Ad Standards

Research Report

Distinguishable advertising

Community perceptions of clearly distinguishable advertising

Produced for Ad Standards by
Colmar Brunton

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Contents

CEO introduction

Ad Standards has commissioned regular research to assess community perceptions since 2006. This is an important part of the work we do to ensure that decisions made by the Ad Standards Community Panel (the Community Panel) are in line with current community values in relation to advertising.

Previous research into specific areas such as advertising directed primarily to children, exploitative and degrading advertising, sex, sexuality and nudity, violence, and discrimination in advertising is available on our website.

This 2018 research examines community perceptions and the level of community concern about what makes social media and online content 'clearly distinguishable as advertising' to the cross-section of people accessing this media.

While complaints about online advertising represent less than 6% of total complaints received in 2018, the issue of distinguishable advertising is increasingly being raised in the media and wider community.

Conducted by Colmar Brunton, this research took five advertisements which had been considered by the Community Panel under Section 2.7 of the AANA Code of Ethics (the Code) introduced in March 2017: *advertising or marketing shall be clearly distinguishable as such to the relevant audience*. Three of these advertisements were social media 'influencer' posts on Instagram, plus an online and a television advertisement.

Overall the research showed that the Community Panel's determinations about whether an advertising or marketing communication was distinguishable as such to the relevant audience were generally in line with community perceptions. It also highlighted a low level of general concern from the community about distinguishable advertising, especially across social media.

There was strong agreement from participants that it was important that online advertising is clearly distinguishable as such. However, there was a low level of current concern about whether advertising is clearly distinguishable or not.

The research also showed a high level of social media usage across all ages with an average of 3.2 hours a day spent online; 1.8 hours of that which is on social media.

Although unprompted awareness of Ad Standards was lower than we hoped it would be, it was pleasing to see that 73% of respondents believed the role of Ad Standards was important. Our aim is to continue to improve community awareness of our service and to promote responsible advertising practice, which is in line with community expectations, to the Australian business sector.

Fiona Jolly
Chief Executive Officer
December 2018

Part 1 Executive summary

1.1 Introduction and methodology

Colmar Brunton was commissioned by Ad Standards to provide insights to understanding how the decisions of the Ad Standards Community Panel (the Community Panel) align with prevailing community standards on what makes social media and online content *'clearly distinguishable as advertising'* to people accessing this media.

The study aimed to provide information which the Community Panel will be able to use to identify what the views of the relevant audience are to support its consideration of community complaints about whether advertising is 'clearly distinguishable' as advertising to that group of people.

The findings will also assist the Community Panel to better understand community perceptions and understanding of Section 2.7 of the Australian Association of National Advertisers (AANA) Code of Ethics (the Code) which was introduced in March 2017. The new clause states that 'Advertising or Marketing Communication shall be clearly distinguishable as such to the **relevant audience**.[1]

The research objectives were to determine:

1. What makes social media and online content 'clearly distinguishable as advertising' to people accessing this media?
2. Is there a difference of opinion about what is recognisable based on age, frequency of use, or any other relevant factors?
3. What is the usage of social media (in comparison to traditional media) by age and gender?
4. What is the level of community concern about clearly distinguishable advertising?

Colmar Brunton conducted **qualitative research** through a seven day online discussion board with n=35 participants. The purpose of the online discussion board was to understand consumer perspectives on clearly distinguishable advertising and uncover key criteria and factors that impact judgments using consumer sourced stimulus and stimulus provided by Ad Standards.

Following on from this, Colmar Brunton conducted an online **quantitative survey** with n=1,027 Australians. Quotas and post weighting were used to ensure the sample was representative of the Australian population in terms of age, gender and location. The purpose of this survey was to quantify and prioritise the criteria that determine what constitutes advertising, and what constitutes clearly distinguishable advertising, also testing community responses to four images and one video that had been considered by the Community Panel under Section 2.7 of the Code.

The quantitative research also tested the awareness and importance of complaints procedures and the role of Ad Standards. The survey explored participants' unprompted and prompted awareness of organisations that consider complaints about advertising and marketing communications. It also asked for views on unacceptable advertising, and the behaviour of lodging a complaint. Lastly, the section explored the role and importance of Ad Standards.

This report presents the findings from both stages of the research. This research builds upon previous community awareness/community standards research conducted by Colmar Brunton since 2006:

- 2006 - Community awareness research (benchmark research)
- 2007 - Community standards research

1 AANA Code of Ethics

- 2009 - Discrimination and vilification in advertising
- 2009 - Community perceptions of violence in advertising
- 2010 - Community perceptions of sex, sexuality and nudity in advertising
- 2012 - Community perceptions research
- 2013 - Community perceptions of exploitative and degrading advertising
- 2015 - Community perceptions of advertising directed primarily to children
- 2017 - Community perceptions, and
- 2007-2017 – Community perceptions research (longitudinal).

1.2 Key qualitative findings

Awareness and level of concern about advertising that is not clearly distinguishable as such

Analyses of the qualitative research on the online discussion board showed that participants, all active social media users, did have a heightened awareness or scepticism regarding online content. There is a general awareness that content that appears genuine might actually be advertising.

However, participants were not overly concerned about whether advertising is clearly distinguishable or not.

> *"Not concerned as I take most things 'with a grain of salt' so may fall victim to the online ads less regularly than general population."*
> *(18-34, Female, VIC, Metro)*

> *"I am a little concerned, not by influencer posts promoting products but by more serious issues. For example, when political campaigns are built into news articles or 'fake news' circulates which has been paid for by a company or political group to promote an agenda."*
> *(18-34, Male, VIC, Metro)*

> *"It's more annoying than a concern. Sometimes you think you are getting information but it's actually marketing."*
> (35-55, Female, NSW, Regional)

Participants' tactics for evaluating whether advertising is clearly distinguishable as such

Participants were asked to explain how they evaluated content to decide whether or not advertising was clearly distinguishable as such. General rules of thumb used by most participants when they scrutinised content are shown in Table 1.

Table 1: Tactics for evaluating advertising as being clearly distinguishable, or not

Markers	Clearly advertising	Not clearly advertising
Contrast	▪ Ad is presented in a way that stands out from other content that is not advertising ▪ Ad is in a format that the audience expects from the channel or the source (i.e. user)	▪ Ad is 'hidden' or blends in with content that is not advertising
Language	▪ Language that suggests a product/service is being promoted	▪ Language that seems a personal view, experience or fact
Imagery	▪ Imagery that looks professional and staged	▪ Imagery that looks user-generated (e.g. selfies)
Textual markers	▪ Content mentions that it contains advertising in accompanying text ▪ Content has tags or hashtags that clarify content is advertising: #ad #advertising #sponsored	▪ Content that doesn't mention it contains advertising in accompanying text ▪ Absence of hashtags or tags that clarify content is advertising: #ad #advertising #sponsored
Disclosure labels	▪ Clearly identifiable labels that show content is advertising	▪ Absence of clearly identifiable labels that show content is advertising
Source	▪ The source is clearly an advertiser or third party that is linked to advertiser	▪ The source is an individual or a third party not clearly linked to the advertiser
Product focus	▪ The product is central to the content, clearly drawing attention to it	▪ The product is 'hidden' or blended into the content, not drawing attention to it

Familiarity with the source and channel impacts judgments of clearly distinguishable advertising

Participants also noted that their expectations of the source (i.e. the publisher of the content) and the channel (i.e. where the content is published) impacted their judgments. Familiarity with the way in which content was presented helped them evaluate whether something was or was not advertising:

- **Familiarity with the source**
  - Having developed familiarity with the publisher's interests, writing style and imagery, participants used these subtle cues to distinguish between genuine content and advertising.
  - Participants particularly applied this when assessing 'influencer' content.
- **Familiarity with the channel**
  - Participants suggested that they had developed a certain familiarity with the formats in which advertising was presented to them as a result of their experience with the social media and online channels they followed.
  - They noted that this helped them to identify advertising cues, even when scrolling or glancing through content.

"I've only just noticed snapchat putting ads at the end of people's stories in the last few months, which I think are very easily distinguishable as such, and they are easily skipped." (18-34, Female, SA, Metro)

1.3 Key quantitative findings

Awareness and level of concern about advertising that is not clearly distinguishable as such

Online survey participants, consisting of a cross section of the community, were asked to think about how often they considered something to be an advertisement or not, when browsing online content. The responses were generally mixed:

- Just over one third (36%) suggested that they think about this frequently (26%) or always (10%).
- Roughly another third (35%) do so sometimes.
- Just under a third noted that they rarely (21%) or never (8%) think about whether something is an advertisement or not.

When participants were asked how often they feel online advertisements were not clearly distinguishable as such, around half (49%) suggested that the response was *'sometimes'*. A further 17% suggested *'frequently'* and just 3% said *'always'*. The vast majority (72%) was either neutral, not very concerned or not at all concerned.

Participants that had recently been exposed to advertising that they thought was unacceptable (20% of all respondents), were also asked a question about what made it unacceptable. The most common response was that it was related to gambling (17%), followed closely by 'sex, sexuality or nudity' (16%). Just 5% suggested that it was because the advertising was not clearly distinguishable as such.

While the majority of participants were not overly concerned, there was agreement that it was important that online advertising is clearly distinguishable as such, providing support for the changes introduced. Nearly half of the participants thought it was either extremely (12%) or very important (31%) for online advertising to be clearly distinguishable, however one third (33%) felt that it was neither important nor not important. Approximately one quarter felt that it was not very (16%) or not at all important (7%).

Community alignment with Community Panel decisions on clearly distinguishable advertising

Participants were asked to react to five potential advertisements that had previously been considered by the Community Panel. They were shown each potential advertisement and asked to consider whether it was advertising or not, and why. The alignment of the participants' view with Community Panel decisions on clearly distinguishable advertising is shown in Table 2.

Table 2: Participants' views and Community Panel decisions on compliance with Section 2.7 of the Code

Potential advertisement	Medium	Seen as clearly advertising	Seen as probably advertising	Community Panel determination on clearly distinguishable as advertising	Alignment
Eco Tan	Online – Instagram	55%	28%	Dismissed	✓
Mercedes Benz	Online – Instagram	25%	33%	Dismissed	?
Neds	Online	53%	18%	Dismissed	✓
Lottoland	Television	63%	17%	Dismissed	✓
Tribal Breweries*	Online – Instagram	31%	30%	Dismissed	?

* NOTE: Participants aged 13 to 17 years were not asked to view or comment on this image as it contains alcohol and partial nudity.

Q7, Q10, Q13, Q16 and Q19. Which of the following best applies to the Instagram post / content of the image displayed / content of the video displayed above? (Single response)

(Base=All participants, 2018 Clearly Distinguishable Advertising Study between n=961 and n=1,027)

✓ = Community aligned with the Community Panel

× = Community not aligned with the Community Panel

? = Mixed community reaction.

The reactions to each potential advertisement are outlined in Table 3 below. Overall, the majority of participants felt that all of the content shown was probably or clearly advertising.

Table 3: Potential advertisements seen as advertising and reasons why

Potential advertisement	Medium	Seen as advertising (probably /clearly)	Top 3 reasons why	%
Eco Tan	Online – Instagram	83%	The product is central to the post – just like in advertising	56%
			The person in the post looks like she is modelling – just like in advertising	55%
			The imagery/photography looks staged	53%
Mercedes Benz	Online – Instagram	58%	The imagery/photography looks staged	57%
			The post contains tags and/or hashtags of the brand or product	47%
			The people in the post look like they are modelling – just like in advertising	42%
Neds	Online	71%	The product/service is central to the layout – just like in advertising	48%
			Advertising is to be expected in this format on this channel (i.e. Pickle)	44%
			The product/service is central to the article	33%
Lottoland	Television	80%	The videography looks staged	53%
			The language used sounds like advertising	49%
			The product/service is central to the video	47%
Tribal Breweries*	Online – Instagram	61%	The imagery/photography looks staged	58%
			The people in the post looks like they are modelling – just like in advertising	54%
			The post contains tags and/or hashtags of the brand of product	47%

* NOTE: Participants aged 13 to 17 years were not asked to view or comment on this image as it contains alcohol and partial nudity.

Q7, Q10, Q13, Q16 and Q19. Which of the following best applies to the Instagram post / content of the image displayed / content of the video displayed above? (Single response)

(Base=All participants, 2018 Clearly Distinguishable Advertising Study between n=961 and n=1,027)

Q8, Q11, Q14, Q17 and Q20. Which of the following are reasons why you think this is advertising? (Multiple response)

(Base=Participants who selected that it is probably or is clearly advertising, 2018 Clearly Distinguishable Advertising Study between n=585 and n=849)

Participants were most certain that the Lottoland video (63%), Eco Tan Instagram post (55%) and Neds article (53%) were 'clearly advertising'. However, there was less certainty for both the Mercedes Benz (25%) and Tribal Breweries (31%) Instagram posts, with less than a third reporting that they were 'clearly advertising'. In both cases, the main driver of uncertainty was that the product was not central to the image – i.e. it was not immediately clear whether a product was being advertised.

Guidance for future determinations

A list of items that may be considered as a starting point for what to look for in future complaints related to Section 2.7 of the Code was created using the information gathered during both the online discussion board and the online survey. A limitation to note is that it is based on a limited selection of advertisements that have received complaints under Section 2.7. It would be useful to repeat this exercise in future with a larger number of advertisements.

After analysing the data, the items have been broken down into three tiers of importance. The first tier being those items that were of most importance to participants when determining why they considered something to be clearly distinguishable as advertising.

If a potential advertisement meets all four of the first tier criteria, then the Community Panel can be confident that it is clearly distinguishable as advertising. If one or more of the first tier criteria are missing or lacking, there will likely be greater confusion or uncertainty amongst the target audience and the potential advertisement will need greater scrutiny.

Figure 1: Tiers of items that participants use to determine whether advertising is clearly distinguishable as such

First Tier (highest importance)	The person/people in the post/image look like they are modelling
	The imagery/photography/videography looks staged
	The post contains tags and/or hastags of the brand or product
	The brand/product/service is central to the post/layout/article/video
Second Tier (middle importance)	The label on the product is visible
	The language used sounds like advertising
	The imagery/photography/videography looks professional
	The post/layout/article/video makes the product appear desirable
Third Tier (least importance)	It was posted/written by a prominent person or celebrity that would post advertisng
	Advertising is to be expected in the format on this channel
	The logo of the brand/product/service is visible

The order and importance of these items were very similar across gender, social media usage and internet usage, however there were a few differences by age.

- Those aged 13-17 placed higher importance on *'The brand/product/service is central to the post/layout/article/video'* with this statement being of the highest importance for them. They also placed higher importance on *'The language used sounds like advertising'*.

First Tier (highest importance)	The brand/product/service is central to the post/layout/article/video
	The imagery/photography/videography looks staged
	The language used sounds like advertising
	The person/people in the post/image look like they are modelling

- Those aged 18-29 years placed the highest importance on *'The post contains tags and/or hashtags of the brand or product'*. They also placed higher importance on *'The label on the product is visible'*, as this item was in the top tier for this age group. The item *'It was posted/written by a prominent person or celebrity that would post advertising'* was also considered to be of higher importance for this age group, as it sat in the second tier (as opposed to the third tier, where it sat for all other age groups).

First Tier (highest importance)	The post contains tags and/or hastags of the brand or product
	The person/people in the post/image look like they are modelling
	The imagery/photography/videography looks staged
	The logo of the brand/product/service is visible

1.4 Awareness and perception of Ad Standards 2018

Participants were asked for unprompted awareness of organisations they could complain to about the standards of advertising. Although a large proportion (38%) did not know or could not recall an organisation, the most common avenue for making a complaint was by going to the channel/source which aired the advertisement (8%), followed by the Ombudsman (7%) and the ACCC (6%). Unprompted awareness of Ad Standards/Advertising Standards and Advertising Standards Board/Bureau is 6% and there were no significant differences amongst participant segments.

When shown a list of organisations that handle advertising complaints, just over half (52%) selected Ad Standards (or any of its prior brand names) as an organisation that they were aware they could complain to.

Most participants (91%) had not made a formal complaint about advertising standards in the 12 months prior to completing the survey. The most common reason for not doing so was that they had not been concerned about any advertising (59%). Of those who did complain (9%), just over a quarter reported that they complained to the Advertising Standards Board (26%), followed by 23% who complained to Free TV. Around one in ten made a complaint to Ad Standards (11%).

Participants were also asked what would make them more likely to complain to Ad Standards, with 62% indicating that they would need to be extremely offended or concerned to be prompted into action. They also indicated that they would be more inclined to complain to Ad Standards if they knew the process was simple (45%) or if they knew who to complain to (32%). These findings suggest that increasing awareness of Ad Standards' complaints procedure could increase likelihood to complain, as well as ensuring the behaviour of lodging a complaint is perceived as relevant, desirable, appropriate and easy.

1.5 Media usage

As part of the online survey participants were asked about both their online media usage and usage of more traditional forms of media (such as television and radio).

With regards to online activities, participants aged 13 to 17 years were the most likely to play games (68%), those aged 18 to 29 years were the most likely to use social media platforms (90%), while those aged 50 years and over were the most likely to check emails (95%).

When looking at more traditional forms of media, free to air television was the most consumed form at 77%, with those aged 50 years and over being significantly more likely to select this option at 88% and participants aged 18 to 29 years being significantly less likely to select it at 59%.

Participants who indicated they use one or more social media platforms in a typical week were asked to specify which platforms they use. Across all age groups, Facebook was the top choice with 92% of all participants using Facebook in a typical week. Interestingly this was highest for those aged 50 years and over at 95% and lowest for those aged 13 to 17 years (74%). Younger participants were also significantly more likely to select Instagram (71% of those aged 13 to 17 year and 80% of those aged 18 to 29 years) or Snapchat (51% of those aged 13 to 17 year and 67% of those aged 18 to 29 years).

Participants were asked how many hours they typically spent on the internet, with the daily average being 3.2 hours. They were also asked specifically about the time they typically spent on social media, with the daily average being 1.8 hours.

Part 2 Qualitative findings

The following section of the report relates to the online discussion board, which was run between the 7th and 13th of November 2018. The profile of the n=35 participants is as follows:

- **Age:** n=8 were aged between 13 and 17 years, n=14 were aged between 18 and 34 years and n=10 were aged between 35 and 55 years.
- **Gender:** n=15 were male and n=20 were female.
- **All** were users of social media, including Facebook, Instagram, Snapchat, Twitter, YouTube, Pinterest and Google+.

2.1 Awareness of advertising on social media and online platforms

Role of social media and online channels

For most participants, whom are all active social media users, social media and online platforms fulfil three main purposes:

- Social connection and support: interacting with friends, family or like-minded people. Participants often share thoughts and photos or comment on others.
- Entertainment or enjoyment: often not specifically with a goal in mind and sometime merely to kill time. This is done by scrolling through content until coming across something appealing.
- Education or information: often more purposeful behaviour such as reading news, getting informed on a topic of interest or gathering product information.

> *"I use social media every day to connect with people who are in a similar situation to me regarding my adult son. It helps me to see that there are other parents struggling with the same situation."*
> (35-55, Female, *QLD, Regional)*

Facebook was the most commonly used and most often mentioned platform, followed by YouTube and Instagram. Twitter and Snapchat were mentioned less often but used by about a third of the participants. Attitudes to social media and online channels varied. Most participants had developed daily routines and strategies for checking social media and getting to the content they wanted. They have put in place their own way of managing an abundance of content, for example, following certain Facebook groups focused around an interest or hobby, subscribing to specific channels on YouTube, certain feeds on Instagram or people on Snapchat.

There was some mention of social media 'fatigue', especially among the adult audience. This fatigue appeared to be a counter reaction to participants' initial enthusiasm and active participation on social media. Participants felt overwhelmed by the large amount of content and options, the perceived expectations from others to be responsive, and the impression that other people's lives seemed more exciting. Key coping mechanisms for this were to limit the amount of time spent online and on social media or to reduce the amount of content that is actively followed; an 'out of sight, out of mind' approach. Quite a few participants mentioned they see themselves as 'followers' more so than 'posters'.

> *"I don't currently use social media as much as I used too. I think this is because it is overwhelming now when it is expected that we keep up to date with Facebook, Twitter, Instagram etc. I have become more of a follower than posting myself."*
> (18-34, Female, VIC, Metro)

2.2 Relevance and level of concern around online advertising

Awareness and relevance

Participants share a somewhat cynical to negative view when it comes to advertising on social media and online platforms; most felt that advertising has increased and has become more intrusive over the last few years. The concept of 'influencer advertising' was spontaneously mentioned, with specific concern around advertising disguised as personal views, expert advice or facts. The subtlety of how this could influence people's opinions was felt to be most alarming.

The idea that people might not be aware of how they are influenced, or that they might make poor decisions as a result, worried participants. There was also a belief that sharing or liking by friends or peers strengthens this influence; information can feel more credible when it endorsed by someone you trust.

> *"I think people are often quite naive and trusting when it comes to what is on the internet. It doesn't even cross their mind that it could be incorrect."*
> (18-34, Female, VIC, Metro)

> *"I think we get 'bystander effect' and assume if it wasn't true then someone would've pointed it out already."*
> (18-34, Female, VIC, Metro)

Influencer advertising was believed to have become more prevalent over the last few years. Participants felt this often revolved around product or brand promotions. About half of the participants said they often think about whether something is an ad or not, when looking at content online. Advertising presence is something all participants seem quite conscious of, but not something that stays top of mind in their everyday internet usage.

Level of concern

Most participants stated they were not very concerned about ads not being clearly distinguishable as such. This appeared linked to them feeling quite confident and capable of identifying ads, which made participants feel they were not at risk of being influenced. Rather than concerned, participants felt annoyed and frustrated to find out that content they had clicked on - thinking it was genuine content – turned out be advertising. For example, accidentally clicking on something that is not clearly distinguishable as advertising could lead to further targeted ads showing up on their social media feed or internet pages. Even though advertising that is not clearly distinguishable as such annoyed participants, most felt there was an active choice in deciding to act (buy - or not to buy) as a result of seeing the ad. In saying this, the more subtle effect that these ads might have on their lifestyle choices or attitudes may be overlooked by participants.

Concerns were mostly related to the impact on others, rather than themselves. A number of concerns were raised about ads not being clearly distinguishable, including:

- **Taking advantage of vulnerable audiences.** Vulnerable audiences, such as children or older people, would be less able to distinguish between what is and what isn't an ad and more likely to mistake advertising for genuine content**.**
- **Presenting false facts**. Information presented as 'expert advice', that isn't clearly distinguishable as advertising, may lead to people making badly informed decisions. In particular, participants mentioned health information or financial advice that is presented as factual.
  - **People I trust presenting false facts**. Even though participants mentioned they are quite confident in their ability to identify facts from fiction, it was acknowledged that "false facts" shared by peers could be mistaken for trustworthy messages.

- **Influencing public opinion**. The possibility of large companies or political parties to subtly influence people's opinions and views on a large scale for their own benefit. They could do this by providing content that is not clearly distinguishable as advertising, or by influencing what does and doesn't show up on people's feed.
- **Biased perceptions of reality.** There was a more general concern that people's views will get biased by content that they might consider to be genuine or fail to scrutinise. Using this content might trigger more similar content being shown via social media feeds, which could enhance this effect.

Most participants felt it was easy to learn to recognise how different platforms show ads, for example by the way ads disrupt the channel experience, are visually contrasting to other content, or use a certain type of language. More generally, video-based media such as YouTube and Snapchat, was mentioned to allow the audience to distinguish between advertising and other content more easily than other channels. The presence of richer and more elaborate cues allows the audience to get a better sense of how 'genuine' video content looks and feels, and how it contrasts with advertising. In addition, the placement of the ads on video-based channels felt more predictable; often 'popping up' and disrupting regular content with videos that appear more professional in quality that what was watched.

It becomes more difficult when ads are 'hidden' among regular content, and the format does not stand out as being advertising. This seems to be most prominent on Facebook and Instagram, where advertising blends in with regular feeds and the 'sponsored' label is sometimes the only visual cue that distinguishes it. For Facebook, ads disguised as news articles seem a common source of frustration.

Instagram also seemed to be the most common channel for 'influencers' to share posts that contain advertising, are not marked as 'sponsored', and appear to reflect personal views or opinions. This came up spontaneously, as something that makes it more challenging for people to recognise ads on Instagram. It was noted, though, that these influencers are often called out on that by their followers: they would comment about the post containing advertising. These comments could then help the audience reflect on the intention of the post and scrutinize it further.

There is a belief that the younger generation is better equipped to distinguish advertising on social media, as they learn how to recognise this more quickly. Nevertheless, it was mentioned that these younger audiences are also more impressionable, something the younger participants themselves agreed with. Since young people are the most active Instagram consumers, participants worried about how subtle 'influencer' advertising impacts them.

As influencers were believed to be aspirational and have a sense of authority, the advertising messages become more impactful as they blend into their broader desirable lifestyle.

> *"I think younger people may be better at identifying ads online. Perhaps because we have grown up with social media and use it quite often and we have been educated in the use of social media."*
> *(13-17, Male, VIC, Metro)*

> *"Instagram is a bit different as the ad is presented the same way as a regular post on your feed. When scrolling quickly, the 'Sponsored' label can be easily missed. On the Snapchat stories section, some ads look the same as normal articles or public stories making it hard to distinguish as the 'sponsored' label is so small."*
> *(13-17, Female, NSW, Regional)*

> *"I've only just noticed snapchat putting ads at the end of people's stories in the last few months, which I think are very easily distinguishable as such, and they are easily skipped."*
> *(18-34, Female, SA, Metro)*

> *"It is too easy for people less internet savvy to be tricked into clicking false links and giving away information."*
> *(35-55, Male, QLD, Regional)*

"Not concerned as I take most thing 'with a grain of salt' so may fall victim to the online ads less regularly than general population."
(18-34, Female, VIC, Metro)

"It's more annoying than a concern. Sometimes you think you are getting information but it's actually marketing."
(35-55, Female, NSW, Regional)

"I am a little concerned, not by influencer posts promoting products but by more serious issues. For example, when political campaigns are built into news articles or 'fake news' circulates which has been paid for by a company or political group to promote an agenda."
(18-34, Male, VIC, Metro)

"people don't have the right/balanced information to make choices. So people may get easily taken in rather than making a properly informed choice. Especially people who are a bit more vulnerable."
(35-55, Female, QLD, Metro)

2.3 Defining advertising

Participants were asked to define advertising in their own words. Even though everyone articulated this slightly different, the key elements that emerged were:

- Purposefully bringing a product/service/brand to the attention of the target audience.
- By creating an appealing impression of the product.
- With the intention to inspire action, such a buying it or finding out more.

After unprompted discussion, participants were exposed to the following definition of advertising:

> Any material which is published or broadcast and is undertaken by, or on behalf of an advertiser or marketer:
>
> - over which the advertiser or marketer has a reasonable degree of control, and
> - that draws the attention of the public with the intention to promote or oppose a product, service, person, organisation or line of conduct.
>
> BUT does not include: labels or packaging for products, corporate reports including corporate affairs messages. *For a full explanation of the definition, please have a look on this page.*

The stated definition was in line with what participants believed to be advertising but prompted discussions around it being too narrow and possibly allowing advertisers ways around the definition. The most common remark was around other parties -not the advertisers- advertising in a manner that is not clearly distinguishable as such. Social media influencers were, once again, mentioned as an example of this.

"I believe the definition is too narrow... Realistically it creeps well beyond these parameters (...) marketing companies (...) will always push the boundaries to try and create a need for something you don't really want."
(18-34, Male, SA, Metro)

"... if someone posts an image of something including a label or package then I think that falls under the umbrella of advertising if it is done in such a manner that it is actually advertising but not overtly so."
(18-34, Male, SA, Metro)

2.4 Defining clearly distinguishable advertising

After exploring the role of advertising on social media and online platforms more broadly, participants were asked to share examples of advertising that they didn't consider clearly distinguishable as such. They did this by sharing examples of (potential) advertising content sourced from their own social media channels and frequently visited websites. They then discussed their examples as a group and shared thoughts about whether the examples were indeed advertising and why this was or wasn't clear to them. In another activity, participants were shown media that had been formally complained about and considered by the Ad Standards Community Panel (the Community Panel). They were asked to evaluate this media individually and decide whether they considered it advertising, and whether it was clearly distinguishable as such.

Expectations depend on channel and source

Participants' expectations and judgments about advertising seem closely linked to what they expect from the channel (where the content appears on) and the source that published or posted the content. Participants had developed a certain awareness about the formats in which advertising was presented to them as a result of their familiarity with the social media and online channels they followed. This helps them to identify advertising cues as such, even when scrolling or glancing through content. Familiarity with the channel is expected to enable the audience to recognise advertising as such. A similar principle applies for familiarity with the source. Participants felt able to recognise when something was or wasn't advertising based on what they expected from who published the content.

After analysing the activities on the online discussion board, some initial and general rules of thumb surfaced, that most participants seemed to use when scrutinised content. These general rules of thumb differ per channel and platform, and potentially per audience, and would need to be further explored and validated.

Table 4: Rules of thumb

Markers	Clearly advertising	Not clearly advertising
Contrast	▪ Ad is presented in a way that stands out from other content that is not advertising ▪ Ad is in a format that the audience expects from the channel or the source (i.e. user)	▪ Ad is 'hidden' or blends in with content that is not advertising
Language	▪ Language that suggests a product/service is being promoted	▪ Language that seems a personal view, experience or fact
Imagery	▪ Imagery that looks professional and staged	▪ Imagery that looks user-generated (e.g. selfies)
Textual markers	▪ Content mentions that it contains advertising in accompanying text ▪ Content has tags or hashtags that clarify content is advertising: #ad #advertising #sponsored	▪ Content that doesn't mention it contains advertising in accompanying text ▪ Absence of hashtags or tags that clarify content is advertising: #ad #advertising #sponsored
Disclosure labels	▪ Clearly identifiable labels that show content is advertising	▪ Absence of clearly identifiable labels that show content is advertising
Source	▪ The source is clearly an advertiser or third party that is linked to advertiser	▪ The source is an individual or a third party not clearly linked to the advertiser
Product focus	▪ The product is central to the content, clearly drawing attention to it	▪ The product is 'hidden' or blended into the content, not drawing attention to it

"I believe to get around all this, if things were clearly and simply labelled as such (e.g. compulsory food labelling etc.) that would be a great start. Consistency is key, as that's how the brain works and it will help us to know what the ads are."
(18-34, Male, SA, Metro)

"That is interesting - I do find that I react a lot better to advertising that is not clearly distinguishable as such - if something catches my eye in this way - I am likely to click further and investigate. It can make the product / service more appealing subconsciously."
(35-55, Female, NSW, Metro)

2.5 Evaluating Ad Standards stimulus

Tribal Brewing – Instagram post

Tribal Brewing's wilde_beer Instagram post (Figure 2) was considered by the Community Panel as meeting the criteria of advertising and marketing communications (case number 0422/18). The Panel considered that this Instagram advertisement is clearly distinguishable as advertising material to the relevant audience and determined that the advertisement did not breach Section 2.7 of the Code.

Of the n=35 participants of the online board n=27 participants evaluated the Tribal Brewery stimulus individually (Figure 2). This was due to 13-17 year old participants being excluded from this activity. The participants were divided as to whether they considered the post to be advertising: about half considered it to be advertising. However, most participants did agree that the post was not clearly distinguishable as such.

Figure 2: Tribal Brewing – wilde_beer Instagram post

For those participants who considered the post to be advertising, most based this conclusion on the username being the brand, the use of multiple hashtags to encourage views and promote the positive aspects of the beer. In addition, the aspirational image of a happy and beautiful couple enjoying life and drinking beer, was believed to be staged for advertising.

For those participants who did not consider the post to be advertising, most did not link the user 'wilde_beer' to a brand or did not think the post originated from the brand.

Distinguishable as advertising

Despite participants being divided as to whether the content was indeed an ad, the large majority agreed "it was not clearly distinguishable as such".

The following reasons were provided:

- **Source:** Even though the post is placed by "wilde_beer", it appeared to come from someone sharing their holiday experiences. The post did not appear an advertising post created by the beer brand.
- **Imagery:** The photo looks like it could be a holiday snapshot.
- **Language:** The language suggests the message is about having an adventurous lifestyle, travel and enjoy life; it does not make the role of beer in this explicit. The text also appears to share personal 'everyday' experiences of a consumer.
- **Product focus:** The product (beer) is not the centre of attention for the audience watching the content, but rather the nature scenery plays a central role.
- **Textual markers:** There is a large number of hashtags used in the post that do not mention the brand or product specifically, making the '#wildebeer' blend into the message.
- **Absence of disclosure labels:** The post does not mention the content is sponsored or contains advertising.

  "#craftbeer, #craftbeerporn, etc do not mention a specific brand of craft beer which is obviously not a promotion"
  (35-55, Male, QLD, Regional, Does not think it is clearly an ad)

  "The photo was not taken by the company but by a user"
  (18-34, Male, VIC, Metro, Does not think it is clearly an ad)

Most participants felt that this message was directed at young adults and couples who are interested in travelling, and people who like beer. Further to this theme of travelling and being outdoors, some thought it may be targeted at 'health-conscious' people.

The coloured 'hotspots' in the Figure 3 illustrate what areas participants focused on when evaluating whether they considered the content to be clearly distinguishable as advertising. The red colour means that more participants have selected that particular area of the image.

Figure 3: Tribal Brewing - hotspots illustrating perceived markers

Neds article – Pickle website

Neds' sports news article published by Nine MSN on their Pickle website (Figure 4) was considered by the Community Panel as meeting the criteria of advertising and marketing communications (case number 0533/17). The Panel considered the article to be clearly distinguishable as advertising material to the relevant audience and determined that the advertisement did not breach Section 2.7 of the Code.

All n=35 participants of the online board individually evaluated the Neds article (Figure 4). Over two third of the participants considered the article to be advertising. Just over half of all participants thought the article was "clearly distinguishable" as an advertisement.

Those participants who felt it was clear that the article was advertising, mostly based this on the article being surrounded by Neds colours and the text references to wagering. For those participants who did not consider the article to be advertising, most felt this the article appeared to be news or editorial.

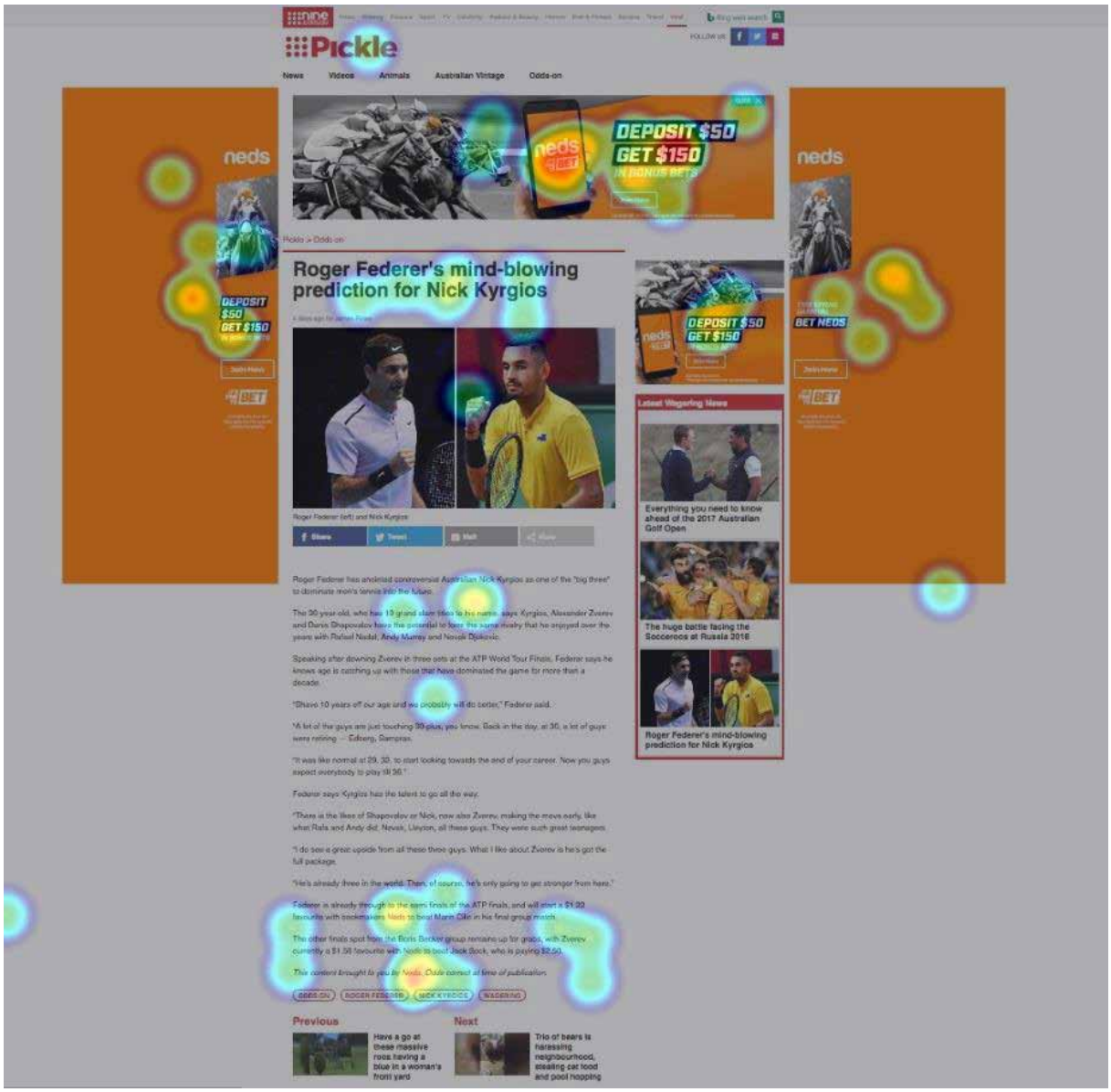
Figure 4: Neds article

Table 5: Neds article – Distinguishable as advertising

Just over half of the participants who felt the article was CLEARLY distinguishable as an ad	Just under half of the participants felt the article was NOT clearly distinguishable as an ad
▪ **Contrast/imagery:** ads for Neds are clearly visible in bright orange and are surrounding the article, visually linking it to the content. ▪ **Language:** there are references to betting and wagering towards the end of the article. ▪ **Disclosure labels:** at the end of the article it mentions 'This content is brought to you by Neds'.	▪ **Language:** The headline used created the impression that the article was sports news (not wagering), and the style of writing was considered that of a news article. ▪ **Lack of contrast:** the article appeared very similar to other 'genuine' content that might be placed on Pickle; some mention the bright orange ads could be unrelated to the article. ▪ **Disclosure label:** it is not clear until the end, that the content was sponsored by Neds.

