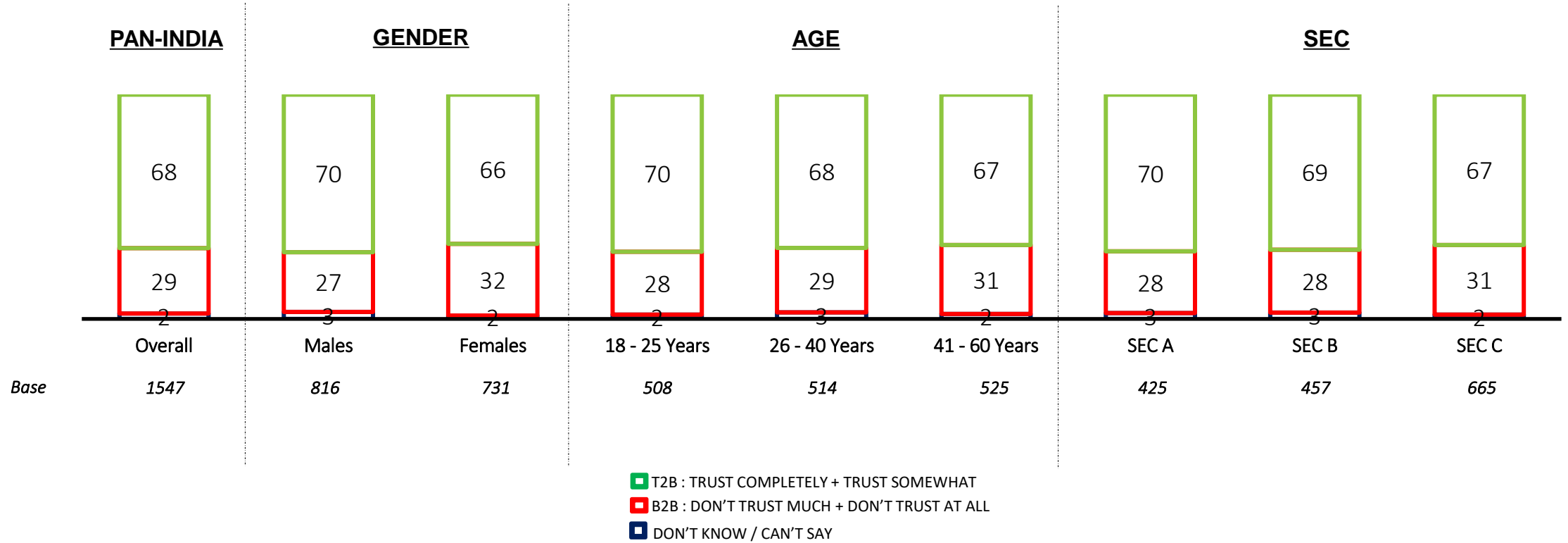
↑ ↓ Significantly Higher / Lower than Overall

Q: Now I will read out certain forms of advertising, do let me know to what extent do you trust these forms of advertising? [SA]

All figures are in % except base

TRUST ON ADS IN MAGAZINES

- Trust levels on ads in magazines across Males & Females, different age groups and Socioeconomic Class of people is more or less consistent with the national average



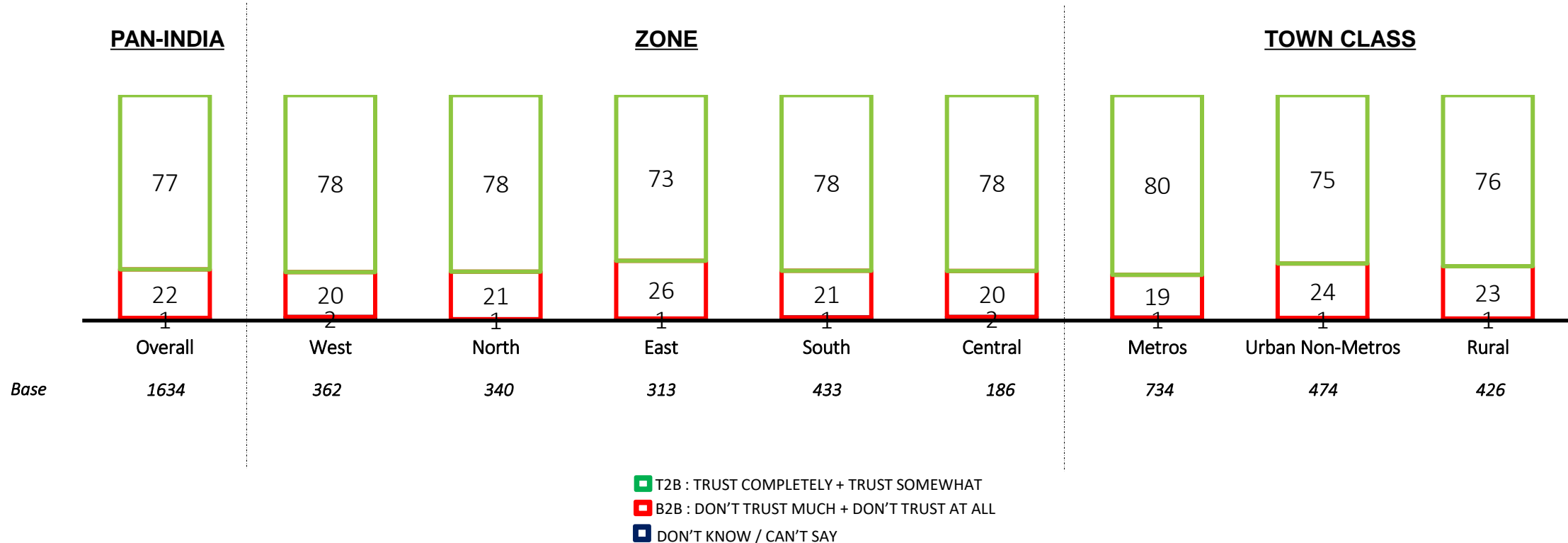
Significantly Higher / Lower than Overall

Q: Now I will read out certain forms of advertising, do let me know to what extent do you trust these forms of advertising? [SA]

All figures are in % except base

TRUST IN ADS ON BRANDED WEBSITES

- Almost 8 out of the 10 respondents are trusting ads on branded websites
- As far as trusting advertisements on branded websites is concerned, the trust levels are more or less in-line with the national average across Zones, except **East Zone** where people seem to be showing slightly lesser trust in ads on branded websites



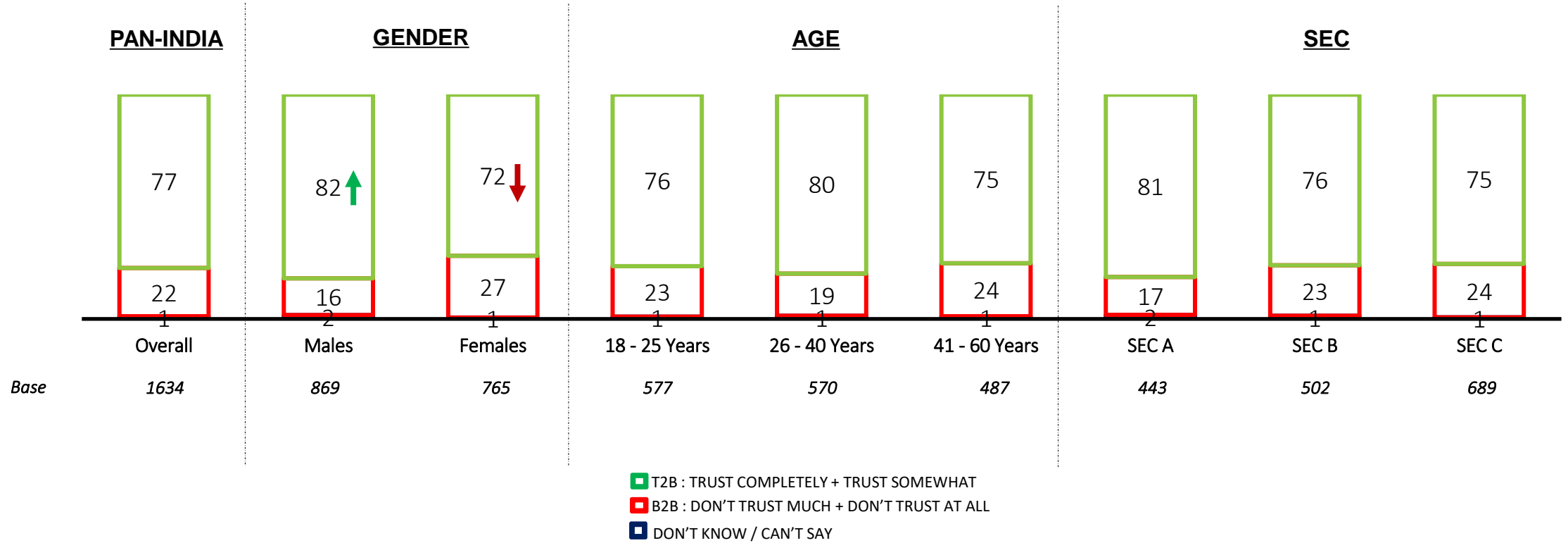
Significantly Higher / Lower than Overall

Q: Now I will read out certain forms of advertising, do let me know to what extent do you trust these forms of advertising? [SA]

All figures are in % except base

TRUST IN ADS ON BRANDED WEBSITES

- Males trust ads on branded websites significantly higher than females



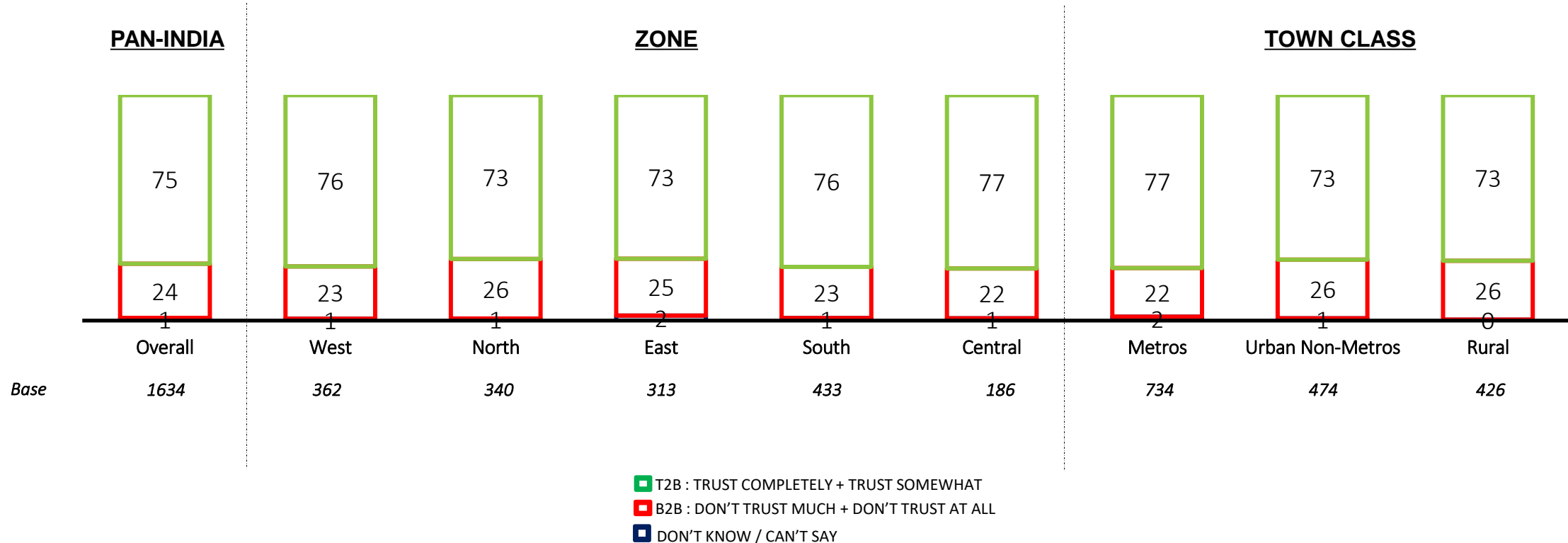
↑ ↓ Significantly Higher / Lower than Overall

Q: Now I will read out certain forms of advertising, do let me know to what extent do you trust these forms of advertising? [SA]

All figures are in % except base

TRUST ON ADS IN SEARCH ENGINE

- Search engine ads are also fairly trusted across India and trust levels are consistent across zones and...
- As far as trusting advertisements on search engines is concerned, the trust levels are more or less in-line with the national average across Zones



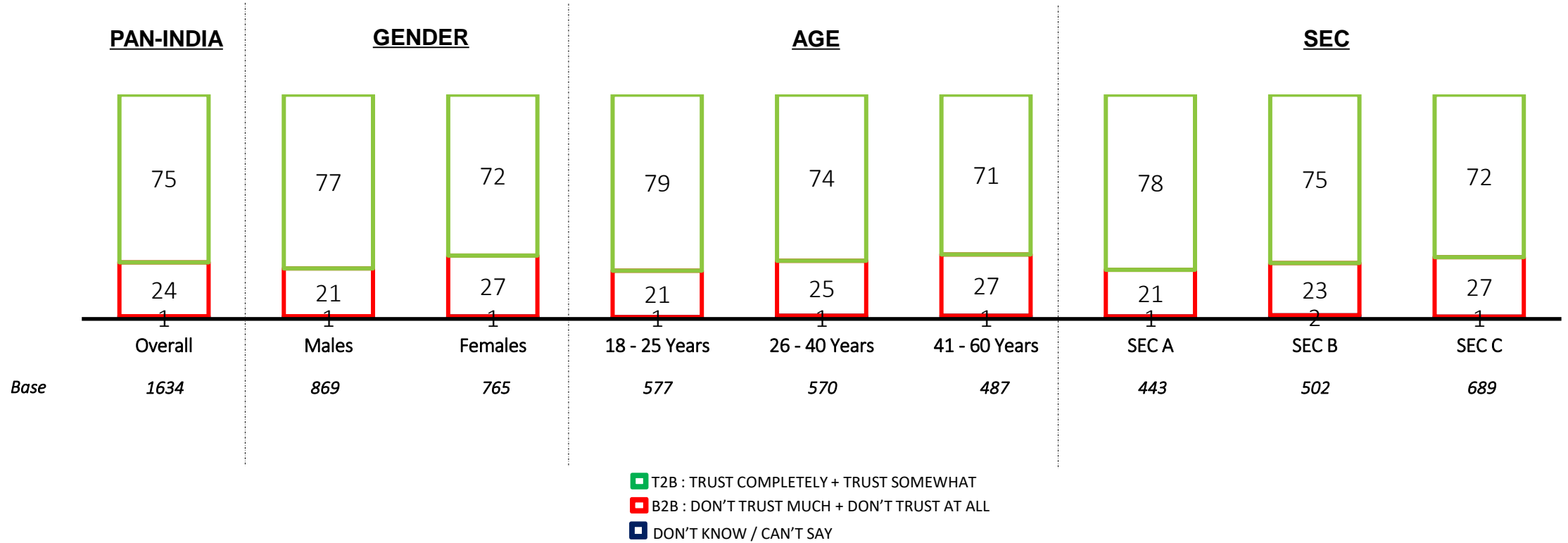
Significantly Higher / Lower than Overall

Q: Now I will read out certain forms of advertising, do let me know to what extent do you trust these forms of advertising? [SA]

All figures are in % except base

TRUST ON ADS IN SEARCH ENGINE

- ...various demographic groups.



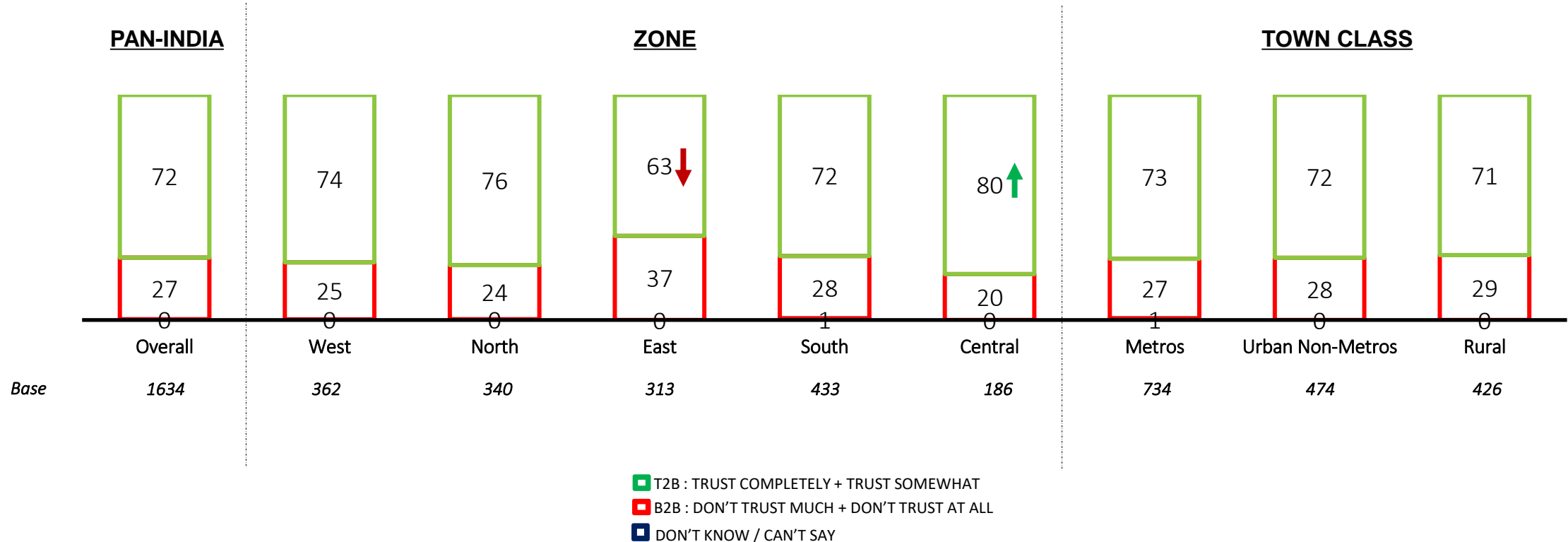
Significantly Higher / Lower than Overall

Q: Now I will read out certain forms of advertising, do let me know to what extent do you trust these forms of advertising? [SA]

All figures are in % except base

TRUST ON ONLINE VIDEO ADS

- Around 70% of the respondents have displayed trust in online video advertising (like YouTube ads)
- **Central Zone has shown significantly more trust**, whereas as observed in many other forms of advertisement, **East Zone** continues to pull the scores down with the trust levels



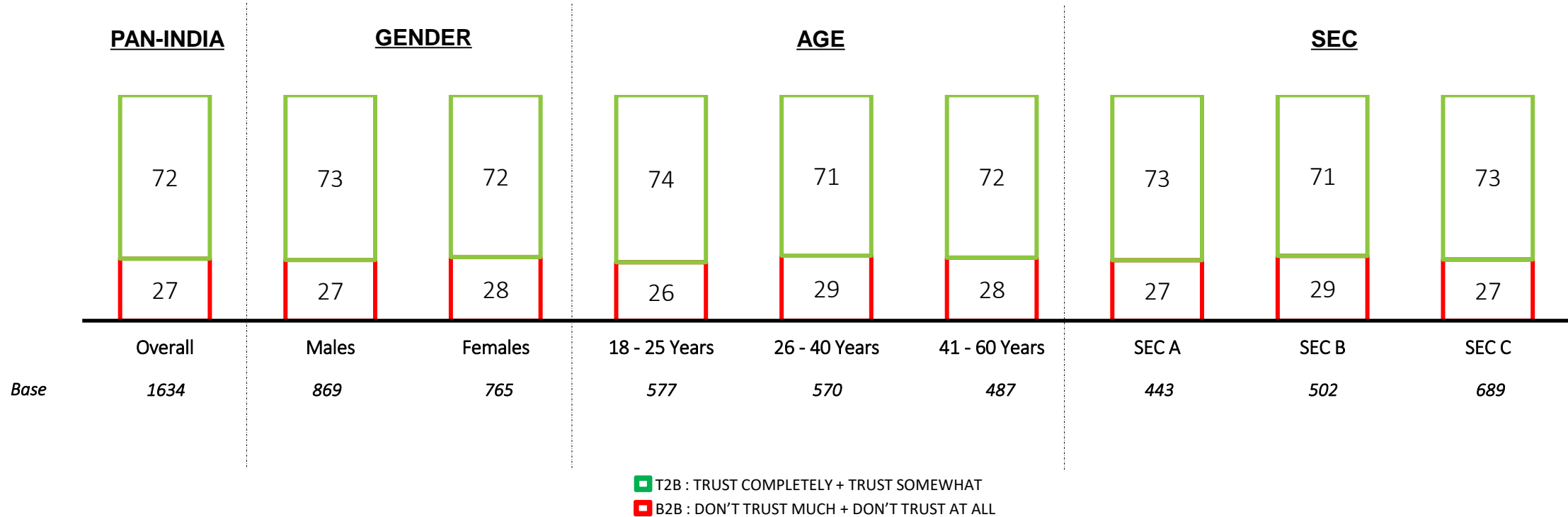
Significantly Higher / Lower than Overall

Q: Now I will read out certain forms of advertising, do let me know to what extent do you trust these forms of advertising? [SA]

All figures are in % except base

TRUST ON ONLINE VIDEO ADS

- Trust levels on online video ads amongst Males & Females as well as people from different age groups and Socioeconomic Class are more or less in line with the National Average



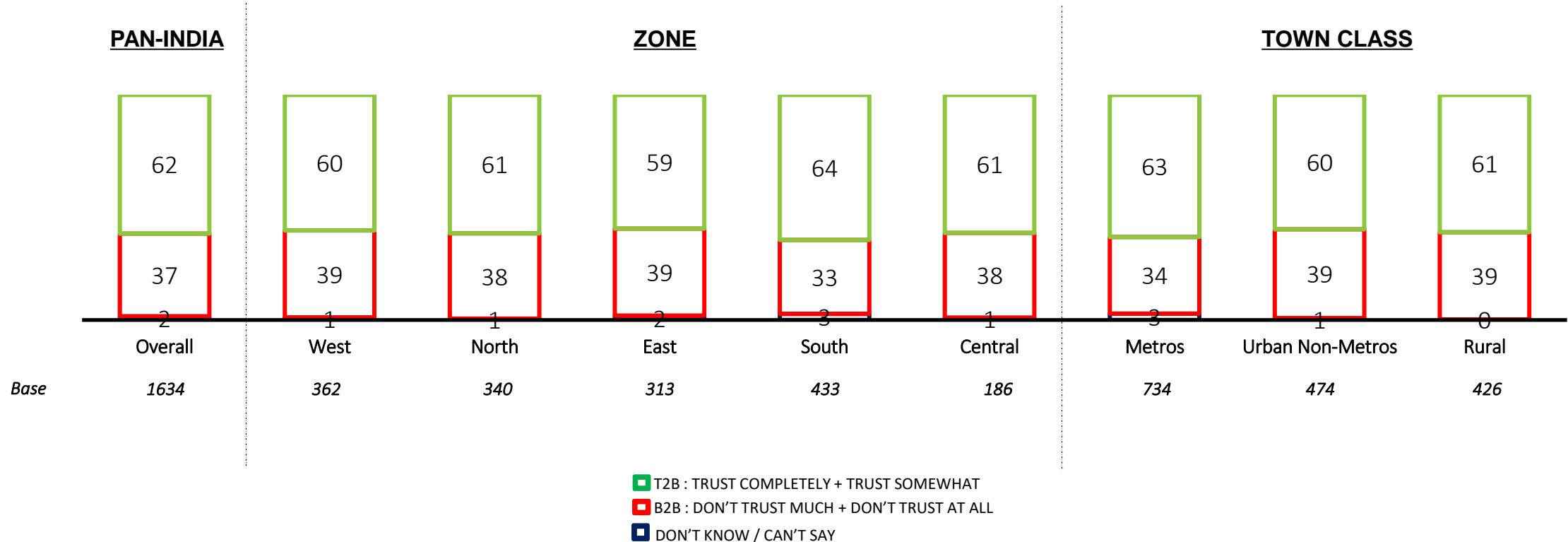
Significantly Higher / Lower than Overall

Q: Now I will read out certain forms of advertising, do let me know to what extent do you trust these forms of advertising? [SA]

All figures are in % except base

TRUST IN ONLINE BANNER ADS

- Trust in online banner ads (pop-up ads) are trusted by only 60% of the respondents
- Trust levels in online banner ads across Zones and Town Class of Cities are in-line with Pan-India average



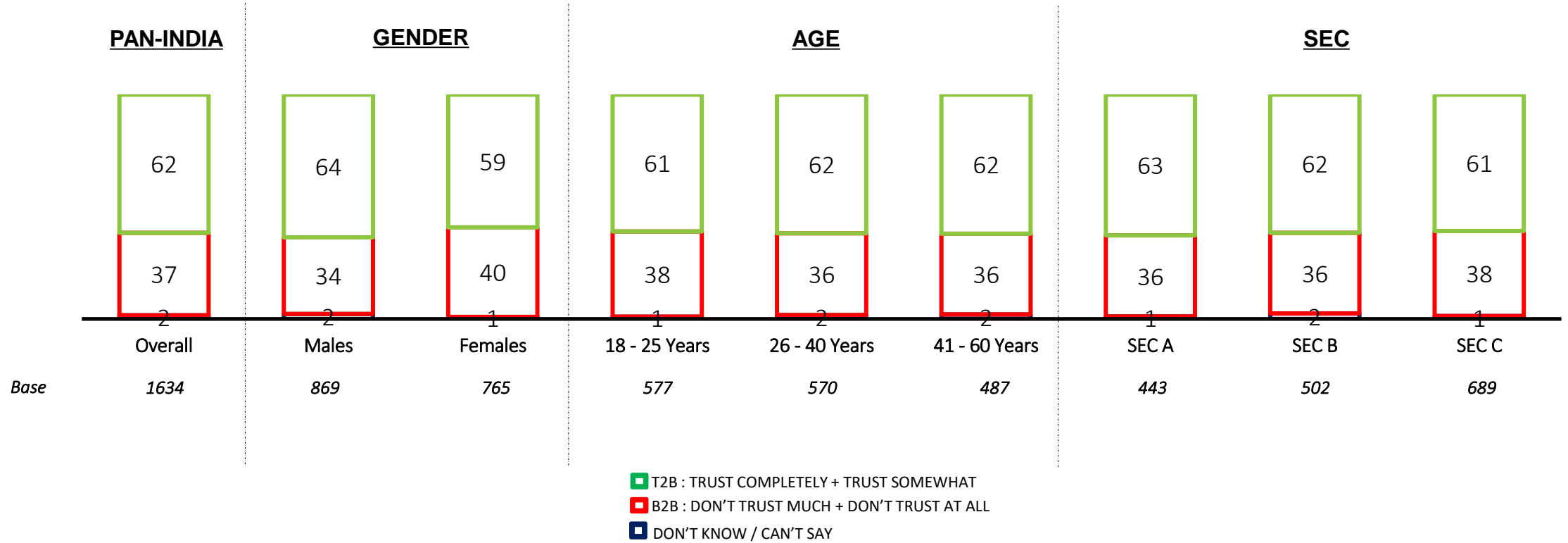
Significantly Higher / Lower than Overall

Q: Now I will read out certain forms of advertising, do let me know to what extent do you trust these forms of advertising? [SA]