Participants felt this message was directed at males, tennis or sports fans and people interested in sports wagering.

Figure 5: Neds - hotspots illustrating perceived markers



Eco Tan – Instagram post

Actress Kat Risteska's Instagram post on Eco Tan's Coconut Body Milk (Figure 6) was considered by the Community Panel as meeting the criteria of advertising and marketing communications (case number 0360/17). The Panel considered the article to be clearly distinguishable as advertising material to the relevant audience and determined that the advertisement did not breach Section 2.7 of the Code.

All n=35 Participants of the online discussion board individually evaluated the Eco Tan Instagram post (Figure 6). Almost all participants considered the content to be advertising, as the product was clearly visible, the text promoted the product features, and the brand was referenced clearly. However, more than half of the participants felt the article was not clearly distinguishable as such: most felt this was due to the content appearing to Kat's personal experience or views.

Figure 6: Eco Tan Instagram post

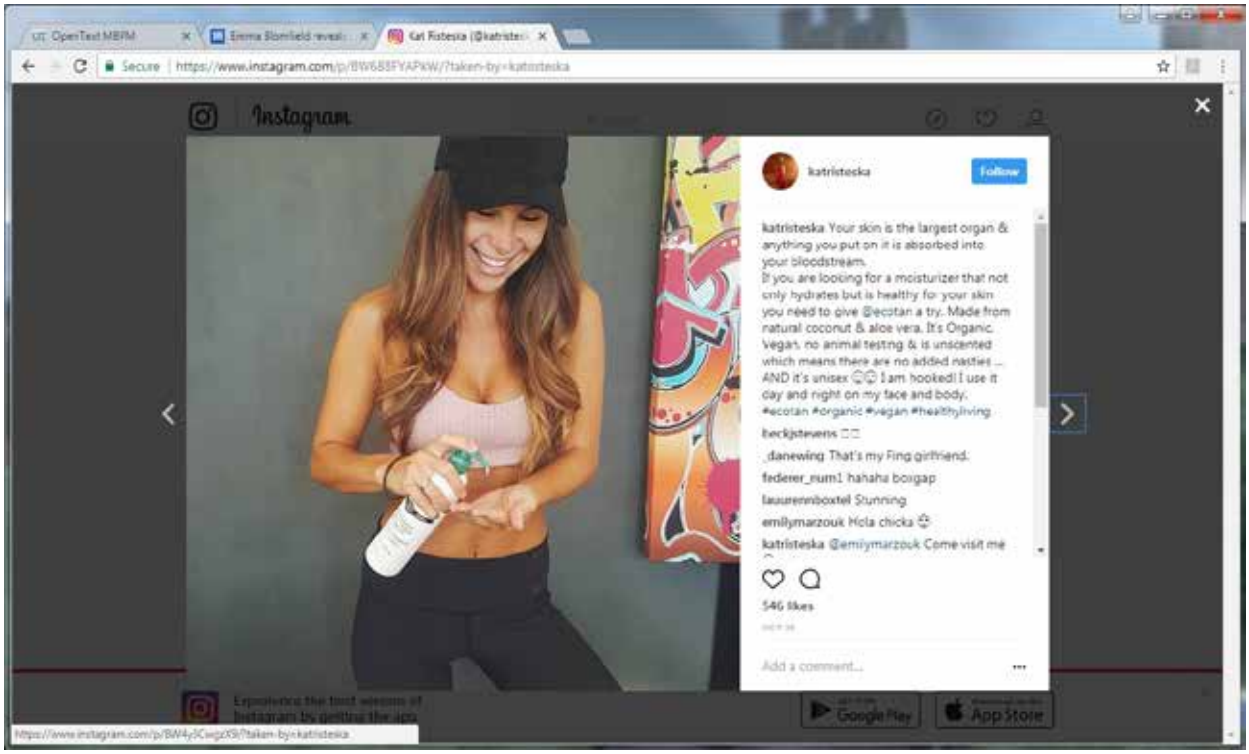


Table 6: Eco Tan Instagram post – Distinguishable as advertising

Over half of the participants felt the post was CLEARLY distinguishable as an ad	Less than half of the participants who felt the post was NOT clearly distinguishable as an ad
▪ **Product focus:** the product was considered the focal point of the image, drawing the audience's attention to it. The product and brand was also the focus of the textual message. ▪ **Language:** the language used was considered very positive, with a lot of details about the product benefits, and was believed to promote the product to the audience. ▪ **Textual markers:** the tag and hashtags mention the brand and the key benefits of the product. ▪ **Imagery:** the image appeared staged around the product; with Kat clearly posing with the product, showing the label, and looking attractive. The image is of good quality and has a professional look.	▪ **Lack of contrast:** the content appears a genuine post from a user, it does not stand out from other content on Instagram that is not advertising. ▪ **Source:** it is unclear if Kat is linked to the advertised product in any way and she is posting with her personal account. One person noted the account was not 'verified', making it less likely advertisers would approach her. ▪ **Language:** some participants felt the post could reflect Kat's personal experience and opinion which she chose to share. ▪ **Disclosure labels/textual markers:** the post does not mention it is sponsored or contains advertising.

Participants felt this message was targeted at young people who follow Kat Risteska on Instagram. They expect these to be mostly women, body and health conscious and interested in beauty products. Fitness enthusiasts and fake tan users were also mentioned.

> *"This image is not genuine. I would think that someone who is genuinely recommending a product take and post a photo of the bottle not pumping it out onto their hand while in activewear."*
> *(18-34, Female, VIC, Metro)*

> *"You might not notice it but she is advertising the product by expressing how good it is. She also states "you need to give @ecotan a try."*
> *(13-17, Male, VIC, Regional)*

> *"Since it appears to be posted by an individual and does not suggest any 'partnership,' it could possibly just be a post by someone who really enjoys the product."*
> *(18-34, Female, NSW, Metro)*

Figure 7: Eco Tan - hotspots illustrating perceived markers

Mercedes Benz – Instagram post

Fashion designer Pip Edwards' Instagram post showing a Mercedes Benz (Figure 8) was considered by the Community Panel as meeting the criteria of advertising and marketing communications (case number 0193/18). The Panel considered the article to be clearly distinguishable as advertising material to the relevant audience and determined that the advertisement did not breach Section 2.7 of the Code.

All n=35 participants of the online discussion board individually evaluated the Instagram post referencing Mercedes Benz (Figure 8). Participants were somewhat divided as to whether they considered the post to be advertising: just over half of the participants said this was the case. This was mainly due to the professional looking photo with a carefully staged set-up, and the text highlighting the quality of the wool. Most participants appeared to think the wool was the main product being advertised, rather than the car, which had a more subtle placement and text reference.

When asked how clearly distinguishable it was as an ad, most participants thought it was not clearly distinguishable as such.

Figure 8: Pip Edwards' Instagram post - Mercedes Benz

Table 7: Pip Edwards' Instagram post – Distinguishable as advertising

About a fifth of the participants felt the article was CLEARLY distinguishable as an ad	The majority of participants felt the article was NOT clearly distinguishable as an ad
▪ **Product focus:** the car and bags of wool appeared carefully placed in the centre of the image, attracting the viewers' attention. ▪ **Image:** the photography looks professional and staged to make the products look attractive. ▪ **Textual markers:** both 'The Woolmark Company' and 'Mercedes Benz' are tagged in the post. ▪ **Language:** the post highlights the qualities of the particular wool. ▪ **Source:** the person posting was believed to be well-known, making it more likely that she might advertise for a brand.	▪ **Source:** as the post comes from a personal account, they may be simply documenting their own experiences or posting about what they like. ▪ **Disclosure label/textual markers:** the post does not mention it is sponsored or contains advertising. ▪ **Image:** the image could be user-generated, beautiful photos can be found on anyone's Instagram. ▪ **Language:** the post does not appear to promote anything, it is describing the wool or listing.

"Judging by the number of likes, pip_edwards1 has a large media presence, so it is definitely plausible that The Wool Company and maybe even Mercedes Benz have some kind of deal with her."
(18-34, Female, SA, Metro)

"If it was on a page that I had saved on my wall and it came up, I would assume that it was just a post to grab viewer attention, rather then a particular advert about a product or service."
(35-55, Female, QLD, Metro)

"The text clearly shows that the post is not an ad as there are no persuasive, 'selling' phrases or words."
(13-17, Female, VIC, Metro)

Participants considered this post to be aimed at Pip Edwards' followers on Instagram, who are most likely interest in fashion, and upper-class quality products. Some participants indicated that this message was directed at those looking to buy wool (i.e. fashion designers) or clothing made out of wool. A few also stated that this message was targeted to 'farming families'.

Figure 9: Mercedes Benz - hotspots illustrating perceived markers

2.6 Clearly distinguishable advertising on Instagram – social media influencers

As mentioned earlier in the report, participants' expectations and judgments about advertising seem closely linked to how familiar they are with the channel and the source that published or posted the content. Participants highlighted that advertising posted by social media users themselves (i.e. not from commercial accounts) can be challenging to distinguish as such. This is particularly prevalent with social media influencers, who are most often accused of using their personal account for advertising or promotional purposes.

> *"Social influencers (...) using their 'personal' experience to make a product seem legitimate and or effective and more often than not, people can be misled into thinking there are reviews of the product/service, rather than an ad for them."*
> *(35-55, Female, VIC, Metro)*

Influencer advertising illustrates how challenging it can be to determine the 'reasonable degree of control of the advertiser'. Participants believed it is not always obvious who controls the content, which can appear to reflect personal experiences, stories, preferences or reviews. Also, there might not always be an official commercial agreement between who is posting the advertising and the advertiser.

However, participants who followed influencers believed they were able to recognise genuine post, as they were familiar with their interests, writing style and use of imagery. They used subtle markers to recognise content as advertising.

In order to understand how followers of social media influencers might distinguish between genuine content and advertising content, such participants were asked to upload examples of both. The examples were sourced from their own social media accounts. The examples illustrate the considerations that followers of social media influencers make when deciding whether the content is genuine or advertising.

Example A: Angela Rummans

Angela Rummans is known from the US Big Brother TV show and is an athlete and fitness model. She has 317k followers on her verified Instagram account and one of our adult participants is one of them. Figure 10 shows a post that was considered advertising by this participant.

Interestingly, Angela Rummans seems to have put some effort into making the post come across as her personal experience and opinion. It could be argued that she implies the product use is her choice (and in her control), by saying "I've always wanted to see what the hype was about". Nevertheless, the participant considered the post to be clearly advertising due to how the content contrasted with her genuine posts through the language used, the presence of textual markers, and a clear product focus.

> *"She has tagged a business and given a little spiel and promoted the brand and in the image, she clearly has the product visible and marketed well. I don't feel as though it is genuine as it is obvious she has teamed up with the brand."*
> *(35-55, Female, NSW, Metro)*

Figure 10: Angela Rummans - upload of Instagram post with advertising content

Source: Instagram.com/angelarummans

Figure 11 contains a post that the participant felt reflected genuine content from Angela Rummans. This genuine feel was attributed to Angela sharing her authentic personal experience with her followers. Note that the post does appear to promote a clothing brand by using "#revolve", something that was initially missed by the participant that posted the example. Even after bringing the text '#revolve' to the attention of the participant, they still felt the post was genuine. As the clothing brand was not put at the centre of attention and was not referenced in any other way, the post did not appear to be advertising.

> *"It still appears as though its genuine content because the photo is of her and her BF and she is inviting us in to her personal life, which for me, doesn't seem as though it's a marketed post. Also, the content of her post just seems very genuine to me."*
> *(35-55, Female, NSW, Metro)*

Figure 11: Angela Rummans - upload of Instagram post with genuine content

Source: Instagram.com/angelarummans

Example B: Kasey Rayton

Sydney based Kasey Rayton uploads her beauty and make-up related posts to YouTube and Instagram. She has over 218k followers on her verified Instagram account and one of our younger participants is one of them.

Figure 12 shows a post that this participant considered to be advertising. Kasey Rayton introduces the post with what appears to be a genuine and current experience, which highlights a challenging situation of having damaged skin. This introduction then builds up to explicit references to the product and where it can be purchased. Kasey Rayton ends the post by illustrating how she uses the product to help her damaged skin, and by referring to some of the product benefits, before sharing three hashtags.

For the participant, this post stands out as advertising compared to Kasey's genuine posts through the language used, the imagery clearly showing the product and textual markers indicating the post contains advertising.

> *"The first image is of a sponsored post she did with Olehenriksen. She wrote her own genuine caption tagging both Olehenrikson and Sephora to notify followers of the brand and where to purchase it. She also put #spon to let her followers know it is an ad." (13-17, Female, NSW, Regional)*

Figure 12: Kasey Rayton - upload of Instagram post with advertising content

Source: Instagram.com/kaseyrayton

Figure 13 shows an example of a post that the same participant considered to be genuine content by Kasey Rayton. This was due to the language used and the way in which Kasey Rayton appeared to be interacting with her audience in an authentic way. Even though the imagery arguably looks professional and staged, the participant perceived the photograph as typical for a genuine post by Kasey Rayton.

"The second image is a picture she wanted to post of her and her boyfriend and clearly isn't a sponsored ad. Through the caption she is interacting with her audience but not through a sponsorship"
(13-17, Female, NSW, Regional)

Figure 13: Kasey Rayton - upload of Instagram post with genuine content

Source: Instagram.com/kaseyrayton

Example C: Sophie Vine

Sophie Vine is an Australian reality star who became known after participating in Channel 9's renovating series The Block. She has over 125k followers on her Instagram account, including one of our adolescent participants.

Figure 14 shows a post that this participant considered advertising. Sophie starts the post by sharing some of her personal thoughts and experiences, which appear quite genuine. The post leads up to her talking about her new Nissan and some of the cars' benefits. It ends with hashtags referencing the car brand and the post being advertising. For the participant, most of the content appeared genuine, but the textual markers still clearly showed that the content is advertising.

> *"This first image is of a post I would class as advertising or sponsored content for Nissan. The second image I would say is genuine content. Her posts all seem to be related to her "mum/family" life. Her tone is pretty much the same on all posts, all based around her living simply in Australia. The only way I can tell the difference is the # hash tags & @ directing me to other pages. The images are all beautiful, she advertises & promotes "natural' brands really well."*
> *(18-34, Female, NSW, Metro)*

Figure 14: Sophie Vine - upload of Instagram post with advertising content

Source: Instagram.com/sophie_vine

Figure 15 shows a post that this participant considered genuine. Sophie's post shows a photo of her two children picking flowers and includes a sentence describing this scene. The photography and the language appear quite similar to the post in Figure 14 showing advertising. For the participant, the main difference is that this post does not contain any visual or textual references to a product or brand.

Figure 15: Sophie Vine - upload of Instagram post with genuine content

Source: Instagram.com/sophie_vine

Part 3 Quantitative findings

3.1 Community reactions to potential advertisements

Community reactions were obtained to five potential advertisements that had been considered by the Ad Standards Community Panel (the Community Panel). Respondents were shown each potential advertisement and asked to select whether it was clearly advertising, probably advertising, probably not advertising, clearly not advertising or whether they were unsure whether it was advertising or not.

The reactions to each potential advertisement in terms of whether or not it was considered to be clearly or potentially advertising are outlined in Table 9 below. Of the five potential advertisements the Mercedes Benz Instagram post received the lowest percentage for being seen as clearly advertising (25%), with the Lottoland Television commercial having the highest percentage (63%).

Table 8: Potential advertisements clearly seen as advertising – survey findings

Potential advertisement	Medium	Seen as clearly advertising	Seen as probably advertising	Community Panel determination on clearly distinguishable as advertising	Alignment
Eco Tan	Online – Instagram	55%	28%	Dismissed	✓
Mercedes Benz	Online – Instagram	25%	33%	Dismissed	?
Neds	Online	53%	18%	Dismissed	✓
Lottoland	Television	63%	17%	Dismissed	✓
Tribal Breweries*	Online – Instagram	31%	30%	Dismissed	?

* NOTE: Respondents aged 13 to 17 years were not asked to view or comment on this image as it contains alcohol and partial nudity.

Q7, Q10, Q13, Q16 and Q19. Which of the following best applies to the Instagram post / content of the image displayed / content of the video displayed above? (Single response)

(Base=All respondents, 2018 Clearly Distinguishable Advertising Study between n=961 and n=1,027)

✓ = Community aligned with the Community Panel

✗ = Community not aligned with the Community Panel

? = Mixed community reaction.

Each potential advertisement are outlined in Table 10 below. Of the five potential advertisements the Eco Tan Instagram post received the overall highest percentage for being seen as advertising as 83% (probably and clearly combined). This was closely followed by the Lottoland Television commercial at 80%. The Neds online article was considered to be advertising by 70% of respondents, while the remaining two Instagram posts came in at positions four (Tribal Breweries – 61%) and five (Mercedes Benz – 8%).

Respondents were also asked to explain why they answered the way they did. Four of the potential advertisements (Eco Tan, Mercedes Benz, Neds and Tribal Breweries) were also tested during the qualitative research, the findings of which were used to assist with creating the code frames for the quantitative research.

When looking at the reasons why there were a couple that appeared multiple times, these were:

- *'The person in the post looks like she is modelling – just like in advertising'*, and
- *'The imagery/photography/videography looks staged'.*

Table 9: Potential advertisements seen as advertising and reasons why – survey findings

Potential advertisement	Medium	Seen as advertising (probably /clearly)	Top 3 reasons why	%
Eco Tan	Online – Instagram	83%	The product is central to the post – just like in advertising	56%
			The person in the post looks like she is modelling – just like in advertising	55%
			The imagery/photography looks staged	53%
Mercedes Benz	Online – Instagram	58%	The imagery/photography looks staged	57%
			The post contains tags and/or hashtags of the brand or product	47%
			The people in the post look like they are modelling – just like in advertising	42%
Neds	Online	71%	The product/service is central to the layout – just like in advertising	48%
			Advertising is to be expected in this format on this channel (i.e. Pickle)	44%
			The product/service is central to the article	33%
Lottoland	Television	80%	The videography looks staged	53%
			The language used sounds like advertising	49%
			The product/service is central to the video	47%
Tribal Breweries*	Online – Instagram	61%	The imagery/photography looks staged	58%
			The people in the post looks like they are modelling – just like in advertising	54%
			The post contains tags and/or hashtags of the brand of product	47%

* NOTE: Respondents aged 13 to 17 years were not asked to view or comment on this image as it contains alcohol and partial nudity.

Q7, Q10, Q13, Q16 and Q19. Which of the following best applies to the Instagram post / content of the image displayed / content of the video displayed above? (Single response)

(Base=All respondents, 2018 Clearly Distinguishable Advertising Study between n=961 and n=1,027)

Q8, Q11, Q14, Q17 and Q20. Which of the following are reasons why you think this is advertising? (Multiple response)

(Base=Respondents who selected that it is probably or is clearly advertising, 2018 Clearly Distinguishable Advertising Study between n=585 and n=849)

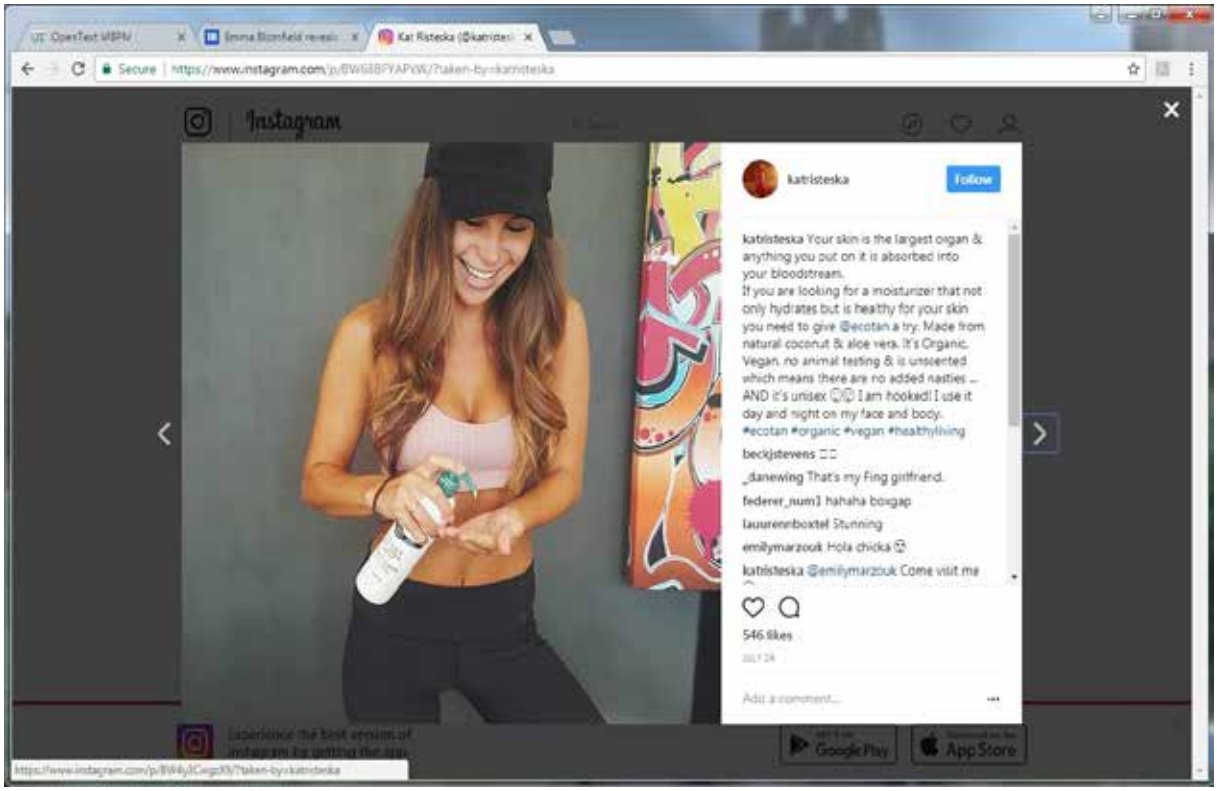
3.2 Reactions to potential advertisements

In this section the results from the individual potential advertisements are broken down and discussed. The results display perceptions of whether each is seen as advertising or not, as well as reasons for selecting their response.

Eco Tan (Online – Instagram)

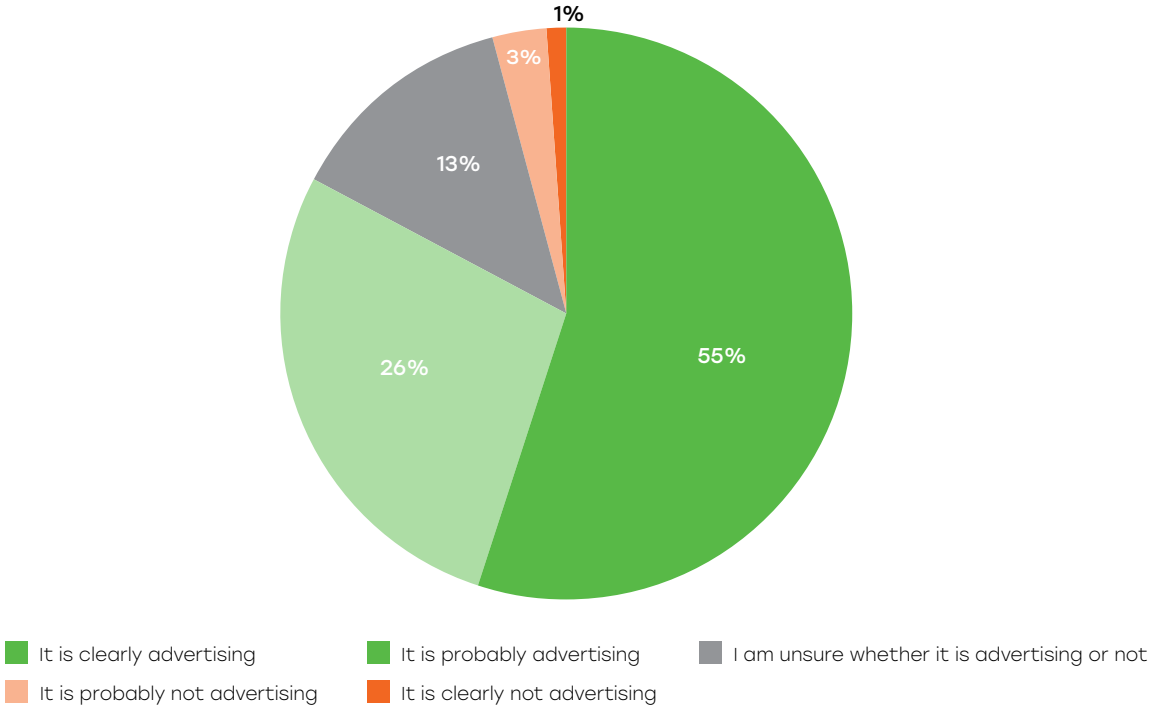
Actress Kat Risteska's Instagram post on Eco Tan's Coconut Body Milk (Figure 16 below) was considered by the Community Panel as meeting the criteria of advertising and marketing communications (case number 0360/17). The Panel considered the article to be clearly distinguishable as advertising material to the relevant audience and determined that the advertisement did not breach Section 2.7 of the Code.

Figure 16: Eco Tan (Online – Instagram)



The majority (83%) of respondents indicated the Eco Tan image from Instagram was either probably (28%) or clearly (55%) advertising. A further 13% were unsure whether the image was advertising or not, with 4% suggested it was not advertising (3% probably not and 1% clearly not).

Figure 17: Eco Tan – Perceptions of whether it is advertising or not



Q7. The image you are being shown appeared on Instagram for all followers of "katristeska", an actress. Which of the following best applies to the Instagram post above? (Single response)

(Base=All respondents, 2018 Clearly Distinguishable Advertising Study n=1,027)

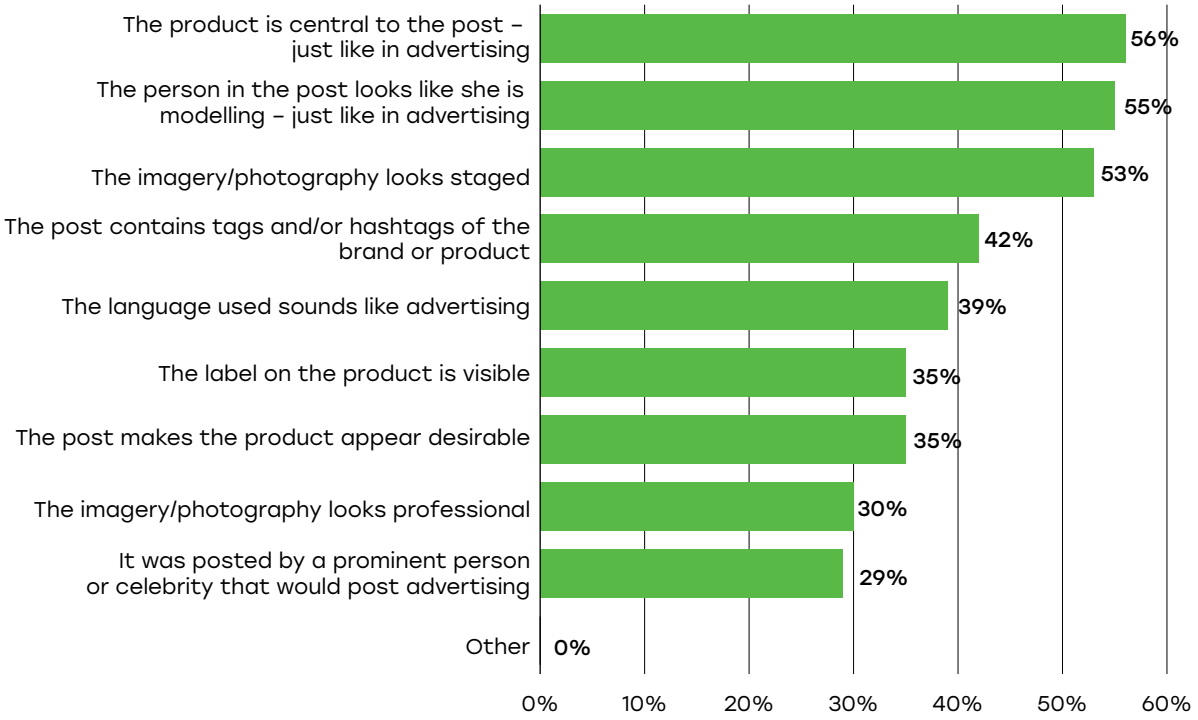
Responses were similar across all demographics, with the only significant difference being:

Respondents that typically spend less than an hour on the internet each day were more likely to be unsure as to whether the image was advertising or not (27% compared to 13% for the total).

The 83% of respondents that suggested the Eco Tan image was either probably or clearly advertising were asked why they felt this way, with the top responses being:

- *'The product is central to the post – just like in advertising'* (56%)
- *'The person in the post looks like she is modelling – just like in advertising'* (55%), and
- *'The imagery/photography looks staged'* (53%).

Figure 18: Eco Tan – Reasons for why it is seen to be advertising



Q8. Which of the following are reasons why you think this is advertising? (Multiple response)

(Base=Respondents who selected that it is probably or is clearly advertising, 2018 Clearly Distinguishable Advertising Study n=849)

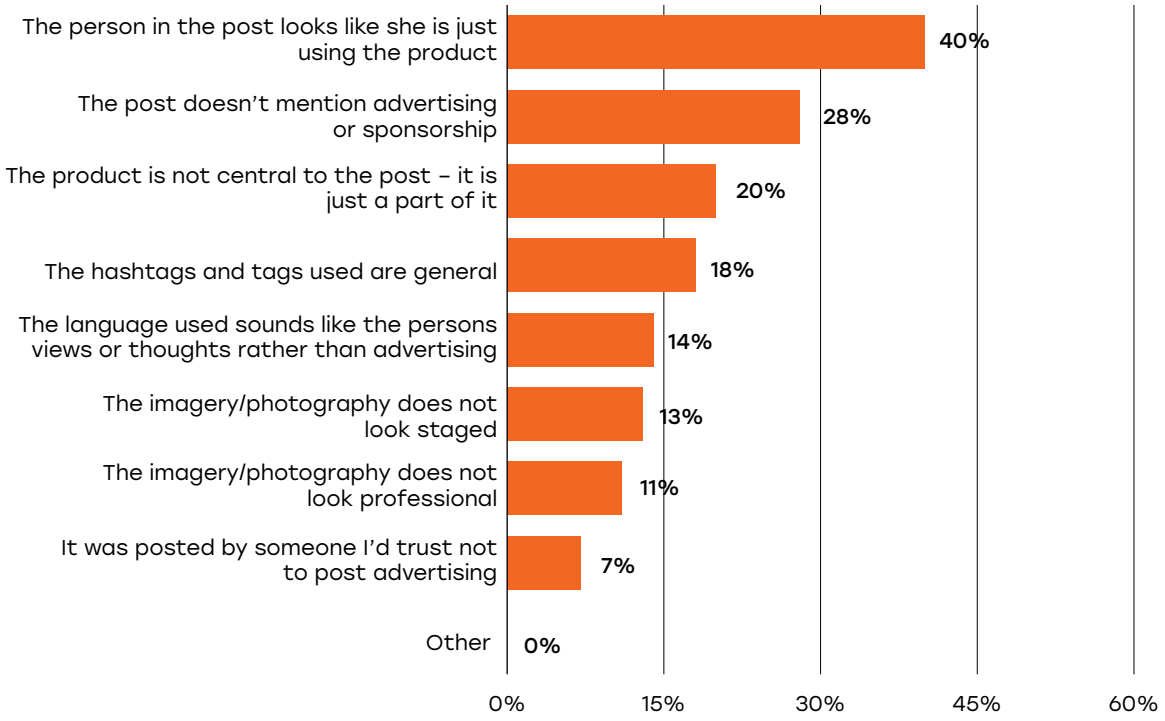
The following significant differences were observed:

- **Age (young)** – Those aged 18-24 years were more likely to think the imagery/photography looks staged (68% compared to 53% for the total), the post makes the product appear desirable (53% compared to 35% for the total – note this was also significantly high for 25-29 years with 53% also), and it was posted by a prominent person or celebrity that would post advertising (47% compared to 29% for the total).
- **Age (middle aged)** – Those aged 40-49 were less likely to think the imagery/photography looks staged (34% compared to 53% for the total), and that the label on the product is visible (24% compared to 35% for the total); 50-59 years were less likely to think the person in the post looks like she is modelling (41% compared to 55% for the total).
- **Internet usage** – Those who use the internet for 5 or more hours a day were more likely to answer that the person in the post looks like she is modelling (67% compared to 55% for the total), and that the imagery / photography looks staged (63% compared to 53% for the total). Those who use less than 1 hour a day were less likely to answer that the imagery / photography looks professional (11% compared to 30% for the total), and that it was posted by a prominent person or celebrity that would post advertising (8% compared to 29% for the total).
- **Education** – Those with a tertiary education were more likely to answer that the imagery / photography looks staged (63% compared to 53% for the total), compared to high school level educated who were less likely (43%).
- **Children** – Those without children were more likely to answer that the imagery / photography looks staged (65% compared to 53% for the total), the post contains tags and/or hashtags of the brand or product (49% compared to 42% for the total), the label on the product is visible (43% compared to 35% for the total), the post makes the product appear desirable (43% compared to 35% for the total), and it was posted by a prominent person or celebrity that would post advertising (36% compared to 29% for the total).

- **Household income** – Those earning $150,001 or more were more likely to answer that the imagery / photography looks staged (67% compared to 53% for the total) or professional (41% compared to 30% for the total). Those earning under $50,000 were less likely to answer that the imagery / photography looks staged (37% compared to 53% for the total), and that the post makes the product appear desirable (23% compared to 35% for the total).

Just 4% of all respondents felt that the Eco Tan image was either probably not or clearly not advertising. When asked why they felt this was the case, the top reason was that *'the person in the post looks like she is just using the product'* (40%). The next highest response, selected by just over a quarter (28%) of these respondents was that *'the post doesn't mention advertising or sponsorship'*.

Figure 19: Eco Tan – Reasons for why it isn't seen to be advertising



Q9. Which of the following are reasons why you think this isn't advertising? (Multiple response)

(Base=Respondents who selected that it is probably not or is clearly not advertising, 2018 Clearly Distinguishable Advertising Study n=42)

There were no significant differences by gender, age, location (state and metro vs. regional), daily social media usage, daily internet usage, languages spoken other than English, education, whether they have children, income and whether they have made a formal complaint before.

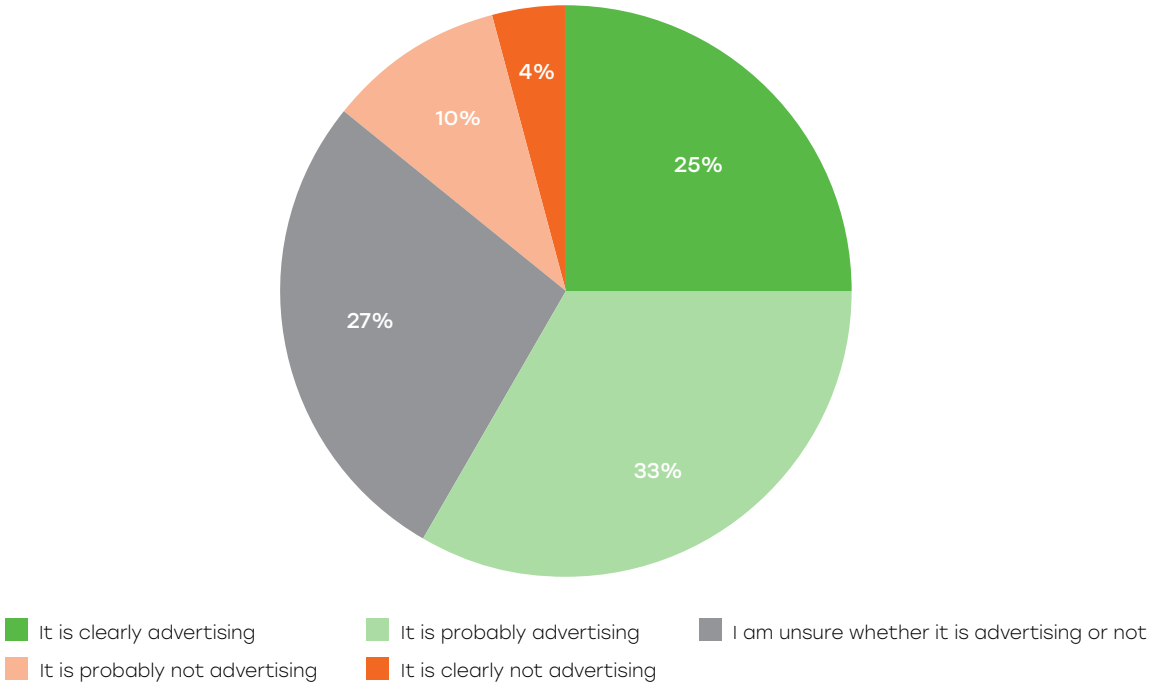
Mercedes Benz (Online – Instagram)

Fashion designer Pip Edwards' Instagram post showing a Mercedes Benz (Figure 20 over) was considered by the Community Panel as meeting the criteria of advertising and marketing communications (case number 0193/18). The Panel considered the article to be clearly distinguishable as advertising material to the relevant audience and determined that the advertisement did not breach Section 2.7 of the Code.