All figures are in % except base

TRUST IN ONLINE BANNER ADS

- Trust levels on online banner ads amongst Males & Females as well as people from different age groups and Socioeconomic Class are more or less in line with the National Average



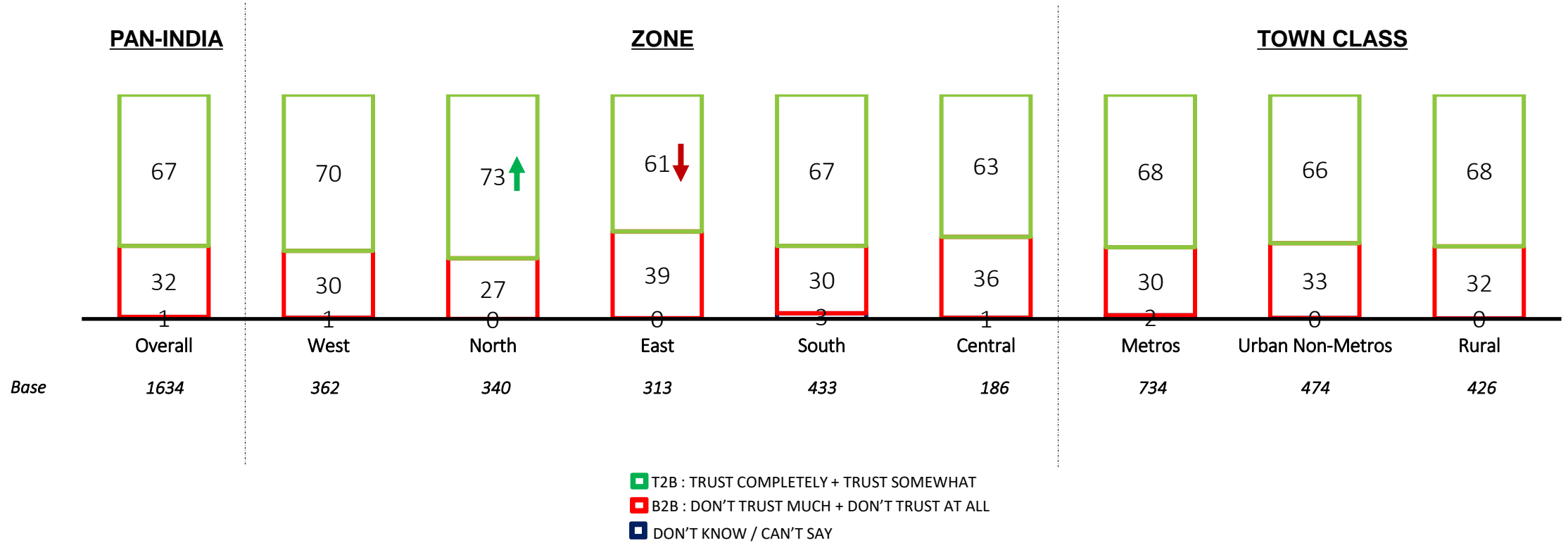
Significantly Higher / Lower than Overall

Q: Now I will read out certain forms of advertising, do let me know to what extent do you trust these forms of advertising? [SA]

All figures are in % except base

TRUST IN ADS ON SOCIAL NETWORK

- Almost 2/ 3rd of the respondents are displaying trust in social network ads
- **North** Zone has shown significantly higher amount trust in ads on Social Network like Facebook, Instagram, etc. whereas **East** Zone continues to show significantly lesser amount trust in this form of advertising as well



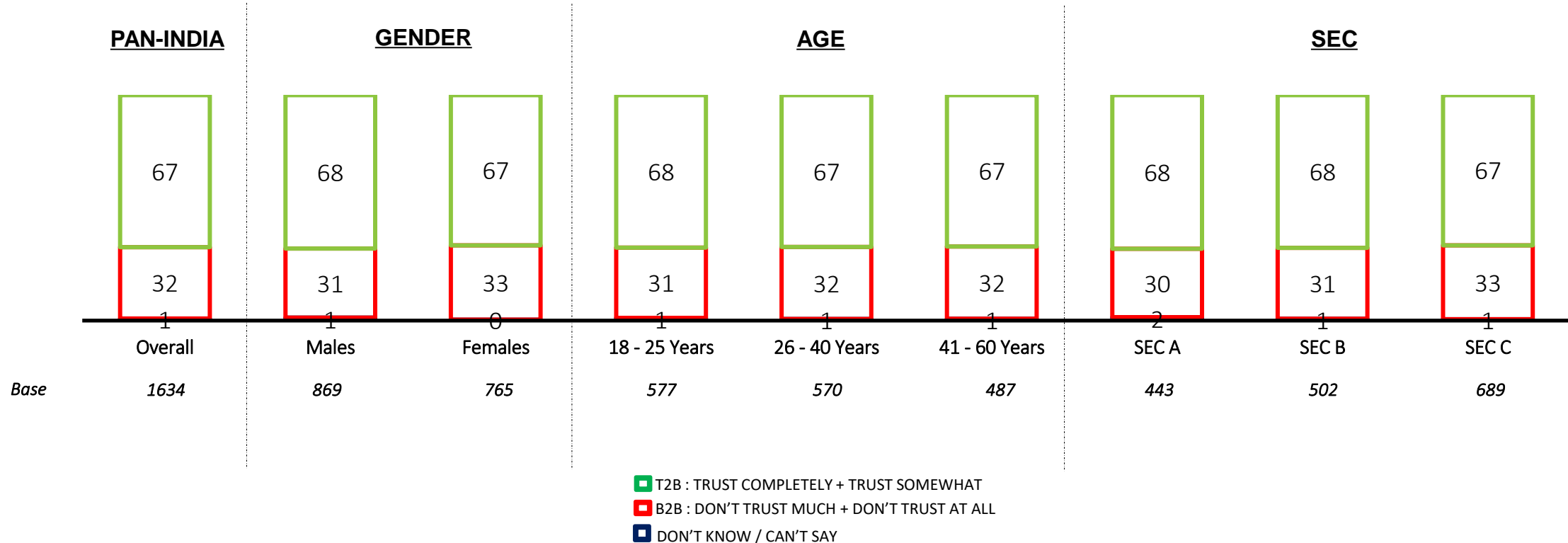
↑↓ Significantly Higher / Lower than Overall

Q: Now I will read out certain forms of advertising, do let me know to what extent do you trust these forms of advertising? [SA]

All figures are in % except base

TRUST ON ADS ON SOCIAL NETWORK

- Trust levels in ads on Social Network banner ads amongst Males & Females as well as people from different age groups and Socioeconomic Class are more or less in line with the National Average



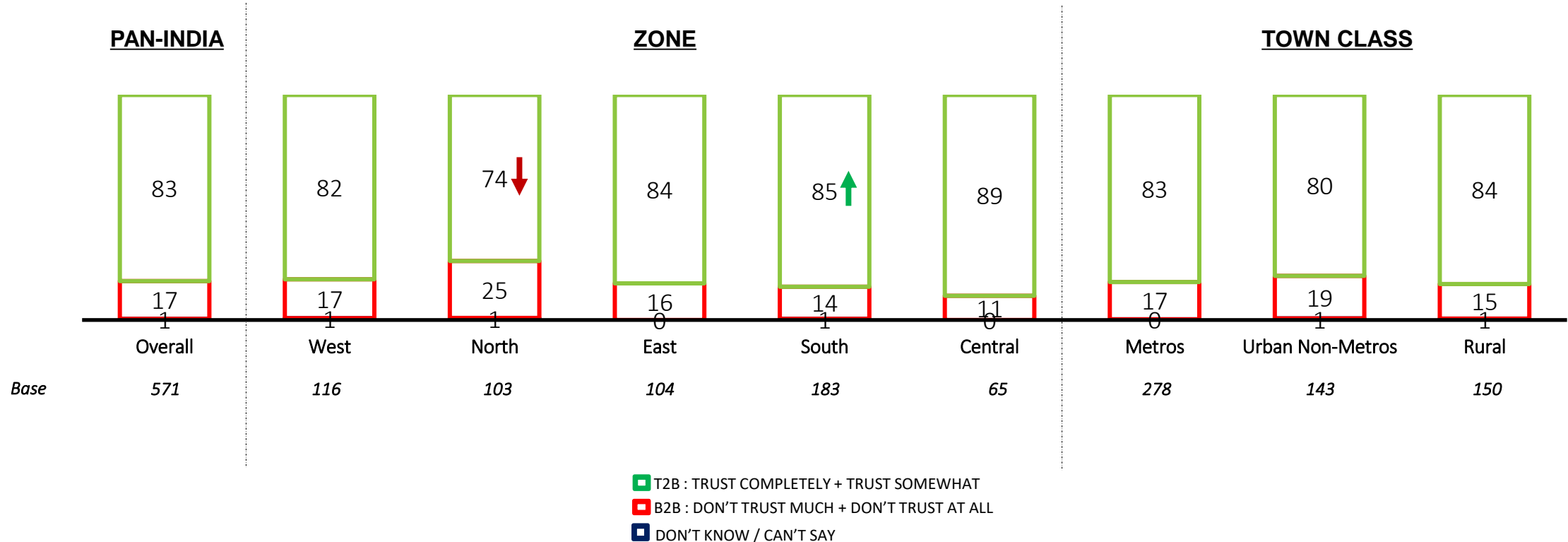
Significantly Higher / Lower than Overall

Q: Now I will read out certain forms of advertising, do let me know to what extent do you trust these forms of advertising? [SA]

All figures are in % except base

TRUST IN ADS ON RADIO

- More than 80% of the respondents have shown trust in radio ads
- Amongst listeners of Radio ads, trust levels are significantly higher in South Zones while significantly lower in North zones



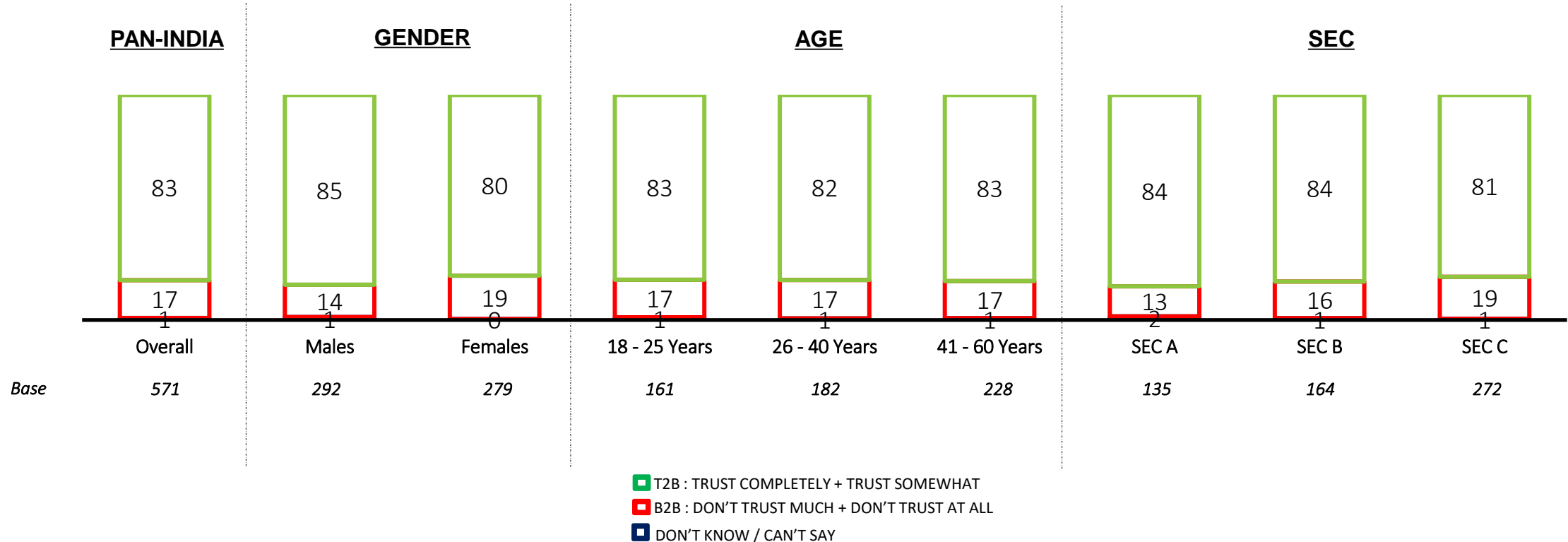
Significantly Higher / Lower than Overall

Q: Now I will read out certain forms of advertising, do let me know to what extent do you trust these forms of advertising? [SA]

All figures are in % except base

TRUST IN ADS ON RADIO

- Trust levels in ads on Radio amongst Males & Females as well as people from different age groups and Socioeconomic Class are more or less in line with the National Average



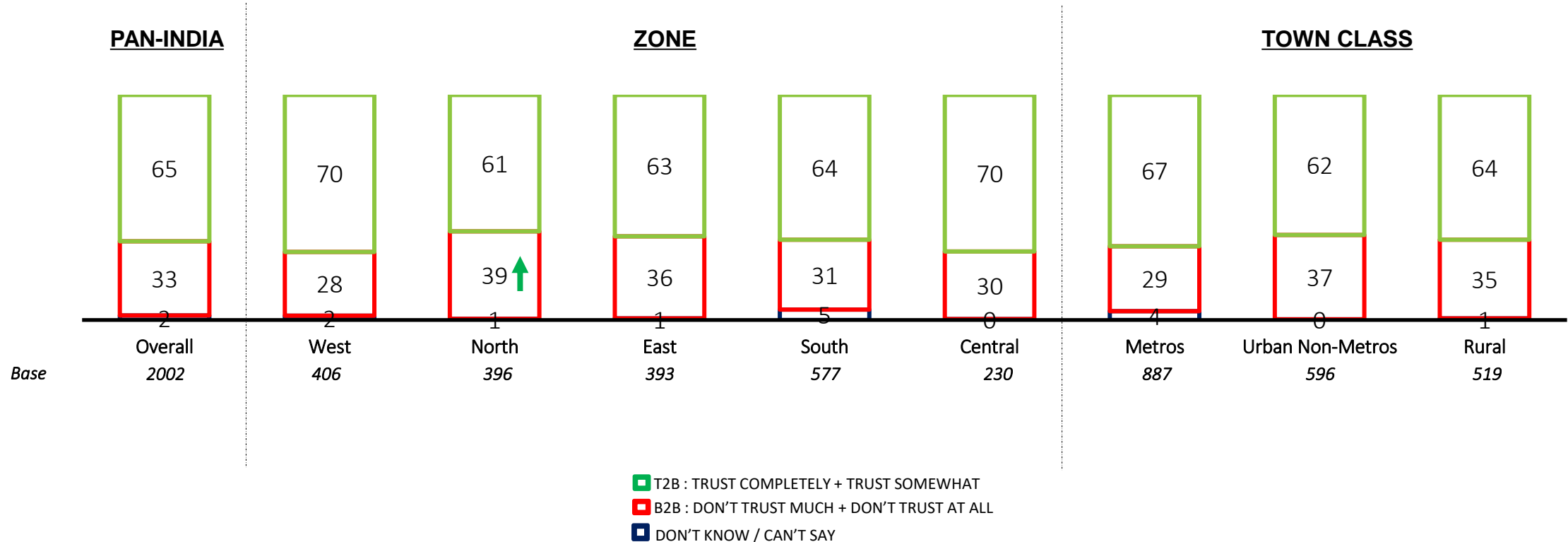
Significantly Higher / Lower than Overall

Q: Now I will read out certain forms of advertising, do let me know to what extent do you trust these forms of advertising? [SA]

All figures are in % except base

TRUST IN BILLBOARDS AND OTHER OUTDOOR ADVERTISING

- Trust level for billboards and other outdoor advertising is bit of a challenge among **North** residents.
- West and Central are relatively better than other regions in depicting trust towards billboards and outdoor ads...