Figure 20: Mercedes Benz (Online – Instagram)

One quarter (25%) of respondents felt that the Mercedes Benz Instagram image was clearly advertising, with a further third (33%) noting that it is probably advertising (58% combined). Just over a quarter (27%) were unsure and the remaining 14% believed that it was either probably not (10%) or clearly not advertising (4%).

Figure 21: Mercedes Benz – Perceptions of whether it is advertising or not

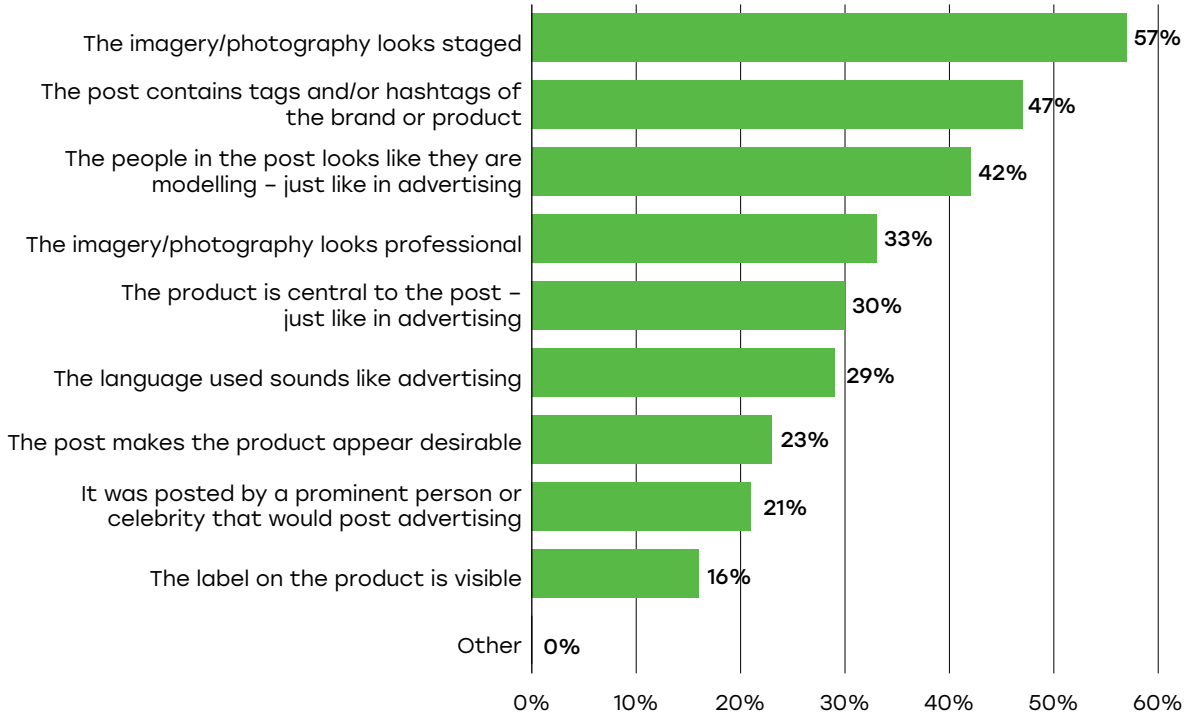


Q10. The image you are now being shown appeared on Instagram for all followers of "pip_edwards1", an Australian fashion designer. Which of the following best applies to the Instagram post above? (Single response)

(Base=All respondents, 2018 Clearly Distinguishable Advertising Study n=1,027)

There were no significant differences by gender, age, location (state and metro vs. regional), daily social media usage, daily internet usage, languages spoken other than English, education, whether they have children, income and whether they have made a formal complaint before. The 58% of respondents that believed the Mercedes Benz image was either probably or clearly advertising were asked a follow up question as to why this was the case. The top response selected by 57% of these respondents was that *'the imagery/photography looks staged'* (57%). Just under half (47%) of these respondents also selected that *'the post contains tags and/or hashtags of the brand or product'.*

Figure 22: Mercedes Benz – Reasons for why it is seen to be advertising



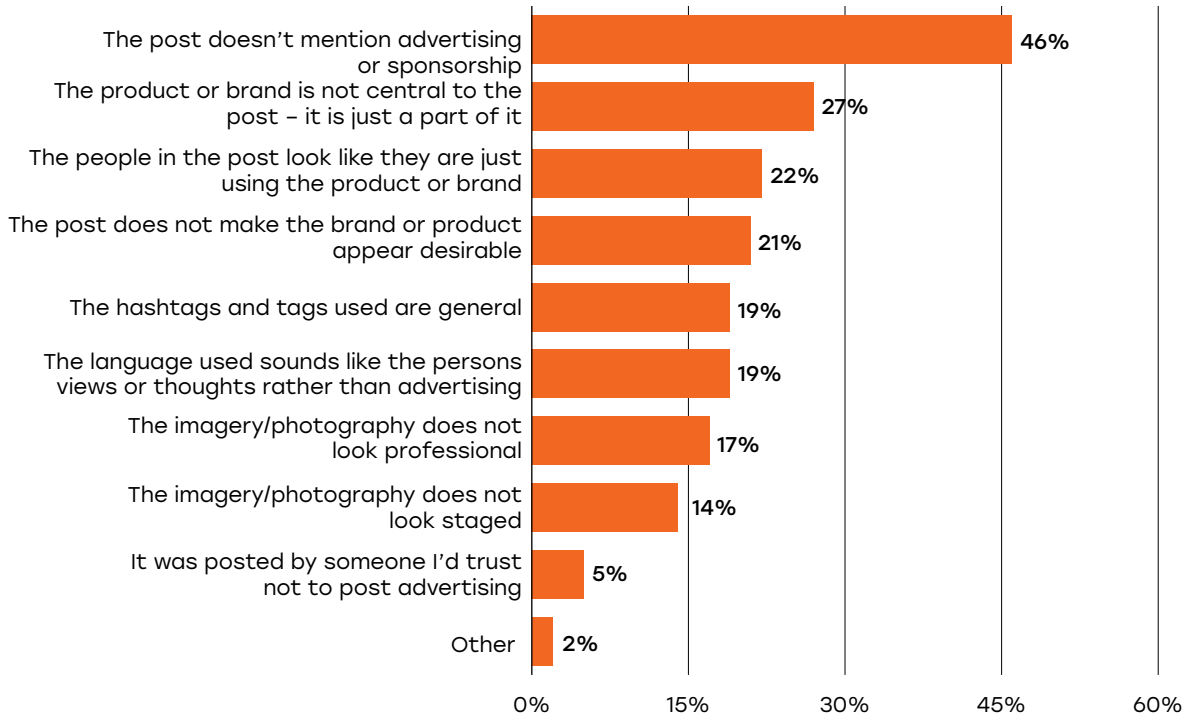
Q11. Which of the following are reasons why you think this is advertising? (Multiple response)

(Base=Respondents who selected that it is probably or is clearly advertising, 2018 Clearly Distinguishable Advertising Study n=602)

Across demographics, those without children were significantly more likely to view it as advertising given the post contains tags and/or hashtags of the brand or product' (59% compared to 47% for the total), and that it was posted by a prominent person or celebrity that would post advertising (31% compared to 21% for the total). Conversely those with children were significantly less likely to view it as advertising across these two indicators (41% and 16% respectively).

The 14% of respondents that felt that the Mercedes Benz image was either probably not or clearly not advertising were also asked why this was the case, with the top response being that *'the post doesn't mention advertising or sponsorship'* (46%).

Figure 23: Mercedes Benz – Reasons for why it isn't seen to be advertising



Q12. Which of the following are reasons why you think this isn't advertising? (Multiple response)

(Base=Respondents who selected that it is probably not or is clearly not advertising, 2018 Clearly Distinguishable Advertising Study n=145)

There were no significant differences by gender, age, location (state and metro vs. regional), daily social media usage, daily internet usage, languages spoken other than English, education, whether they have children, income and whether they have made a formal complaint before.

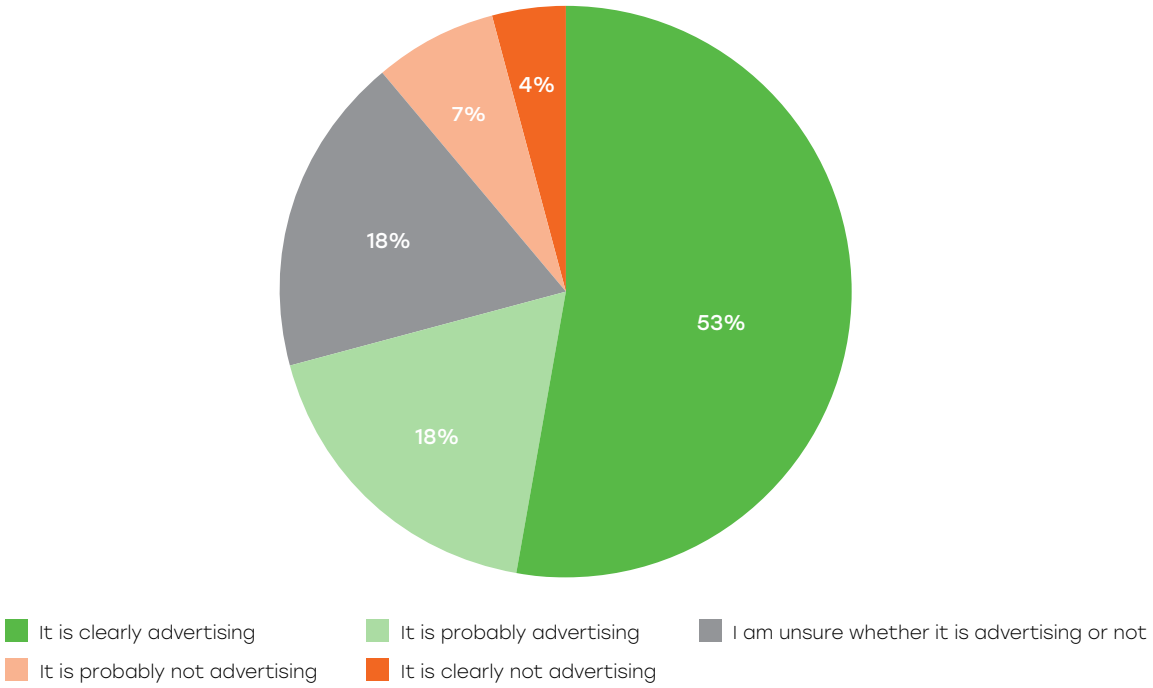
Neds (Online)

Neds' sports news article published by Ninemsn on their Pickle website (Figure 24 below) was considered by the Community Panel as meeting the criteria of advertising and marketing communications (case number 0533/17). The Panel considered the article to be clearly distinguishable as advertising material to the relevant audience and determined that the advertisement did not breach Section 2.7 of the Code.

Figure 24: Neds Online

The majority (71%) of respondents felt that the Neds image was advertising (18% felt that is was probably advertising and a further 53% felt that it was clearly advertising), while 18% were unsure and 11% noted that it was not advertising (7% said probably not and 4% said clearly not).

Figure 25: Neds – Perceptions of whether it is advertising or not



Q13. The image you are now being shown appeared on Pickle – a Ninemsn website. Which of the following best applies to the content of the image displayed? (Single response)

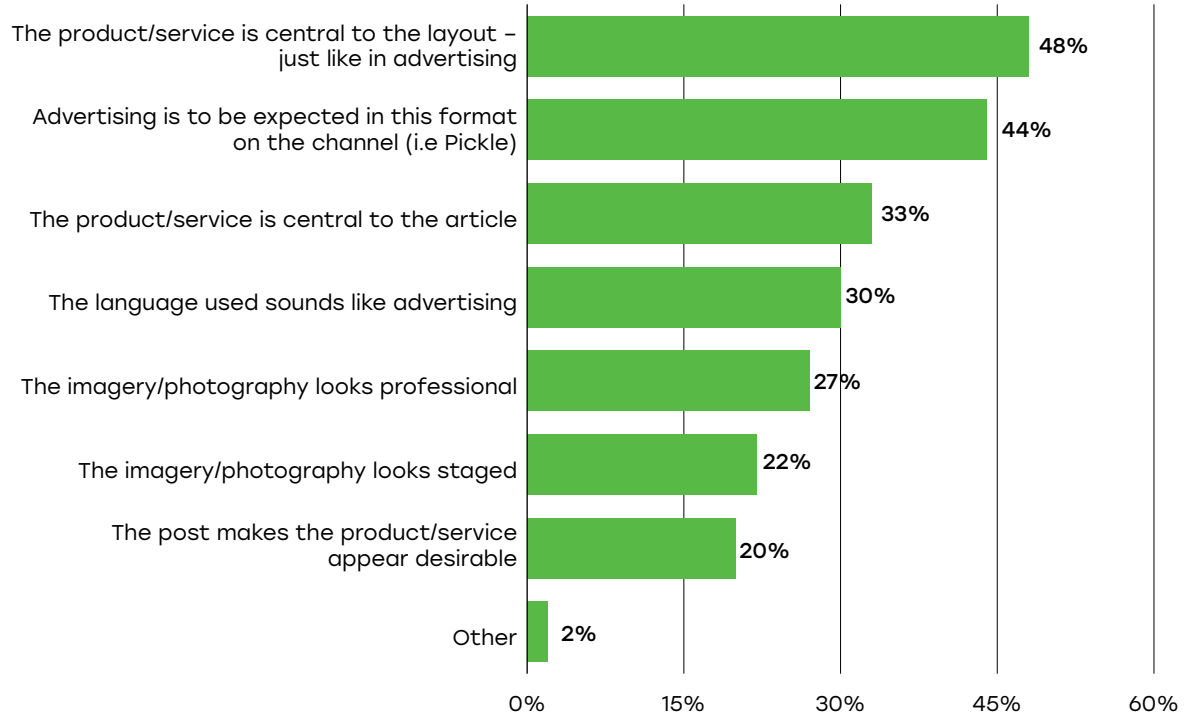
(Base=All respondents, 2018 Clearly Distinguishable Advertising Study n=1,027)

The following significant differences were observed:

- **Age** – Younger respondents aged between 18-24 years and 25-29 years were more likely to think it is clearly advertising (68% and 70% respectively, compared to 53% for the total). Conversely, those aged 70 and older were significantly less likely to view this as clearly advertising (39% compared to 53% for the total).
- **Children** – Those without children were significantly more likely to think it is clearly advertising (62% compared to 53% for the total), while those with children were significantly less likely (49% compared to 53% for the total).

The 71% of respondents that suggested the Neds image was advertising (either probably or clearly) were asked to select the reasons as to why they felt this way. The top response selected by just under half (48%) of these respondents was that *'the product/service is central to the layout – just like in advertising'*. The next highest response was that *'advertising is to be expected in this format on this channel (i.e. Pickle)'* at 44%.

Figure 26: Neds – Reasons for why it is seen to be advertising



Q14. Which of the following are reasons why you think this is advertising? (Multiple response)

(Base=Respondents who selected that it is probably or is clearly advertising, 2018 Clearly Distinguishable Advertising Study n=727)

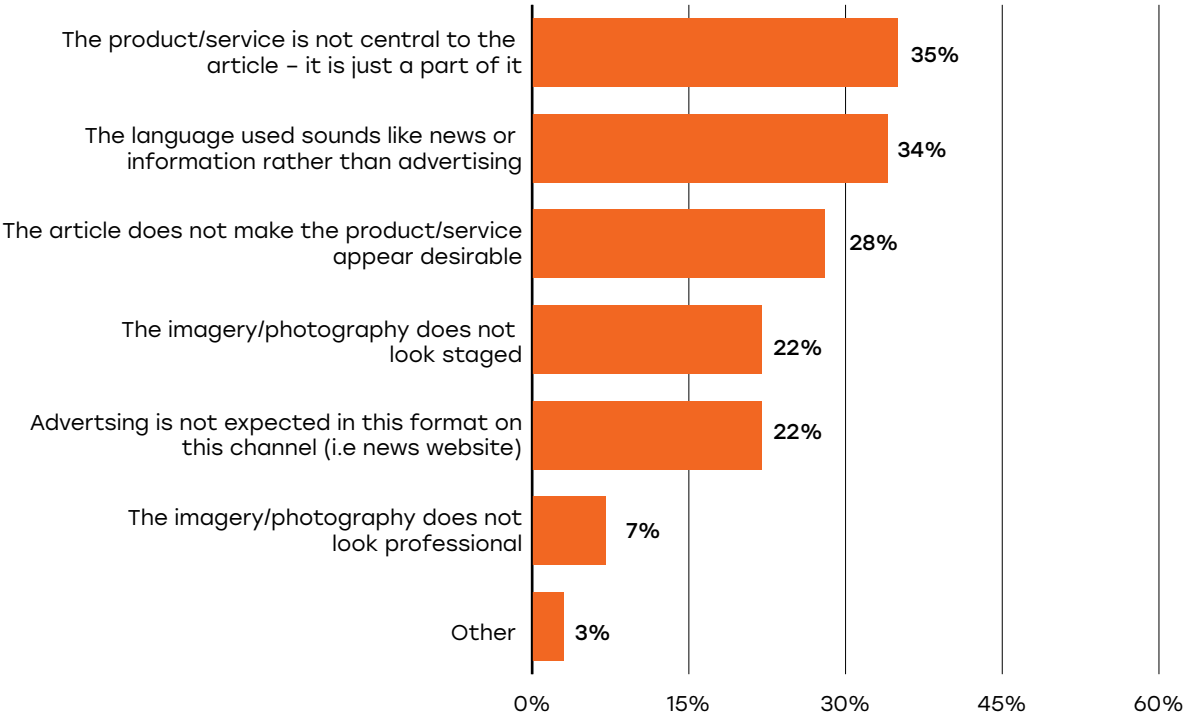
Responses were similar across all demographics, with the only significant difference being:

Respondents aged 18 to 24 years were more likely to have selected *'advertising is to be expected in this format on this channel (i.e. Pickle)* (64% compared to 44% for the total).

The 11% of respondents that felt the Neds image was not advertising (7% probably not and 4% clearly not) suggested that the main two reasons were that:

- *'The product/service is not central to the article – it is just a part of it'* (35%), and
- *'The language used sounds like news or information rather than advertising'* (34%).

Figure 27: Neds – Reasons for why it isn't seen to be advertising



Q15. Which of the following are reasons why you think this isn't advertising? (Multiple response)

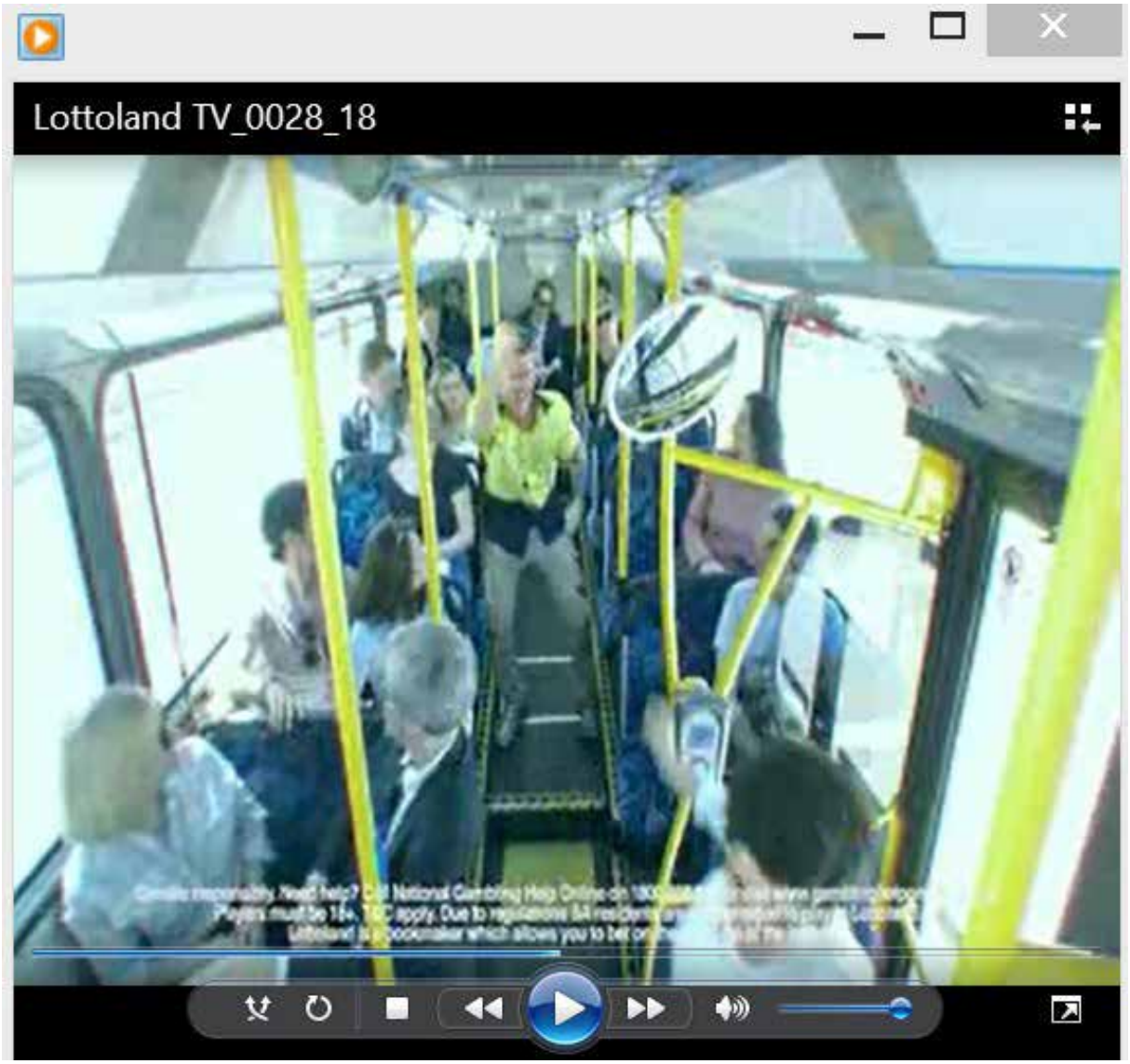
(Base=Respondents who selected that it is probably not or is clearly not advertising, 2018 Clearly Distinguishable Advertising Study n=119)

There were no significant differences by gender, age, location (state and metro vs. regional), daily social media usage, daily internet usage, languages spoken other than English, education, whether they have children, income and whether they have made a formal complaint before.

Lottoland (Television)

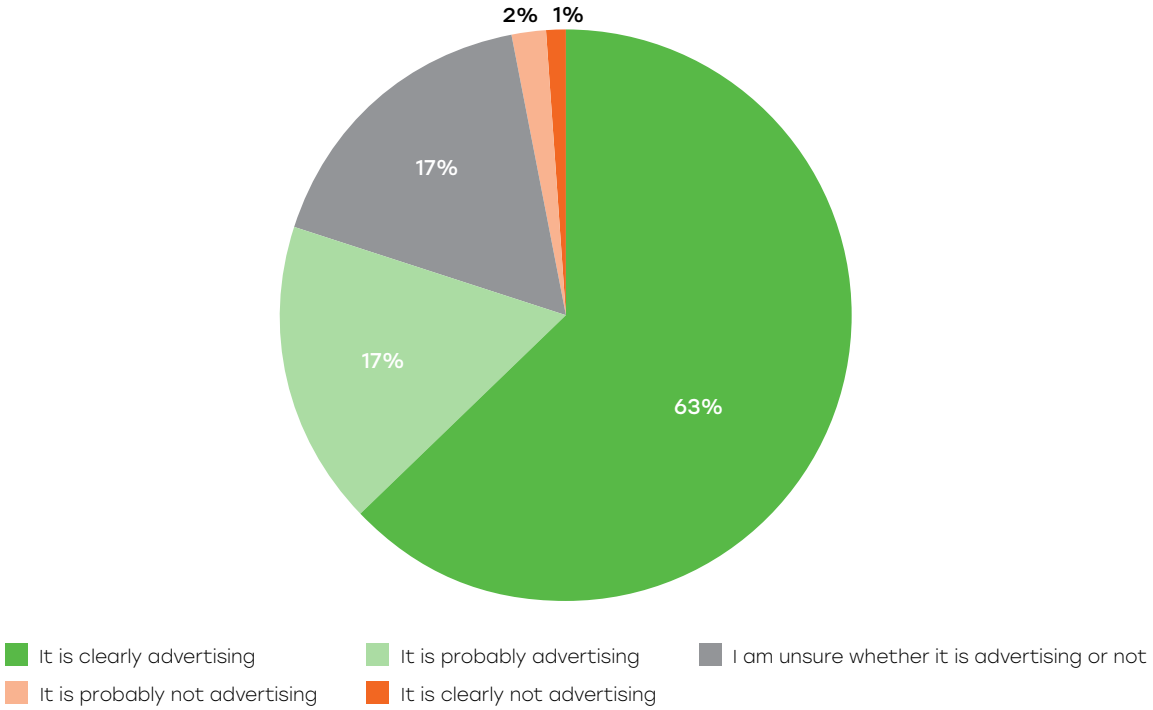
Lottolands television commercial (Figure 28 below) was considered by the Community Panel as meeting the criteria of advertising and marketing communications (case number 0028/18). The Panel considered the article to be clearly distinguishable as advertising material to the relevant audience and determined that the advertisement did not breach Section 2.7 of the Code.

Figure 28: Lottoland (Television)



Eight out of ten respondents (80%) felt that the Lottoland video was either probably (17%) or clearly (63%) advertising. This was followed by 17% that were unsure and just 3% that felt it was not advertising (2% probably not and 1% clearly not).

Figure 29: Lottoland – Perceptions of whether it is advertising or not



Q16. The video you are now being shown appeared on television. Which of the following best applies to the content of the video displayed? (Single response)

(Base=All respondents, 2018 Clearly Distinguishable Advertising Study n=1,023)

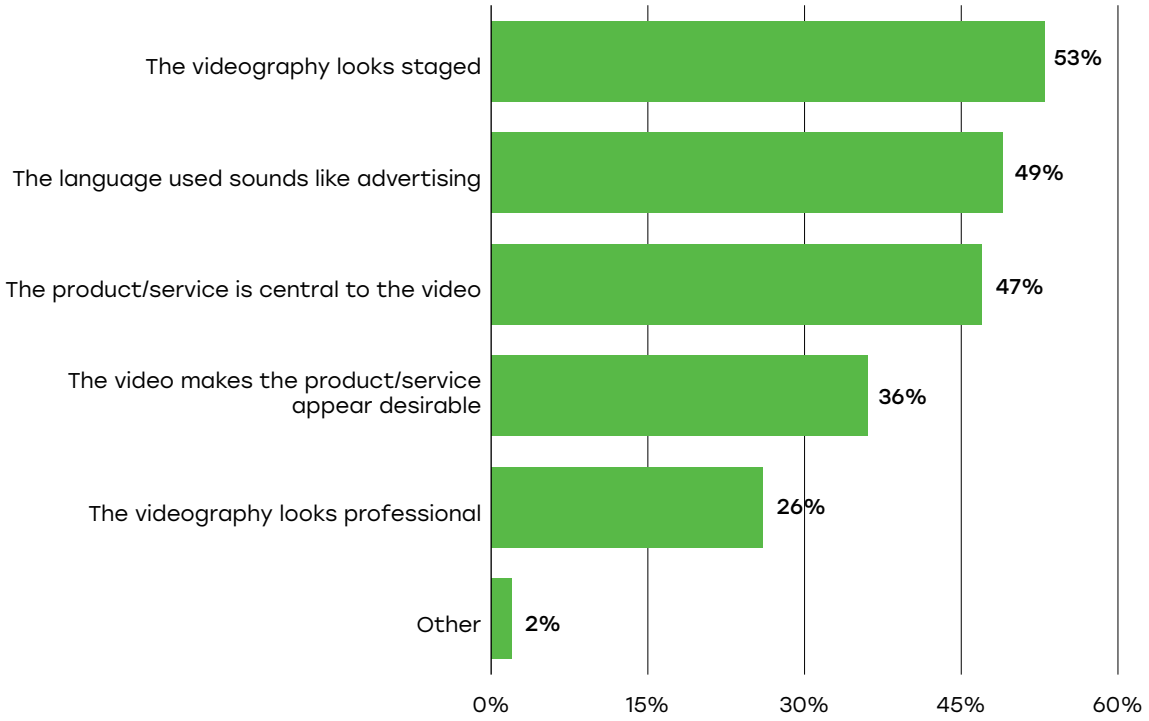
Note: n=4 respondents were removed from this question as they were unable to view the video

The following significant differences were observed:

- **Age** – Those aged 40-49 years or 70 years and older were more likely to think it is clearly advertising (74% and 77% respectively, compared to 63% for the total), while those aged 18-24 years were significantly less likely (46% compared to 63% for the total).
- **Internet usage** – Those who use the internet for less than 1 hour or for 1 to 2 hours were more likely to think it is clearly advertising (71% and 70% respectively, compared to 63% for the total), while those who use the internet for 2 to 3 hours or for 3 to 4 hours were less likely (53% and 49% respectively, compared to 63% for the total).
- **Children** –Those with children were more likely to think it is clearly advertising (69% compared to 63% for the total), while those without children were significantly less likely (55% compared to 63% for the total).

The 80% of respondents that suggested the Lottoland video was advertising (17% probably and 63% clearly) were asked why they felt this way. Just over half (53%) of these respondents noted that it was because *'the videography looks staged'*, while just under half (49%) noted that it was because *'the language used sounds like advertising'*. The product/service being central to the video was also selected by 47% of respondents.

Figure 30: Lottoland – Reasons for why it is seen to be advertising



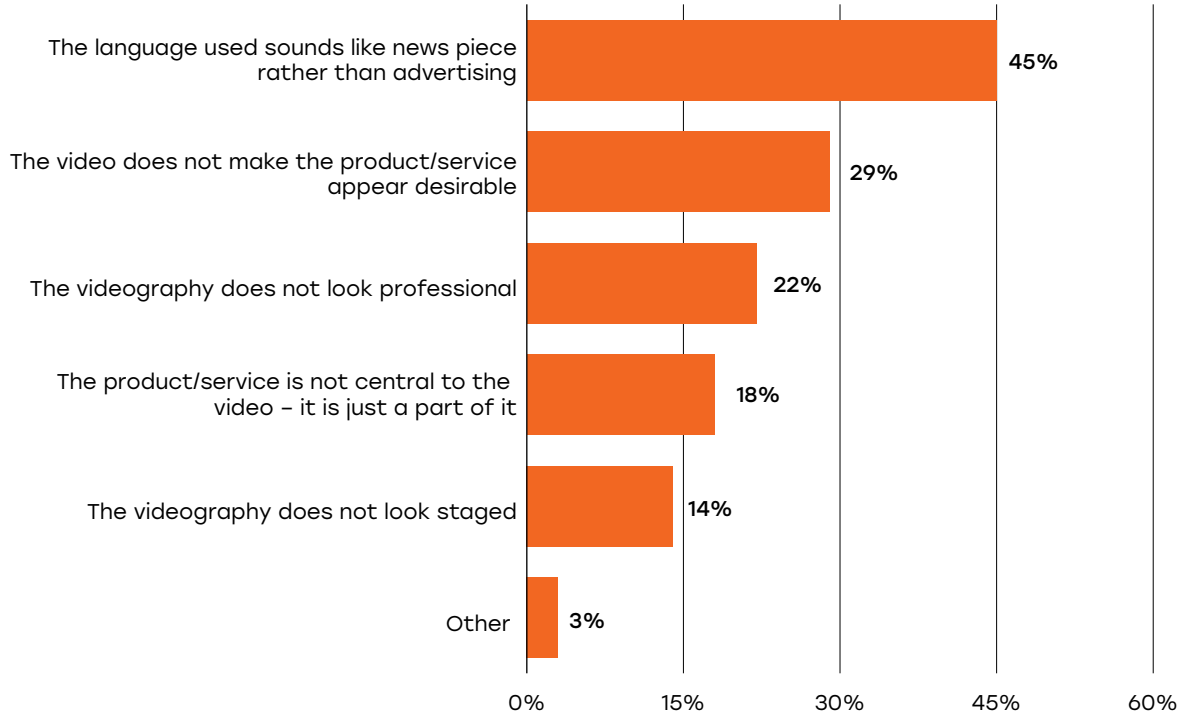
Q17. Which of the following are reasons why you think this is advertising? (Multiple response)

(Base=Respondents who selected that it is probably or is clearly advertising, 2018 Clearly Distinguishable Advertising Study n=822)

There were no significant differences by gender, age, location (state and metro vs. regional), daily social media usage, daily internet usage, languages spoken other than English, education, whether they have children, income and whether they have made a formal complaint before.

Just n=28 respondents felt that the Lottoland video was either probably not (n=15) or clearly not advertising (n=13). These respondents were asked the follow up question about why this was the case with the top response being that *'the language used sounds like a news piece rather than advertising'* (45%).

Figure 31: Lottoland – Reasons for why it is not seen to be advertising



Q18. Which of the following are reasons why you think this isn't advertising? (Multiple response)

(Base=Respondents who selected that it is probably not or is clearly not advertising, 2018 Clearly Distinguishable Advertising Study n=28)

Note: Sample sizes less than n=30 should be interpreted with caution.

There were no significant differences by gender, age, location (state and metro vs. regional), daily social media usage, daily internet usage, languages spoken other than English, education, whether they have children, income and whether they have made a formal complaint before.

Tribal Breweries (Online – Instagram)

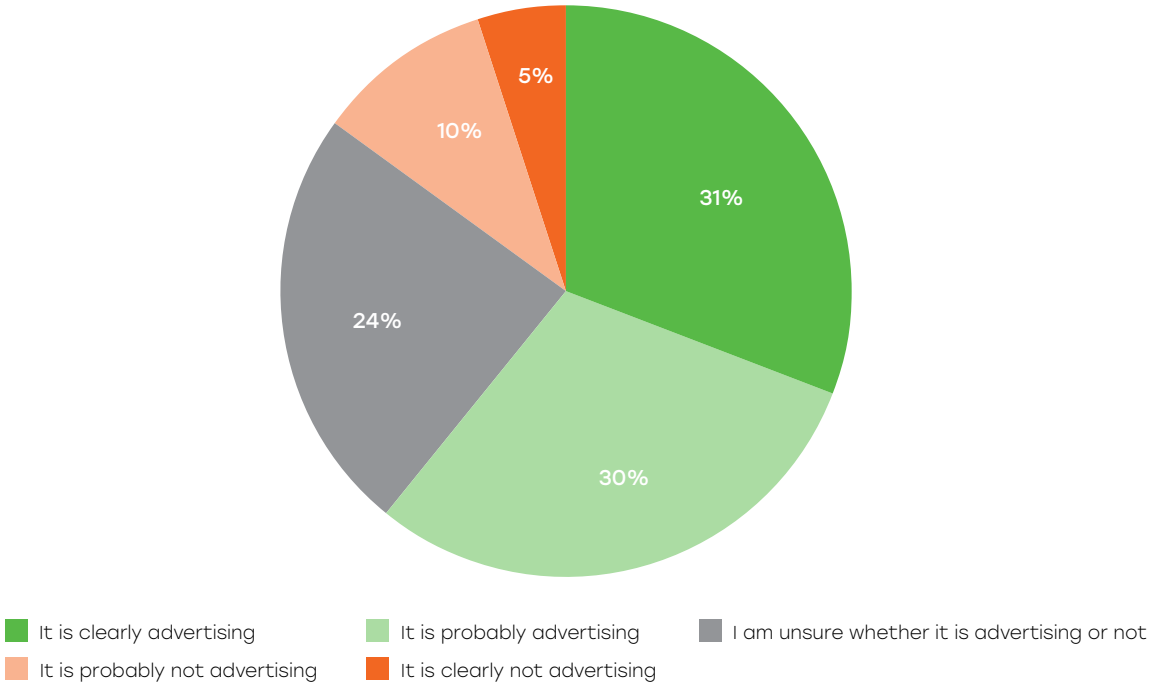
Tribal Brewing's wilde_beer Instagram post (Figure 32 below) was considered by the Community Panel as meeting the criteria of advertising and marketing communications (case number 0422/18). The Panel considered that this Instagram advertisement is clearly distinguishable as advertising material to the relevant audience and determined that the advertisement did not breach Section 2.7 of the Code.

Figure 32: Tribal Breweries (Online – Instagram)

NOTE: Respondents aged 13 to 17 years were not asked to view or comment on this image as it contains alcohol and partial nudity.

Six out of ten respondents (61%) aged 18 years and over noted that the Tribal Breweries image from Instagram was advertising (30% felt that it was probably advertising, while 31% felt that it was clearly advertising). Approximately one quarter (24%) of respondents were unsure and 15% felt that it was not advertising (made up of 10% that felt it was probably not advertising and 5% that felt it was clearly not advertising).

Figure 33: Tribal Breweries – Perceptions of whether it is advertising or not



Q19. The image you are now being shown appeared on Instagram for all followers of "wilde_beer". Which of the following best applies to the Instagram post above? (Single response)

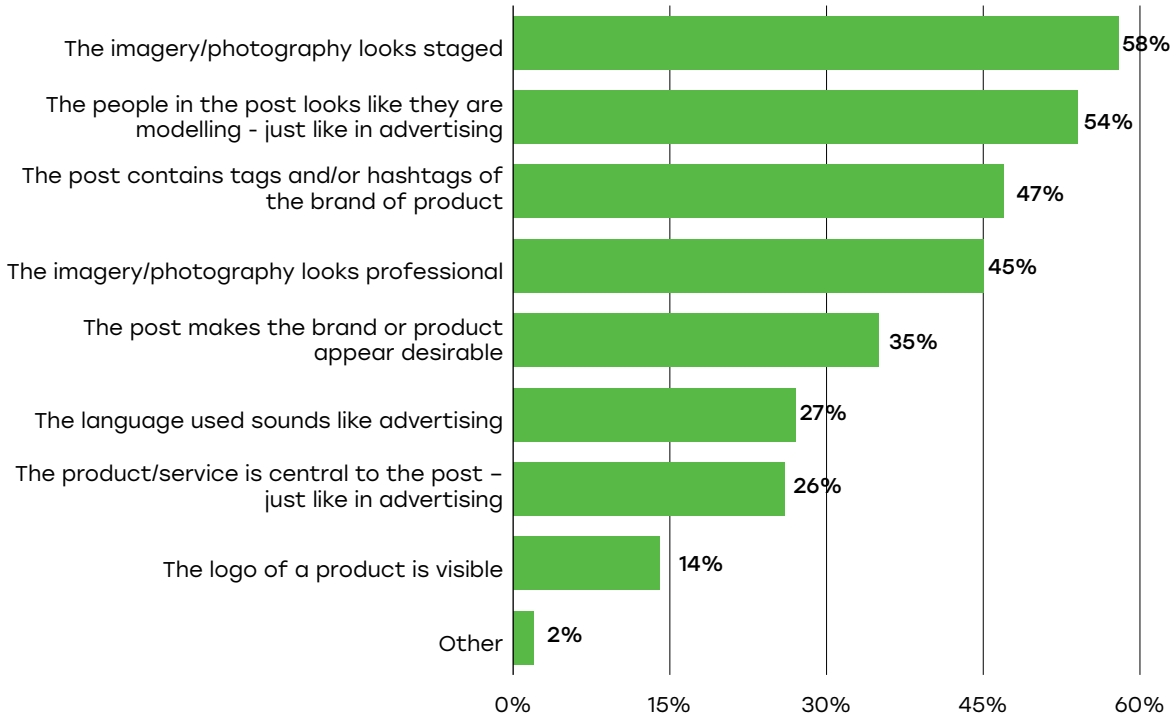
(Base=All respondents aged 18 years and over, 2018 Clearly Distinguishable Advertising Study n=961)

There were no significant differences by gender, age, location (state and metro vs. regional), daily social media usage, daily internet usage, languages spoken other than English, education, whether they have children, income and whether they have made a formal complaint before.

The respondents that felt the image was advertising (61%) felt that this was due to a variety of reasons, the top four of which were:

- *'The imagery/photography looks staged'* (58%);
- *'The people in the post looks like they are modelling – just like in advertising'* (54%);
- *'The post contains tags and/or hashtags of the brand of product'* (47%), and
- *'The imagery/photography looks professional'* (45%).

Figure 34: Tribal Breweries – Reasons for why it is seen to be advertising



Q20. Which of the following are reasons why you think this is advertising? (Multiple response)

(Base=Respondents who selected that it is probably or is clearly advertising, 2018 Clearly Distinguishable Advertising Study n=585)

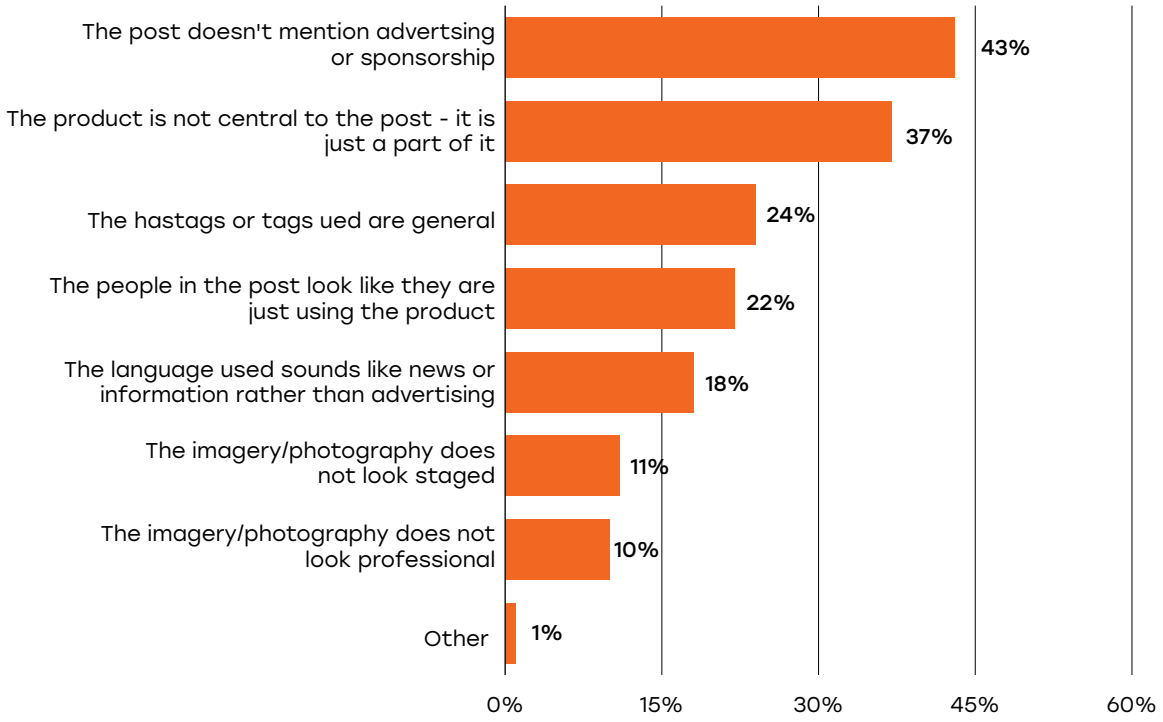
The following significant differences were observed:

- **Age (young)** – Those aged 18-24 years were significantly more likely to think it was advertising given the post contains tags and/or hashtags of the brand of product (72% compared to 47% for the total).
- **Age (older) –** Those aged 60-69 years were more likely to think it was advertising given the imagery / photography looks staged (76% compared to 58% for the total).

The 15% of respondents aged 18 and over that suggested the Tribal Breweries image was not advertising noted two main reasons:

- *'The post doesn't mention advertising or sponsorship'* (43%), and
- *'The product is not central to the post – it is just a part of it'* (37%).

Figure 35: Tribal Breweries – Reasons for why it isn't seen to be advertising



Q21. Which of the following are reasons why you think this isn't advertising? (Multiple response)

(Base=Respondents who selected that it is probably not or is clearly not advertising, 2018 Clearly Distinguishable Advertising Study n=146)

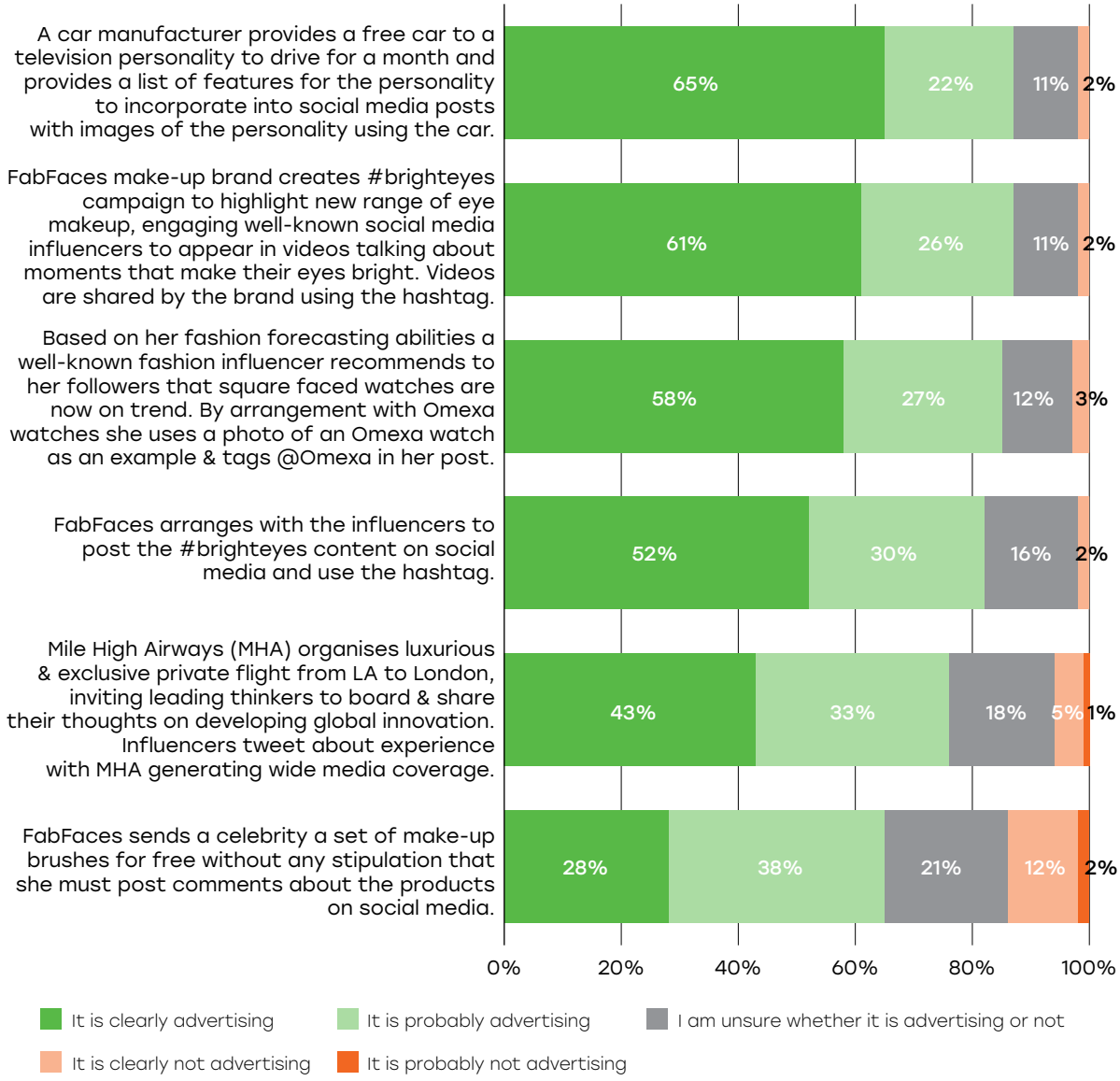
There were no significant differences by gender, age, location (state and metro vs. regional), daily social media usage, daily internet usage, languages spoken other than English, education, whether they have children, income and whether they have made a formal complaint before.

Classifying advertising

Respondents were presented with a number of hypothetical situations which may or may not be inferred as clearly distinguishable advertising.

Overall, most respondents held the view that these situations were either clearly advertising or probably advertising. However, there was some doubt about whether '*FabFaces sends a celebrity a set of make-up brushes for free without any stipulation that she must post comments about the products on social media*' was advertising, with 12% stating it is probably not advertising.

Figure 36: Classifying advertising



Q22. We are now going to show you a few examples of situations that might occur. Which of the following would you classify as advertising? (Single response)

(Base=All respondents, 2018 Clearly Distinguishable Advertising Study n=1,027)

The following significant differences were observed by demographics:

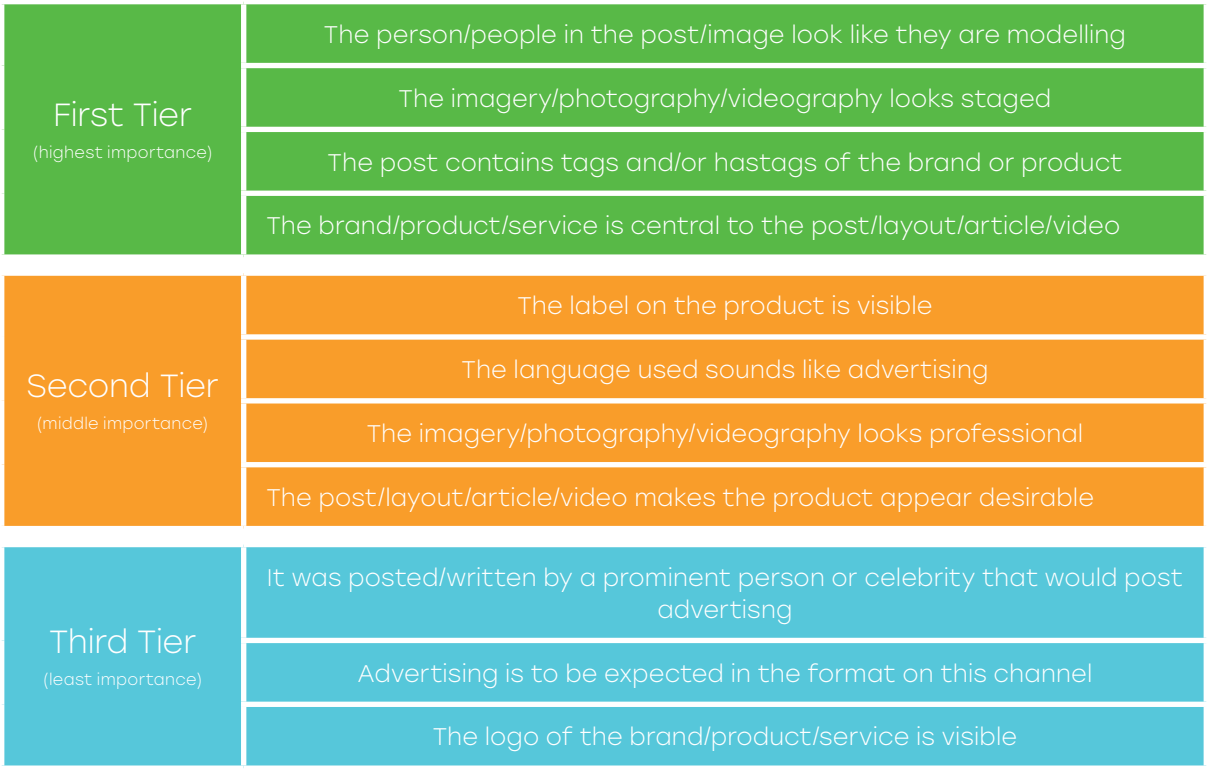
- Groups that were more likely to think '*Based on her fashion forecasting abilities…*' was clearly advertising included those aged 60-69 years, 70+ years, and those who have made a formal complaint about advertising (72%, 74% and 80% respectively, compared to 58% for the total). Conversely, those aged 30-39 years and 40-49 years (47% and 45% respectively, compared to 58% for the total) were less likely to think it was clearly advertising.
- Metro residents were more likely to be unsure if '*Based on her fashion forecasting abilities…*' it was advertising or not (14% compared to 12% for the total).
- Those who have made a formal complaint about advertising were more likely to think '*FabFaces arranges with the influencers to post…*' was clearly advertising (79% compared to 52% for the total).

3.3 Guidance for future determinations

A list of items that may be considered as a starting point for what to look for in future complaints related to Section 2.7 of the Code was developed using the information gathered during both the online discussion board and the online survey.

The items have been broken down into three tiers of importance. The first tier being those items that were of most importance to respondents when determining why they considered something to be advertising, followed by the second tier and lastly the third tier.

Figure 37: Guidance for future determinations – Overall

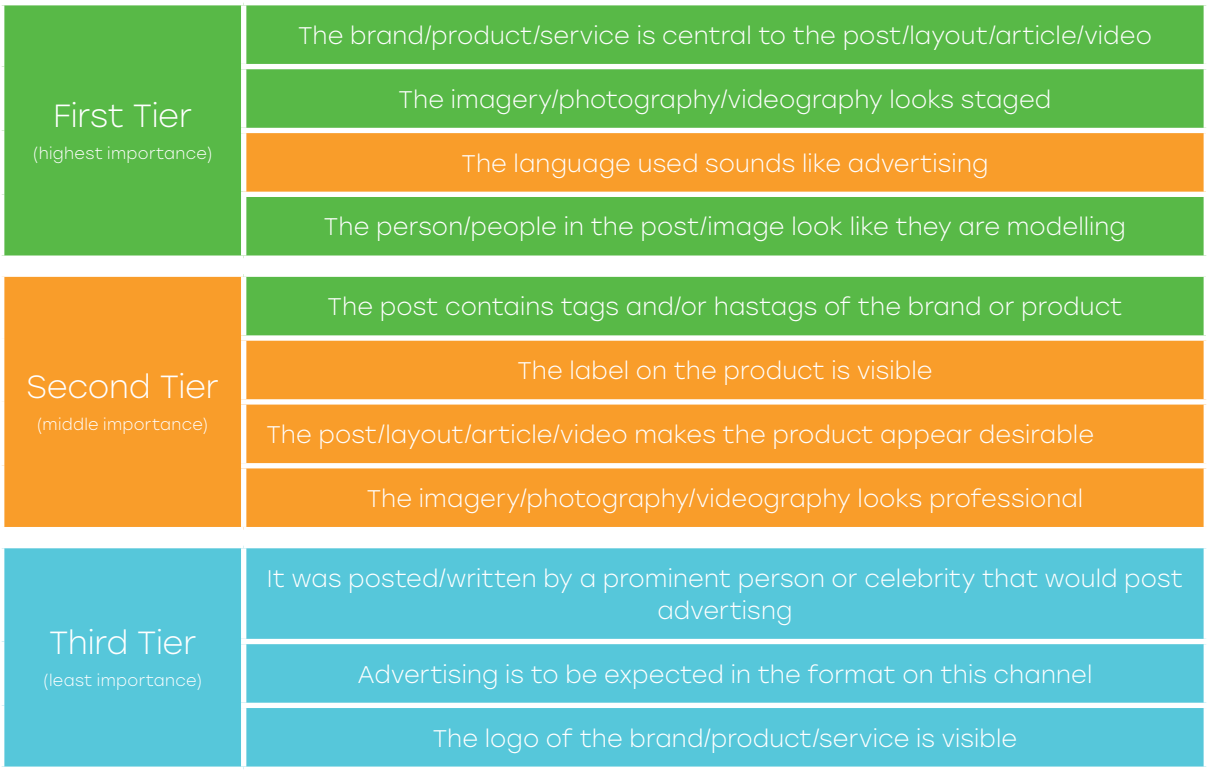


The order and importance of these items were very similar across gender, social media usage and internet usage, however there were a few differences by age. As such the guidance list (as shown above) has been replicated for each of the four age brackets (see the following pages).

Respondents aged 13-17 years

As shown in Figure 38 below, those aged 13-17 placed higher importance on *'The brand/product/service is central to the post/layout/article/video'* with this statement being of the highest importance for them. They also placed higher importance on *'The language used sounds like advertising'*.

Figure 38: Guidance for future determinations – 13-17 years

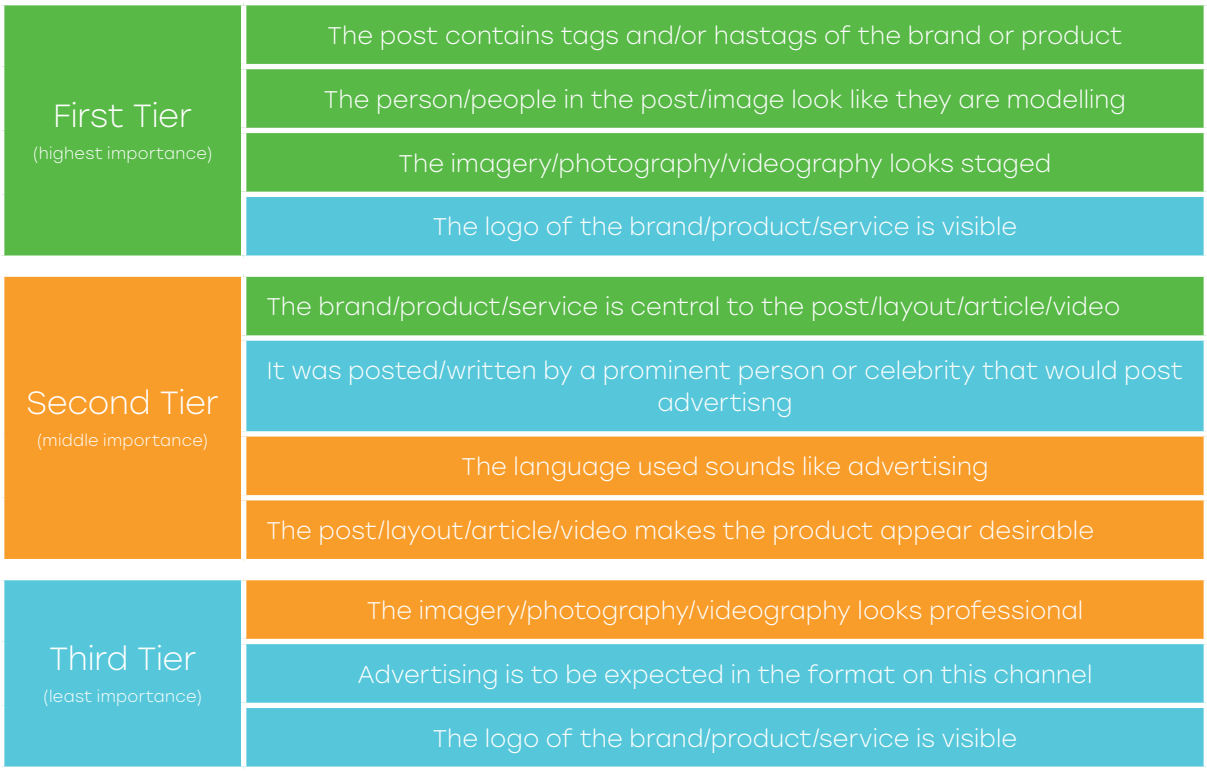


Note: The colours used per item are those from the overall order.

Respondents aged 18-29 years

Those aged 18-29 years placed the highest importance on *'The post contains tags and/or hashtags of the brand or product'*. They also felt that the visibility of the label was of greater importance than the overall results.

Figure 39: Guidance for future determinations – 18-29 years



Note: The colours used per item are those from the overall order.

Respondents aged 30-49 years

Those aged 30-49 years experienced results that were largely similar to those of the overall, however the order of the first tier for this age bracket did change somewhat. Respondents aged 30-49 years placed greatest importance on the item *'The imagery/photography/videography looks staged'*.

Figure 40: Guidance for future determinations – 30-49 years

First Tier (highest importance)	The imagery/photography/videography looks staged
	The post contains tags and/or hastags of the brand or product
	The person/people in the post/image look like they are modelling
	The brand/product/service is central to the post/layout/article/video
Second Tier (middle importance)	The language used sounds like advertising
	The label on the product is visible
	The imagery/photography/videography looks professional
	The post/layout/article/video makes the product appear desirable
Third Tier (least importance)	It was posted/written by a prominent person or celebrity that would post advertisng
	Advertising is to be expected in the format on this channel
	The logo of the brand/product/service is visible

Respondents aged 50+ years

Those aged 50 and over also experienced results that were largely similar to those of the overall, with very minor changes and no differences to the items within each tier.

Figure 41: Guidance for future determinations – 50+ years

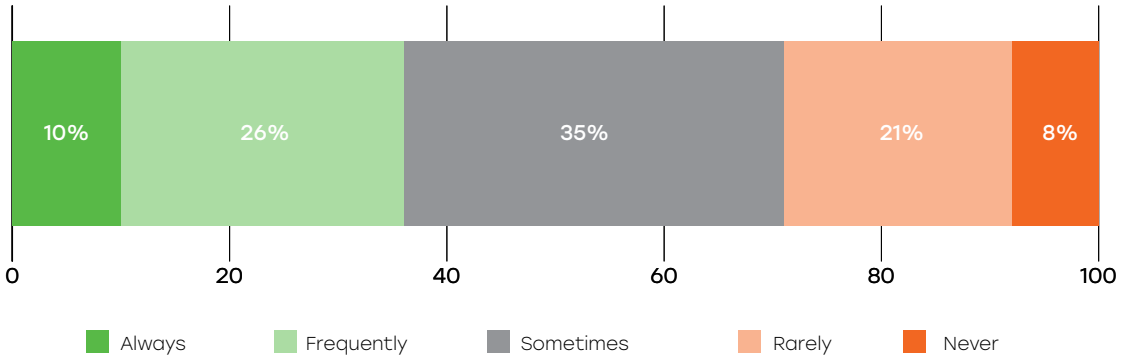
First Tier (highest importance)	The person/people in the post/image look like they are modelling
	The imagery/photography/videography looks staged
	The brand/product/service is central to the post/layout/article/video
	The post contains tags and/or hastags of the brand or product
Second Tier (middle importance)	The label on the product is visible
	The imagery/photography/videography looks professional
	The language used sounds like advertising
	The post/layout/article/video makes the product appear desirable
Third Tier (least importance)	Advertising is to be expected in the format on this channel
	It was posted/written by a prominent person or celebrity that would post advertisng
	The logo of the brand/product/service is visible

3.4 Concern of advertising/marketing communications that is not clearly distinguishable

Thinking about advertising online

Respondents were asked to think about how often they consider something to be an advertisement or not when browsing online content. The responses were generally mixed, with 36% either always or frequently considering this, and 28% either rarely or never considered this.

Figure 42: Thinking about advertising online



Q23. When looking at online content, how often do you think about whether something is an advertisement or not? (Single Response)

(Base=All respondents, 2018 Clearly Distinguishable Advertising Study n=1,027)

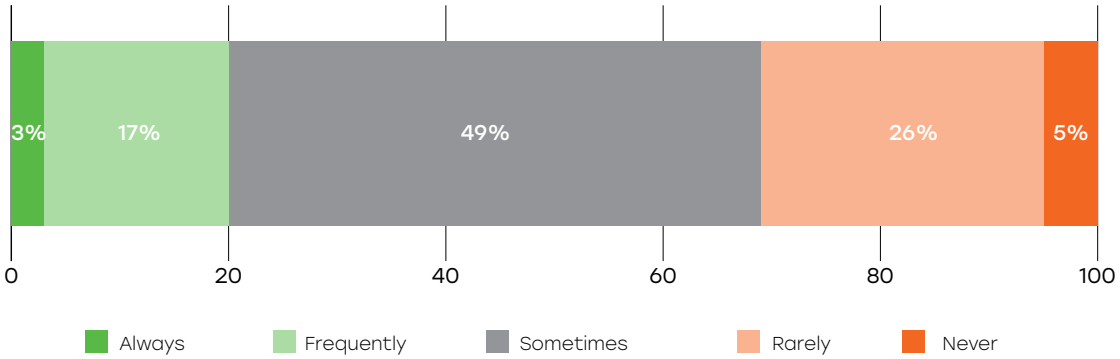
The following significant differences were observed:

- **Age –** Those aged 70 and over were more likely to think about whether content is advertising or not (always or frequently) (48% compared to 36% for the total). Whereas those aged 13-17 years and 40-49 years were more likely to think about this never or rarely (45% and 40% respectively, compared to 28% for the total).
- **Education –** Those with a high school level of education were more likely to think about this never or rarely (37% compared to 28% for the total). whereas those with a post-graduate education were more likely to think about it either always or frequently (52% compared to 36% for the total).
- **Complaint –** Those who have made a formal complaint were more likely to think about it either always or frequently (69% compared to 36% for the total).

Online advertising not clearly distinguishable as such

Around half (49%) of respondents felt that they sometimes feel advertisements are not clearly distinguishable when browsing online content. A further one in five either frequently (17%) or always (3%) feel that online advertisements are not clearly distinguishable.

Figure 43: Online advertising not clearly distinguishable as such



Q24. When looking at online content, how often do you feel advertisements are not clearly distinguishable as such? (Single Response)

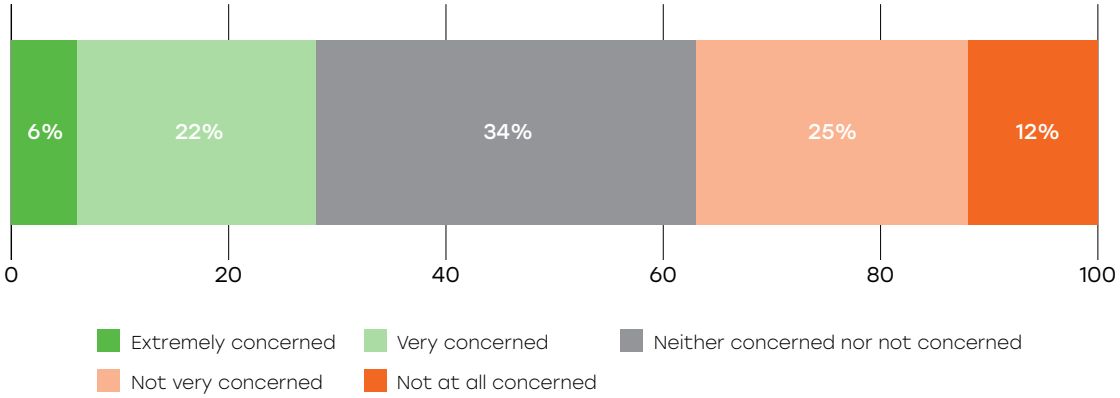
(Base=All respondents, 2018 Clearly Distinguishable Advertising Study n=1,027)

There were no significant differences by gender, age, location (state and metro vs. regional), daily social media usage, daily internet usage, languages spoken other than English, education, whether they have children, income and whether they have made a formal complaint before.

Concerns for online advertising that is not clearly distinguishable as such

Respondents shared mixed levels of concern about whether online advertising was clearly distinguishable or not. Just over a quarter (28%) were very or extremely concerned, 34% were neutral, and 37% were not very concerned or not at all concerned.

Figure 44: Concerns for online advertising that is not clearly distinguishable as such



Q25. When looking at online content, to what extent are you concerned about advertising not being clearly distinguishable as such? Single Response)

(Base=All respondents, 2018 Clearly Distinguishable Advertising Study n=1,027)

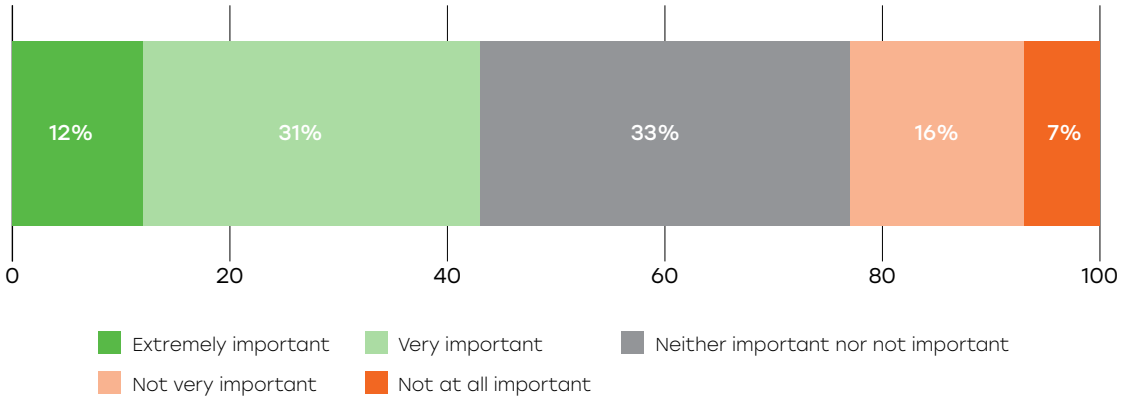
The following significant differences were observed:

- **Education –** Those with a high school level of education were more likely to have no concern (not very or not at all concerned) (47% compared to 37% for the total).
- **Complaint –** Those who have made a formal complaint about advertising were more likely to be concerned (extremely or very concerned) (60% compared to 28% for the total).

Importance of online advertising being clearly distinguishable as such

A reasonable proportion of respondents (43%) thought it was either extremely or very important for online advertising to be clearly distinguishable. Nonetheless, 23% still thought it was not very or not at all important, and the remaining third felt it was neither important nor unimportant (33%).

Figure 45: Importance of online advertising being clearly distinguishable as such



Q26. When looking at online content, to what extent is it important to you that advertising is clearly distinguishable as such? Single Response)

(Base=All respondents, 2018 Clearly Distinguishable Advertising Study n=1,027)

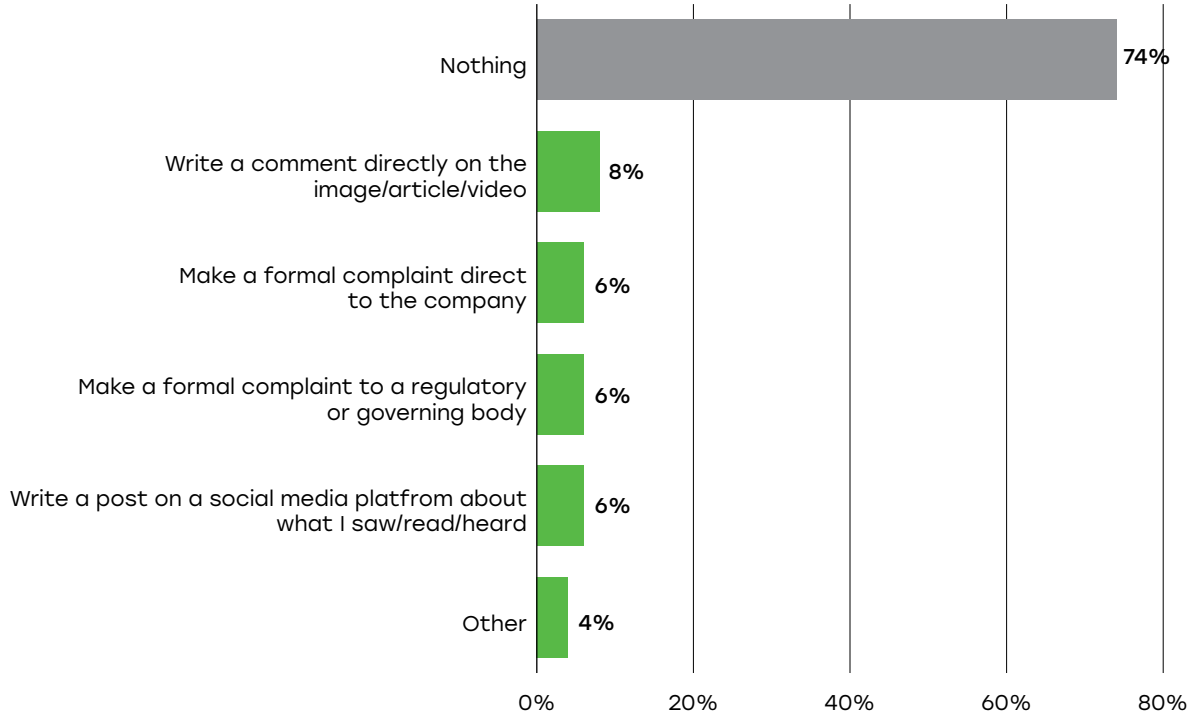
Only one significant difference was observed across demographics with regards to the importance of online advertising being clearly distinguishable as such:

- **Complaint –** Those who have made a formal complaint about advertising were more likely to think it was important (extremely or very important) (67% compared to 43% for the total).

Actions to seeing something that was not clearly distinguishable

Almost three-quarters of respondents (74%) would do nothing if they saw something online that was not clearly distinguishable as advertising. The remaining quarter were evenly split over what course of action they would do, but was slightly led by 8% who would write a comment directly on the image / article / video.