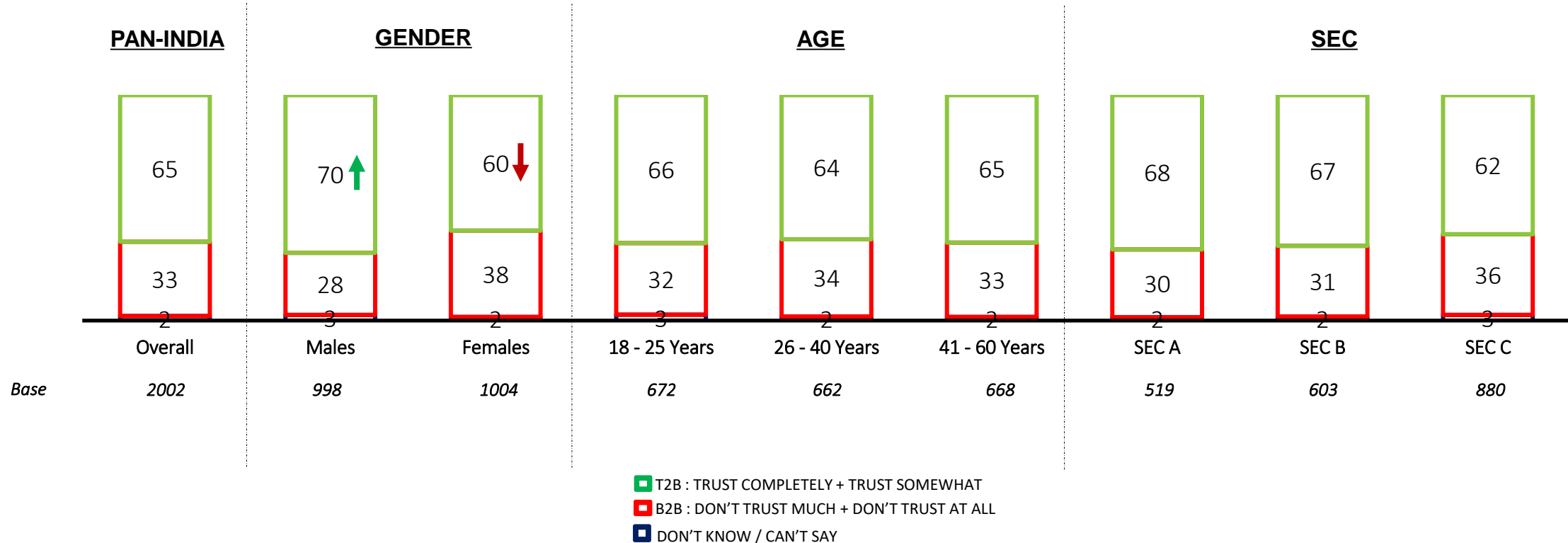
Significantly Higher / Lower than Overall

Q: Now I will read out certain forms of advertising, do let me know to what extent do you trust these forms of advertising? [SA]

All figures are in % except base

TRUST IN BILLBOARDS AND OTHER OUTDOOR ADVERTISING

- ...also, **Males** trust Billboards and other outdoor advertising **significantly higher** than females
- The trust in Billboards and other outdoor advertising across age groups and SEC is more or less **consistent**



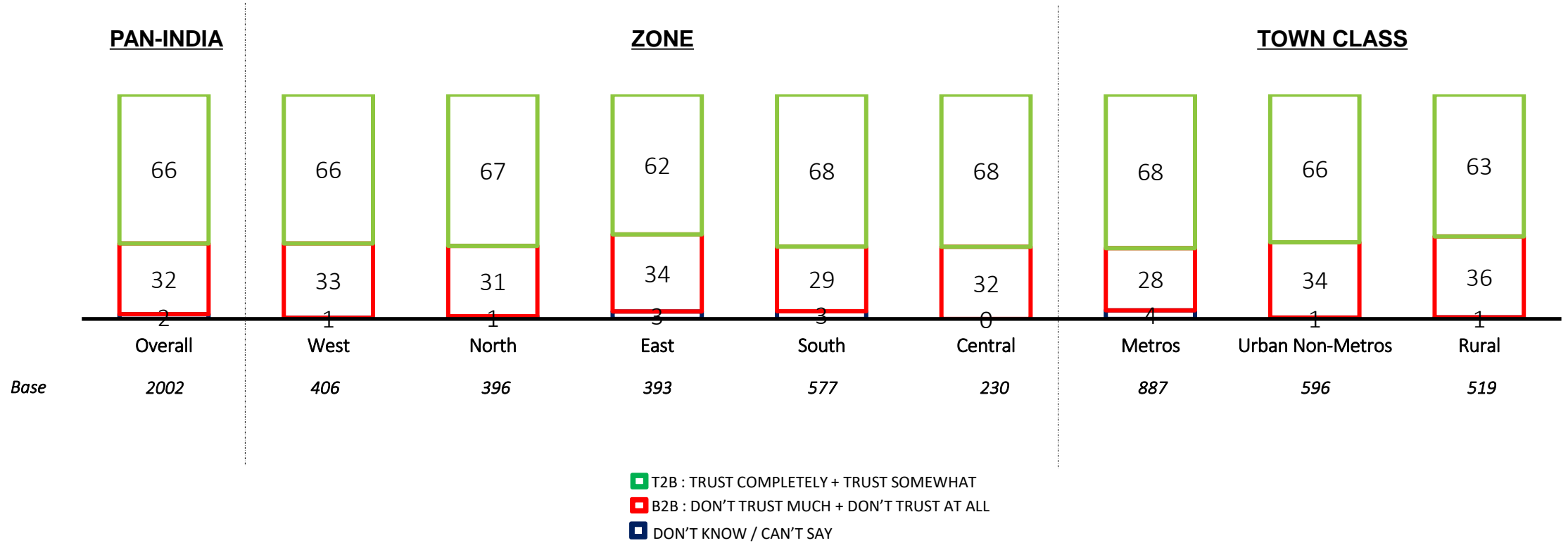
Significantly Higher / Lower than Overall

Q: Now I will read out certain forms of advertising, do let me know to what extent do you trust these forms of advertising? [SA]

All figures are in % except base

TRUST IN ADS BEFORE MOVIES IN CINEMA HALLS

- Almost 2/3rd of the respondents are trusting ads shown before movies in Cinema halls



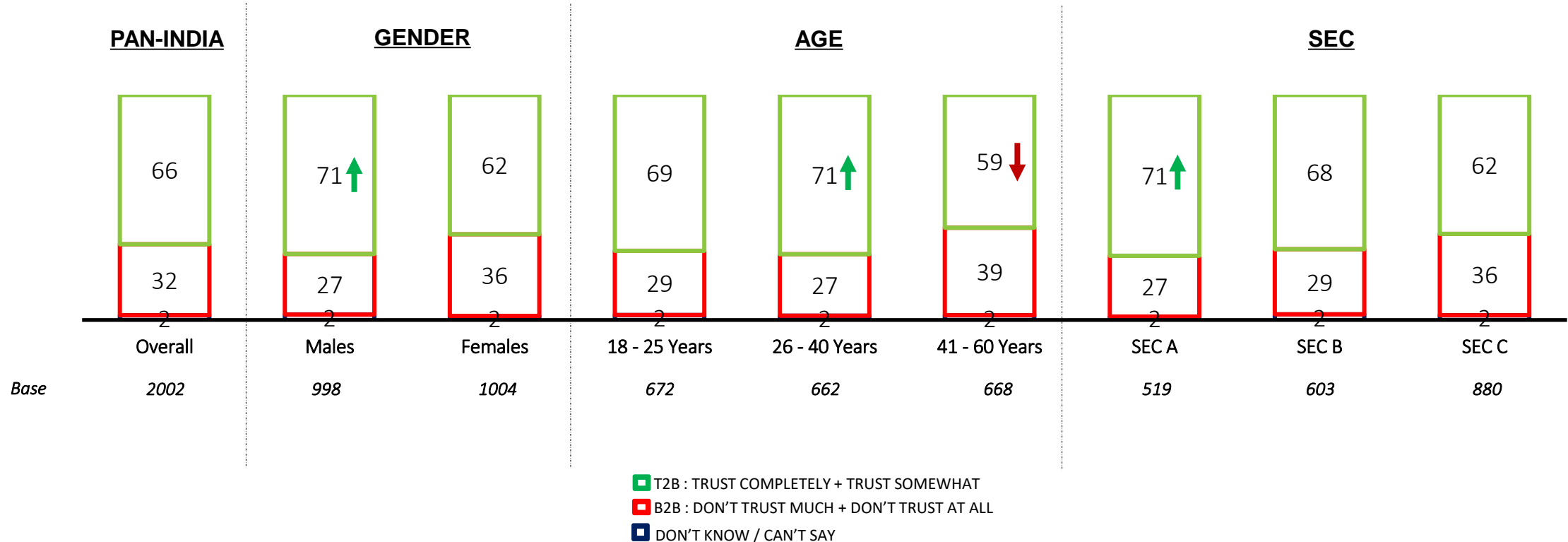
Significantly Higher / Lower than Overall

Q: Now I will read out certain forms of advertising, do let me know to what extent do you trust these forms of advertising? [SA]

All figures are in % except base

TRUST IN ADS BEFORE MOVIES IN CINEMA HALLS

- Trust is significantly higher among **Males, 26-40 YO and SEC A respondents** towards ad shown before movies in cinema halls → its probably due to they form a larger part of cinema audience
- On the other hand, older respondents (41-60 YO) are not trusting ads shown before movies in cinema halls



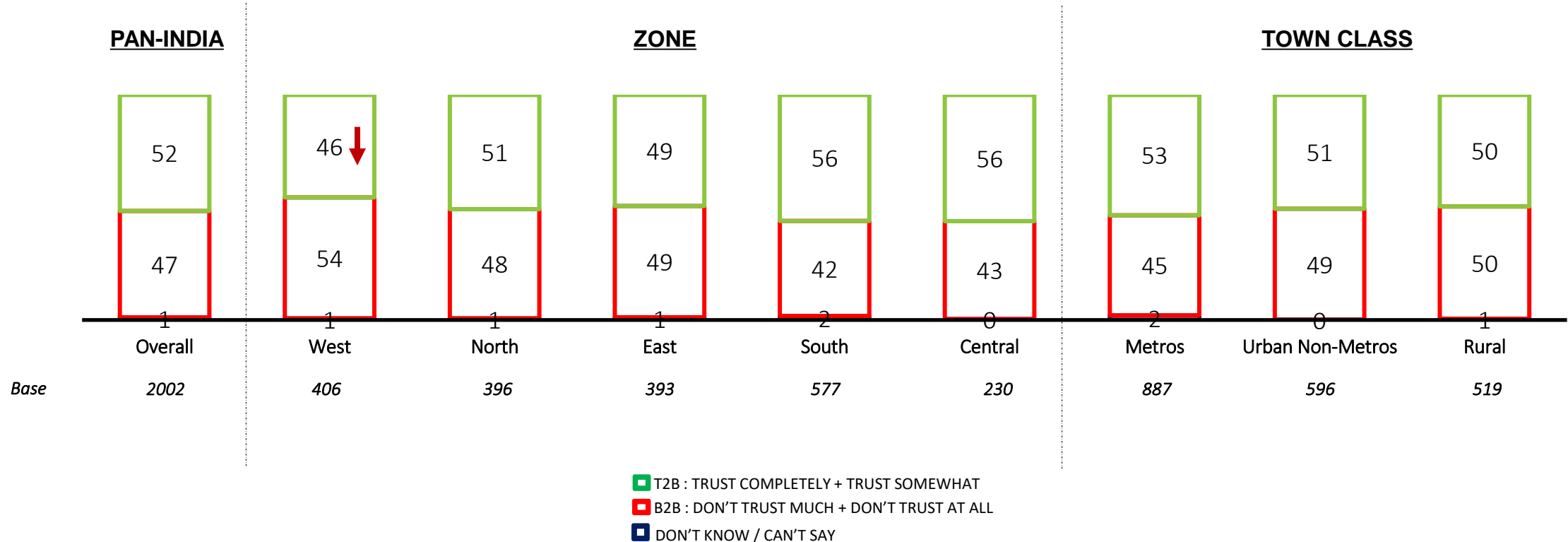
Significantly Higher / Lower than Overall