Figure 46: Actions to seeing something that was not clearly distinguishable



Q27. Which of the following would you be likely to do if you saw something ONLINE that wasn't clearly distinguishable as advertising? (Multiple Response)

(Base=All respondents, 2018 Clearly Distinguishable Advertising Study n=1,027)

The following significant differences were observed:

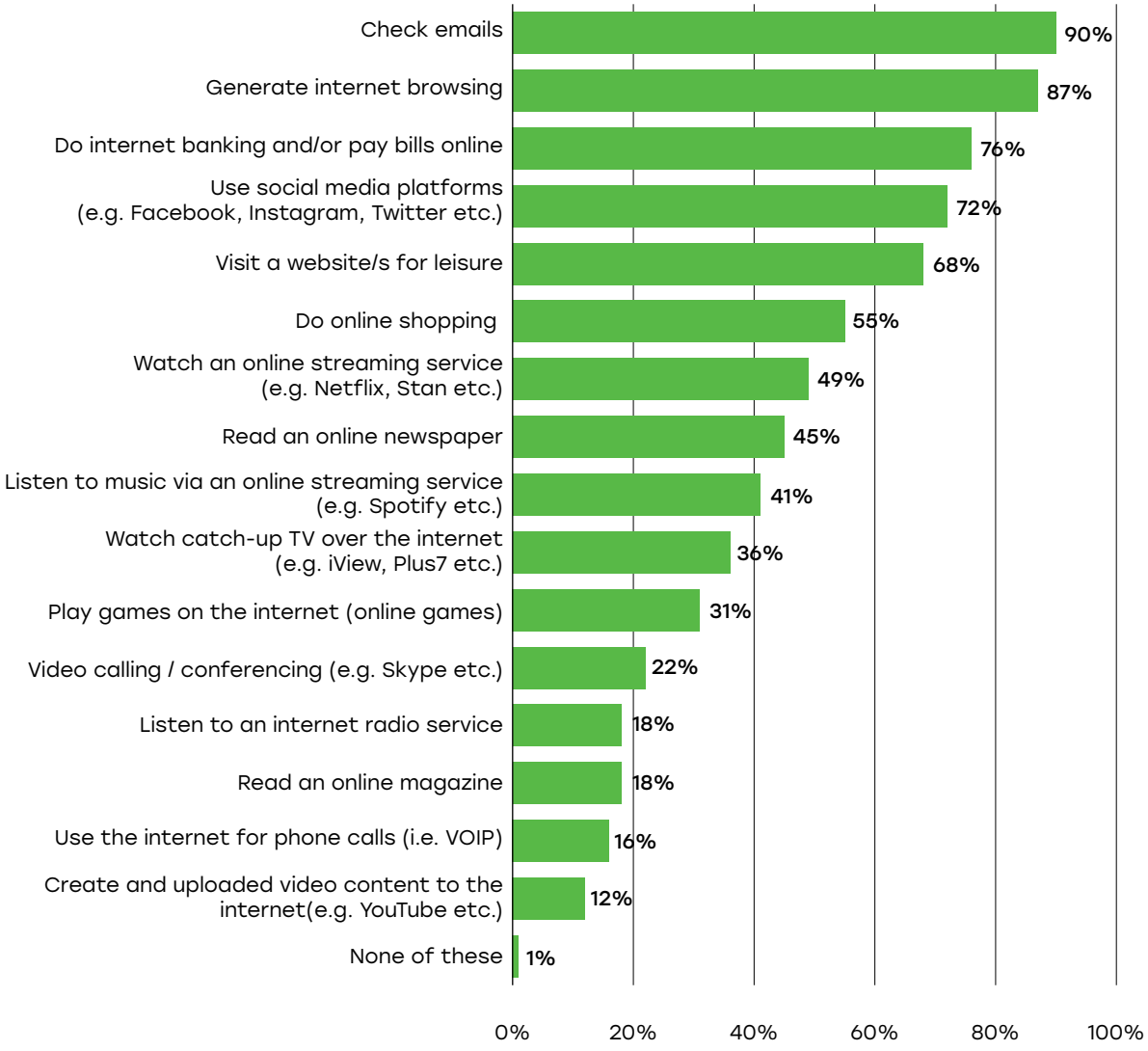
- **Gender –** Males would be more likely to make a formal complaint to a regulatory or governing body (9% compared to 6% for the total), while females were less likely (4% compared to 6% for the total).
- **Language –** Those who speak a language other than English at home were less likely to do nothing (64% compared to 74% for the total).
- **Children –** Those without children would be more likely to do nothing (81% compared to 74% for the total).
- **Complaint –**Those who have made a formal complaint would be more likely to write a general post on a social media platform about it (19% compared to 6% for the total) or make a formal complaint to a regulatory or governing body (17% compared to 6% for the total).

3.5 General media, social media and internet usage

Online media usage

Respondents were asked to indicate what online activities they do in a typical week. Nine out of ten respondents check their emails (90%), whilst general internet browsing (87%) and doing internet banking or paying bills online (76%) were also popular activities. Almost three-quarters of respondents (72%) use some form of social media.

Figure 47: Online media usage



Q1. Which of the following would you do in a typical week? (Multiple Response)

(Base=All respondents, 2018 Clearly Distinguishable Advertising Study n=1,027)

The table below looks at what online activities respondents do in a typical week, split by gender and age. Respondents aged 18 to 29 years were the highest users of social media (90% compared to 72% for the total).

Table 10: Online media usage – by gender and age

	Total	Male	Female	13-17 years	18-29 years	30-49 years	50+ years
Check emails	90%	88%	92%	64% ↓	94%	88%	95% ↑
General internet browsing	87%	90% ↑	83% ↓	79%	86%	86%	89%
Do internet banking and/or pay bills online	76%	77%	75%	17% ↓	81%	80%	80%
Use social media platforms (e.g. Facebook, Instagram, Twitter etc.)	72%	66% ↓	77% ↑	84%	90% ↑	76%	57% ↓
Visit a website/s for leisure	68%	73% ↑	62% ↓	65%	75%	70%	63%
Do online shopping	55%	52%	57%	34% ↓	61%	61% ↑	50%
Watch an online streaming service (e.g. Netflix, Stan etc.)	49%	50%	49%	47%	74% ↑	54%	33% ↓
Read an online newspaper	45%	52% ↑	39% ↓	10% ↓	47%	49%	47%
Listen to music via an online streaming service (e.g. Spotify etc.)	41%	44%	38%	56%	71% ↑	47% ↑	18% ↓
Watch catch-up TV over the internet (e.g. iView, Plus7 etc.)	36%	35%	36%	29%	36%	37%	35%
Play games on the internet (online games)	31%	33%	29%	68% ↑	25%	34%	25% ↓
Video calling / conferencing (e.g. Skype etc.)	22%	23%	21%	16%	25%	26%	19%
Listen to an internet radio service	18%	22% ↑	15% ↓	6% ↓	15%	26% ↑	15%
Read an online magazine	18%	21%	15%	11%	19%	21%	16%
Use the internet for phone calls (i.e. VOIP)	16%	18%	14%	7%	21%	17%	14%
Create and uploaded video content to the internet (e.g. YouTube etc.)	12%	13%	12%	27% ↑	6% ↓	18% ↑	8% ↓
None of these	1%	1%	0%	0%	1%	1%	0%

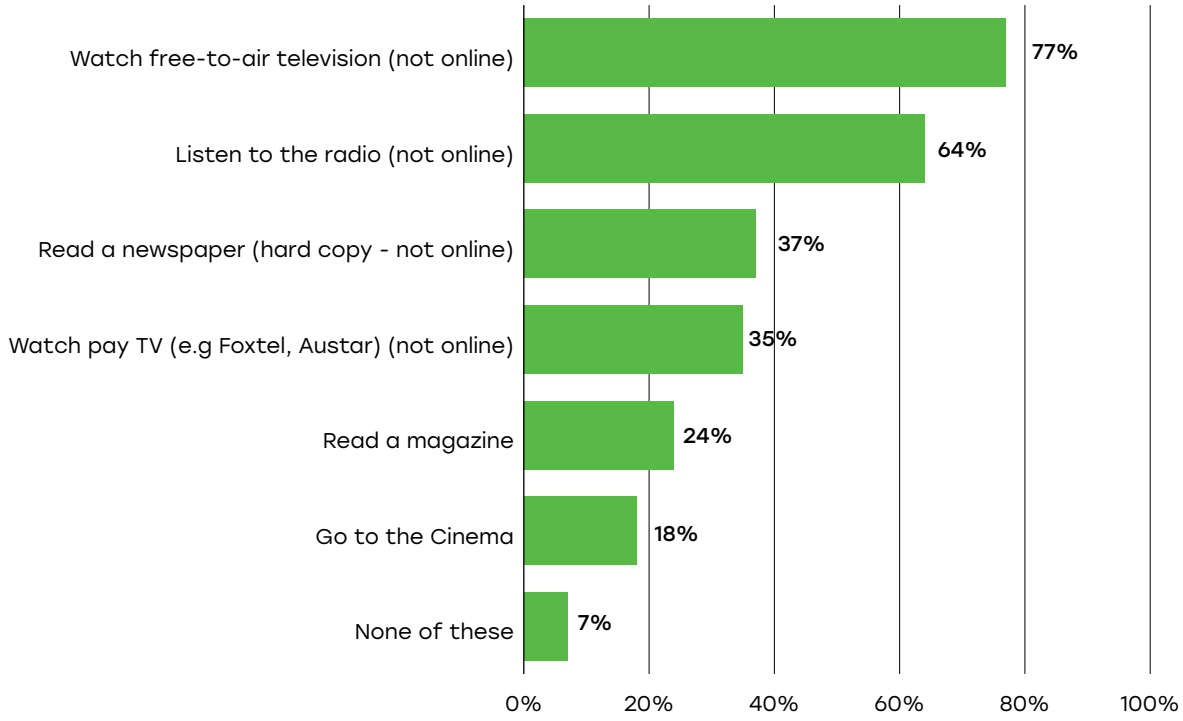
Q1. Which of the following would you do in a typical week? (Multiple Response)

(Base=All respondents, 2018 Clearly Distinguishable Advertising Study n=1,027)

General media usage

Respondents were also asked to indicate what 'traditional' (i.e. non-online) means of media they access during a typical week. More than three-quarters (77%) typically watch free to air television, with 35% also watching pay TV. Listening to the radio was another popular response, with 64% typically doing this activity.

Figure 48: General media usage



Q2. Which of the following would you do in a typical week? (Multiple Response)
(Base=All respondents, 2018 Clearly Distinguishable Advertising Study n=1,027)

The table below looks at 'traditional' media usage, split by gender and age.

Table 11: General media usage – by gender and age

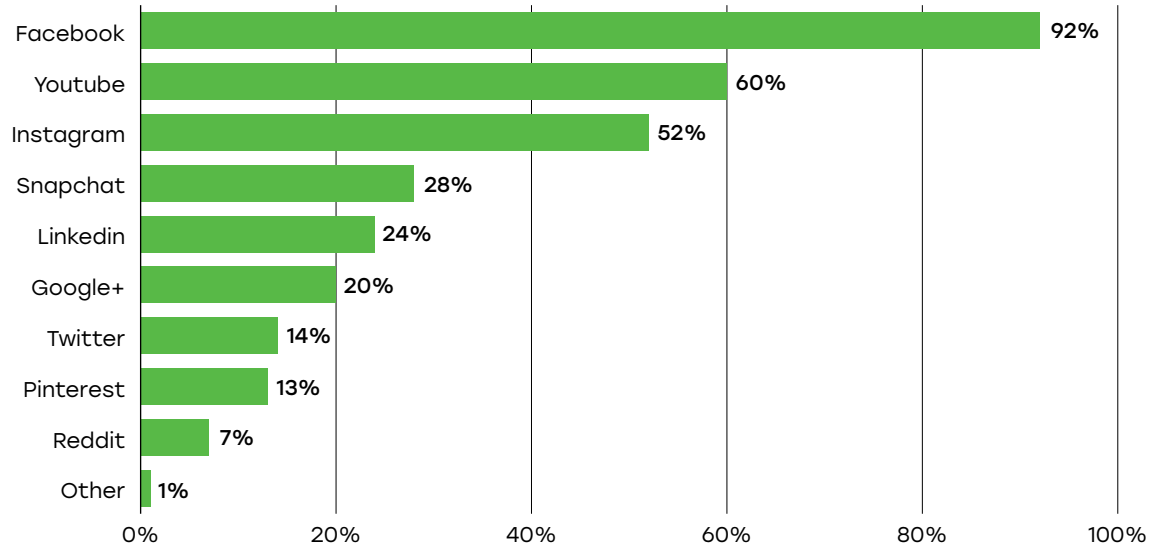
	Total	Male	Female	13-17 years	18-29 years	30-49 years	50+ years
Watch free-to-air television (not online)	77%	77%	77%	69%	59% ↓	77%	88% ↑
Watch pay TV (e.g. Foxtel, Austar) (not online)	35%	38%	32%	51% ↑	24% ↓	36%	36%
Listen to the radio (not online)	64%	65%	63%	41% ↓	51% ↓	66%	72% ↑
Read a magazine	24%	21%	27%	15%	10% ↓	24%	33% ↑
Read a newspaper (hard copy – not online)	37%	39%	35%	10% ↓	19% ↓	35%	52% ↑
Go to the Cinema	18%	18%	19%	24%	12%	20%	18%
None of these	7%	8%	6%	10%	19% ↑	5%	3% ↓

Q2. Which of the following would you do in a typical week? (Multiple Response)
(Base=All respondents, 2018 Clearly Distinguishable Advertising Study n=1,027)

Social media usage

Those who indicated using some form of social media (72%, n=731), were then asked to specify which platforms they use. Facebook was the most commonly used, with two-thirds using this platform (92%). This was followed by YouTube (60%) and Instagram (52%).

Figure 49: Social media usage



Q3. In a typical week, which of the following social media platforms would you use? (Multiple Response)
(Base=Respondents that selected social media at Q1, 2018 Clearly Distinguishable Advertising Study n=731)

The table below looks at social media usage, split by gender and age. Respondents aged 13 to 17 and those aged 18 to 29 were the most likely to use Instagram (71% and 80% respectively, compared to 52% for all social media users).

Table 12: Social media usage – by gender and age

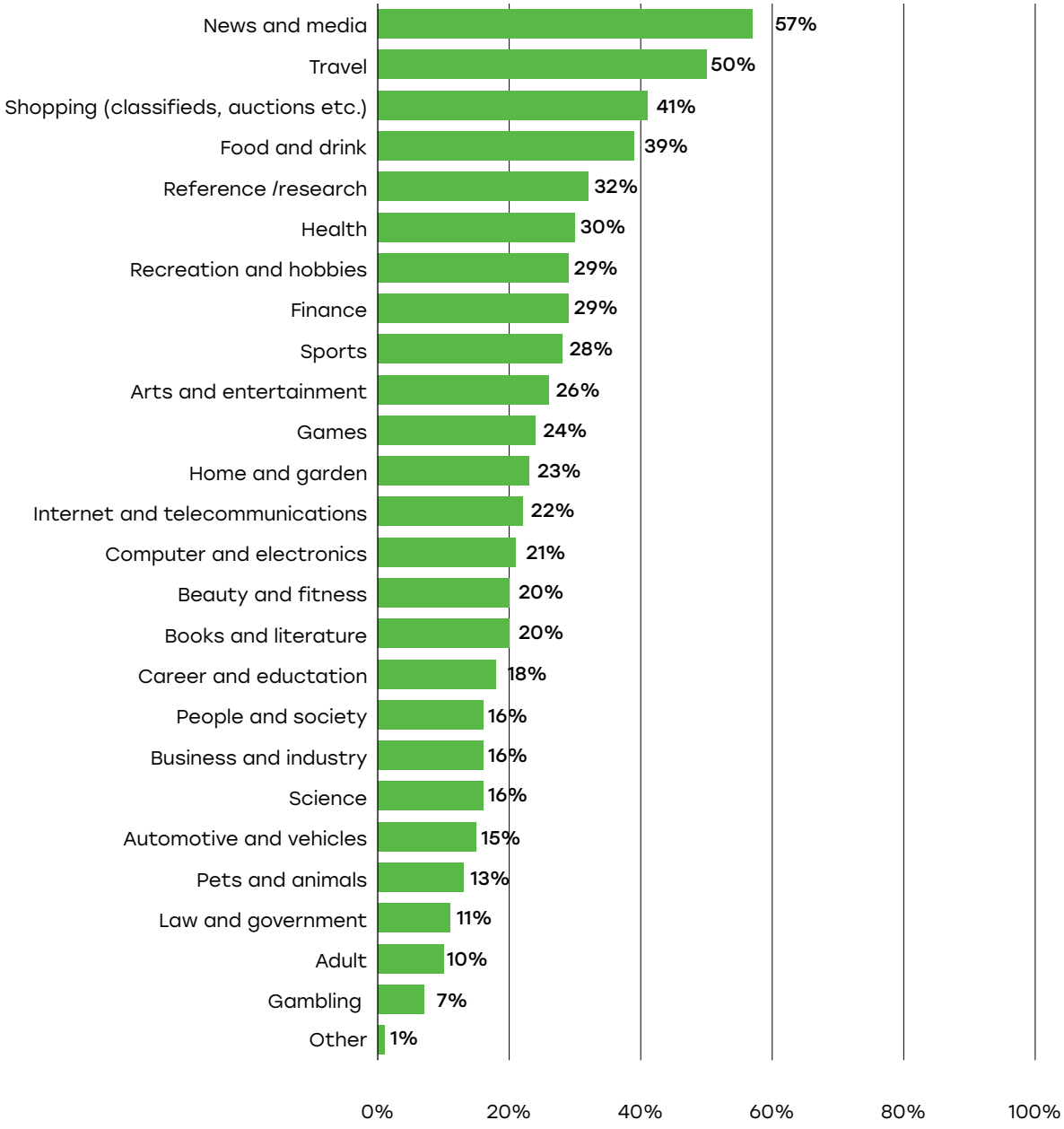
	Total	Male	Female	13-17 years	18-29 years	30-49 years	50+ years
Facebook	92%	91%	92%	74% ↓	93%	92%	95%
Instagram	52%	49%	53%	71% ↑	80% ↑	47%	29% ↓
Twitter	14%	18% ↑	11% ↓	9%	16%	15%	14%
LinkedIn	24%	30% ↑	20% ↓	3% ↓	32% ↑	28%	20%
YouTube	60%	71% ↑	52% ↓	72%	70% ↑	64%	46% ↓
Reddit	7%	12% ↑	2% ↓	4%	15% ↑	6%	2% ↓
Google+	20%	18%	20%	18%	7% ↓	19%	31% ↑
Pinterest	13%	7% ↓	18% ↑	17%	12%	12%	16%
Snapchat	28%	26%	29%	51% ↑	67% ↑	16% ↓	3% ↓
Other	1%	2%	1%	0%	2%	2%	1%

Q3. In a typical week, which of the following social media platforms would you use? (Multiple Response)
(Base=Respondents that selected social media at Q1, 2018 Clearly Distinguishable Advertising Study n=731)

Website usage

Those who indicated using websites (90%, n=929), were then asked to specify which types of websites. The most commonly visited websites related to news and media (57%), travel (50%), and shopping (classified, auctions etc.) (41%).

Figure 50: Website usage



Q4. In a typical week, what types of websites do you visit? (Multiple Response)

(Base=Respondents that selected visits websites or general internet browsing at Q1, 2018 Clearly Distinguishable Advertising Study n=929)

The table below looks at website usage, split by gender and age.

Table 13: Website usage – by gender and age

	Total	Male	Female	13-17 years	18-29 years	30-49 years	50+ years
News and media	57%	62%	53%	13% ↓	59%	60%	62%
Travel	50%	46%	54%	12% ↓	54%	47%	56% ↑
Shopping (classifieds, auctions etc.)	41%	40%	43%	20% ↓	39%	50% ↑	39%
Food and drink	39%	34% ↓	44% ↑	18% ↓	45%	45%	35%
Reference / research (e.g. dictionaries, encyclopedias, maps)	32%	33%	32%	30%	32%	28%	37%
Health	30%	23% ↓	37% ↑	11% ↓	32%	34%	29%
Recreation and hobbies	29%	30%	28%	39%	34%	30%	25%
Finance	29%	36% ↑	22% ↓	3% ↓	26%	32%	32%
Sports	28%	42% ↑	15% ↓	37%	26%	31%	26%
Arts and entertainment	26%	22%	29%	37%	31%	24%	23%
Games	24%	26%	22%	65% ↑	21%	23%	19%
Home and garden	23%	18% ↓	27% ↑	4% ↓	13% ↓	28%	26%
Internet and telecommunications	22%	28% ↑	15% ↓	9%	20%	22%	24%
Computer and electronics	21%	35% ↑	7% ↓	35%	23%	25%	15% ↓
Beauty and fitness	20%	10% ↓	31% ↑	21%	32% ↑	26% ↑	10% ↓
Books and literature	20%	17%	23%	18%	19%	21%	20%
Career and education	18%	17%	18%	14%	36% ↑	19%	9% ↓
People and society	16%	12% ↓	20% ↑	16%	17%	19%	14%
Business and industry	16%	21% ↑	10% ↓	0% ↓	20%	20%	13%
Science	16%	21% ↑	10% ↓	19%	17%	19%	12%
Automotive and vehicles	15%	26% ↑	4% ↓	4%	9%	18%	17%
Pets and animals	13%	10%	17%	19%	11%	18%	11%
Law and government	11%	13%	9%	8%	10%	11%	12%
Adult	10%	17% ↑	2% ↓	0%	16% ↑	12%	6% ↓
Gambling	7%	11% ↑	2% ↓	2%	4%	11% ↑	5%
Other	1%	1%	2%	4%	0%	2%	2%

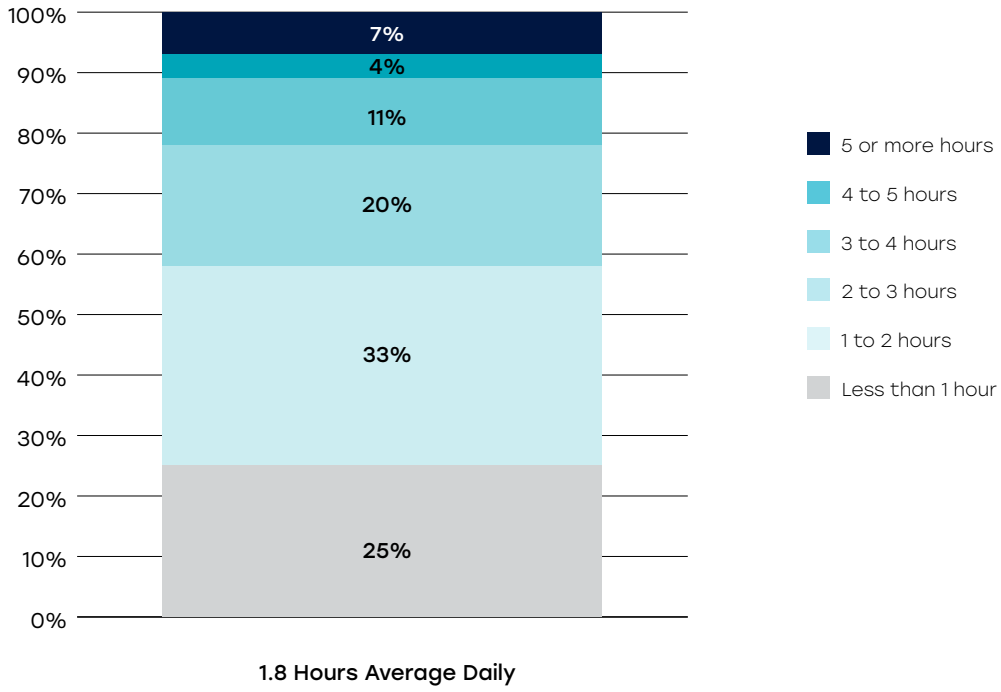
Q4. In a typical week, what types of websites do you visit? (Multiple Response)

(Base=Respondents that selected visits websites or general internet browsing at Q1, 2018 Clearly Distinguishable Advertising Study n=929)

Typical daily social media usage

On a typical day respondents spent an average of 1.8 hours on social media platforms. The majority (58%) indicated that they typically spent less than two hours. A further 20% suggested that they spent between two and three hours daily, 11% spent three to four hours, 4% spent four to five hours and the remaining 7% spent five or more hours a day.

Figure 51: Typical daily social media usage



Q5. How many hours would you say you spend on social media platforms (e.g. Facebook, Instagram, Twitter etc.) in a typical day OR week?

Please enter to the nearest whole number of hours one response in EITHER the daily OR weekly box. *SR*

(Base=All respondents, 2018 Clearly Distinguishable Advertising Study n=1,027)

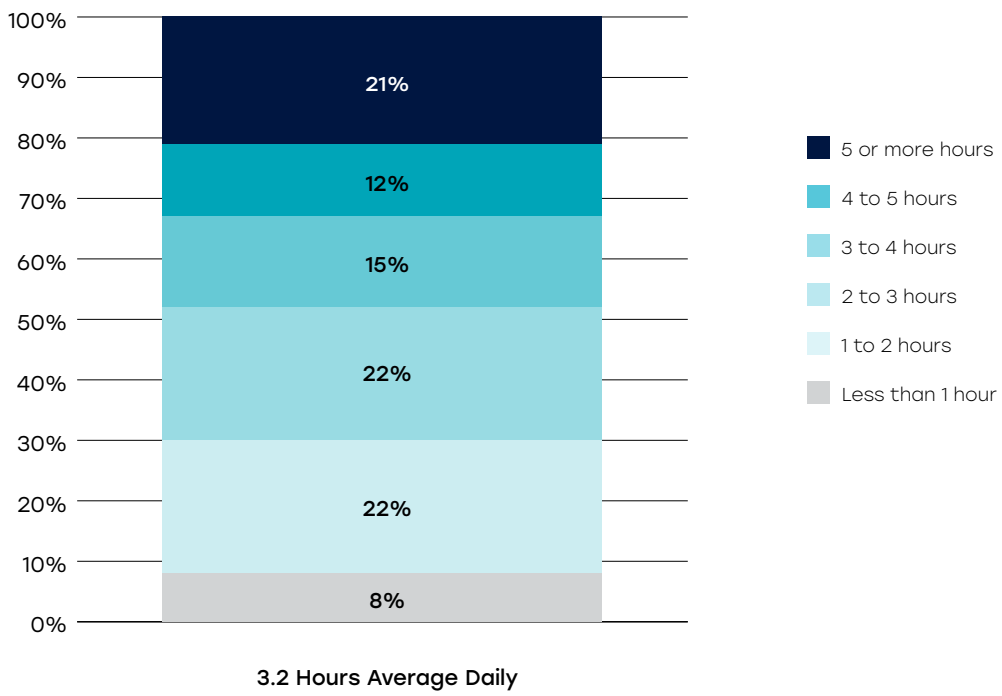
The following significant differences were observed:

- **Gender –** Females typically spent an average of 2 hours a day on social media, which was significantly higher than the total average of 1.8. Conversely, males typically spent 1.6 hours a day, which was significantly lower.
- **Age –** Those aged 13-17 and those aged 18-29 spent significantly more time on social media daily (2.5 and 2.6 hours respectively compared to 1.8 for the total), while those aged 50 years or more spent significantly less time (1.3 hours compared to 1.8 for the total).
- **Education –** Those with a high school level of education typically spent significantly more time daily on social media (2.2 compared to 1.8 for the total), while those with a graduate diploma or graduate certificate spent significantly less time daily (1.4 compared to 1.8 for the total).
- **Children –** Those who do not have children typically spent significantly more time daily on social media (2.1 compared to 1.8 for the total), while those with children spent significantly less time (1.5 compared to 1.8 for the total).
- **Income –** Those earning less than $50,000 spent significantly more time on social media (2.3 compared to 1.8 for the total), while those earning between $100,000 and $150,000 spent significantly less (1.5 compared to 1.8 for the total).

Typical daily internet usage

Respondents were also asked how many hours they typically spent on the internet, with the daily average being 3.2 hours. Roughly half (52%) of all respondents spent less than three hours a day on the internet, with the other half (48%) spending three or more hours on the internet on a typical day.

Figure 52: Typical daily internet usage



Q6. And in total how many hours would you say you spend on the internet in a typical day OR week? Please enter to the nearest whole number of hours one response in EITHER the daily OR weekly box. *SR (Base=All respondents, 2018 Clearly Distinguishable Advertising Study n=1,027)*

The following significant differences were observed:

- **Gender –** Females typically spent an average of 2.9 hours a day on the internet, which was significantly lower than the total average of 3.2. Conversely, males typically spent significantly more time on the internet each day (3.4 compared to 3.2 for the total).
- **Age –** Those 18-29 spent significantly more time on the internet daily (4.2 compared to 3.2 for the total), while those aged 50 years or more spent significantly less time (2.7 hours compared to 3.2 for the total).
- **Children –** Those who do not have children typically spent significantly more time on the internet daily (3.7 compared to 3.2 for the total), while those with children spent significantly less time (2.8 compared to 3.2 for the total).
- **Income –** Those earning less than $50,000 and those earning $150,001 or more spent significantly more time on the internet (3.9 and 3.6 respectively compared to 3.2 for the total).

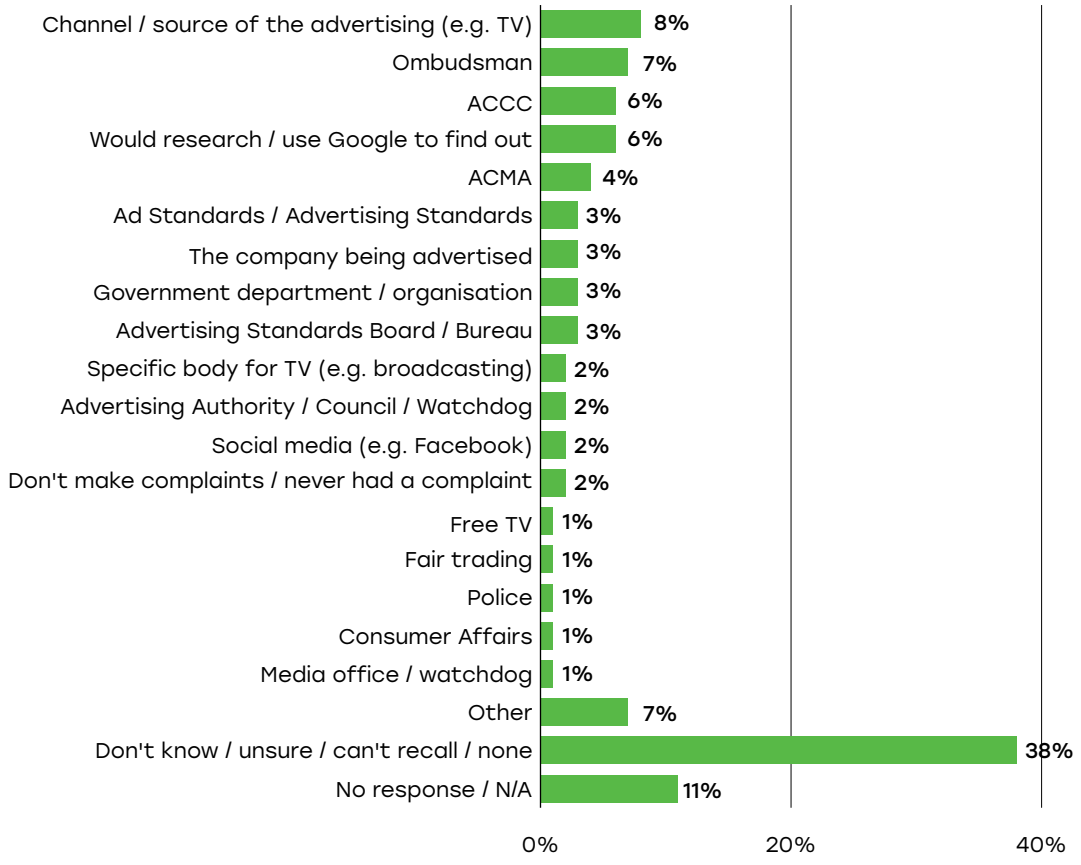
Part 4 Awareness and perception of Ad Standards

4.1 Awareness of complaint organisations

In an open-ended question, respondents were asked to identify the organisations they could complain to about the standards of advertising. Although a large proportion (38%) did not know or could not recall an organisation, respondents were able to identify a range of different organisations or channels they would explore to make a complaint.

The most common avenue for making a complaint was by going to the channel/source which aired the advertisement (8%), followed by the Ombudsman (7%) and the ACCC (6%). Ad Standards/Advertising Standards and Advertising Standards Board/Bureau were both mentioned by 3% of respondents (see Appendix A, 'Definitions' on pp 86).

Figure 53: Unprompted awareness of organisations that handle advertising complaints



Q28C. If you had a complaint about the standards of advertising in relation to language, sex, sexuality and nudity, discrimination, concern for your children, violence, sexual appeal in a manner that is exploitative and degrading, health and safety, or advertising that is not clearly distinguishable as such, which organisations are you aware of that you could complain to? Advertising refers to television, radio, outdoor advertising, newspaper, magazine and online and social media advertising. (Open ended)

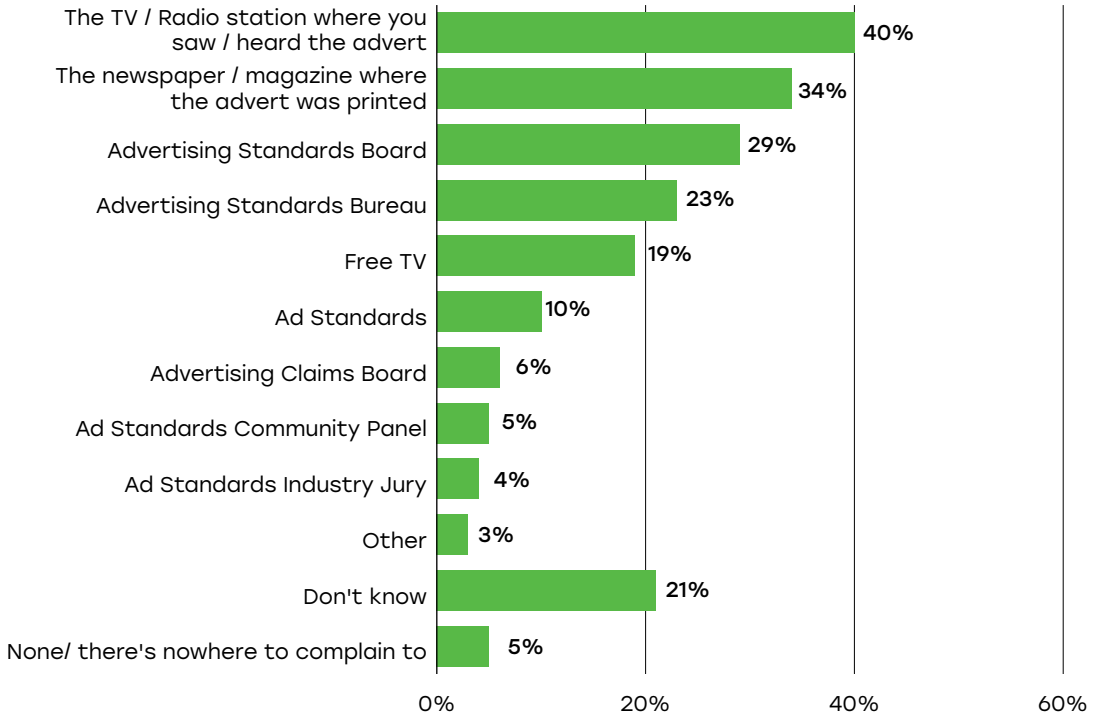
(Base=All respondents, 2018 Clearly Distinguishable Advertising Study n=1,027)

The following significant differences were observed:

- **Age –** Those aged 60-69 years were more likely to answer 'the channel or source of the advertising' (16% compared to 8% for the total) or a 'specific body for TV' (8% compared to 2% for the total), while those aged 13-17 years were more likely to answer 'police' (6% compared to 1% for the total).
- **Education –** Those with a tertiary education were more likely to answer 'ACCC' (10% compared to 6% for the total), while those with a post-graduate education were more likely to answer 'government department/organisation' (8% compared to 3% for the total).
- **Children –** Those who have children were more likely to answer 'ombudsman' (10% compared to 7% for the total).

Respondents were then shown a list of organisations that handle advertising complaints and were asked to identify which ones they were aware of. Most respondents were aware that they could complain to the source of the advertisement, with 40% answering they could complain to the TV or radio station and 34% answering they could complain to the newspaper or magazine. Approximately one quarter (23%) selected Advertising Standards Bureau and 10% selected Ad Standards.

Figure 54: Prompted awareness of organisations that handle advertising complaints



Q29D. If you had a complaint about the standards of advertising in relation to language, sex, sexuality and nudity, discrimination, concern for your children, violence, sexual appeal in a manner that is exploitative and degrading, health and safety, or advertising that is not clearly distinguishable as such, which organisations are you aware of that you could complain to? (Multiple Response)

(Base=All respondents, 2018 Clearly Distinguishable Advertising Study n=1,027)

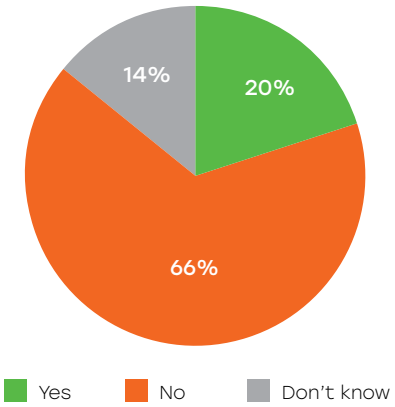
The following significant differences were observed:

- **Age (young) –** Those aged 18-24 years were more likely to answer 'Ad Standards' (19% compared to 10% for the total).
- **Age (older) –** Those aged 60-69 years or 70 years and older were more likely to answer 'the TV / radio station where they saw/heard the advert' (64% and 61% respectively, compared to 40% for the total), and 'the newspaper / magazine where the advert was printed' (50% and 54% respectively, compared to 34% for the total).
- **Language –** Those who speak English only were more likely to answer 'the TV / radio station where they saw/heard the advert' (43% compared to 40% for the total).
- **Complaint –** Those who have made a formal complaint about advertising were more likely to answer 'the TV / radio station where they saw/heard the advert' (63% compared to 40% for the total), and 'the newspaper / magazine where the advert was printed' (62% compared to 34% for the total).

Complaints about advertising standards

One in five respondents (20%) indicated they had recently been exposed to advertising that they found to be unacceptable.