Q: Now I will read out certain forms of advertising, do let me know to what extent do you trust these forms of advertising? [SA]

All figures are in % except base

TRUST IN TEXT ADS ON MOBILE PHONES (SMS)

- Only ~50% of the respondents are trusting ads on mobile phones (SMS) and it is significantly lower in **West** region



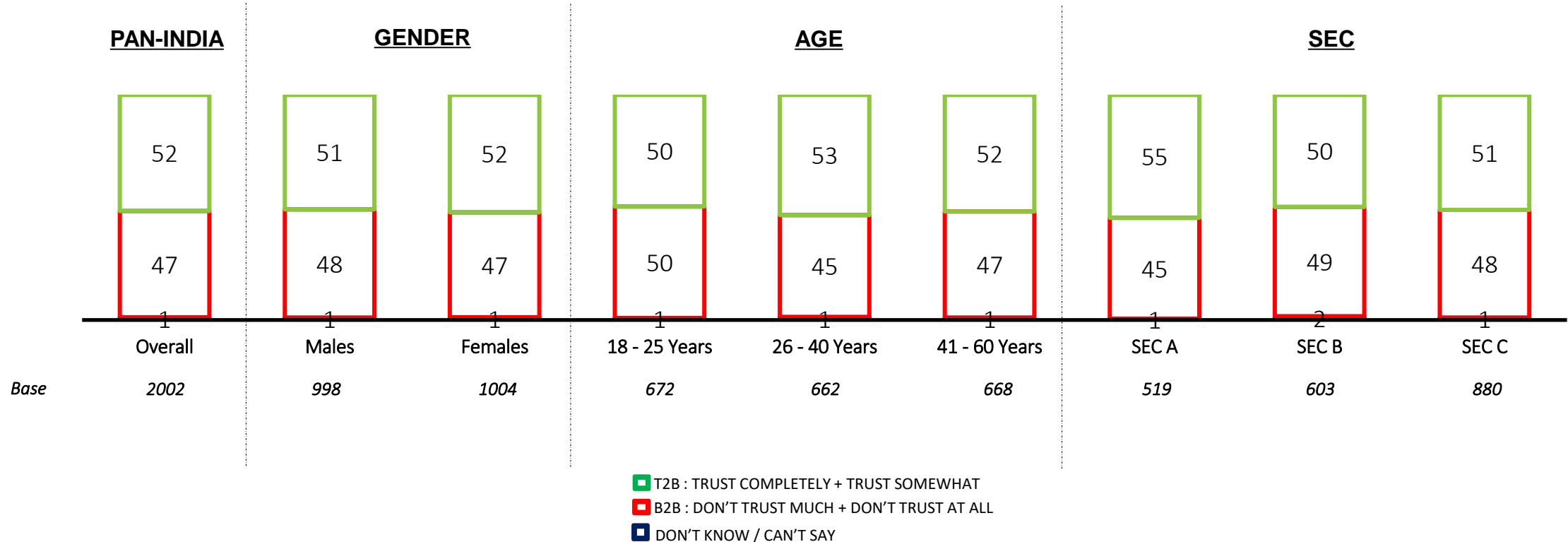
Significantly Higher / Lower than Overall

Q: Now I will read out certain forms of advertising, do let me know to what extent do you trust these forms of advertising? [SA]

All figures are in % except base

TRUST IN TEXT ADS ON MOBILE PHONES (SMS)

- Trust levels in text ads on Mobile Phones amongst Males & Females, different age group of people and Socioeconomic Class is more or less in-line with the Pan-India average



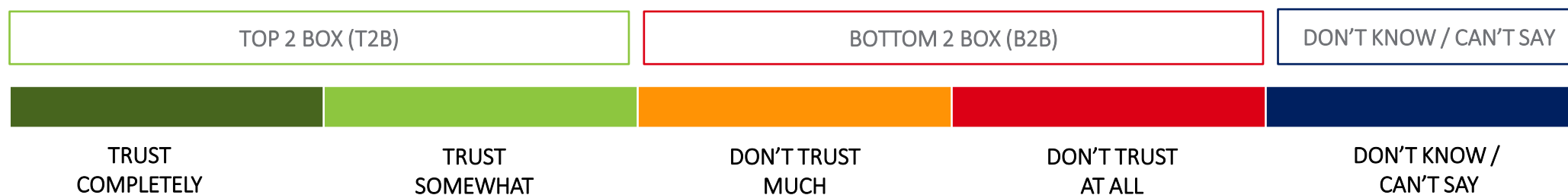
Significantly Higher / Lower than Overall

Q: Now I will read out certain forms of advertising, do let me know to what extent do you trust these forms of advertising? [SA]

All figures are in % except base

SECTION 4.1

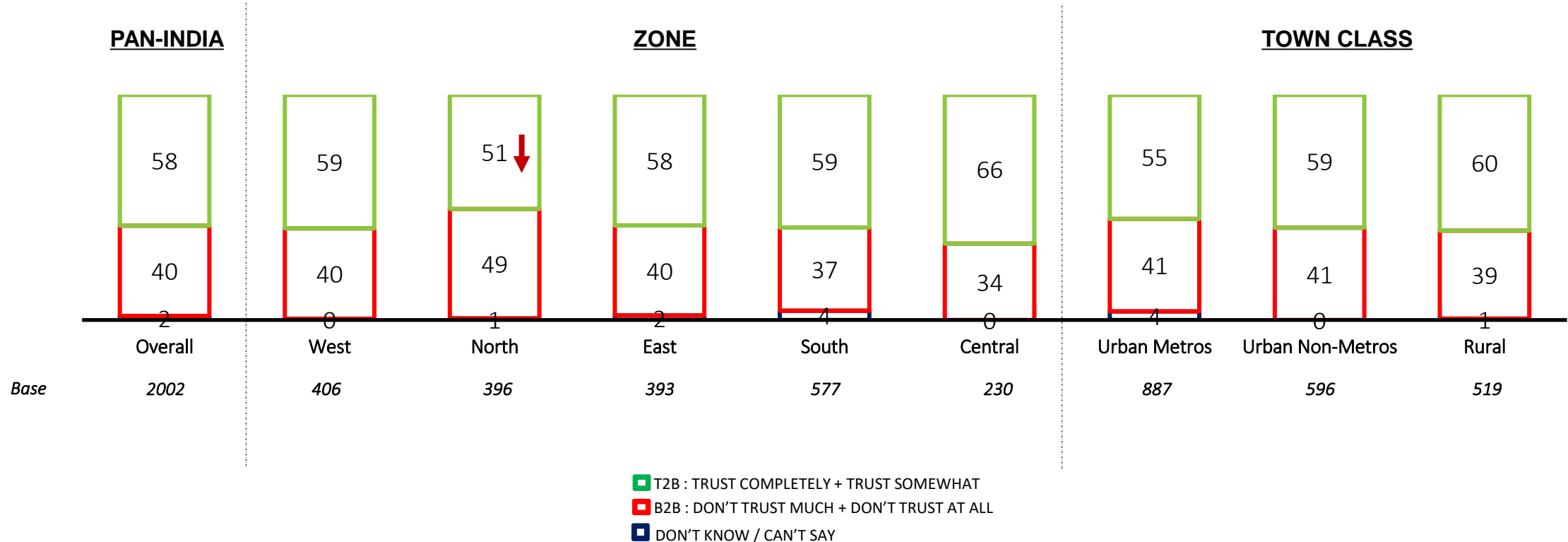
LET'S DEEP DIVE INTO TRUST IN ADVERTISING BY INDUSTRY TYPES ...



Q: Now I will read out certain industry types one by one. Do let me know to what extent do you trust the advertisements by these industry types? [SA]

TRUST IN REAL ESTATE ADVERTISING

- Only 6 in every 10 respondents are trusting real estate ads. Positively, slightly higher trust in Central region
- Worth noting, distrust levels are high in North residents towards real estate sector ads



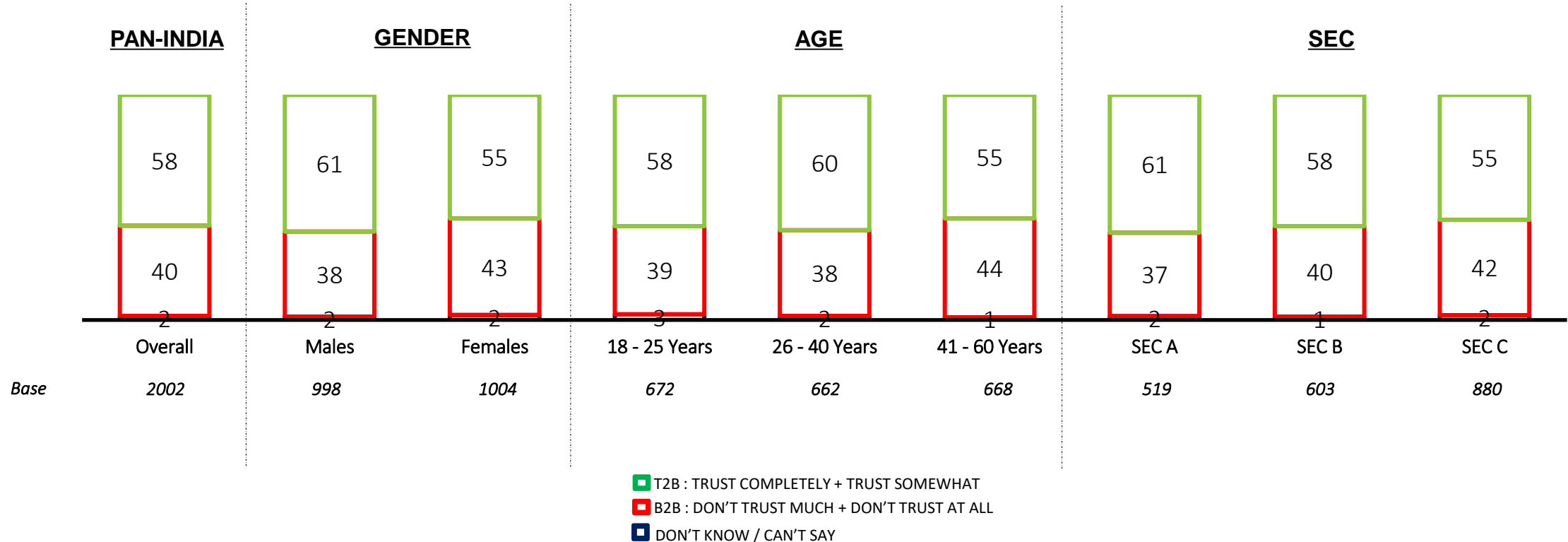
Significantly Higher / Lower than Overall

Q: Now I will read out certain industry types one by one. Do let me know to what extent do you trust the advertisements by these industry types? [SA]

All figures are in % except base

TRUST IN REAL ESTATE ADVERTISING

- The trust in Real estate advertising across gender, different age groups and Socioeconomic class of people is more or less consistent



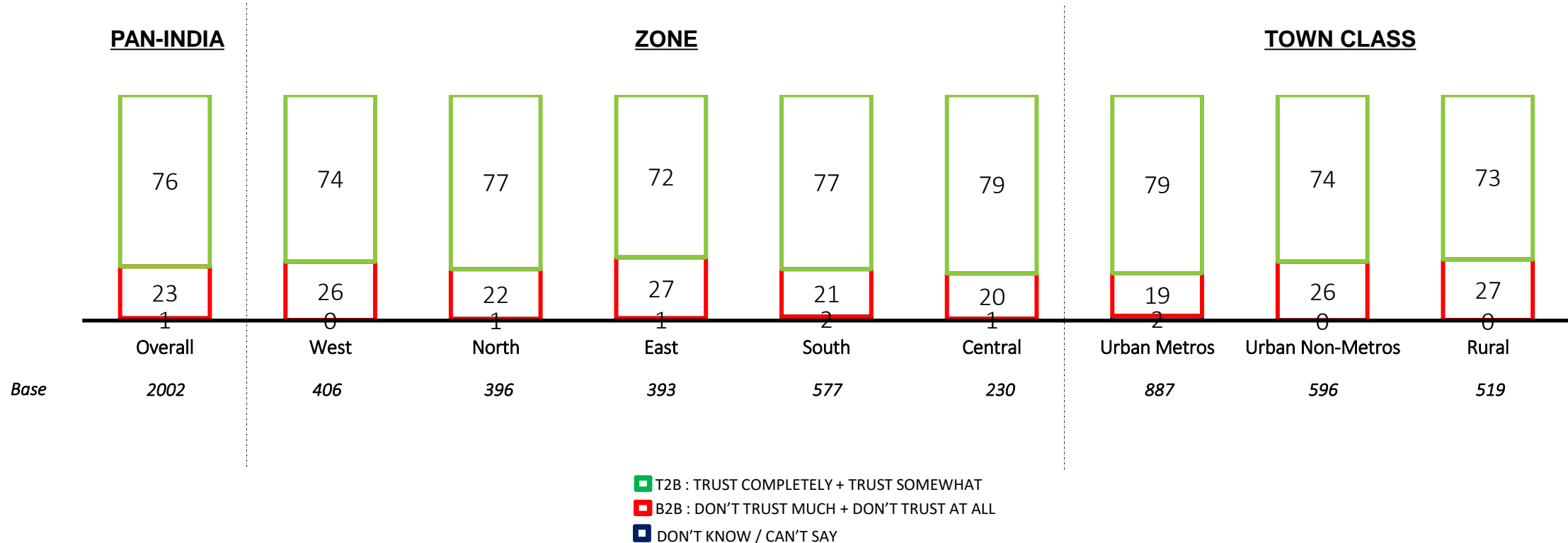
Significantly Higher / Lower than Overall

Q: Now I will read out certain industry types one by one. Do let me know to what extent do you trust the advertisements by these industry types? [SA]

All figures are in % except base

TRUST IN E-COMMERCE SITES/APPS ADVERTISING

- E-com ads have grabbed noteworthy trust probably due to the boom in this sector
- The trust in Ecommerce sites/apps advertising across all the zone, town class people are same.