Figure 55: Recent exposure to unacceptable advertising



Q28A. Have you recently been exposed to any advertising that you found unacceptable? (Single Response)
(Base=All respondents, 2018 Clearly Distinguishable Advertising Study n=1,027)

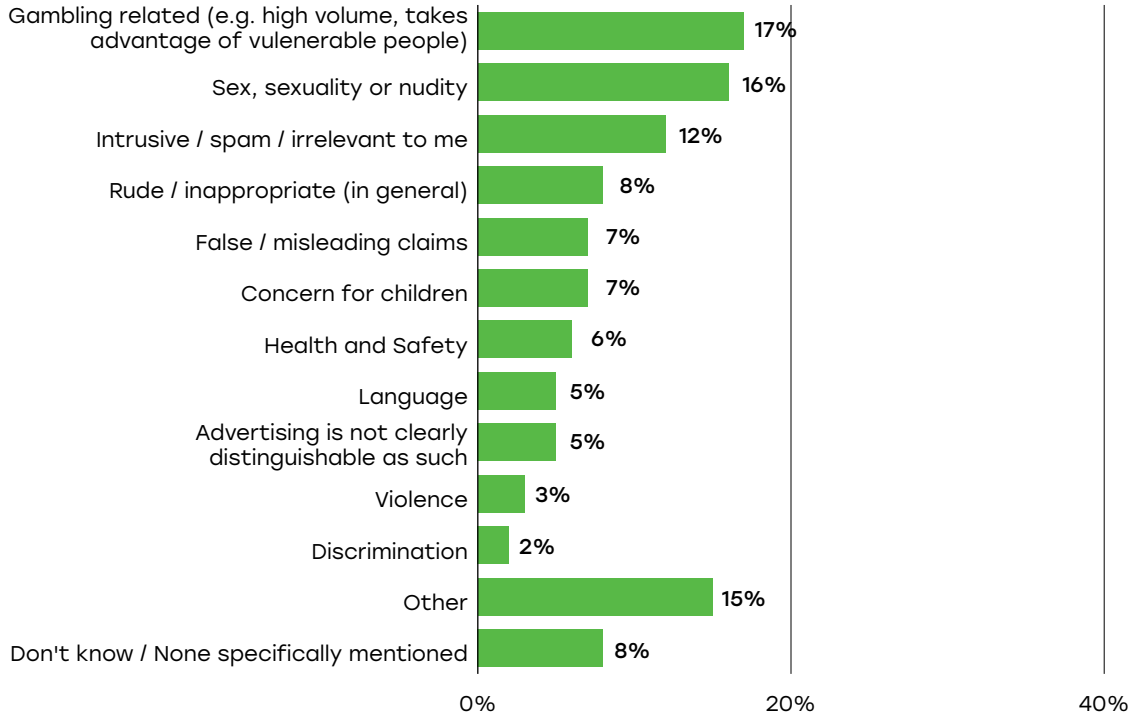
The following significant differences were observed:

Age (older) – Those aged 70 and older were more likely to have been recently exposed to advertising they found unacceptable (32% compared to 20% for the total).

Complaint – Those who have made a formal complaint about advertising were more likely to have been recently exposed to advertising they found unacceptable (60% compared to 20% for the total).

Those who had found advertising unacceptable were then asked an open-ended question about why they found the advertisement unacceptable. The most common response related to gambling advertisements (17%) with many complaining about the high volume of these ads and how they take advantage of vulnerable people. Others found the advertising to be unacceptable on the basis that it had something to do with 'sex, sexuality or nudity' (16%) or they found the advertising to be 'intrusive / spam / irrelevant' (12%).

Figure 56: Reasons for finding the advertising to be unacceptable

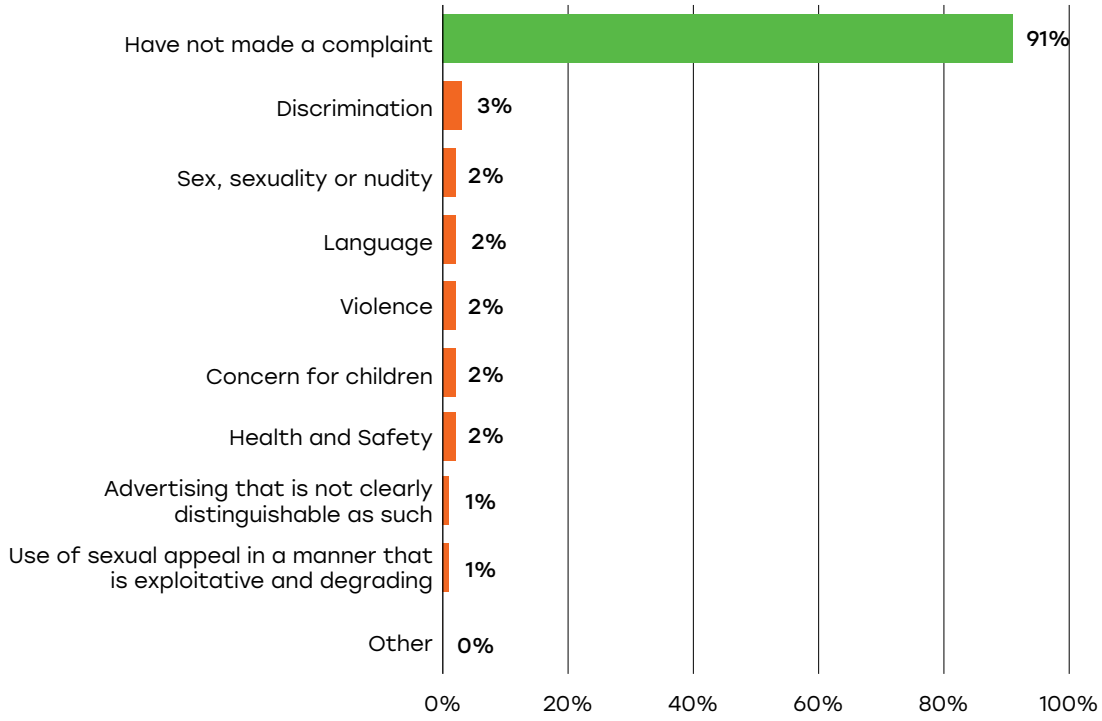


Q28B. What was unacceptable about the advertising you read, saw or heard? (Open Ended)
(Base=Respondents who have recently been exposed to advertising they thought was unacceptable n=214)

There were no significant differences by gender, age, location (state and metro vs. regional), daily social media usage, daily internet usage, languages spoken other than English, education, whether they have children, income and whether they have made a formal complaint before.

Most respondents (91%) had not made a formal complaint about advertising standards in the 12 months prior to taking the survey.

Figure 57: Formal complaints about advertising standards in the last 12 months



Q30. In the last 12 months have you made a formal complaint about advertising standards in relation to any of the following? (Multiple Response)

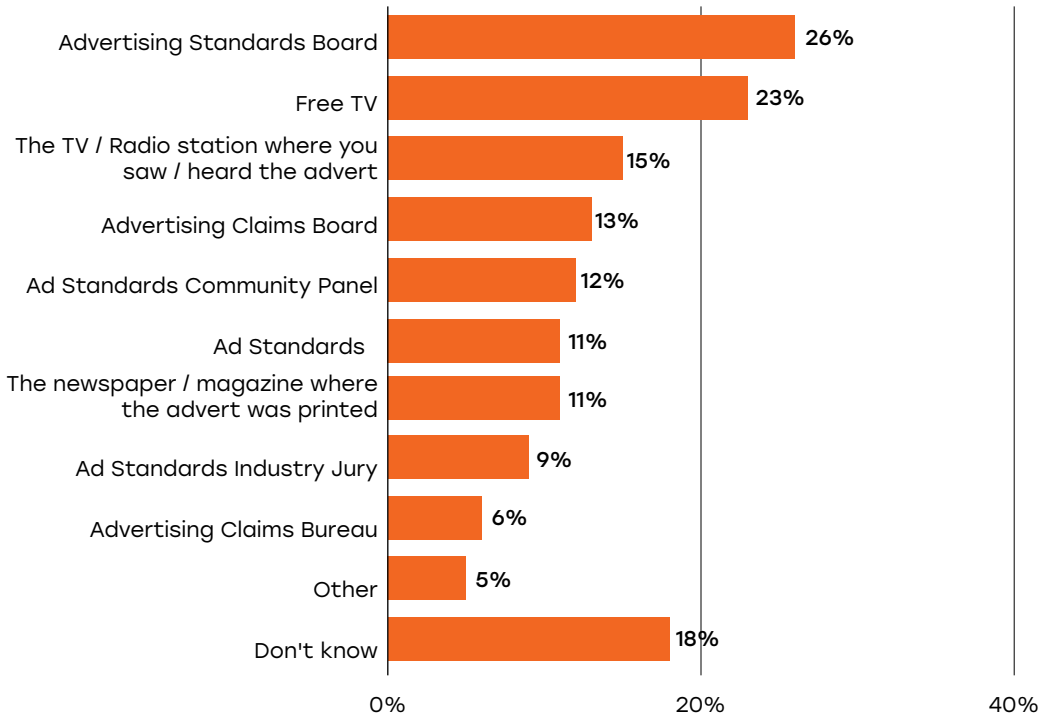
(Base=All respondents, 2018 Clearly Distinguishable Advertising Study n=1,027)

The following significant differences were observed:

- **Age –** Those aged 13-17 years were more likely to have complained about advertising that was not clearly distinguishable (7% compared to 1% for the total), while those aged 30-39 were more likely to have complained about discrimination (7% compared to 3% for the total).
- **Language –** Those who speak a language other than English were more likely to complain about the use of sexual appeal in a manner that was degrading (3% compared to 1% for the total).

Those who had made a formal complaint about advertising standards in the past 12 months were then asked to identify from a list, which organisations they complained to. Just over a quarter reported that they complained to the Advertising Standards Board (26%), followed by 23% who complained to Free TV. Around one in ten made a complaint to Ad Standards (11%).

Figure 58: Organisations complained to



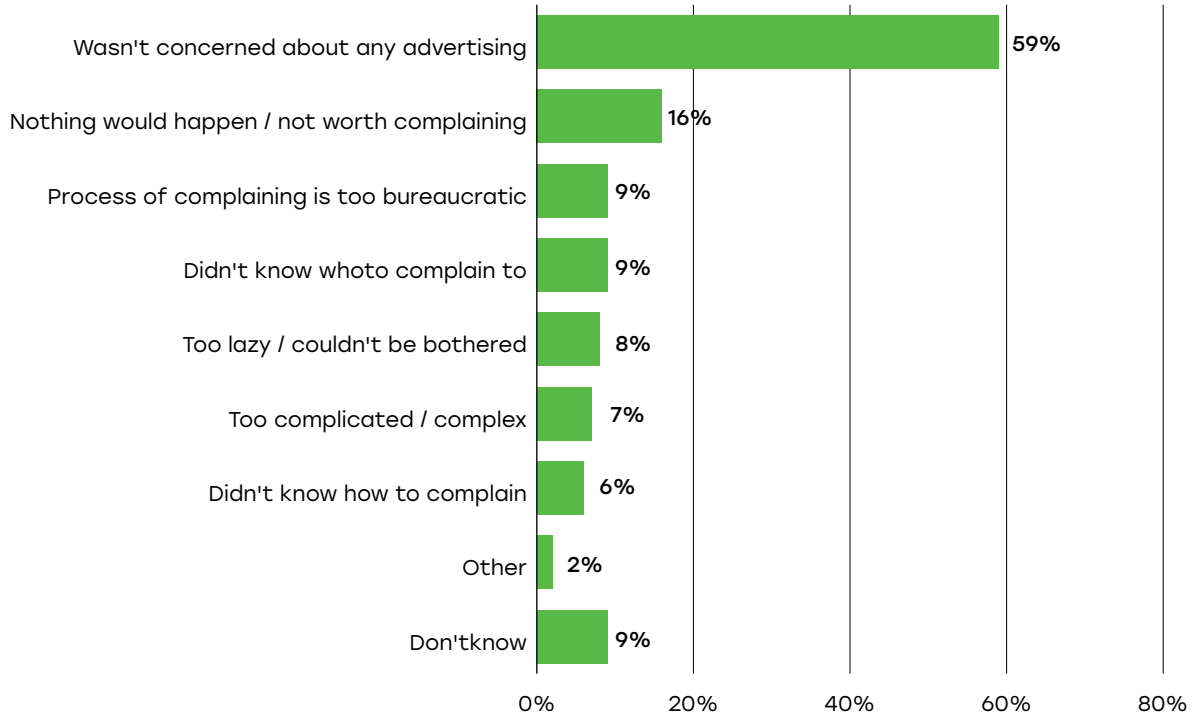
Q31. Which organisation(s) did you complain to? (Multiple Response)

(Base=Respondents who have made a formal complaint about advertising standards in the last 12 months n=87)

There were no significant differences by gender, age, location (state and metro vs. regional), daily social media usage, daily internet usage, languages spoken other than English, education, whether they have children, income and whether they have made a formal complaint before.

Among those who had not made a formal complaint (91%, n=940), the most common reason for not doing so was that they had not been concerned about any advertising (59%). The next most common reason was due to a perception that nothing would happen from complaining or that it was not worth it (16%).

Figure 59: Reasons for not making a complaint



Q32. For what reasons did you not make a complaint? (Multiple Response)

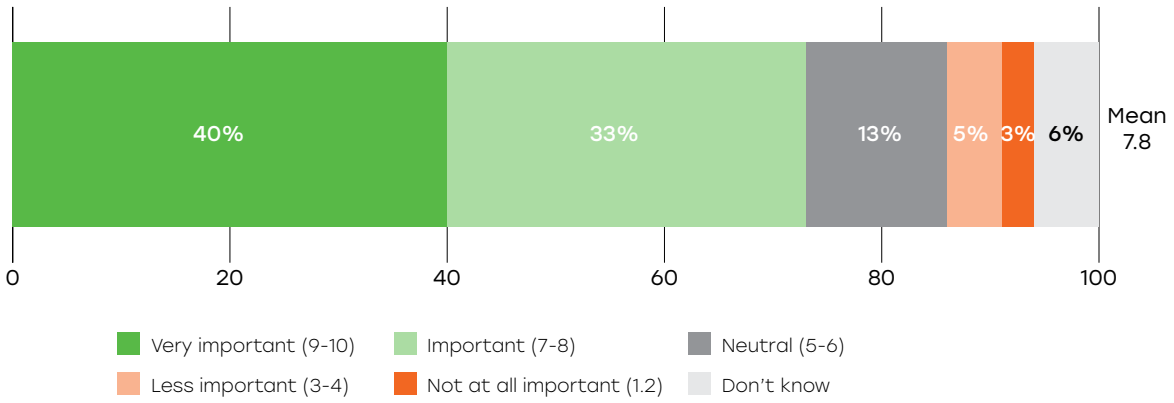
(Base=Respondents who have not made a formal complaint about advertising standards in the last 12 months n=940)

There were no significant differences by gender, age, location (state and metro vs. regional), daily social media usage, daily internet usage, languages spoken other than English, education, whether they have children, income and whether they have made a formal complaint before.

4.2 Importance of Ad Standards' role

Respondents were asked to rate how important Ad Standards' role is. Almost three-quarters (73%) felt that Ad Standards has an important role, including 40% who thought their role was very important.

Figure 60: Importance of Ad Standards role



Q34. Ad Standards *(formerly known as the Advertising Standards Bureau) provides a free public service to the community in a system of self-regulation to resolve complaints about advertisements in relation to issues including the use of language, discriminatory portrayal of people, suitability for children, portrayals of violence, sex, sexuality, nudity, health and safety and advertising that is not clearly distinguishable as such. The* Ad Standards *Community Panel makes decisions about complaints using the Advertiser Code of Ethics as the basis of its determinations. Using a scale of* 1 to 10 *where* 1 *is extremely unimportant and* 10 *is extremely important, how unimportant or important do you feel the role of* Ad Standards *(formerly known as the Advertising Standards Bureau) is? (Single response)*

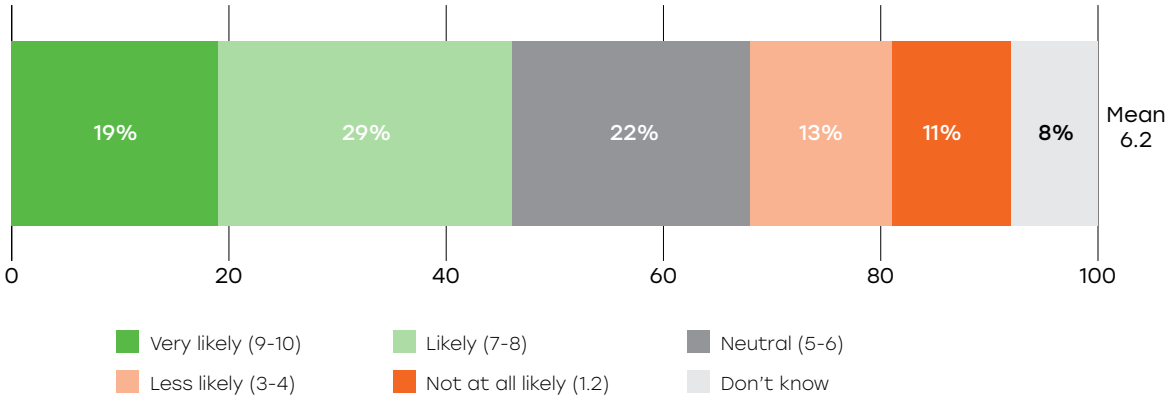
(Base=All respondents, 2018 Clearly Distinguishable Advertising Study n=1,027)

The following significant differences were observed:

- **Gender –** Females were more likely to see Ad Standards' role as important with a mean rating of 8.0 (compared to 7.8 for the total), while males experienced a significantly lower mean rating (7.5 compared to 7.8 for the total).
- **Age –** Those aged 18 to 29 years had a significantly lower mean rating (7.1 compared to 7.8 for the total). Conversely, those aged 50 years and over had a higher mean rating (8.0 compared to 7.8 for the total).
- **Children –** Those without children showed lower importance (7.4 compared to 7.8 for the total), while those with children showed greater importance (8.0 compared to 7.8 for the total).
- **Income –** Those earning a household income of $150,001 or more had a significantly lower mean rating (7.3 compared to 7.8 for the total).

Just under half (47%) would be likely or very likely to make a complaint to Ad Standards if they were concerned about advertising standards.

Figure 61: Likelihood to make a complaint to Ad Standards



Q35. If you had a concern about advertising standards in relation to language, discriminatory portrayal of people, suitability for your children, portrayals of violence, sex, sexuality, nudity, health and safety or advertising that is not clearly distinguishable as such, using a scale of 1 to 10 *where* 1 is *extremely unlikely and* 10 is *extremely likely, how unlikely or likely would you be to make a complaint to* Ad Standards *(formerly known as the Advertising Standards Bureau)? (Single response)*

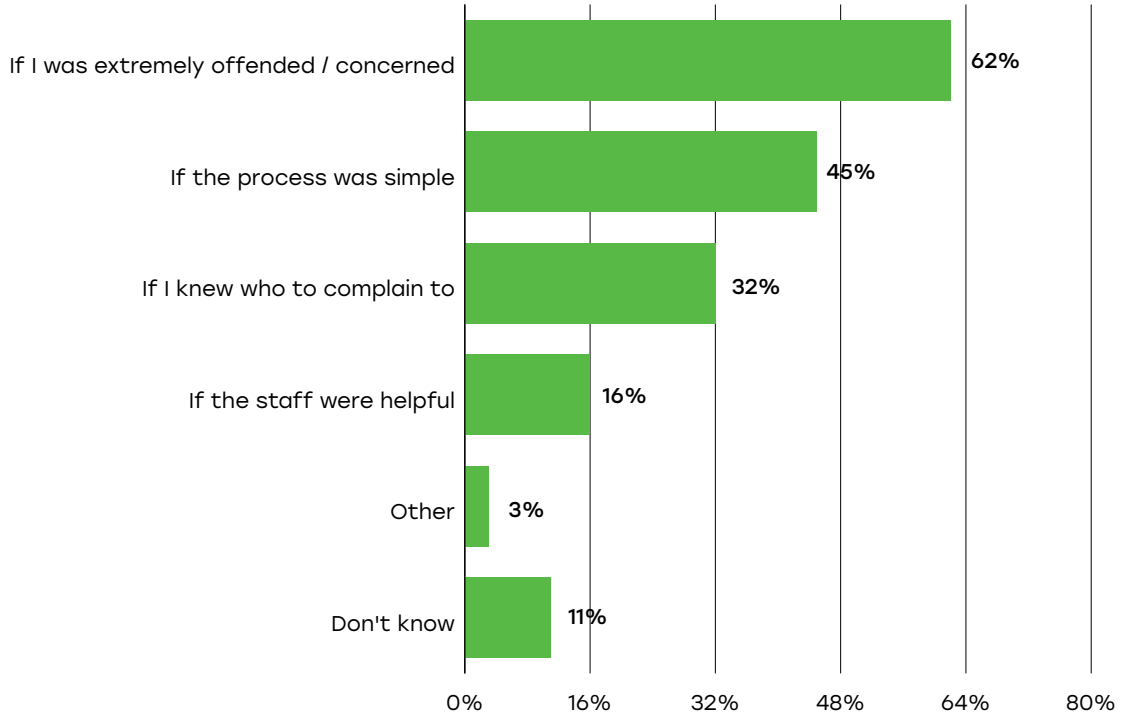
(Base=All respondents, 2018 Clearly Distinguishable Advertising Study n=1,027)

The following significant differences were observed:

- **Gender –** Females were more likely to make a complaint to Ad Standards (6.5 compared to 6.2 for the total), while males were less likely (5.9 compared to 6.2 for the total).
- **Age –** Those aged 18 to 29 years were significantly less likely to complain to Ad Standards (5.2 compared to 6.2 for the total). Conversely, those aged 50 years were significantly more likely (6.6 compared to 6.2 for the total).
- **Children –** Those without children were also less likely to complain (5.4 compared to 6.2 for the total), while those with children were more likely to make a complaint to Ad Standards (6.6 compared to 6.2 for the total).
- **Income –** Those earning a household income of $150,001 or more were less likely to make a complaint to Ad Standards (5.7 compared to 6.2 for the total). Conversely, those earning under $50,000 were more likely (7.0 compared to 6.2 for the total).
- **Complaint –** Unsurprisingly, those who have made a formal complaint about advertising were more likely to make a complaint to Ad Standards (7.7 compared to 6.2 for the total).

Respondents were then asked what would make them more likely to complain to Ad Standards. Most felt that they would have to be extremely offended or concerned to be prompted into action (62%). Respondents would also be more inclined to complain to Ad Standards if they knew the process was simple (45%) or if they knew who to complain to (32%).

Figure 62: Encouraging complaints to Ad Standards



Q36. What would encourage you to make a complaint to Ad Standards *(formerly known as the Advertising Standards Bureau)? (Single response)*

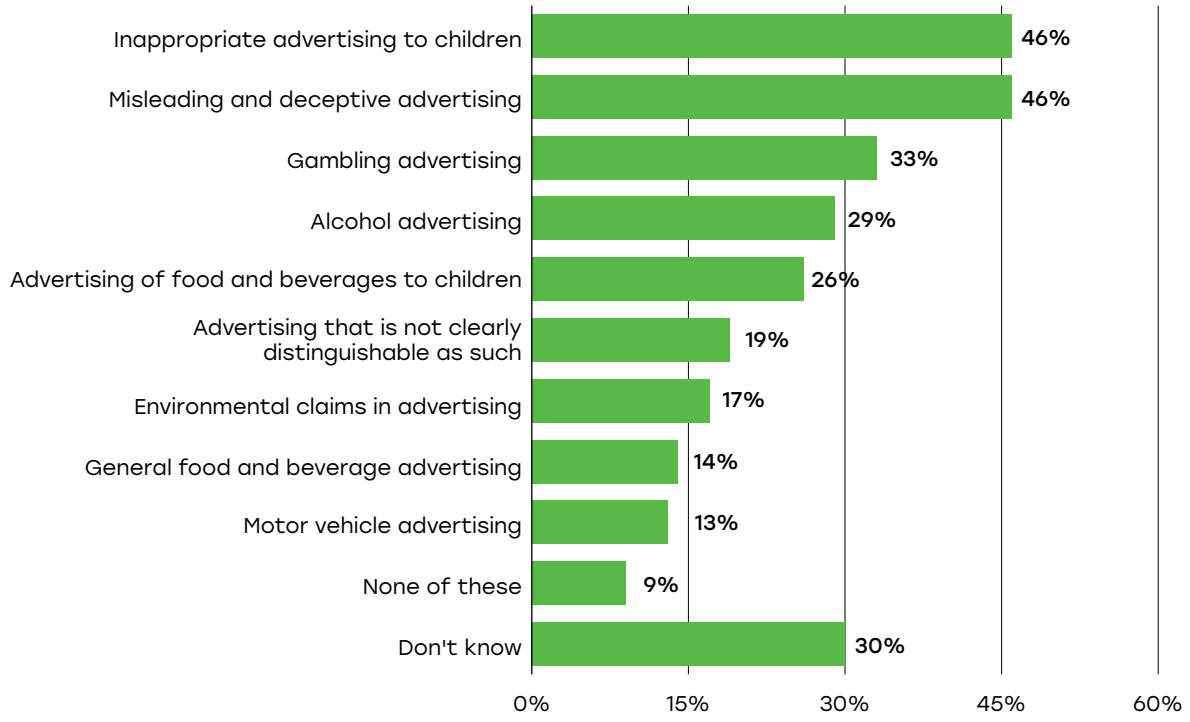
(Base=All respondents, 2018 Clearly Distinguishable Advertising Study n=1,027)

The following significant differences were observed:

- **Gender –** Females were more likely to indicate they would be encouraged if they knew who to complain to (38% compared to 32% for the total), while males were less likely (27% compared to 32% for the total).
- **Social media usage –** Those who use social media for less than 1 hour a day were more likely to be encouraged if they were extremely offended or concerned (71% compared to 62% for the total).
- **Education –** Those with a tertiary education were more likely to be encouraged if the process was simple (53% compared to 45% for the total).
- **Complaint –** Those who have made a formal complaint about advertising were more likely to be encouraged if the process was simple (77% compared to 45% for the total) or if the staff were helpful (32% compared to 16% for the total).

Respondents were asked to identify from a list of categories what they could complain to Ad Standards about. Almost half indicated that they were aware they could complain to Ad Standards about inappropriate advertising to children (46%), and misleading and deceptive advertising (46%).

Figure 63: Complaints that can be directed to Ad Standards



Q33. From the list below, please select any categories for which you are aware complaints can be directed to Ad Standards *(formerly known as the Advertising Standards Bureau). Please select all that apply. (Multiple Response)*

(Base=All respondents, 2018 Clearly Distinguishable Advertising Study n=1,027)

The following significant differences were observed:

- **Age (older) –** Those aged 70 years and older were more likely to be aware that complaints can be directed to Ad Standards in regards to inappropriate advertising to children (61% compared to 46% for the total) and for gambling advertising (45% compared to 33% for the total).
- **Social media usage –** Those who use social media for less than 1 hour a day were more likely to be aware that complaints can be directed to Ad Standards in regards to inappropriate advertising to children (57% compared to 46% for the total) and misleading and deceptive advertising (56% compared to 46% for the total).
- **Education –** Those with a high school level of education were less likely to be aware that complaints can be directed to Ad Standards in regards to advertising of food and beverages to children (17% compared to 26% for the total).
- **Complaint –** Those who have made a formal complaint about advertising were more likely to be aware that complaints can be directed to Ad Standards in regards to alcohol advertising (51% compared to 29% for the total), environmental claims in advertising (34% compared to 17% for the total), and motor vehicle advertising (27% compared to 13% for the total).

Appendix A: Methodology

The following four phase approach was used for the research undertaken by Colmar Brunton.

- Stage 1: Scoping and planning
- Stage 2: Online discussion board
- Stage 3: Quantitative survey
- Stage 4: Analysis and reporting
- Stage 1: Scoping and planning

On Thursday the 18th of October 2018, a scoping meeting was held between members of the Ad Standards team and the Colmar Brunton research team. During this meeting shared vision for the research was agreed upon. In addition, the research objectives, research design, research timings and all other relevant details for the study were confirmed and agreed.

Stage 2: Online discussion board

The online discussion board was run from the 7th to 13th of November 2018, with a total of n=35 participants. The purpose of the online discussion board was to understand consumer perspectives on clearly distinguishable advertising and uncover key criteria and factors that impact judgments using consumer sourced stimulus and stimulus provided by Ad Standards.

The online discussion board was utilised to allow participants to engage from the comfort of their own environment, which enabled them to contribute at any time that suited and to use a device that they felt comfortable with. It also provided participants time to reflect and think about topics in more depth and to upload images and screenshots. Furthermore, the online discussion boards enabled us to involve participants from all over Australia, ensuring a broad and diverse sample.

Participants were offered an incentive of $100 upon completion of the online discussion board, to cover their time and effort and to thank them for their participation.

The discussion guide used in this stage can be found at Appendix D.

Stage 3: Quantitative survey

An online survey was employed for the quantitative portion of the research, which allowed Colmar Brunton to show respondents four images and one video, which were embedded in the survey. The four images and one video that were shown to respondents related to Section 2.7 of the Code and were selected by Ad Standards.

Sampling and online fieldwork

The target audience for the quantitative research was the Australian population aged 13 years and over. The research sample was designed to ensure that a good representative sample of the Australian population was used for the research.

Quotas were set according to location, age and gender, to ensure a representation of the Australian population was surveyed. The quotas were developed in accordance with ABS Residential Population Estimates.

The participants for this research were sourced from Colmar Brunton's ISO accredited sister fieldwork company, the Online Research Unit (ORU).

Fieldwork was conducted between the 26th of November and the 4th of December 2018.

Quotas and sample achievement are shown in Appendix C: Technical Notes.

Stage 4: Analysis and reporting

This report contains the results from both the online discussion board and the quantitative survey.

For further details of the survey approach, please see Appendix C: Technical Notes.

The questionnaire instrument can be found in Appendix E.

Interpreting this report

Definitions

The following terms or abbreviations have been utilised throughout this report.

Table 14: Definitions

Term of abbreviation	Definition
Ad Standards*	Ad Standards Limited
AANA	Australian Association of National Advertisers
The Code	AANA Code of Ethics

* In 2018 Ad Standards rebranded with the following changes effective from 1 March 2018:
- the Advertising Standards Bureau rebranded to 'Ad Standards'
- the Advertising Standards Board rebranded to the 'Ad Standards Community Panel', and
- the Advertising Claims Board rebranded to the 'Ad Standards Industry Jury'.

Percentages and averages

Respondents who completed a survey but did not answer a particular question were excluded from the tabulation of results and calculation of statistics for that question.

Percentages were generally rounded to whole numbers. Some percentages may not add to 100% due to rounding. Some questions allowed respondents to give multiple answers and as such these may add to more than 100%.

Survey questions that asked respondents to give a rating from 1 to10 were subsequently grouped for analysis purposes. An example of this using an importance scale is shown below:

- a rating of 1-2 was classified as extremely unimportant
- a rating of 3-4 was classified as unimportant
- a rating of 5-6 was classified as neither important nor unimportant
- a rating of 7-8 was classified as important, and
- a rating of 9-10 was classified as extremely important.

Average ratings were rounded to one decimal place.

Note that average ratings **cannot** be translated into percentages. For example, an average rating of 7.3 out of 10 cannot be interpreted as meaning 73% of people.

Sorting of results

In all tables, rows were sorted from most frequent response to least.

Weighting

The results of this survey have been weighted according to gender, age and location. For further details about weighting please see Appendix C: Technical Notes.

Tests of statistical significance

Where appropriate within this report, statistical comparisons have been made to comparing demographic sub-groups against the total. With differences tested for statistical significance at the 95% confidence level (note: significance testing could not be undertaken on sample sizes smaller than n=30).

Tests of statistical significance are displayed in the report as follows:

- In tables and graphs, the â symbol and/or a figure coloured **red** represents a proportion that is significantly lower than the total.
- Conversely, the á symbol and/or a figure coloured **blue** represents a proportion that is significantly higher than the total.

An exception reporting approach has been undertaken in that if no statistical significance was mentioned, there was none associated with these groups.

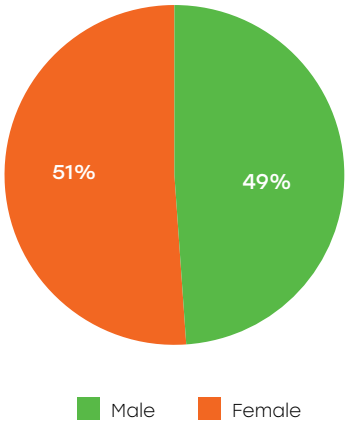
Reliability

A raw sample of n=1,027 from the Australian population has an associated margin of error of +/- 3.06%. This means we can be 95% confident that the true result in the population of interest is within +/- 3.06% of the result that we have obtained from our sample.

Where sample sizes were low (less than n=30), these were marked by an asterisk (*) in this report. These results should be interpreted with caution.