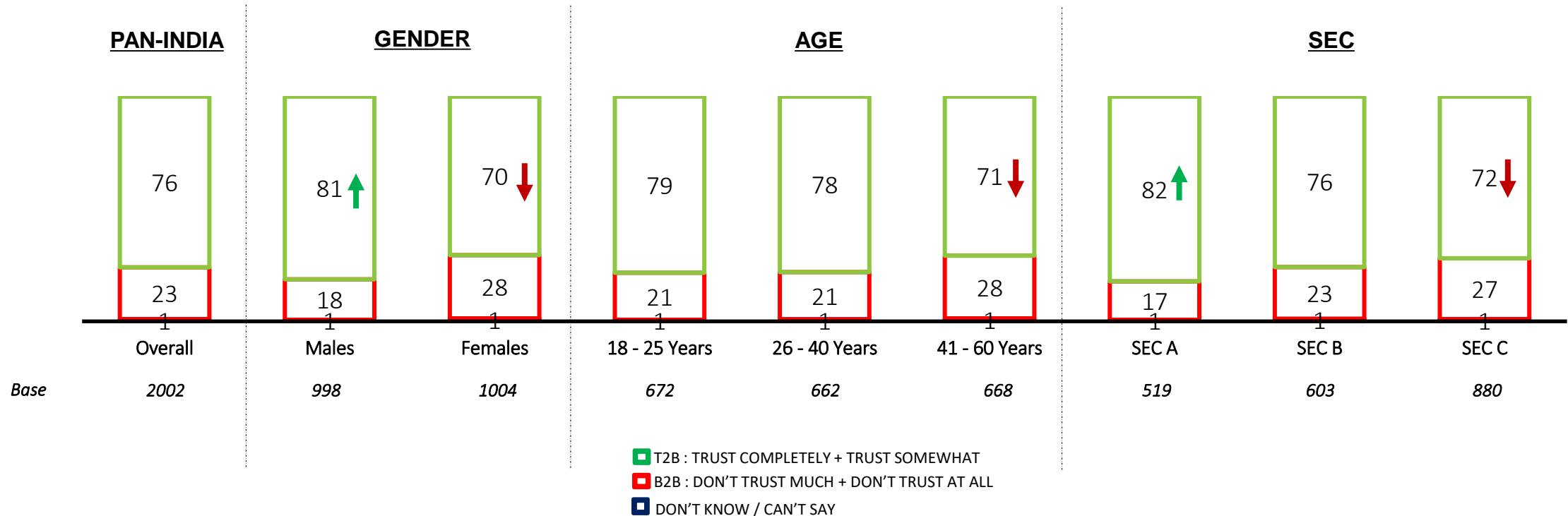
Significantly Higher / Lower than Overall

Q: Now I will read out certain industry types one by one. Do let me know to what extent do you trust the advertisements by these industry types? [SA]

All figures are in % except base

TRUST IN E-COMMERCE SITES/APPS ADVERTISING

- **Males** trust E-com sites/apps advertising significantly more than females. Even SEC A respondents are showing considerable trust probably they are the potential user of E-com sites/apps
- Understandably, **41-60 YO** and **SEC C** have shown significantly lower trust in E-com ads → probably led by lesser adoption of E-com sites in a said group



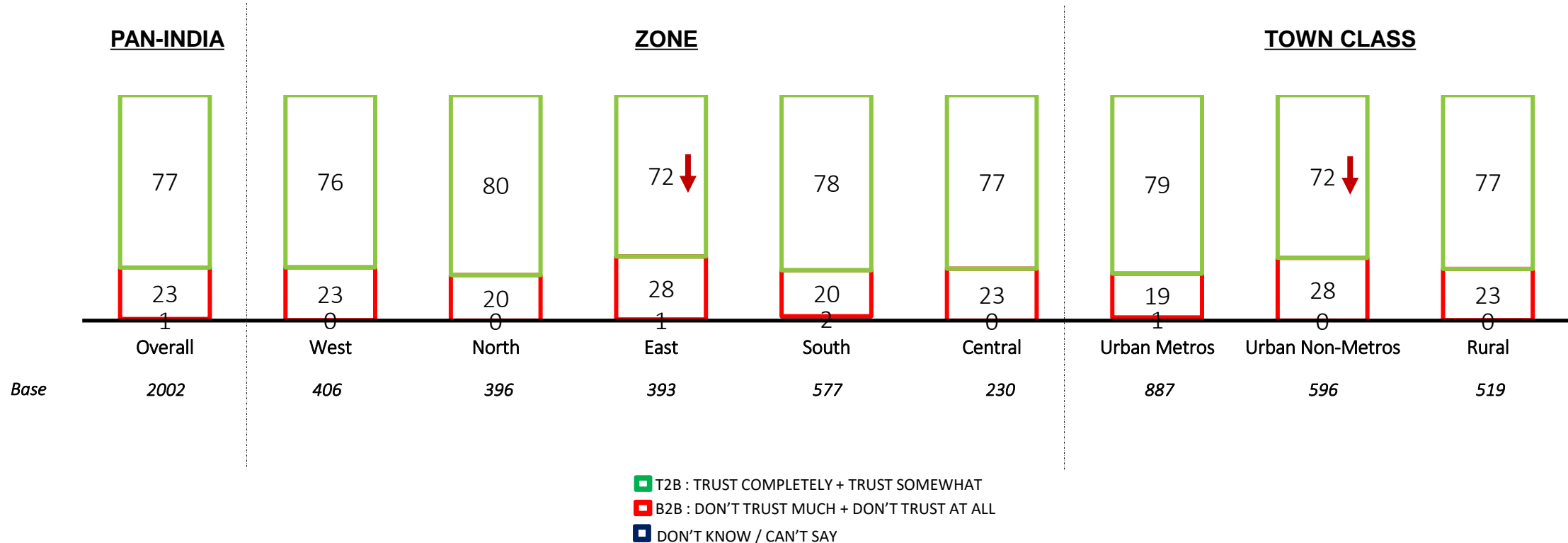
Significantly Higher / Lower than Overall

Q: Now I will read out certain industry types one by one. Do let me know to what extent do you trust the advertisements by these industry types? [SA]

All figures are in % except base

TRUST IN BANKING AND FINANCIAL SERVICES ADVERTISING (BFSI)

- For BFSI, ~80% of respondents trust ads from BFSI sector which is one of the highest compared to other industries
- However, East region and Urban non-metros are exhibiting significantly lower trust for ads from BFSI sector



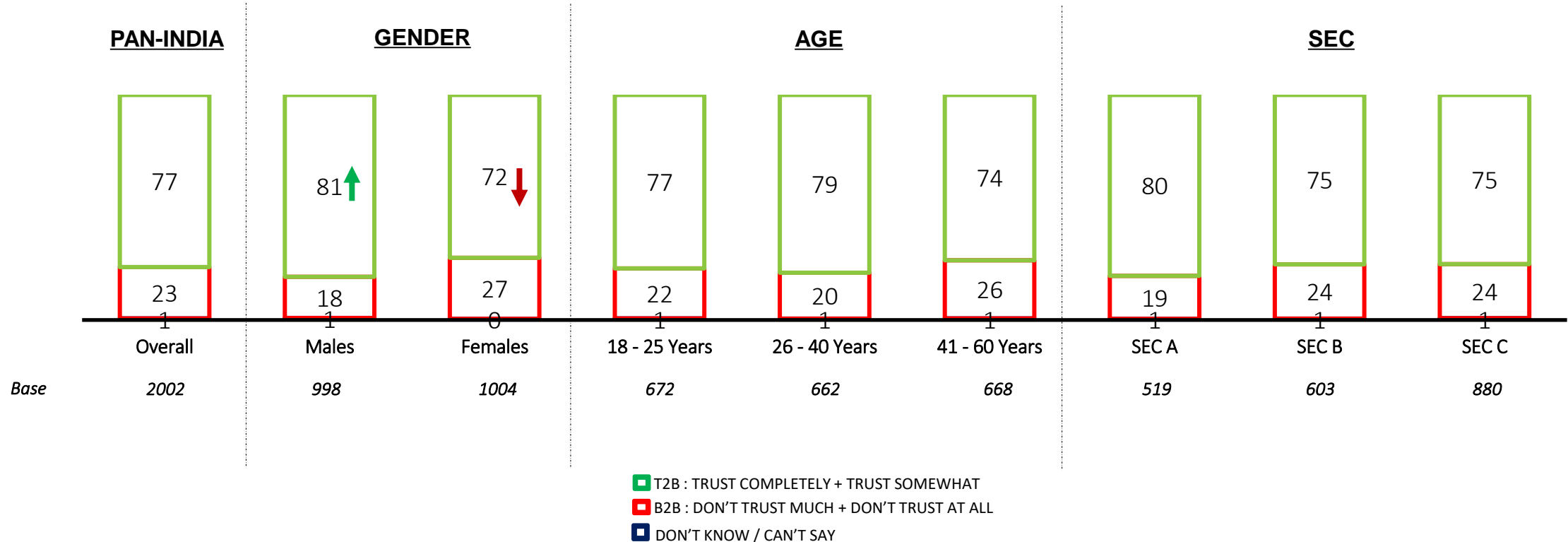
Significantly Higher / Lower than Overall

Q: Now I will read out certain industry types one by one. Do let me know to what extent do you trust the advertisements by these industry types? [SA]

All figures are in % except base

TRUST IN BANKING AND FINANCIAL SERVICES ADVERTISING (BFSI)

- **Males** trust Banking & Financial services advertising significantly higher than **females**
- The trust in Banking & Financial services advertising across different age groups and Socioeconomic class of people is same



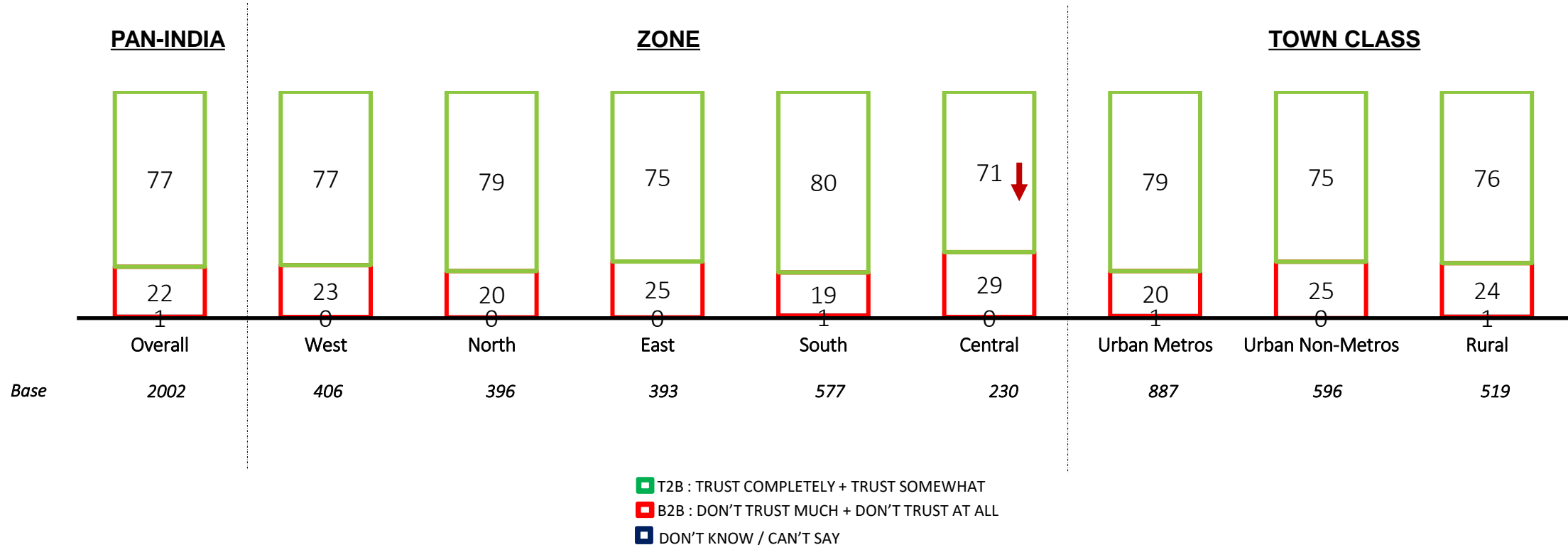
Significantly Higher / Lower than Overall

Q: Now I will read out certain industry types one by one. Do let me know to what extent do you trust the advertisements by these industry types? [SA]

All figures are in % except base

TRUST IN HEALTH PRODUCT AND SERVICES ADVERTISING

- Even, for health care industry ads, trust levels (77%) are one of the highest compared to other industries
- Nonetheless, Central region depicts lower trust towards health care industry ads



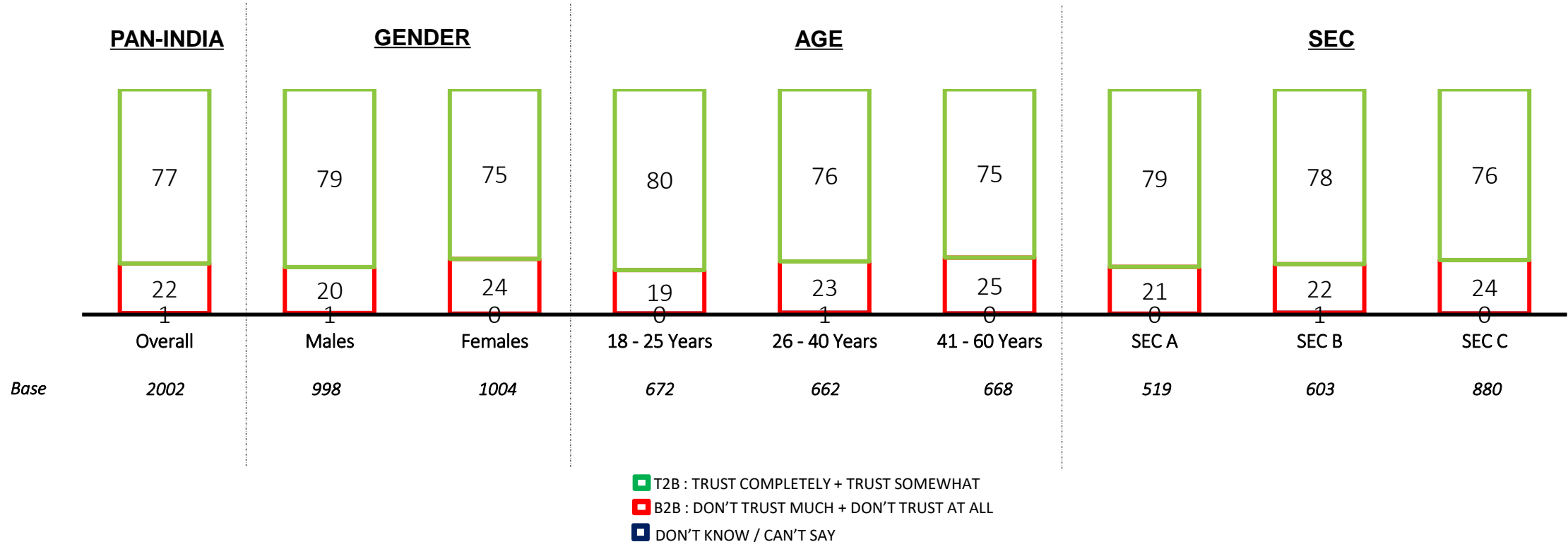
Significantly Higher / Lower than Overall

Q: Now I will read out certain industry types one by one. Do let me know to what extent do you trust the advertisements by these industry types? [SA]

All figures are in % except base

TRUST IN HEALTH PRODUCT AND SERVICES ADVERTISING

- The trust in Health Products and Services across Males & Females, Age group of people and Socioeconomic Class is more or less in line with the National Average



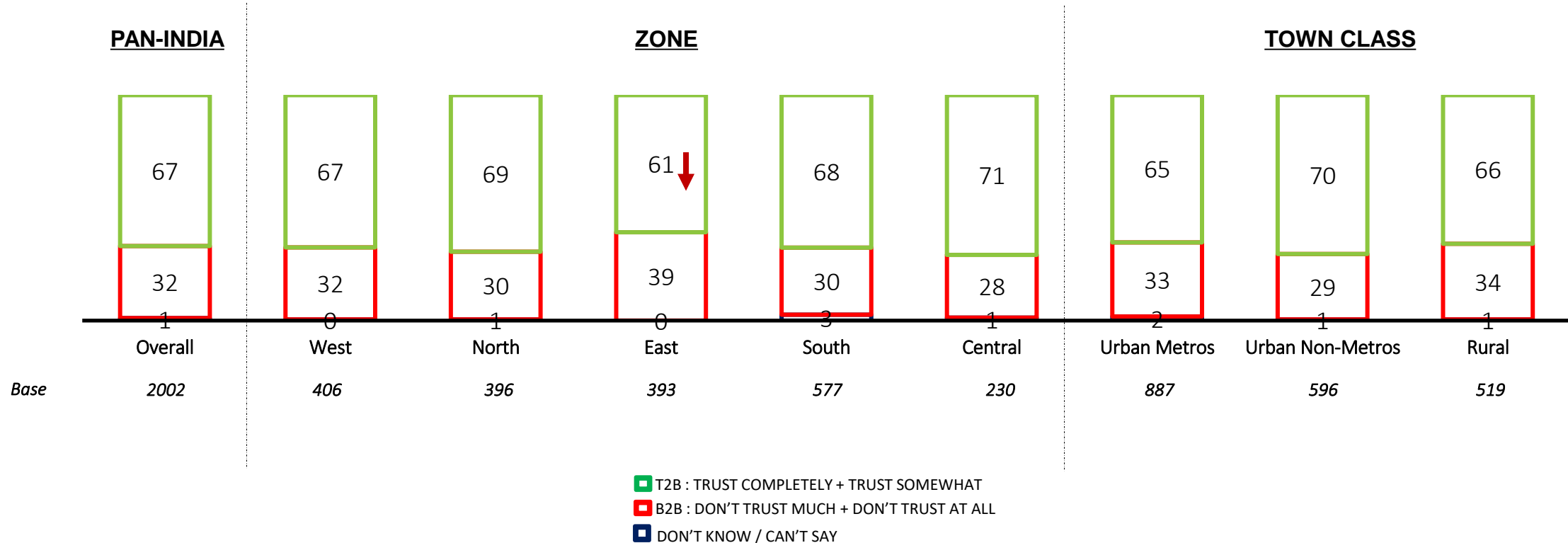
Significantly Higher / Lower than Overall

Q: Now I will read out certain industry types one by one. Do let me know to what extent do you trust the advertisements by these industry types? [SA]

All figures are in % except base

TRUST IN COSMETIC PRODUCTS AND SERVICES ADVERTISING

- Almost 2/3rd are trusting ads on cosmetic products and services
- Having said that, East region is bit of challenge when it comes to trust in ad on cosmetic products and services



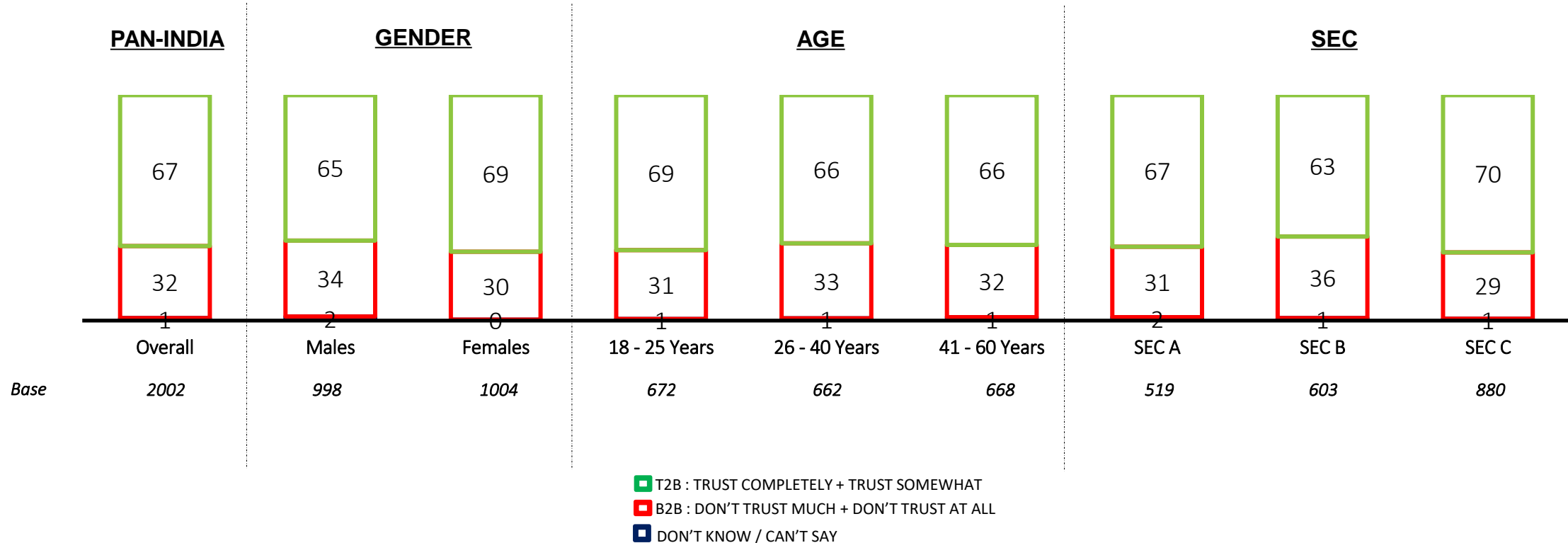
Significantly Higher / Lower than Overall

Q: Now I will read out certain industry types one by one. Do let me know to what extent do you trust the advertisements by these industry types? [SA]

All figures are in % except base

TRUST IN COSMETIC PRODUCTS AND SERVICES ADVERTISING

- The trust in Cosmetic Products & Services advertisements across Males & Females, Age group of people and Socioeconomic Class is more or less in line with the National Average



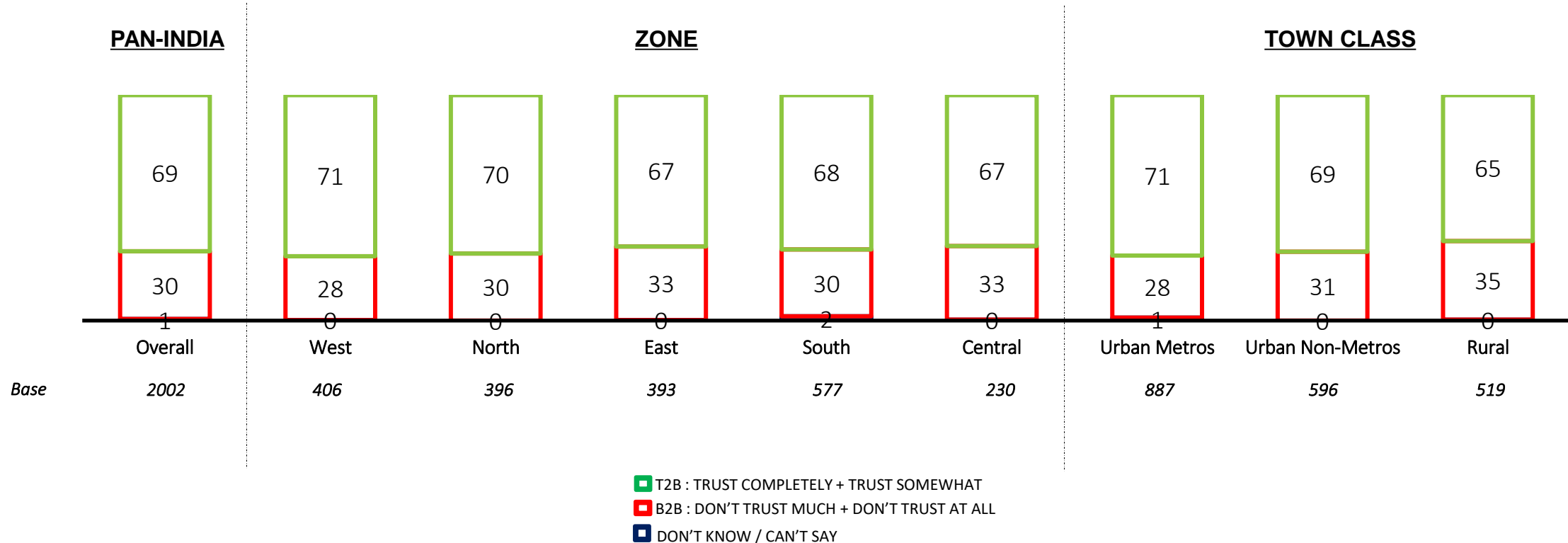
Significantly Higher / Lower than Overall

Q: Now I will read out certain industry types one by one. Do let me know to what extent do you trust the advertisements by these industry types? [SA]

All figures are in % except base

TRUST IN FOOD & BEVERAGES PRODUCTS ADVERTISING

- 70% respondents garner trust in ads from Food and Beverage industry
- The trust in Food & Beverage Product advertisements across Zones and Town Class of Cities is more or less in line with the National Average



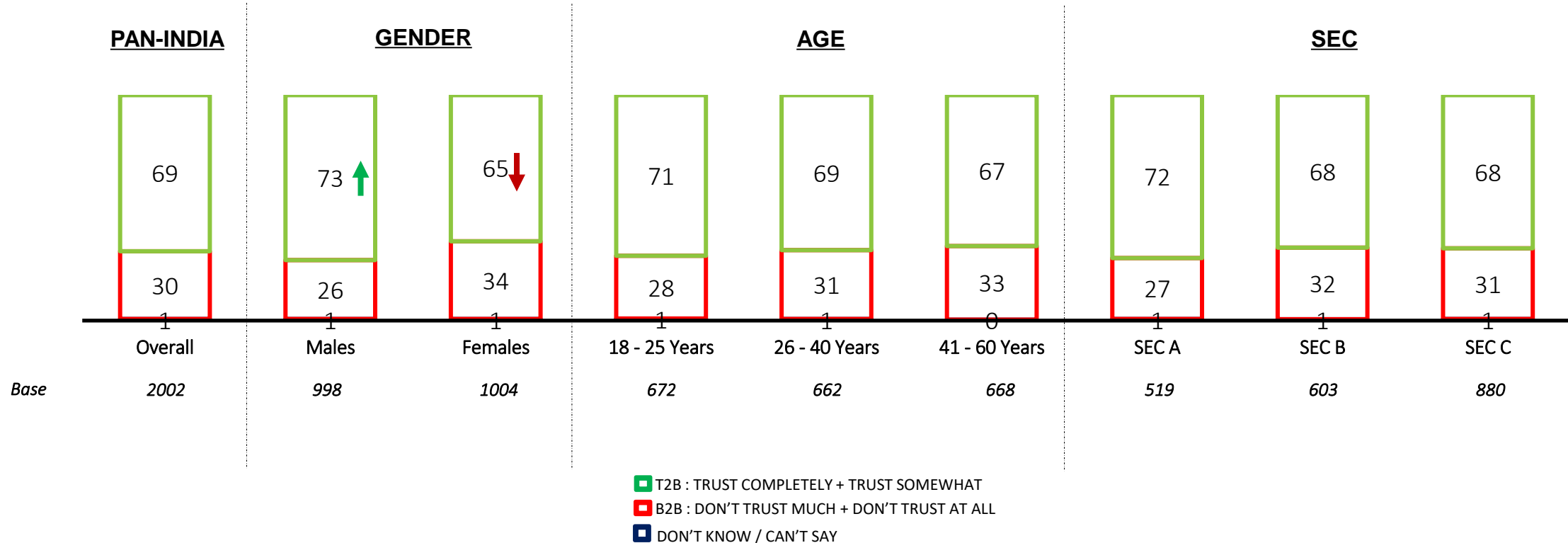
Significantly Higher / Lower than Overall