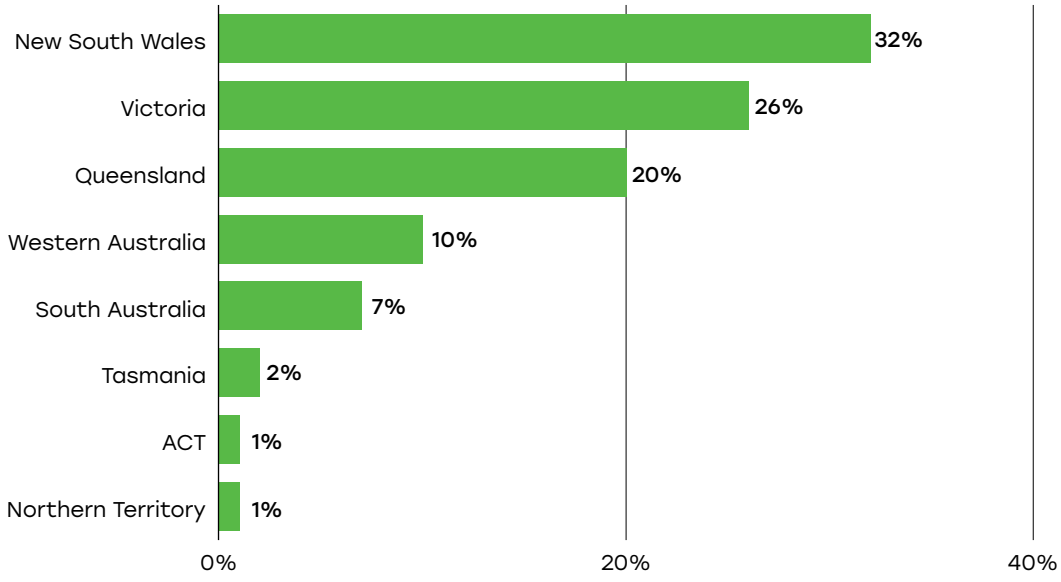
Appendix B: Sample profile for quantitative study

Figure 64: Gender



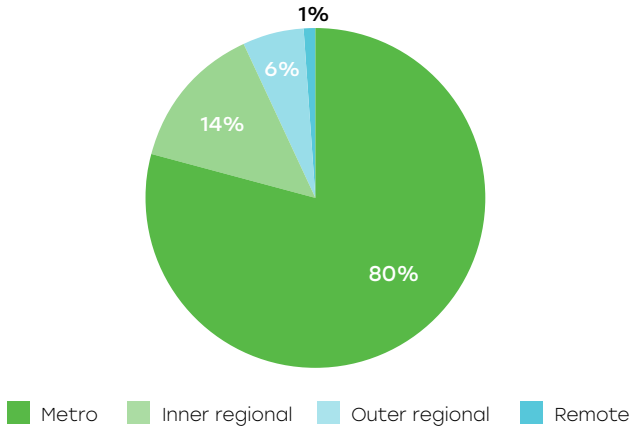
S2. Please indicate your gender. (Single response)
(Base=All respondents, 2018 Clearly Distinguishable Advertising Study n=1,027)

Figure 65: Location - State



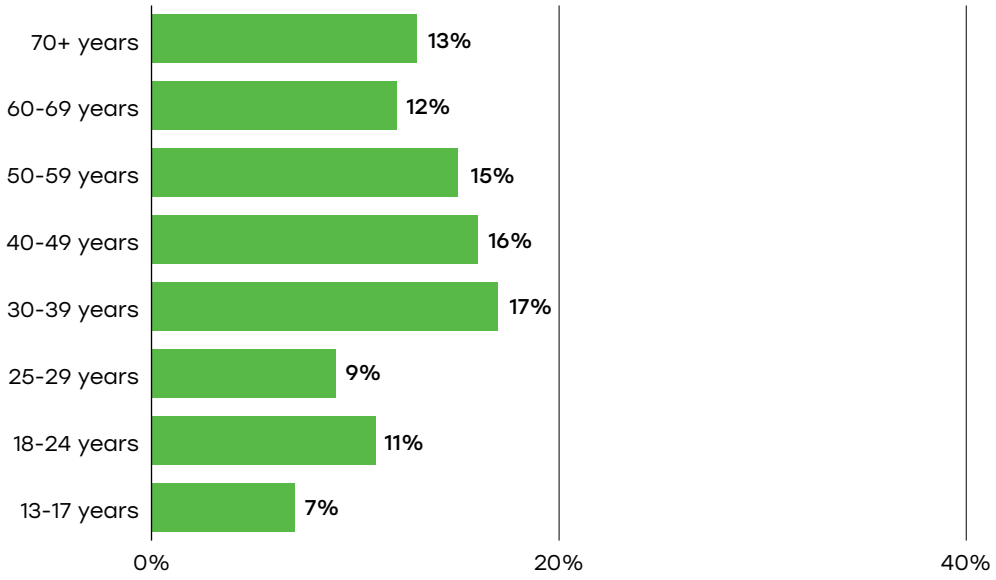
S5. Please indicate the postcode of your home address below. (Single response)
(Base=All respondents, 2018 Clearly Distinguishable Advertising Study n=1,027)

Figure 66: Location - Metro versus Regional



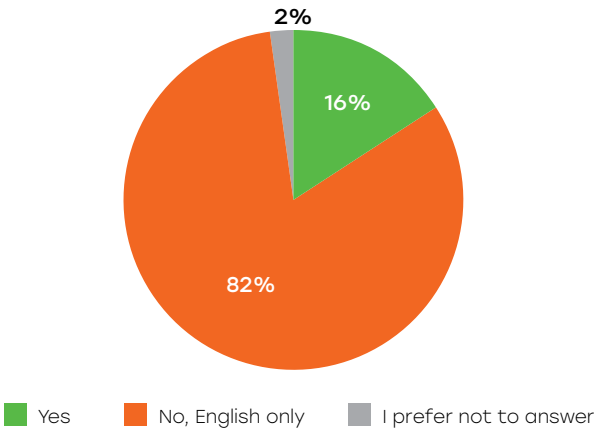
S5. Please indicate the postcode of your home address below. (Single response)
(Base=All respondents, 2018 Clearly Distinguishable Advertising Study n=1,027)

Figure 67: Age groups



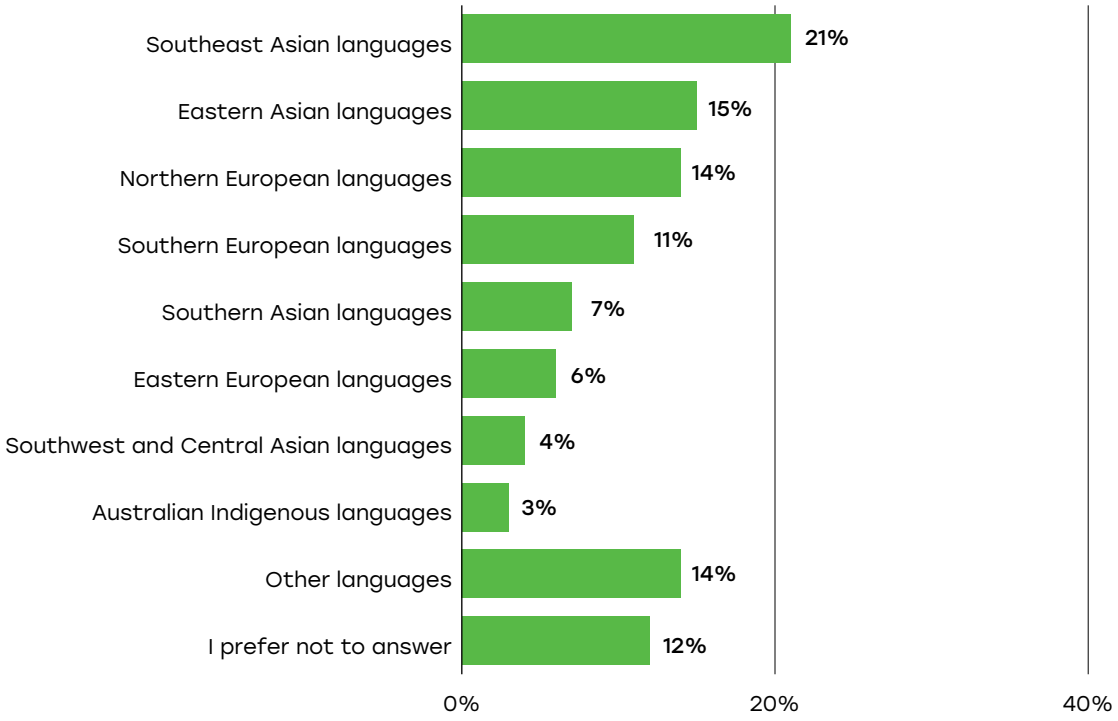
S4. Please indicate which of the following age groups you fall into. (Single response)
(Base=All respondents, 2018 Clearly Distinguishable Advertising Study n=1,027)

Figure 68: Speak a language other than English at home



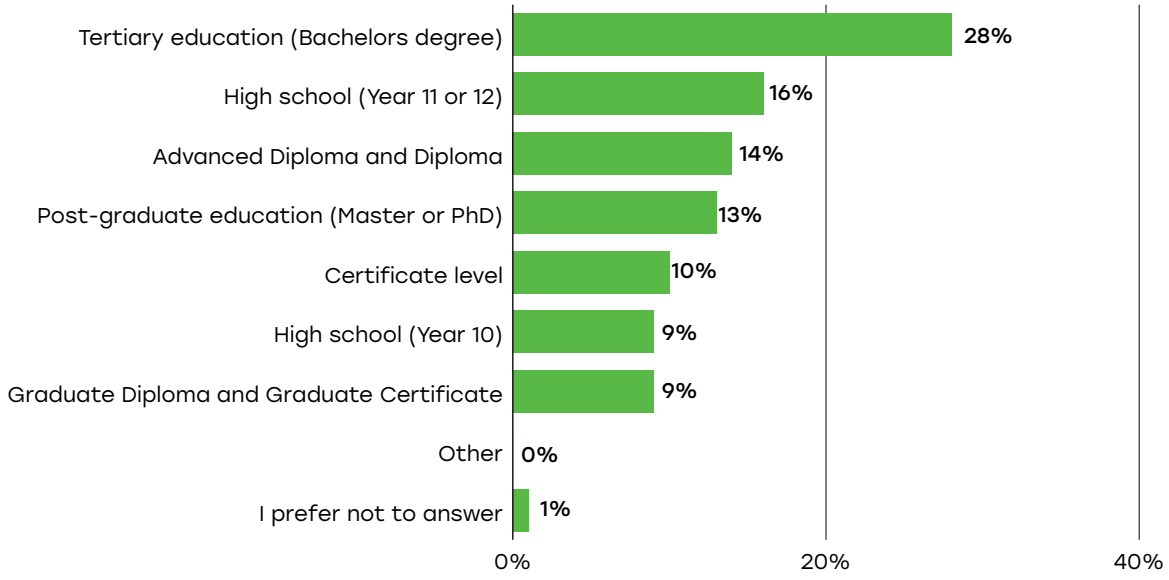
Q37. Do you speak a language other than English at home? (Single response)
(Base=All respondents, 2018 Clearly Distinguishable Advertising Study n=1,027)

Figure 69: Languages spoken



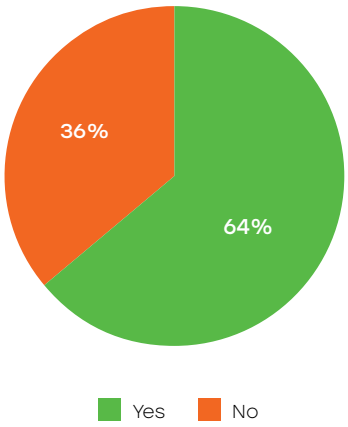
Q38. What languages do you speak? (Single response)
(Base=Respondents who have spoken a language other than English at home n=168)

Figure 70: Highest level of education



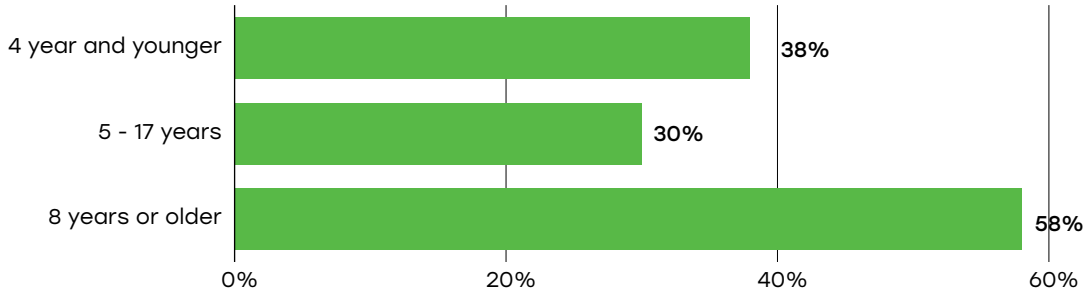
Q39. What is the highest level of education you have attained? (Single response)
(Base=All respondents, 2018 Clearly Distinguishable Advertising Study n=1,027)

Figure 71: Children



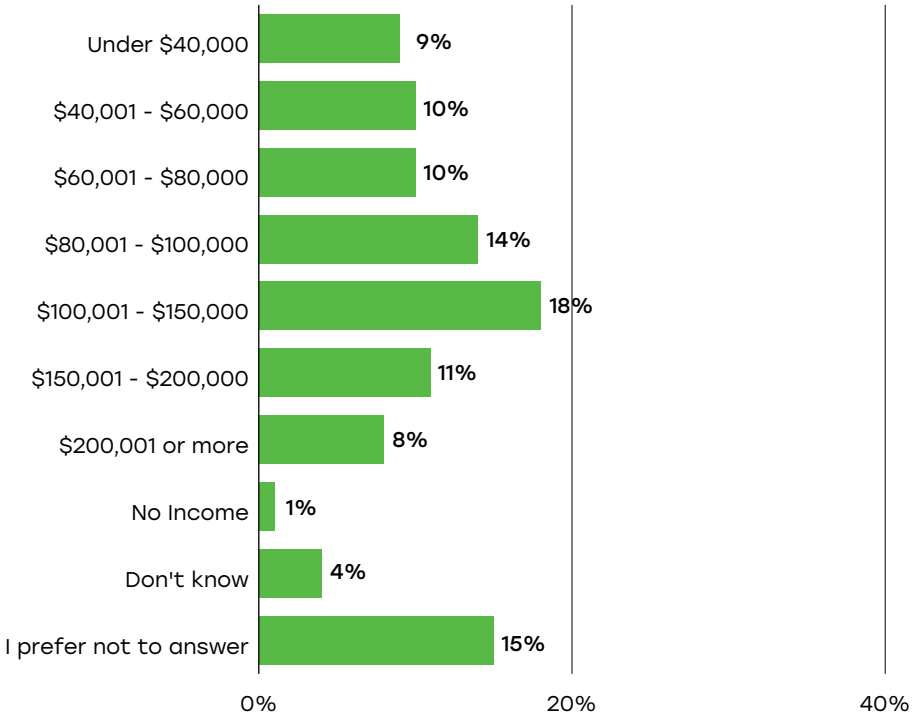
Q40. Do you have any children? (Single response)
(Base=All respondents, 2018 Clearly Distinguishable Advertising Study n=1,027)

Figure 72: Age of children



Q41. And what ages are they? (Single response)
(Base=Respondents who have children n=617)

Figure 73: Household annual gross income before tax



Q42. Including all Government benefits, pensions and allowances, what is your HOUSEHOLD'S ANNUAL gross income before tax from all sources? Just an estimate is fine. (Single response)
(Base=All respondents, 2018 Clearly Distinguishable Advertising Study n=1,027)

Appendix C: Technical notes

Research approach

The following four phase approach was used for the research undertaken by Colmar Brunton.

- Stage 1: Scoping and planning
- Stage 2: Online discussion board
- Stage 3: Quantitative survey
- Stage 4: Analysis and reporting

Quantitative research approach

An online research methodology was used to administer the survey.

The sample for the survey consisted of general public participants who were selected randomly from Colmar Brunton's ISO accredited, sister fieldwork company, the Online Research Unit (ORU).

The following sections discuss the quantitative survey methodology in detail.

Scope of the survey

It is important to note the following about the scope of the survey:

- A total of n=1,027 respondents were included
- Persons aged 13 years and over were asked to respond to the survey
- Permanent residents from regional and metropolitan areas of Australia were allowed to respond
- Persons of varied cultural, ethnic and socioeconomic backgrounds were included in the study;
- A cross section of consumers of varying education levels responded to the survey, and
- The Tribal Breweries Instagram image was not shown to 13-17 year old's.

Fieldwork

Fieldwork for the survey was conducted between 26th of November and the 4th of December 2018:

- The final response rate is the number of surveys completed as a proportion of eligible members. Thus, the final response rate for the survey was 9.1%[2].
- The average length of the survey was 13 and a half minutes.

Quotas and Weighting

Fieldwork quotas were set based on state/territory, gender and age. Any variations between sample achievement and quotas (which were reflective of population statistics) have been adjusted for by post-weighting the sample.

The following table shows how weights for this survey were calculated and applied for the analysis using all survey respondents. Column A shows how many surveys were achieved in each location for both gender and the specific age group. Column B shows the proportion of

2 Including completed, screen out and quota full

the number of completed surveys in each location, gender and specific age group. Column C shows the population figures in each location, gender and specific age group. Column D shows the proportion of the population represented by each cell. Column E shows the needed weight factor using the following calculation:

- Population % n (column D) / completed surveys % n (column B).

Table 15: Statistics used in weighting – All Survey Respondents

LOCATION	A	B	C	D	E
	Completed surveys n=	Completed surveys % n	Population figure n=	Population figure% n	Weight
MALES - NSW/ ACT - 13-17	9	2%	245,190	1.2%	0.567913831
MALES - NSW/ ACT - 18-24	17	4%	397,394	1.9%	0.487297951
MALES - NSW/ ACT - 25-29	14	3%	312,683	1.5%	0.465584416
MALES - NSW/ ACT - 30-39	26	6%	587,550	2.9%	0.471078934
MALES - NSW/ ACT - 40-49	25	6%	532,748	2.6%	0.444226048
MALES - NSW/ ACT - 50-59	13	3%	500,078	2.4%	0.801893324
MALES - NSW/ ACT - 60-69	23	5%	417,789	2.0%	0.378661688
MALES - NSW/ACT - 70+	22	5%	410,416	2.0%	0.388887339
MALES - VIC/ TAS - 13-17	8	2%	198,269	1.0%	0.516638814
MALES - VIC/ TAS - 18-24	19	4%	341,479	1.7%	0.374655922
MALES - VIC/ TAS - 25-29	14	3%	264,677	1.3%	0.39410357
MALES - VIC/ TAS - 30-39	21	5%	491,434	2.4%	0.487829553
MALES - VIC/ TAS - 40-49	20	5%	442,846	2.2%	0.46157782
MALES - VIC/ TAS - 50-59	21	5%	408,013	2.0%	0.405020408
MALES - VIC/ TAS - 60-69	19	4%	337,890	1.6%	0.370718227
MALES - VIC/TAS - 70+	20	5%	332,320	1.6%	0.346376712
MALES - QLD - 13-17	9	2%	157,729	0.8%	0.365334967
MALES - QLD - 18-24	13	3%	236,636	1.2%	0.379454462
MALES - QLD - 25-29	11	3%	176,282	0.9%	0.334070006
MALES - QLD - 30-39	16	4%	328,882	1.6%	0.428491611
MALES - QLD - 40-49	18	4%	325,054	1.6%	0.376448188
MALES - QLD - 50-59	17	4%	301,081	1.5%	0.369195696
MALES - QLD - 60-69	13	3%	250,303	1.2%	0.401369996
MALES - QLD - 70+	13	3%	232,427	1.1%	0.372705177
MALES - SA/NT - 13-17	3	1%	58,736	0.3%	0.408136385
MALES - SA/NT - 18-24	5	1%	93,882	0.5%	0.391412355

LOCATION	A	B	C	D	E
	Completed surveys n=	Completed surveys % n	Population figure n=	Population figure% n	Weight
MALES - SA/ NT - 25-29	4	1%	70,498	0.3%	0.367399877
MALES - SA/ NT - 30-39	4	1%	132,384	0.6%	0.68991837
MALES - SA/ NT - 40-49	6	1%	128,082	0.6%	0.444999017
MALES - SA/ NT - 50-59	5	1%	126,186	0.6%	0.526094026
MALES - SA/ NT - 60-69	7	2%	106,153	0.5%	0.316123247
MALES - SA/NT - 70+	7	2%	102,440	0.5%	0.305065946
MALES - WA - 13-17	5	1%	77,782	0.4%	0.324288317
MALES - WA - 18-24	9	2%	121,090	0.6%	0.280471005
MALES - WA - 25-29	6	1%	100,189	0.5%	0.348089556
MALES - WA - 30-39	7	2%	196,147	1.0%	0.58412505
MALES - WA - 40-49	5	1%	176,493	0.9%	0.735833714
MALES - WA - 50-59	5	1%	159,822	0.8%	0.666329066
MALES - WA - 60-69	7	2%	125,985	0.6%	0.37518287
MALES - WA - 70+	6	1%	111,145	0.5%	0.386154305
FEMALES - NSW/ ACT - 13-17	9	2%	232,271	1.1%	0.537990592
FEMALES - NSW/ ACT - 18-24	15	4%	381,706	1.9%	0.530468902
FEMALES - NSW/ ACT - 25-29	13	3%	312,003	1.5%	0.500308197
FEMALES - NSW/ ACT - 30-39	30	7%	593,662	2.9%	0.41251543
FEMALES - NSW/ ACT - 40-49	30	7%	547,742	2.7%	0.380607191
FEMALES - NSW/ ACT - 50-59	21	5%	519,565	2.5%	0.515754225
FEMALES - NSW/ ACT - 60-69	25	6%	436,239	2.1%	0.363753082
FEMALES - NSW/ACT - 70+	29	7%	490,229	2.4%	0.352389697
FEMALES - VIC/ TAS - 13-17	10	2%	188,495	0.9%	0.392936195
FEMALES - VIC/ TAS - 18-24	14	3%	327,114	1.6%	0.487072149
FEMALES - VIC/ TAS - 25-29	15	4%	265,163	1.3%	0.368505408
FEMALES - VIC/ TAS - 30-39	25	6%	497,867	2.4%	0.415140911
FEMALES - VIC/ TAS - 40-49	24	6%	458,639	2.2%	0.398365703
FEMALES - VIC/ TAS - 50-59	25	6%	427,105	2.1%	0.356136797
FEMALES - VIC/ TAS - 60-69	21	5%	357,304	1.7%	0.354683336

LOCATION	A	B	C	D	E
	Completed surveys n=	Completed surveys % n	Population figure n=	Population figure% n	Weight
FEMALES - VIC/TAS - 70+	22	5%	398,509	1.9%	0.377604929
FEMALES - QLD - 13-17	9	2%	149,957	0.7%	0.34733331
FEMALES - QLD - 18-24	12	3%	231,281	1.1%	0.401773151
FEMALES - QLD - 25-29	8	2%	178,060	0.9%	0.463979276
FEMALES - QLD - 30-39	16	4%	339,199	1.7%	0.441933356
FEMALES - QLD - 40-49	20	5%	337,647	1.6%	0.351929037
FEMALES - QLD - 50-59	16	4%	314,238	1.5%	0.409412332
FEMALES - QLD - 60-69	15	4%	257,656	1.3%	0.358072693
FEMALES - QLD - 70+	15	4%	266,843	1.3%	0.370840157
FEMALES - SA/ NT - 13-17	2	0%	55,770	0.3%	0.581289998
FEMALES - SA/ NT - 18-24	4	1%	88,278	0.4%	0.460060233
FEMALES - SA/ NT - 25-29	3	1%	68,884	0.3%	0.478651368
FEMALES - SA/ NT - 30-39	7	2%	132,783	0.6%	0.395427289
FEMALES - SA/ NT - 40-49	7	2%	127,905	0.6%	0.380900623
FEMALES - SA/ NT - 50-59	8	2%	128,855	0.6%	0.335763505
FEMALES - SA/ NT - 60-69	6	1%	110,376	0.5%	0.383482546
FEMALES - SA/NT - 70+	7	2%	124,037	0.6%	0.369381733
FEMALES - WA - 13-17	2	0%	74,390	0.4%	0.77536602
FEMALES - WA - 18-24	5	1%	113,837	0.6%	0.474608639
FEMALES - WA - 25-29	4	1%	97,286	0.5%	0.507005368
FEMALES - WA - 30-39	10	2%	191,397	0.9%	0.398985697
FEMALES - WA - 40-49	8	2%	173,873	0.8%	0.453069014
FEMALES - WA - 50-59	8	2%	160,462	0.8%	0.418123344
FEMALES - WA - 60-69	7	2%	128,763	0.6%	0.383455744
FEMALES - WA - 70+	8	2%	129,968	0.6%	0.338663701
TOTAL		**100%**	**20,531,542**	**100%**	**NA**

Why do researchers weight data?

Raw data from the survey can be biased and therefore it would be misleading to use it as a basis of coming to an understanding about the topic at hand. For example, if the sample has a greater proportion of female respondents than male respondents and female respondents have different views than male respondents, reporting on raw data would lead to a bias towards what females do or think. Weighting the data overcomes this problem because it ensures that the results are representative of the target population.

Sampling error

Surveys are subject to errors, of which there are two main types: sampling error and non-sampling error.

Sampling error

The sampling error is the error that arises because not every single member of the population was included in the survey. If different demographic or attitudinal groups are included in the sample in a different proportion to their incidence rate in the population, the sample can be skewed and unrepresentative. Colmar Brunton randomly samples to minimise the likelihood of this happening.

Naturally it is simply not feasible to survey the whole population to avoid this type of error. One can, however, estimate how big this error component is, using statistical theory. This theory indicates that with a sample of 1,000 people from a population of 100,000 people or more, the maximum margin of sampling error on an estimate of a proportion is 3.1%.

The way this can be interpreted is as follows in an example. The survey results estimate that 50% of respondents consider an image to clearly distinguishable as advertising. The maximum margin of error on this estimate of 50% from a sample of n=1,027 from the Australian population is +/- 3.06%. Hence, one can be 95% confident that the actual proportion of people in the population that consider the ad acceptable is 50% +/- 3.06%, i.e. it is between 46.94% and 53.06%.

Non-sampling error

All surveys, regardless of whether they are samples or censuses, are subject to other types of error called non-sampling error. Non-sampling errors include things like interviewer keying errors and respondents misunderstanding a question.

Every attempt has been made to minimise the non-sampling error in this study. For example, use of an online survey reduces the errors of interviewers transcribing comments, but relies on respondents typing skills. Some types of error are out of the control of the researcher. In particular, the study is reliant on accurate reporting of behaviours and views by respondents. As an example, a respondent may forget that they played tennis nine months ago and fail to report this activity.

Appendix D: Qualitative discussion guide

Day 1	
Goal	Allowing participants to introduce themselves, creating a sense of community, establish trust in the moderator and encourage sharing. Introductory discussion about online behaviours and social media usage, understanding general attitudes, current usage and social media platform preferences.
Activity	Discussion
Date	Wednesday 7th November
Other details	Open to all, participants can see responses upon accessing the activity.

Activity Title: 1. Introduce yourself!

Activity description:

Welcome to the "Talking Social Media" discussion board. As mentioned before, this board is created for you specifically, to get together and discuss views and opinions. But before we get too serious.... Let's get to know each other a bit!

- Upload a photo of yourself and include a hashtag that best describes you (see my example).
- Tell us what a typical day looks like for you when it comes to social media and internet use.
- Share an experience: Have you ever come across online content that you thought was genuine or factual, but turned out to be advertising? If so, please tell us about it... How and where did you come across it? What was it about? How did it make you feel? What did you do as a result?
- Now try and get to know at least 2 fellow board members by responding to their introductions!

Today is the opportunity to get to know each other a bit and feel comfortable sharing our views. Over the next week, you will mostly be discussing themes together. I will be here as a moderator, to introduce the activities, observe your comments and ask more questions if needed.

Can't wait to see everyone and get to know you a bit more!

Joyce

Day 2a	**Context Exploration**
Goal	Consumer definition of advertising.
Activity	Association and top of mind thoughts (open ended question)
Date	Thursday 8th November
Other details	Individual

Activity title: 2. Defining an ad (part 1/3)

Activity description:

It was great getting to know everyone a bit more! Before we start with a discussion, I would like to get your top of mind thoughts, so please don't spend more than 2 minutes on this activity!

Please tell me, in no more than two sentences, how you would define 'advertising'. Think about what sets an ad apart from other forms of content, such as information or an opinion?

Please remember that there are no right or wrong answers and it is about your own thoughts and words (please do not use Google ☺)

- How would you define 'advertising', using your own words? How would you define 'advertising', using your own words? [Open ended response]

Day 2b	Context Exploration
Goal	Awareness of advertising on social media and online platforms, including exploring definitions of advertising or marketing communication in this context.
Activity	Discussion, sequenced (opens after participants have completed 2a)
Date	Thursday 8th November
Other details	Open to all, participants can only see responses once they have posted a comment.

Activity title: 2. Defining an ad (part 2/3)

Activity description:

In this discussion we will talk about advertising on social media and other online channels a bit more.

- Tell us.. How do you feel about advertising on social media and other online channels?
- Is advertising on social media different to other forms of advertising, that we might see in print or on television? If so, how come?
- What different types of advertising could you think of, specifically when thinking about how it is used on social media and online platforms?

Once you have posted your comments, you will be able to see what your fellow board members have posted...

- Please have a close look at some of the responses... what do we have in common when it comes to defining advertising?
- What are some of the differences or challenges in defining advertising?

Once you have completed this activity... you will be able to access part 3 of this activity. The activity will appear on your homepage!

Joyce

Day 2b	Context Exploration
Goal	Awareness of advertising on social media and online platforms, including exploring definitions of advertising or marketing communication in this context.
Activity	Discussion, sequenced (open as soon as participants have completed part 2b)
Date	Thursday 8th November
Other details	Open to all, participants can only see responses once they have posted a comment.

Activity title: 2. Defining an ad (part 3/3)

Activity description:

I can see that the first part of the activity got you thinking… From now on we will agree on one definition of advertising, just to make sure that we are all talking about the same thing!

Advertising is:

Any material which is published or broadcast and is undertaken by, or on behalf of an advertiser or marketer,

- *• over which the advertiser or marketer has a reasonable degree of control, and*
- *• that draws the attention of the public with the intention to promote or oppose a product, service, person, organisation or line of conduct,*

BUT does not include: labels or packaging for products, corporate reports including corporate affairs messages.

For a full explanation of the definition, please have a look **on this page**

- How do you feel about this definition? Please share your thoughts.

Joyce

Day 3 & 4	Exploring criteria for 'distinguishable ads'
Goal	Source participant examples of ads that are considered clearly distinguishable, and ads considered not clearly distinguishable. Participants can upload stimulus from social media, e.g. ads or posts they have seen, and describe who they think they were aimed at. This topic aims to collect a variety of stimulus and spark discussion about the criteria that determine ad distinction.
Activity	Discussion and image sharing
Date	Friday 9th November & Saturday 10th November
Other details	Open to all, participants can only see responses once they have posted a comment.

Activity title: 3. To ad or not to ad

Activity description:

Today we will start with one of the most fun activities! Look for examples that you consider "clearly distinguishable as an ad" and examples that you consider "NOT clearly distinguishable as an ad". Use your own social media and webpages you regularly visit to find these examples.

- Please keep in mind the definition of an ad, also see the widget on the right side of the screen. Avoid example of clickbait: that is not what we are looking for in this activity!
- Look for examples on your social media or any online platform you regularly visit (again, please don't Google J). You can make a screenshot with your phone/computer and upload that screenshot into your comment. If you have any questions about this, please contact me!
- Use one example/ screenshot per comment, then fill out the pre filled comment box to show what the example represents:

This is my example of an ad that …. (write IS or ISN'T) clearly distinguishable as such.

This ad is aimed at … (describe who you think the target audience is)

If feel this is a good example, because….(list the reasons why you feel this is a good example)

Once you are done, make sure you comment on at least 2 other examples, uploaded by your fellow board members.

Can't wait to see what you come up with!

Day 5a	Consumer sentiment (survey)
Goal	Relevance and level of concern to advertising (on social media and online platforms) that is not clearly distinguishable.
Activity	Quick poll
Date	Sunday 11th November
Other details	Individual, participants only see their own responses.

Activity title: 4. Stop and think – Quick poll

Activity description:

While we are thinking about what makes advertising "clearly distinguishable" as such…
Let's take a step back and talk about how we felt about this theme PRIOR to starting this discussion board…

- How often did you think about whether something is an ad or not, when looking at content online? [1-5 scale: Never – Always]
- How often do you feel ads are not clearly distinguishable as such, when you are looking at content online? [1-5 scale: Never – Always]
- To what extent are you concerned about ads not being clearly distinguishable as such? [1-5 scale: Not at all concerned – Extremely concerned]
- Please explain your level of concern [open ended]
- To what extent is it important to you that ads are clearly distinguishable as such? [1-5 scale: Not at all important – Extremely important]

Day 5b	Consumer sentiment (discussion)
Goal	Relevance and level of concern to advertising (on social media and online platforms) that is not clearly distinguishable.
Activity	Discussion and image sharing, sequenced (open as soon as participants have completed the quick poll).
Date	Sunday 11th November
Other details	Open to all, participants can only see responses once they have posted a comment.

Activity title: 4. Stop and Think - Discussion

Activity description:

Now that we have shared our individual opinions, let's share and discuss our thoughts as a group.

Do we feel there are any differences between online channels, when it comes to how clearly distinguishable ads are? (channels are e.g. Instagram, Facebook, Twitter, Snapchat, websites, forums).
If so, please describe any differences.

And would it be more important for certain channels than others to have ads being clearly distinguishable as such? If so, please describe how and why this is different for each channel.

And what about the audiences... Would it be more important to certain people than others to have ads being clearly distinguishable as such? If so, please describe how and why this importance might differ depending on the audience.

Again, please ensure you comment on your fellow board members thoughts, so we can create an interesting and active discussion!

You can always go back to our previous activity "to ad or not to ad", and continue commenting on the screenshots that have been uploaded there.

Day 6	Exploring criteria for 'distinguishable ads'
Goal	Evaluate selected participant sourced stimulus from prior topic (and potentially stimulus provided by Ad Standards e.g. examples from Eco Tan, Mercedes Benz, Neds, Donut King). Collecting individual responses via a poll and hotspot activity*, followed by discussion to uncover and examine criteria. In particular: Understanding context related criteria (e.g. where the content is placed, how participants are directed to the content). Exploring content related factors (e.g. nature of the content, theme, product, visuals, language, brand names and logos)
Activity	Quick poll questions, followed by hotspot tool A hotspot (or markup) activity is where respondents pinpoint areas on stimulus, giving their individual and unprompted feedback. This allows capturing criteria that influence judgments and why, before embarking on a collective discussion and reflection. Before entering the hotspot activity, participants have been asked whether they think the stimulus is advertising or not. They are then asked to explain why they have come to that conclusion, by marking areas on the stimulus and providing comments.
Date	Monday 12th November
Other details	Individual, participants only see their own responses.

Activity title: 5. You be the judge - quick poll

Activity description:

Let's look at some images. Please answer a few quick questions about each of these images, before providing your further explanations in the next activity.

[FOR EACH IMAGE]

- Do you consider this an ad? [yes/no, add segment]
- How come? [open ended]
- Who do you think this message is directed at? [open ended]
- If it were an ad, would you consider this clearly distinguishable as such? [yes/no]

Please click "next activity" to explain your answers in more detail!

Day 6	Exploring criteria for 'distinguishable ads'
Goal	Evaluate stimulus
Activity	Hotspot tool
Date	Monday 12th November
Other details	Individual, participants only see their own responses.

Activity title: 6. You be the judge - pin it down

Activity description:

We will now look at each image again, and you will be able to provide comments, explaining the answers you gave in the quick poll. Drop pins in the areas of the image that helped you form an opinion about whether you considered it to be an ad or not. Then answer the questions that pop up.

[FOR EACH STIMULUS PARTICIPANT CAN DROP UP TO 5 PINS, DROPPED PINS WILL PROMPT THE FOLLOWING QUESTIONS]

- Please explain how this helped you decide whether this image is clearly an ad or not [open ended] (tweaked text: How does this tell you the image is clearly an ad or not?)
- How does this make you feel? Select J, K, or L
- What effect does this have on people seeing this (audience)?

[REPEAT FOR ALL STIMULUS]

Appendix E: Quantitative questionnaire

SECTION A: MANDATORY QMS REQUIREMENTS

EMAIL INTRODUCTION – DO NOT SCRIPT, THIS WILL GO IN EMAIL INVITATION

We are conducting a NEW survey and you are invited to participate. If you choose to participate, please be assured that the information and opinions you provide will be used only for research purposes. In particular, no individual responses will be given to the organisation sponsoring this research; they will be combined with those from other participants in this research.

The purpose of this research is to understand community expectations around the content of advertising. There is nothing too explicit in the survey, but it does include some advertisements which have generated complaints. If you think you are likely to be offended, then please do not participate – however, it is important to the research that we have a broad cross section of the community in the survey in order that our client can get a good understanding of the full range of views.

The identity of the organisation sponsoring this research will be revealed to you at the end of this survey. We cannot reveal this to you now as it may bias your responses to some of the questions.

SURVEY INTRODUCTION – THIS SHOULD BE THE FIRST PAGE OF THE SCRIPT

Thank you for agreeing to complete our new survey.

Please make sure you fill out all the questions on each page.

Thank you for your time and have a nice day.

SECTION B: INDIVIDUAL PROJECT REQUIREMENTS

SCREENER

S1. EMPLOY (DO NOT DISPLAY)

S1. Firstly, could you please tell me if you are currently employed in any of the following areas?

CODE	SELECT AS MANY AS APPLY	SEQUENCE INSTRUCTION
01	Market Research	CLOSE
02	An advertising agency	
03	Any other organisation heavily involved with advertising in any way	
04	The legal profession	CONTINUE
05	A company involved in banking or finance	
06	Unsure	CLOSE
97	None of the above	CONTINUE

S2. GENDER (DO NOT DISPLAY)

S2. Please indicate your gender

CODE	SELECT ONE RESPONSE ONLY	SEQUENCE INSTRUCTION
01	Male	CHECK QUOTAS (INTERLOCKING WITH AGE) & CONTINUE
02	Female	

S3. AUSTRALIAN RESIDENT (DO NOT DISPLAY)

S3. Are you a permanent resident of Australia?

CODE	SELECT ONE RESPONSE ONLY	SEQUENCE INSTRUCTION
01	Yes	CONTINUE
02	No	CLOSE

S4. AGE (DO NOT DISPLAY)

S4. Please indicate which of the following age groups you fall into (SR)

CODE	SELECT ONE RESPONSE ONLY	SEQUENCE INSTRUCTION
01	13-17 years	CHECK QUOTAS (INTERLOCKING AGE, GENDER, LOCATION) & CONTINUE
02	18-24 years	
03	25-29 years	
04	30-34 years	
05	35-39 years	
06	40-44 years	
07	45-49 years	
08	50-54 years	
09	55-59 years	
10	60-64 years	
11	65-69 years	
12	70+ years	

S5A. POSTCODE (DO NOT DISPLAY)

S5A. Please indicate the postcode of your home address below. **CHECK QUOTAS**

_____

PROGRAMING INSTRCUTION: PLEASE THEN MATCH POSTCODE TO REGIONAL STATUS AND STATE

S5B. STATE (DO NOT DISPLAY)

S5B. FIELDWORK PROVIDER TO FILL OUT TABLE BELOW BASED ON POSTCODE

CODE	SELECT ONE RESPONSE ONLY	SEQUENCE INSTRUCTION
01	New South Wales	CHECK QUOTAS (INTERLOCKING AGE, GENDER, LOCATION) & CONTINUE
02	ACT	
03	Victoria	
04	Tasmania	
05	Queensland	
06	South Australia	
07	Northern Territory	
08	Western Australia	
09	Does not currently live in Australia	CLOSE

S5C. REGION (DO NOT DISPLAY)

S5C. FIELDWORK PROVIDER TO FILL OUT TABLE BELOW BASED ON POSTCODE

CODE	SELECT ONE RESPONSE ONLY	SEQUENCE INSTRUCTION
01	Metro	CONTINUE
02	Inner regional	
03	Outer regional	
04	Remote	

IF UNSUCCESSFUL

Unfortunately for this particular survey, we need responses from people who fit a specific criteria.

Thank you for your participation and we will contact you again shortly for another [ORU] survey!

Regards
[ORU]

IF SUCCESSFUL, CONTINUE

SECTION A: GENERAL MEDIA, SOCIAL MEDIA AND GENERAL INTERNET USAGE

Q1. ONLINE MEDIA USAGE (DO NOT DISPLAY)

Q1. Which of the following would you do in a typical week? MR RANDOMISE

CODE	SELECT AS MANY AS APPLY	SEQUENCE INSTRUCTION
01	Visit a website/s for leisure	CONTINUE
02	Use social media platforms (e.g. Facebook, Instagram, Twitter etc.)	
03	Watch catch-up TV over the internet (e.g. iView, Plus7 etc.)	
04	Watch an online streaming service (e.g. Netflix, Stan etc.)	
05	Listen to an internet radio service	
06	Play games on the internet (online games)	
07	Create and uploaded video content to the internet (e.g. YouTube etc.)	
08	Listen to music via an online streaming service (e.g. Spotify etc.)	
09	Use the internet for phone calls (i.e. VOIP)	
10	General internet browsing	
11	Check emails	
12	Video calling / conferencing (e.g. Skype etc.)	
13	Do internet banking and/or pay bills online	
14	Do online shopping	
15	Read an online newspaper	
16	Read an online magazine	
99	None of these	

Q2. GENERAL MEDIA USAGE (DO NOT DISPLAY)

Q2. Which of the following would you do in a typical week? MR RANDOMISE

CODE	SELECT AS MANY AS APPLY	SEQUENCE INSTRUCTION
01	Watch free to air television (not online)	CONTINUE
02	Watch pay TV (e.g. Foxtel, Austar) (not online)	
03	Listen to the radio (not online)	
04	Read a magazine	
05	Read a newspaper (hard copy – not online)	
06	Go to the Cinema	
99	None of these	

PROGRAMING INSTRCUTION: ASK Q3 IF Q1 = CODE 2 (I.E. USES SOCIAL MEDIA)

Q3. SOCIAL MEDIA USAGE (DO NOT DISPLAY)

Q3. In a typical week, which of the following social media platforms would you use?
MR RANDOMISE

CODE	SELECT AS MANY AS APPLY	SEQUENCE INSTRUCTION
01	Facebook	CONTINUE
02	Instagram	
03	Twitter	
04	LinkedIn	
05	YouTube	
06	Reddit	
07	Google+	
08	Pinterest	
09	Snapchat	
96	Other (please specify)	

PROGRAMING INSTRCUTION: ASK Q4 IF Q1 = CODES 1 OR 10 (I.E. VISITS WEBSITES/BROWSES THE INTERNET)

Q4. WEBSITE USAGE (DO NOT DISPLAY)

Q4. In a typical week, what types of websites do you visit? MR RANDOMISE

CODE	SELECT AS MANY AS APPLY	SEQUENCE INSTRUCTION
01	Arts and entertainment	
02	Automotive and vehicles	
03	Beauty and fitness	
04	Books and literature	
05	Business and industry	
06	Career and education	
07	Computer and electronics	
08	Finance	
09	Food and drink	
10	Gambling	
11	Games	
12	Health	
13	Home and garden	
14	Internet and telecommunications	CONTINUE
15	Law and government	
16	News and media	
17	People and society	
18	Pets and animals	
19	Recreation and hobbies	
20	Reference / research (e.g. dictionaries, encyclopedias, maps)	
21	Science	
22	Shopping (classifieds, auctions etc.)	
23	Sports	
24	Travel	
25	Adult	
96	Other (please specify)	

Q5. SOCIAL MEDIA USAGE IN HOURS (DO NOT DISPLAY)

Q5. How many hours would you say you spend on social media platforms (e.g. Facebook, Instagram, Twitter etc.) in a typical day OR week?