Q: Now I will read out certain industry types one by one. Do let me know to what extent do you trust the advertisements by these industry types? [SA]

All figures are in % except base

TRUST IN FOOD & BEVERAGES PRODUCTS ADVERTISING

- **Males** trust Food & Beverages products advertising significantly more than **females**
- The trust in Food & Beverages products advertising across different age groups and Socioeconomic class of people is more or less consistent



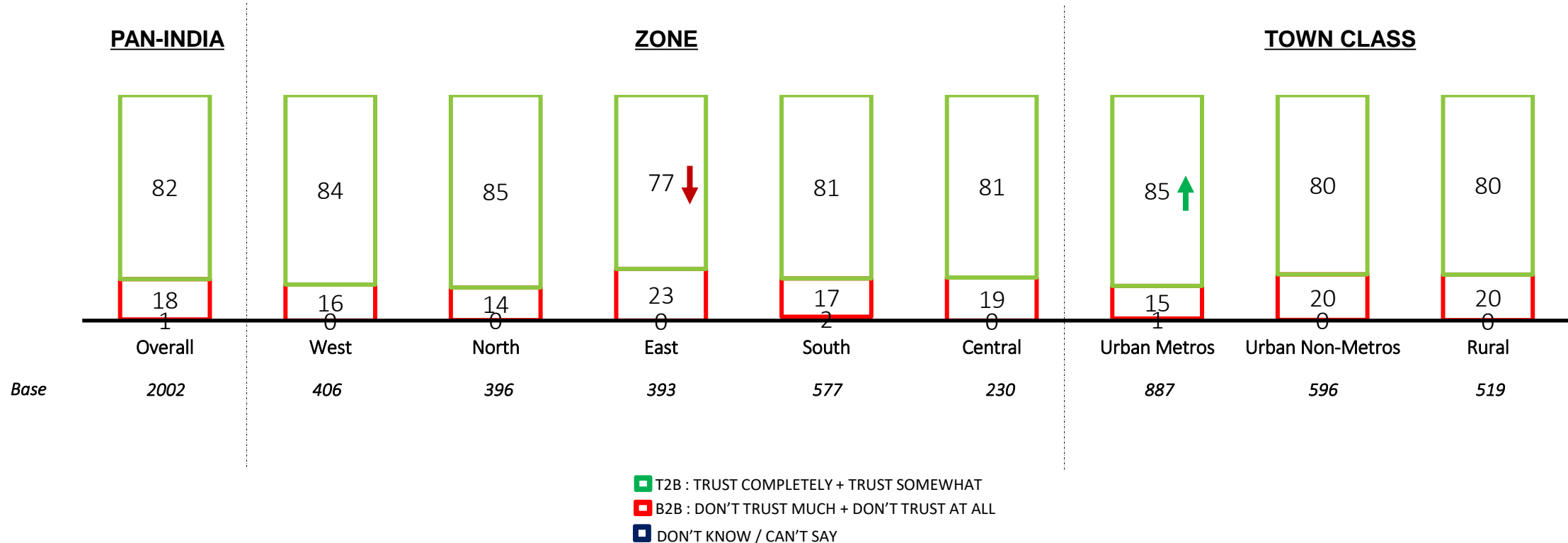
Significantly Higher / Lower than Overall

Q: Now I will read out certain industry types one by one. Do let me know to what extent do you trust the advertisements by these industry types? [SA]

All figures are in % except base

TRUST IN EDUCATIONAL INSTITUTES ADVERTISING

- Educational institutes have grabbed highest trust levels within the group of industries
- Urban Metros are driving scores for Educational institutes however, East continues to be the laggard in trusting ads from Educational sector



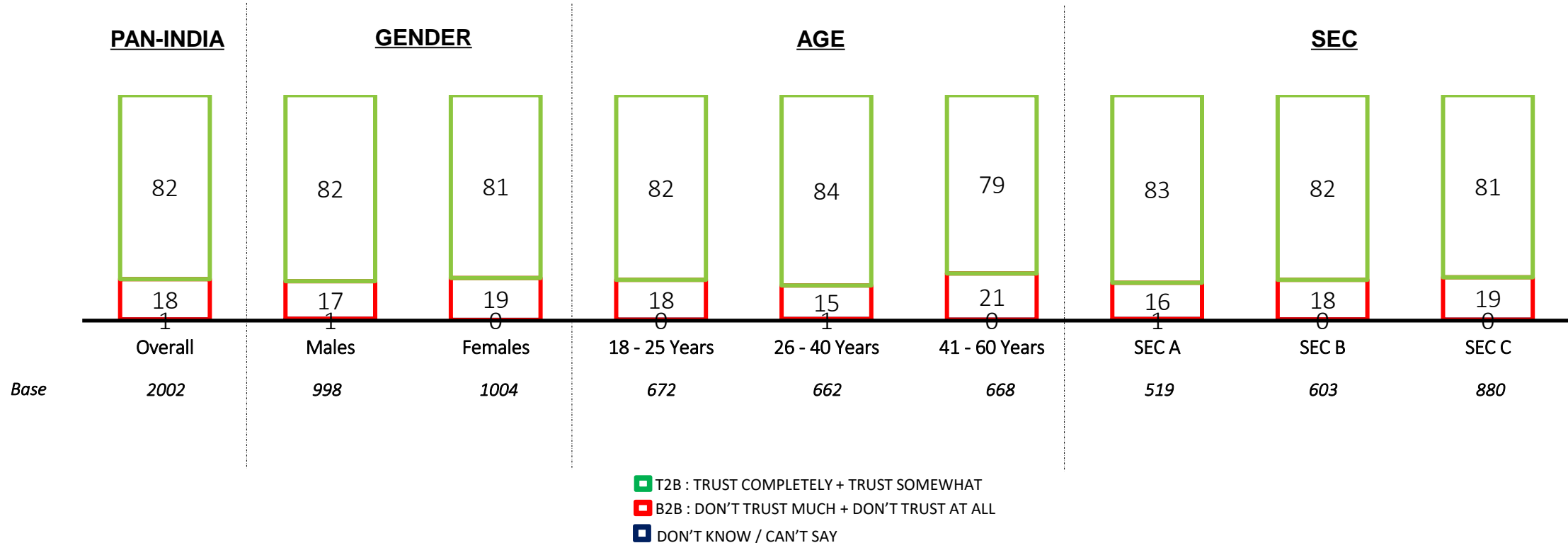
Significantly Higher / Lower than Overall

Q: Now I will read out certain industry types one by one. Do let me know to what extent do you trust the advertisements by these industry types? [SA]

All figures are in % except base

TRUST IN EDUCATIONAL INSTITUTES ADVERTISING

- The trust in Educational Institutions' advertisements across Males & Females, Age group of people and Socioeconomic Class is more or less in line with the National Average



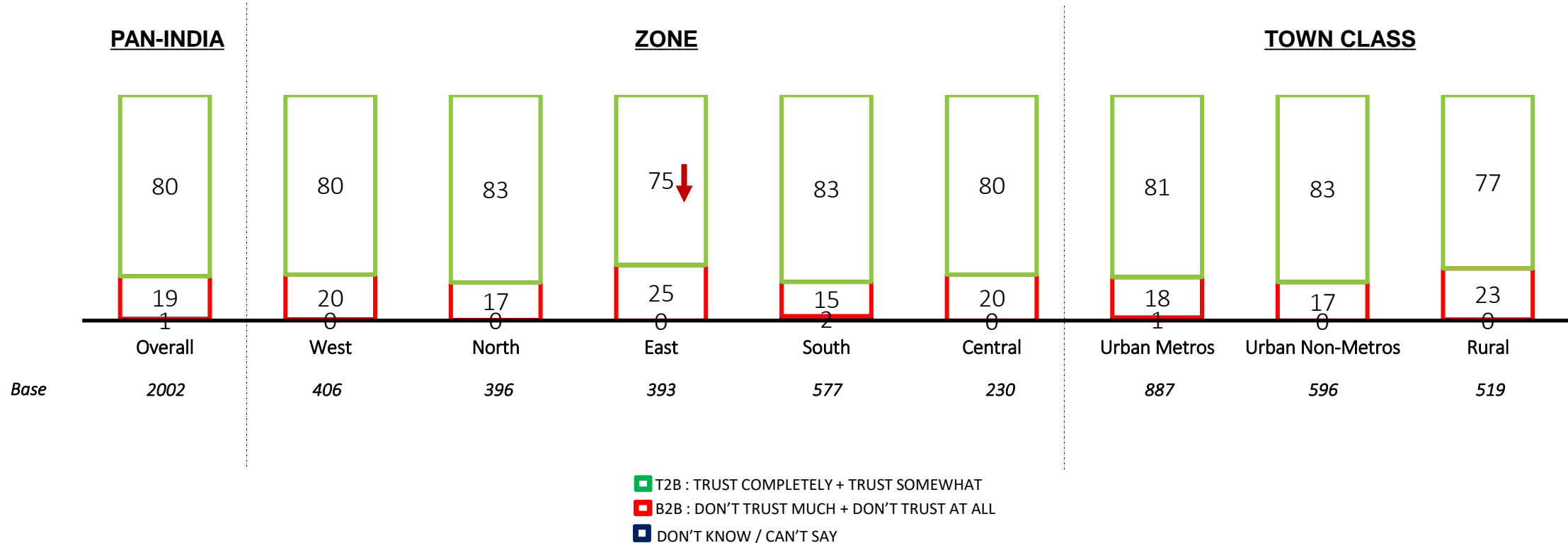
Significantly Higher / Lower than Overall

Q: Now I will read out certain industry types one by one. Do let me know to what extent do you trust the advertisements by these industry types? [SA]

All figures are in % except base

TRUST IN HOME CARE PRODUCTS ADVERTISING

- Home care is also one of those sectors where trust levels are comparatively higher (80%)
- Here as well, East region continues to pull-down scores by showing significantly lower trust



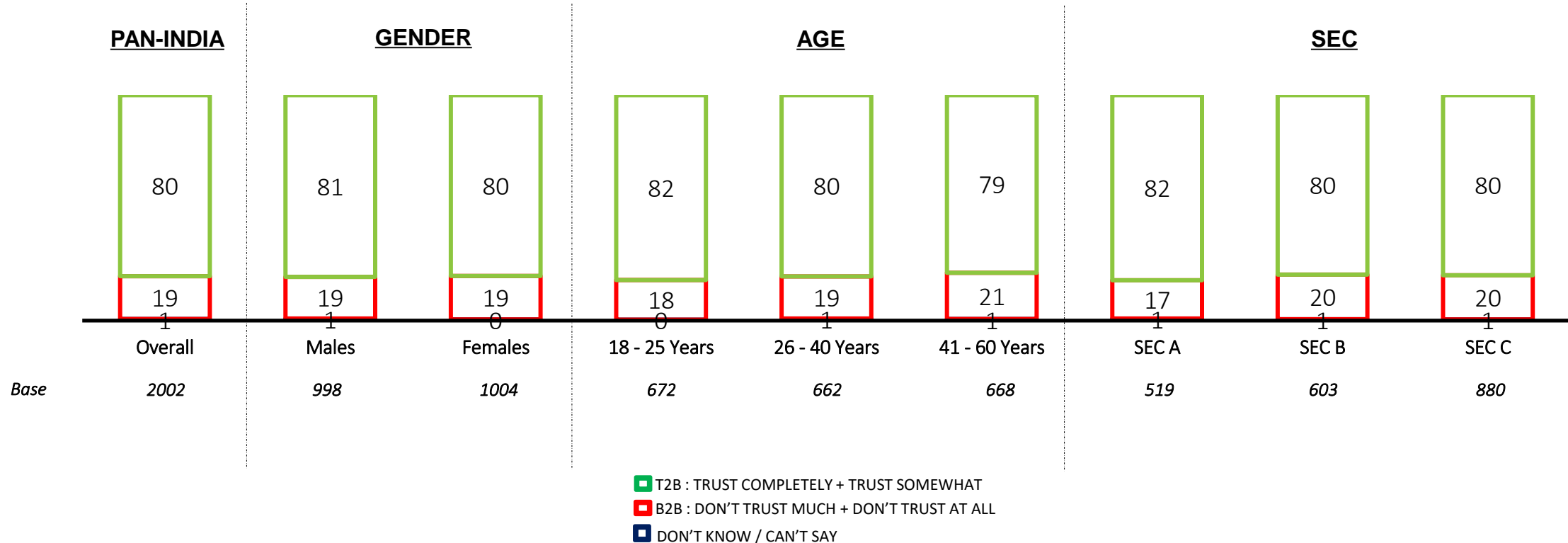
Significantly Higher / Lower than Overall

Q: Now I will read out certain industry types one by one. Do let me know to what extent do you trust the advertisements by these industry types? [SA]

All figures are in % except base

TRUST IN HOME CARE PRODUCTS ADVERTISING

- The trust in Home Care Products' advertisements across Males & Females, Age group of people and Socioeconomic Class is more or less in line with the National Average



Significantly Higher / Lower than Overall

Q: Now I will read out certain industry types one by one. Do let me know to what extent do you trust the advertisements by these industry types? [SA]

All figures are in % except base



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