Please enter to the nearest **whole number of hours one response in EITHER the daily OR weekly box**. SR

Note: this includes accessing social media on any device (e.g. internet-enabled TV screen, computer, laptop or notebook, tablet computer, smart phone or other mobile device etc.).

PROGRAMING INSTRCUTION: PLEASE ENSURE RESPONDENTS ONLY HAVE TO ANSWER ONE OR THE EITHER, BUT DO NEED TO ANSWER SOMETHING IN ORDER TO MOVE ON

DAILY	WEEKLY	SEQUENCE INSTRUCTION
WHOLE NUMBER	**WHOLE NUMBER**	CONTINUE

Q6. INTERNET USAGE IN HOURS (DO NOT DISPLAY)

Q6. And in total how many hours would you say you spend on the internet in a typical day OR week?

Please enter to the nearest **whole number of hours one response in EITHER the daily OR weekly box**. SR

Note: this includes accessing the internet on any device (e.g. internet-enabled TV screen, computer, laptop or notebook, tablet computer, smart phone or other mobile device etc.).

PROGRAMING INSTRCUTION: PLEASE ENSURE RESPONDENTS ONLY HAVE TO ANSWER ONE OR THE EITHER, BUT DO NEED TO ANSWER SOMETHING IN ORDER TO MOVE ON

DAILY	WEEKLY	SEQUENCE INSTRUCTION
WHOLE NUMBER	**WHOLE NUMBER**	CONTINUE

SECTION B: COMMUNITY REACTIONS TO ADVERTISEMENTS/POTENTIAL ADVERTISEMENTS (UNINFORMED)

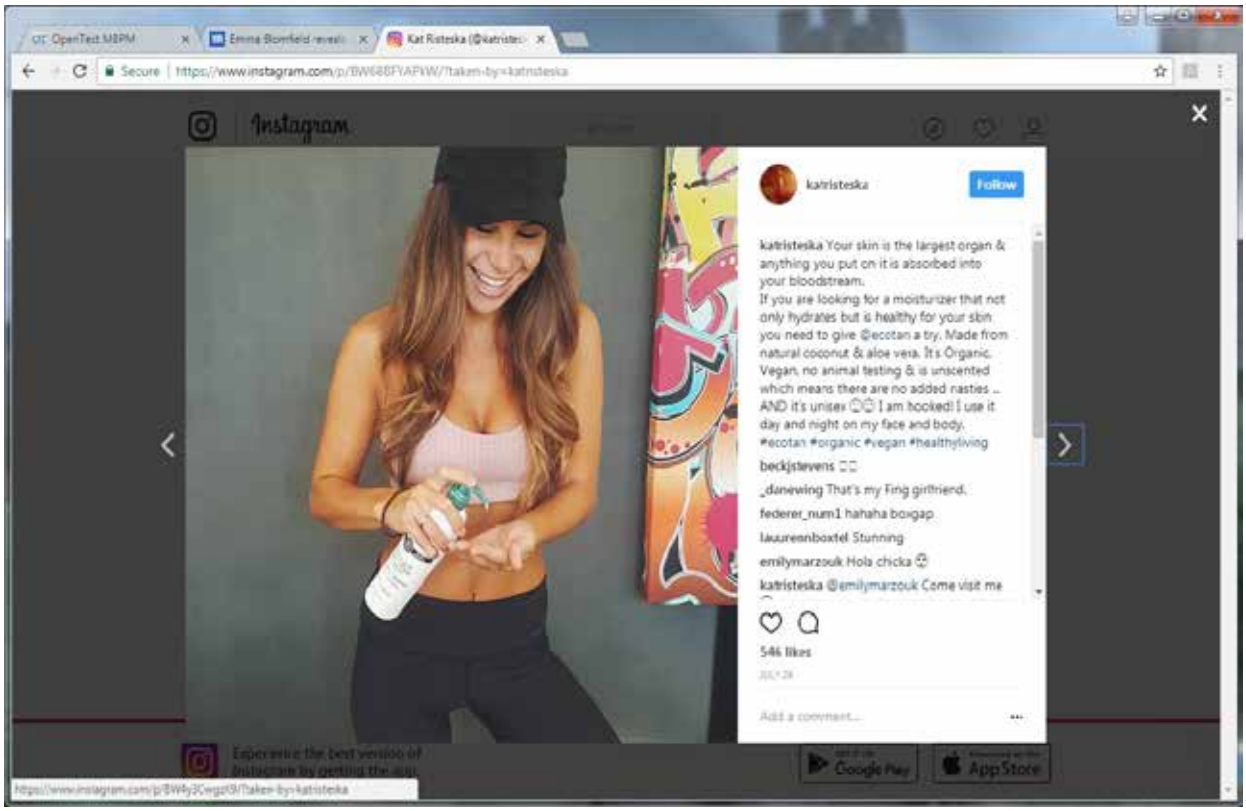
Now we are going to look at some images, articles and videos. We are keen to understand what online or social media content (i.e. images, articles and videos) people consider to be advertising and what's not advertising. We will show each image and then ask you some questions about each one.

IMAGES TO BE SHOWN IN THE FOLLOWING SECTION, UNDER AANA CODE OF ETHICS SECTION 2.7 CLEARLY DISTINGUISHABLE ADVERTISING.

PROGRAMING INSTRCUTION: DO NOT SHOW THIS TITLE IN ONLINE PROGRAMMING – TOPIC HAS TO REMAIN UNPROMPTED

Ad Number	Ad Name	Medium	Special notes
Image 1.	Eco Tan	Online – Instagram	
Image 2.	Mercedes Benz	Online – Instagram	
Image 3.	Neds	Online	
Video 5.	Lottoland	Television	
Image 6.	Tribal Breweries	Online - Instagram	This Image cannot be shown to and respondent that is under 18 years of age

PROGRAMING INSTRCUTION: PLEASE RANDOMISE IMAGES 1-6 FOR EACH RESPONDENT AND ENSURE THE IMAGE/VIDEO IS SHOWN ON EVERY PAGE THAT A RELATED QUESTION IS ASKED



Q7. IMAGE 1 – ADVERTISING OR NOT (DO NOT DISPLAY)

Q7. The image you are being shown appeared on Instagram for all followers of "katristeska", an actress.

Which of the following best applies to the Instagram post above?

CODE	SELECT ONE RESPONSE ONLY	SEQUENCE INSTRUCTION
01	It is **clearly** advertising	CONTINUE TO Q8
02	It is **probably** advertising	
03	I am **unsure** whether it is advertising or not	SKIP TO Q10
04	It is **probably not** advertising	SKIP TO Q9
05	It is **clearly not** advertising	

PROGRAMING INSTRCUTION: ASK Q8 IF Q7 = CODES 01 OR 02 (I.E. DEEMED TO BE CLEARLY OR PROBABLY ADVERTISING)

Q8. IMAGE 1 – ADVERTISING (DO NOT DISPLAY)

Q8. Which of the following are reasons why you think this **is** advertising? MR RANDOMISE

CODE	SELECT AS MANY AS APPLY	SEQUENCE INSTRUCTION
01	The language used sounds like advertising	SKIP TO Q10
02	The imagery/photography looks professional	
03	The imagery/photography looks staged	
04	The product is central to the post – just like in advertising	
05	The post contains tags and/or hashtags of the brand or product	
06	The label on the product is visible	
07	The person in the post looks like she is modelling – just like in advertising	
08	The post makes the product appear desirable	
09	It was posted by a prominent person or celebrity that would post advertising	
96	Other (please specify)	

PROGRAMING INSTRCUTION: ASK Q9 IF Q7 = CODES 04 OR 05 (I.E. DEEMED TO BE CLEARLY NOT OR PROBABLY NOT ADVERTISING)

Q9. IMAGE 1 – NOT ADVERTISING (DO NOT DISPLAY)

Q9. Which of the following are reasons why you think this **isn't** advertising? MR RANDOMISE

CODE	SELECT AS MANY AS APPLY	SEQUENCE INSTRUCTION
01	The language used sounds like the persons views or thoughts rather than advertising	CONTINUE
02	The imagery/photography does not look professional	
03	The imagery/photography does not look staged	
04	The product is not central to the post – it is just a part of it	
05	The hashtags and tags used are general	
06	The person in the post looks like she is just using the product	
07	The post doesn't mention advertising or sponsorship	
08	It was posted by someone I'd trust not to post advertising	
96	Other (please specify)	

Q10. IMAGE 2 – ADVERTISING OR NOT (DO NOT DISPLAY)

Q10. The image you are now being shown appeared on Instagram for all followers of "pip_edwards1", an Australian fashion designer.

Which of the following best applies to the Instagram post above?

CODE	SELECT ONE RESPONSE ONLY	SEQUENCE INSTRUCTION
01	It is **clearly** advertising	CONTINUE TO Q11
02	It is **probably** advertising	
03	I am **unsure** whether it is advertising or not	SKIP TO Q13
04	It is **probably not** advertising	SKIP TO Q12
05	It is **clearly not** advertising	

PROGRAMING INSTRCUTION: ASK Q11 IF Q10 = CODES 01 OR 02 (I.E. DEEMED TO BE CLEARLY OR PROBABLY ADVERTISING)

Q11. IMAGE 2 – ADVERTISING (DO NOT DISPLAY)

Q11. Which of the following are reasons why you think this **is** advertising? MR RANDOMISE

CODE	SELECT AS MANY AS APPLY	SEQUENCE INSTRUCTION
01	The language used sounds like advertising	SKIP TO Q13
02	The imagery/photography looks professional	
03	The imagery/photography looks staged	
04	The brand or product is central to the post – just like in advertising	
05	The post contains tags and/or hashtags of the brand or product	
06	The logo of the brand or product is visible	
07	The people in the post looks like they are modelling – just like in advertising	
08	The post makes the brand or product appear desirable	
09	It was posted by a prominent person or celebrity that would post advertising	
96	Other (please specify)	

PROGRAMING INSTRCUTION: ASK Q12 IF Q10 = CODES 04 OR 05 (I.E. DEEMED TO BE CLEARLY NOT OR PROBABLY NOT ADVERTISING)

Q12. IMAGE 2 – NOT ADVERTISING (DO NOT DISPLAY)

Q12. Which of the following are reasons why you think this **isn't** advertising? MR RANDOMISE

CODE	SELECT AS MANY AS APPLY	SEQUENCE INSTRUCTION
01	The language used sounds like the persons views or thoughts rather than advertising	CONTINUE
02	The imagery/photography does not look professional	
03	The imagery/photography does not look staged	
04	The product or brand is not central to the post – it is just a part of it	
05	The hashtags and tags used are general	
06	The people in the post looks like they are just using the product or brand	
07	The post doesn't mention advertising or sponsorship	
08	It was posted by someone I'd trust not to post advertising	
09	The post does not make the brand or product appear desirable	
96	Other (please specify)	

Q13. IMAGE 3 – ADVERTISING OR NOT (DO NOT DISPLAY)

Q13. The image you are now being shown appeared on Pickle – a Ninemsn website.

Which of the following best applies to the content of the image displayed?

CODE	SELECT ONE RESPONSE ONLY	SEQUENCE INSTRUCTION
01	It is **clearly** advertising	CONTINUE TO Q14
02	It is **probably** advertising	
03	I am **unsure** whether it is advertising or not	SKIP TO Q16
04	It is **probably not** advertising	SKIP TO Q15
05	It is **clearly not** advertising	

PROGRAMING INSTRCUTION: ASK Q14 IF Q13 = CODES 01 OR 02 (I.E. DEEMED TO BE CLEARLY OR PROBABLY ADVERTISING)

Q14. IMAGE 3 – ADVERTISING (DO NOT DISPLAY)

Q14. Which of the following are reasons why you think this **is** advertising? MR RANDOMISE

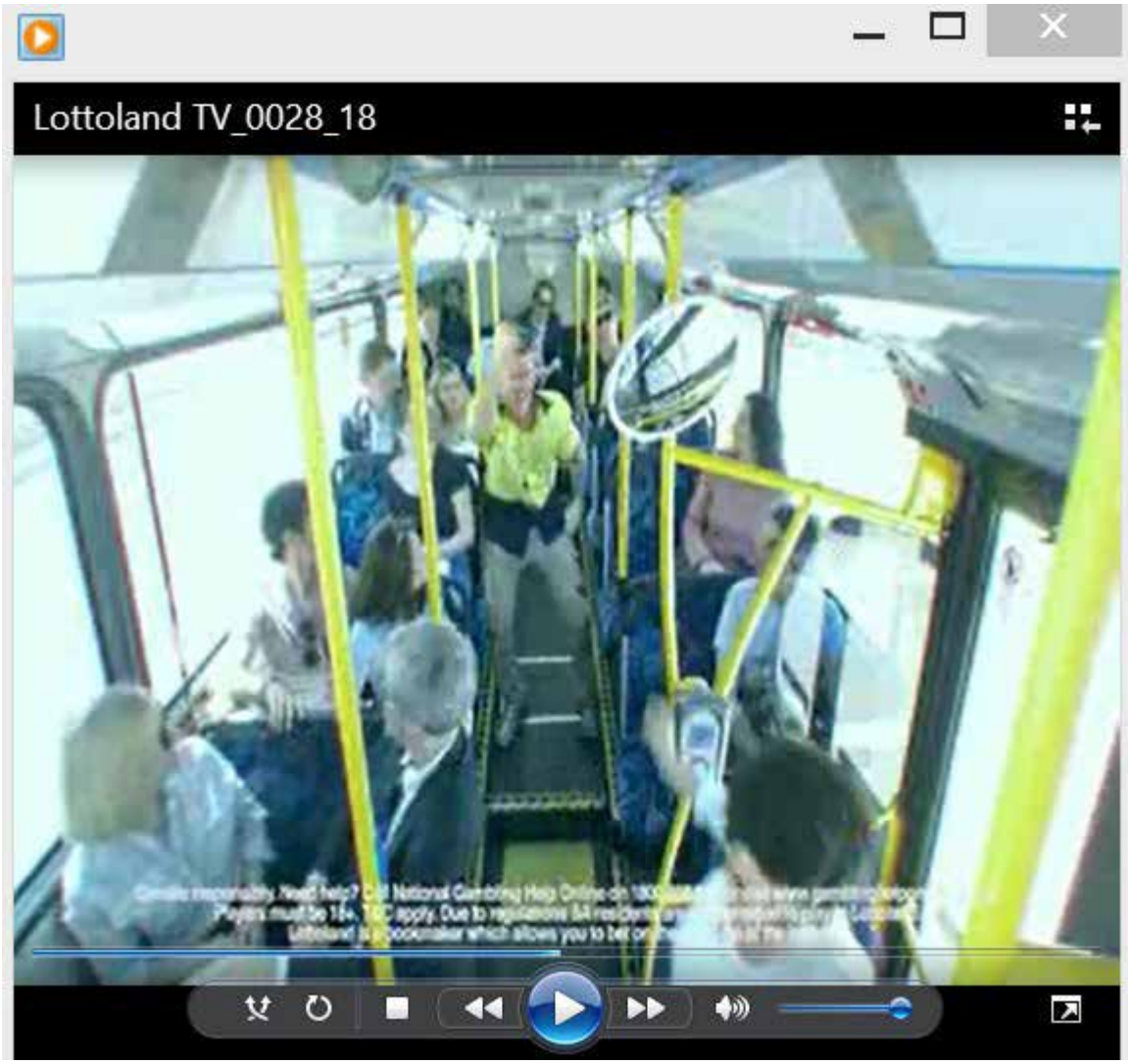
CODE	SELECT AS MANY AS APPLY	SEQUENCE INSTRUCTION
01	The language used sounds like advertising	SKIP TO Q16
02	The imagery/photography looks professional	
03	The imagery/photography looks staged	
04	The product/service is central to the layout – just like in advertising	
05	The product/service is central to the article	
06	Advertising is to be expected in this format on this channel (i.e. Pickle)	
07	The article makes the product/service appear desirable	
96	Other (please specify)	

PROGRAMING INSTRCUTION: ASK Q15 IF Q13 = CODES 04 OR 05 (I.E. DEEMED TO BE CLEARLY NOT OR PROBABLY NOT ADVERTISING)

Q15. IMAGE 3 – NOT ADVERTISING (DO NOT DISPLAY)

Q15. Which of the following are reasons why you think this **isn't** advertising? MR RANDOMISE

CODE	SELECT AS MANY AS APPLY	SEQUENCE INSTRUCTION
01	The language used sounds like news or information rather than advertising	CONTINUE
02	The imagery/photography does not look professional	
03	The imagery/photography does not look staged	
04	The product/service is not central to the article – it is just a part of it	
05	Advertising is not expected in this format on this channel (i.e. news website)	
06	The article does not make the product/service appear desirable	
96	Other (please specify)	



Q16. VIDEO 4 – ADVERTISING OR NOT (DO NOT DISPLAY)

Q16. The video you are now being shown appeared on television.

Which of the following best applies to the content of the video displayed?

CODE	SELECT ONE RESPONSE ONLY	SEQUENCE INSTRUCTION
01	It is **clearly** advertising	CONTINUE TO Q17
02	It is **probably** advertising	
03	I am **unsure** whether it is advertising or not	SKIP TO Q19
04	It is **probably not** advertising	SKIP TO Q18
05	It is **clearly not** advertising	

PROGRAMING INSTRCUTION: ASK Q17 IF Q16 = CODES 01 OR 02 (I.E. DEEMED TO BE CLEARLY OR PROBABLY ADVERTISING)

Q17. VIDEO 4 – ADVERTISING (DO NOT DISPLAY)

Q17. Which of the following are reasons why you think this **is** advertising? MR RANDOMISE

CODE	SELECT AS MANY AS APPLY	SEQUENCE INSTRUCTION
01	The language used sounds like advertising	SKIP TO Q19
02	The videography looks professional	
03	The videography looks staged	
04	The product/service is central to the video	
05	The video makes the product/service appear desirable	
96	Other (please specify)	

PROGRAMING INSTRCUTION: ASK Q18 IF Q16 = CODES 04 OR 05 (I.E. DEEMED TO BE CLEARLY NOT OR PROBABLY NOT ADVERTISING)

Q18. VIDEO 4 – NOT ADVERTISING (DO NOT DISPLAY)

Q18. Which of the following are reasons why you think this **isn't** advertising? MR RANDOMISE

CODE	SELECT AS MANY AS APPLY	SEQUENCE INSTRUCTION
01	The language used sounds like a news piece rather than advertising	CONTINUE
02	The videography does not look professional	
03	The videography does not look staged	
04	The product/service is not central to the video – it is just a part of it	
05	The video does not make the product/service appear desirable	
96	Other (please specify)	

PROGRAMING INSTRUCTION: ONLY ASK Q19, Q20 AND Q21 IF S4 = CODES 02 TO 12 (I.E. RESPONDENTS AGED 18 YEARS AND OVER)

19. IMAGE 5 – ADVERTISING OR NOT (DO NOT DISPLAY)

Q19. The image you are now being shown appeared on Instagram for all followers of "wilde_beer".

Which of the following best applies to the Instagram post above?

CODE	SELECT ONE RESPONSE ONLY	SEQUENCE INSTRUCTION
01	It is **clearly** advertising	CONTINUE TO Q20
02	It is **probably** advertising	
03	I am **unsure** whether it is advertising or not	SKIP TO Q22
04	It is **probably not** advertising	SKIP TO Q21
05	It is **clearly not** advertising	

PROGRAMING INSTRCUTION: ASK Q20 IF Q19 = CODES 01 OR 02 (I.E. DEEMED TO BE CLEARLY OR PROBABLY ADVERTISING)

Q20. IMAGE 5 – ADVERTISING (DO NOT DISPLAY)

Q20. Which of the following are reasons why you think this **is** advertising? MR RANDOMISE

CODE	SELECT AS MANY AS APPLY	SEQUENCE INSTRUCTION
01	The language used sounds like advertising	CONTINUE TO Q22
02	The imagery/photography looks professional	
03	The imagery/photography looks staged	
04	The product is central to the post – just like in advertising	
05	The post contains tags and/or hashtags of the brand of product	
06	The logo of a product is visible	
07	The people in the post looks like they are modelling – just like in advertising	
08	The post makes the brand or product appear desirable	
96	Other (please specify)	

PROGRAMING INSTRCUTION: ASK Q21 IF Q19 = CODES 04 OR 05 (I.E. DEEMED TO BE CLEARLY NOT OR PROBABLY NOT ADVERTISING)

Q21. IMAGE 5 – NOT ADVERTISING (DO NOT DISPLAY)

Q21. Which of the following are reasons why you think this **isn't** advertising? MR RANDOMISE

CODE	SELECT AS MANY AS APPLY	SEQUENCE INSTRUCTION
01	The language used sounds like the persons views or thoughts rather than advertising	CONTINUE
02	The imagery/photography does not look professional	
03	The imagery/photography does not look staged	
04	The product is not central to the post – it is just a part of it	
05	The hashtags or tags used are general –	
06	The post doesn't mention advertising or sponsorship	
07	The people in the post looks like they are just using the product	
96	Other (please specify)	

Q22. CLASSIFYING ADVERTISING (DO NOT DISPLAY)

Q22. We are now going to show you a few examples of situations that might occur.

Which of the following would you classify as advertising? MR RANDOMISE

SECTION C: CONCERN OF ADVERTISING/ MARKETING COMMUNICATIONS (ON SOCIAL MEDIA AND ONLINE PLATFORMS) THAT IS NOT CLEARLY DISTINGUISHABLE

Q23. THINKING ABOUT ADVERTISING ONLINE (DO NOT DISPLAY)

Q23. When looking at online content, how often do you think about whether something is an advertisement or not? SR

CODE	SELECT ONE RESPONSE ONLY	SEQUENCE INSTRUCTION
01	Never	
02	Rarely	
03	Sometimes	CONTINUE
04	Frequently	
05	Always	

Q24. ADVERTISING NOT CLEARLY DISTINGUISHABLE AS SUCH (DO NOT DISPLAY)

Q24. When looking at online content, how often do you feel advertisements are not clearly distinguishable as such? SR

CODE	SELECT ONE RESPONSE ONLY	SEQUENCE INSTRUCTION
01	Never	
02	Rarely	
03	Sometimes	CONTINUE
04	Frequently	
05	Always	

Q25. CONCERN FOR ADVERTISING THAT IS NOT CLEARLY DISTINGUISHABLE AS SUCH (DO NOT DISPLAY)

Q25. When looking at online content, to what extent are you **concerned** about advertising not being clearly distinguishable as such? SR

CODE	SELECT ONE RESPONSE ONLY	SEQUENCE INSTRUCTION
01	Not at all concerned	
02	Not very concerned	
03	Neither concerned nor not concerned	CONTINUE
04	Very concerned	
05	Extremely concerned	

Q26. IMPORTANCE OF ADVERTISING BEING NOT CLEARLY DISTINGUISHABLE AS SUCH (DO NOT DISPLAY)

Q26. When looking at online content, to what extent is it **important** to you that advertising is clearly distinguishable as such? SR

CODE	SELECT ONE RESPONSE ONLY	SEQUENCE INSTRUCTION
01	Not at all important	CONTINUE
02	Not very important	
03	Neither important nor not important	
04	Very important	
05	Extremely important	

Q27. ACTIONS TO SEEING SOMETHING THAT WAS NOT CLEARLY DISTINGUISHABLE (DO NOT DISPLAY)

Q27. Which of the following would you be likely to do if you saw something ONLINE that wasn't clearly distinguishable as advertising? MR

CODE	SELECT AS MANY AS APPLY	SEQUENCE INSTRUCTION
01	Nothing (SR ONLY)	CONTINUE
02	Write a comment directly on the image/article/video	
03	Make a formal complaint direct to the company	
04	Make a formal complaint to a regulatory or governing body	
05	Write a general post on a social media platform about what I saw/read/heard	
96	Other (please specify)	

SECTION D: COMPLAINTS PROCEDURES

Thank you for your patience in answering the questions so far. We would now like to ask you some more general questions around advertising and making complaints. Please consider all the different forms of advertising that you see whether that be on television, radio, outdoors, print and online.

Q28A. EXPOSURE TO UNACCEPTABLE ADVERTISING (DO NOT DISPLAY)

Q28A. Have you recently been exposed to any advertising that you found unacceptable? SR

CODE	SELECT ONE RESPONSE ONLY	SEQUENCE INSTRUCTION
01	Yes	CONTINUE
02	No	SKIP TO Q28C
97	Don't Know	SKIP TO Q28C

Q28B. UNACCEPTABLE CONTENT (DO NOT DISPLAY)

Q28B. What was unacceptable about the advertising you read, saw or heard? OE

Q28C. UNPROMPTED AWARENESS (DO NOT DISPLAY)

Q28C. If you had a complaint about the standards of advertising in relation to language, sex, sexuality and nudity, discrimination, concern for your children, violence, sexual appeal in a manner that is exploitative and degrading, health and safety, or advertising that is not clearly distinguishable as such, which organisations are you aware of that you could complain to? OE

Advertising refers to television, radio, outdoor advertising, newspaper, magazine and online and social media advertising.

Q29D. AWARENESS OF ORGS (DO NOT DISPLAY)

Q29D. If you had a complaint about the standards of advertising in relation to language, sex, sexuality and nudity, discrimination, concern for your children, violence, sexual appeal in a manner that is exploitative and degrading, health and safety, or advertising that is not clearly distinguishable as such, which organisations are you aware of that you could complain to? MR RANDOMISE

CODE	SELECT AS MANY AS APPLY	SEQUENCE INSTRUCTION
01	Advertising Standards Bureau	CONTINUE
02	Advertising Claims Board	
03	Free TV	
04	The TV / Radio station where you saw / heard the advert	
05	The newspaper / magazine where the advert was printed	
06	Advertising Standards Board	
07	Ad Standards	
08	Ad Standards Industry Jury	
09	Ad Standards Community Panel	
96	Other (specify)	
97	Don't know (SR ONLY)	
99	None / there's nowhere to complain to (SR ONLY)	

Q30. TOPIC OF COMPLAINT (DO NOT DISPLAY)

Q30. In the last 12 months have you made a formal complaint about advertising standards in relation to any of the following? MR

CODE	SELECT AS MANY AS APPLY	SEQUENCE INSTRUCTION
97	Have not made a complaint (SR ONLY)	SKIP TO Q32
01	Language	CONTINUE
02	Discrimination	
03	Use of sexual appeal in a manner that is exploitative and degrading	
04	Violence	
05	Sex, sexuality or nudity	
06	Health and Safety	
07	Concern for children	
08	Advertising that is not clearly distinguishable as such	
96	Other (specify)	

Q31. ORGS COMPLAINED TO (DO NOT DISPLAY)

Q31. Which organisation(s) did you complain to? MR

CODE	SELECT AS MANY AS APPLY	SEQUENCE INSTRUCTION
01	Advertising Standards Board	
02	Advertising Claims Board	
03	Advertising Standards Bureau	
04	Free TV	
05	The TV / Radio station where you saw / heard the advert	
06	The newspaper / magazine where the advert was printed	CONTINUE TO Q33
07	Ad Standards	
08	Ad Standards Industry Jury	
09	Ad Standards Community Panel	
96	Other (specify)	
97	Don't know	

ASK Q32 IF Q30 = CODE 97 (I.E. THOSE WHO HAVE NOT MADE COMPLAINT)

Q32. REASON FOR NOT COMPLAINTING (DO NOT DISPLAY)

Q32. For what reasons did you not make a complaint?

CODE	SELECT AS MANY AS APPLY	SEQUENCE INSTRUCTION
01	Wasn't concerned about any advertising	
02	Too complicated / complex	
03	Didn't know who to complain to	
04	Didn't know how to complain	
05	Process of complaining is too bureaucratic	CONTINUE
06	Too lazy / couldn't be bothered	
07	Nothing would happen / not worth complaining	
96	Other (specify)	
97	Don't know	

Q33. COMPLAINTS CATEGORIES (DO NOT DISPLAY)

Q33. From the list below, please select any categories for which you are aware complaints can be directed to Ad Standards (formerly known as the Advertising Standards Bureau). Please select all that apply. MR RANDOMISE

CODE	SELECT AS MANY AS APPLY	SEQUENCE INSTRUCTION
01	Misleading and deceptive advertising	
02	Advertising of food and beverages to children	
03	Inappropriate advertising to children	
04	Motor vehicle advertising	
05	Alcohol advertising	
06	Gambling advertising	CONTINUE
07	General food and beverage advertising	
08	Environmental claims in advertising	
09	Advertising that is not clearly distinguishable as such	
96	None of these	
97	Don't know	

Q34. IMPORTANCE OF AD STANDARDS (DO NOT DISPLAY)

Q34. Ad Standards (formerly known as the Advertising Standards Bureau) provides a free public service to the community in a system of self-regulation to resolve complaints about advertisements in relation to issues including the use of language, discriminatory portrayal of people, suitability for children, portrayals of violence, sex, sexuality, nudity, health and safety and advertising that is not clearly distinguishable as such. The Ad Standards Community Panel makes decisions about complaints using the Advertiser Code of Ethics as the basis of its determinations. Using a scale of 1 to 10 where 1 is extremely unimportant and 10 is extremely important, how unimportant or important do you feel the role of Ad Standards (formerly known as the Advertising Standards Bureau) is?

CODE	SELECT ONE RESPONSE ONLY	SEQUENCE INSTRUCTION
01	1 – Extremely unimportant	
02	2	
03	3	
04	4	
05	5	
06	6	CONTINUE
07	7	
08	8	
09	9	
10	10 – Extremely important	
97	Don't know	

Q35. LIKELIHOOD OF MAKING A COMPLAINT (DO NOT DISPLAY)

Q35. If you had a concern about advertising standards in relation to language, discriminatory portrayal of people, suitability for your children, portrayals of violence, sex, sexuality, nudity, health and safety or advertising that is not clearly distinguishable as such, using a scale of 1 to 10 where 1 is extremely unlikely and 10 is extremely likely, how unlikely or likely would you be to make a complaint to Ad Standards (formerly known as the Advertising Standards Bureau)?

CODE	SELECT ONE RESPONSE ONLY	SEQUENCE INSTRUCTION
01	1 – Extremely unlikely	
02	2	
03	3	
04	4	
05	5	
06	6	CONTINUE
07	7	
08	8	
09	9	
10	10 – Extremely likely	
97	Don't know	

Q36. ENCOURAGING MAKING A COMPLAINT

Q36. What would encourage you to make a complaint to Ad Standards (formerly known as the Advertising Standards Bureau)?

CODE	SELECT AS MANY AS APPLY	SEQUENCE INSTRUCTION
01	If I was extremely offended / concerned	
02	If the process was simple	
03	If I knew who to complain to	
04	If the staff were helpful	CONTINUE
96	Other (please specify)	
97	Don't know	

SECTION E: DEMOGRAPHICS

We require some personal details from you so that we can determine whether people with certain characteristics are likely to give different responses to the questions in this survey. The answers you give will remain completely confidential.

Q37. LOTE (DO NOT DISPLAY)

Q37. Do you speak a language other than English at home?

CODE	SELECT ONE RESPONSE ONLY	SEQUENCE INSTRUCTION
01	Yes	CONTINUE
02	No, English only	SKIP TO Q39
99	I prefer not to answer	

Q38. LANGUAGE (DO NOT DISPLAY)

Q38. What languages do you speak?

CODE	SELECT AS MANY AS APPLY	SEQUENCE INSTRUCTION
01	Northern European languages	CONTINUE
02	Southern European languages	
03	Eastern European Languages	
04	Southwest and Central Asian languages	
05	Southern Asian languages	
06	Southeast Asian languages	
07	Eastern Asian languages	
08	Australian Indigenous languages	
96	Other languages	
99	I prefer not to answer	

Q39. EDUCATION (DO NOT DISPLAY)

Q39. What is the highest level of education you have attained?

CODE	SELECT ONE RESPONSE ONLY	SEQUENCE INSTRUCTION
01	High school (Year 10 or below)	
02	High school (Year 11 or 12)	
03	Certificate level	
04	Advanced Diploma and Diploma	
05	Tertiary education (Bachelors degree)	CONTINUE
06	Graduate Diploma and Graduate Certificate	
07	Post-graduate education (Masters or PhD)	
96	Other (specify)	
99	I prefer not to answer	

PROGRAMING INSTRCUTION: ASK Q40 IF S4 = CODES 02 TO 12 (I.E. RESPONDENTS AGED 18 YEARS AND OVER). OTHERWISE SKIP TO Q42

Q40. CHILDREN (DO NOT DISPLAY)

Q40. Do you have any children?

CODE	SELECT ONE RESPONSE ONLY	SEQUENCE INSTRUCTION
01	Yes	CONTINUE
02	No	SKIP TO Q42

Q41. AGE OF CHILDREN (DO NOT DISPLAY)

Q41. And what ages are they?

CODE	SELECT AS MANY AS APPLY	SEQUENCE INSTRUCTION
01	14 years or younger	
02	15 - 17 years	CONTINUE
03	18 years or older	

Q42. INCOME (DO NOT DISPLAY)

Q42. Including all Government benefits, pensions and allowances, what is your HOUSEHOLD'S ANNUAL gross income before tax from all sources? Just an estimate is fine.

CODE	SELECT ONE RESPONSE ONLY	SEQUENCE INSTRUCTION
01	Under $40,000	CONTINUE
02	$40,001 - $50,000	
03	$50,001 - $60,000	
04	$60,001 - $70,000	
05	$70,001 - $80,000	
06	$80,001 – $90,000	
07	$90,001 - $100,000	
08	$100,001 - $150,000	
09	$150,001 - $200,000	
10	$200,001 - $250,000	
11	$250,001 or more	
12	No income	
13	Negative income	
97	Don't know	
99	I prefer not to answer	

Q43. COMPLAINT (DO NOT DISPLAY)

Q43. Have you ever made a formal complaint about advertising?

CODE	SELECT ONE RESPONSE ONLY	SEQUENCE INSTRUCTION
01	Yes	CONTINUE
02	No	SKIP TO Q45
97	Don't Know	

Q44. COMPLAINT_ASB (DO NOT DISPLAY)

Q44. Have you ever made a formal complaint about advertising to Ad Standards (formerly known as the Advertising Standards Bureau)?

CODE	SELECT ONE RESPONSE ONLY	SEQUENCE INSTRUCTION
01	Yes	CONTINUE
02	No	
97	Don't Know	

Q45. IMPORTANCE OF ASB (DO NOT DISPLAY)

Q45. How unimportant or important do you feel the role of Ad Standards (formerly known as the Advertising Standards Bureau) is?

CODE	SELECT ONE RESPONSE ONLY	SEQUENCE INSTRUCTION
01	1 – Extremely unimportant	
02	2	
03	3	
04	4	
05	5	
06	6	CONTINUE
07	7	
08	8	
09	9	
10	10 – Extremely important	
97	Don't know	

And finally....

Q46. ENCOURAGING COMPLAINTS (DO NOT DISPLAY)

Q46. What would encourage you to make a complaint to Ad Standards (formerly known as the Advertising Standards Bureau)?

CODE	SELECT AS MANY AS APPLY	SEQUENCE INSTRUCTION
01	If I was extremely offended / concerned	
02	If the process was simple	
03	If I knew who to complain to	
04	If the staff were helpful	CONTINUE
96	Other (specify)	
97	Don't know	

SECTION F: MANDATORY QMS REQUIREMENTS

CONCLUSION

That's the end of the survey. As this is market research, it is carried out in compliance with the Privacy Act [and the Market & Social Research Code of Professional Behaviour] and the information you provided will be used only for research purposes.

Your answers will be combined with those of other participants to help our client in their decision making. We are conducting this research project on behalf of Ad Standards (formerly known as the Advertising Standards Bureau).

Thank you for your opinions.

Please click SUBMIT to send your responses

Appendix F: Table list

Appendix G: Figure list

Ad Standards
PO Box 5110, Braddon ACT 2612

AdStandards.com.au

@Ad_Standards

Ad Standards