Research on the Labelling of Influencer Advertising

Report for the Advertising Standards Authority

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Executive Summary

Overview

This report examines the role that labels and other factors play in helping people identify when social media posts by those with significant followings ("influencers") include advertising, rather than organic, content. That distinction is important because the Advertising Codes, administered by the Advertising Standards Authority (ASA), require it to be obvious to people when they are seeing advertising.

The ASA commissioned Ipsos MORI to research people's comprehension of influencer advertising and how they identify influencer advertising vs. organic (i.e. 'normal') posts. Specifically the research sought to:

- identify how the audience interprets specific labels (e.g. "#ad" or "#sponsored") and the extent to which the placement, visibility and style of these labels impacts people's ability to identify an advert;
- examine how children and adults differ in their ability to identify and interpret labels often seen on social media posts, and
- uncover what other elements of a post might help people to understand whether what they are looking at is an advert or a 'normal' post

Method

Ipsos MORI conducted two stages of research:

Qualitative:
The qualitative phase acted as an exploratory phase of the research, uncovering the different elements (e.g. labels or the style of the image) that impacted on people's ability to distinguish between advertising and non-advertising posts. Participants were interviewed online (between 6 August 2018 and 10 August 2018) before being invited to an online forum (between 13 August 2018 and 17 August 2018).

Quantitative:
The quantitative phase surveyed an online nationally representative population of 1,999 participants aged between 18 and 64 years of age. A further 301 children (aged between 13 and 17 years of age) were also interviewed. Fieldwork took place between 4 March 2019 and 12 March 2019. During the 12-minute survey, participants were asked a series of questions that helped Ipsos MORI to uncover their level of awareness, familiarity and understanding of different labels, as well as their ability to distinguish between advertising and non-advertising posts (using a combination of real-life and edited versions of social media posts).

Set out below is a summary of the key findings from the research.

Social media usage and awareness:

- The vast majority of UK internet users aged 13-64 accessed the internet at least several times a day and were therefore classed in the research as 'heavy users'; almost half of 13-17s (45%) reported going online multiple times an hour.

- More than four in five (84%) claimed to access social media on a daily basis, which increased significantly among the younger age groups; 94% of 13-17s, 95% of 18-24s and 91% of 25-34s.

- When it came to awareness of influencer advertising, most claimed to at least 'think they knew' that some people are either paid (80%) or given/loaned products (80%) by brands in exchange for social media mentions.

- UK internet users aged 18-64 were significantly more likely than 13-17s to be 'definitely aware' of the financial arrangements between brands and influencers (54% for 18-64s and 47% for 13-17s). They were also directionally (not significant at 95% confidence intervals) more likely to be 'definitely aware' of the giving/loaning of products (55% for 18-64s and 49% for 13-17s).

Identifying adverts

- A small majority of participants (56% and 66%) were able to identify the two brand adverts tested as 'definitely adverts'.

- They were less certain about classifying influencer adverts. On average, a third (32%) of 18-64 year olds exposed to influencer adverts as they had originally appeared on social media said that what they had seen was 'definitely an ad'.

- Of the eight influencer adverts the highest scoring posts – which all had labels that had been added or changed – received an average score of 41% as 'definitely adverts'.

- Of the eight pieces of influencer advertising tested, all eight originals (i.e. those which had not had labels added or amended) scored lowest for being 'definitely an ad'. There was also ambiguity amongst participants who saw examples where the disclosure label was placed in the middle of other hashtags.

- The research suggests that the wording and positioning of labels plays a role in helping people to determine whether what they are seeing is an advert or not. All of the influencer advertising posts tested were more readily identified as advertising, once labelling had either been added or repositioned.

- Participants in the qualitative research mentioned that placement and visibility were key, as hidden labels do not prompt them to think that what they are seeing is an advert. They were more likely to identify posts as advertising when the posts had clear labels that appeared at the beginning of the post or above the picture.

Familiarity and understanding of labels:

- The labels that UK internet users aged 13-64 were most likely to have claimed seeing were 'Advertisement' (64%), 'Advert' (65%), 'Sponsored' (67%) and 'Ad' (68%).

- 13-17-year olds were more likely than those aged 18-64 to have seen 'Ad', 'Sponsored', 'Gifted' and 'Collab'.

- Participants were generally more likely to recall seeing full words on social media (e.g. 'Sponsorship' and 'Collaboration'), as opposed to any abbreviated iterations (e.g. 'Spon' and 'Collab).

- They reported greater confidence in explaining what the different words/phrases meant when they were words that are more likely to be used in everyday life (e.g. 'Advertisement', 'Advert' and 'Sponsored').

- Even when UK internet users aged 18-64 were significantly more likely than 13-17s to feel 'very confident' in explaining what particular words mean, 13-17s still tended to score the words/phrases in order of confidence, the same as those aged 18+.

- Internet users were more likely to say they were confident in explaining the meaning of particular words used as labels when the full word was used vs. any abbreviated versions. They were more likely to say that they were 'very confident' in explaining what 'Advertisement' and 'Advert' meant more than 'Ad', and in explaining what 'Sponsored' and 'Sponsorship' meant more than 'Spon' or 'Sp'.

- They were less confident in explaining what 'Sp', 'Gifted', 'Spon' and 'Affiliate' meant. 'Affiliate' was specifically identified in the qualitative work as being a word that one would not normally associate with advertising.

- UK internet users aged 13-64 who said they were 'very confident' about the meaning of a word/phrase were more likely to be broadly accurate when asked to describe the term in their own words than those who said they were 'not confident' or 'unsure'.

Applying labels to real-life social media scenarios:

- Participants in the quantitative survey reviewed six social media scenarios and were asked to pick a term that described each of them. Responses varied with no one word being picked by a majority of participants for any of the individual scenarios.

- For all the scenarios, a majority of participants selected a descriptive word or phrase that suggested at least some degree of advertising or marketing involved – although the word or phrase most commonly picked by participants varied across scenarios.

- For the one scenario in which a brand was not involved in providing the item referred to or paying the poster in some way, the most common single description chosen was 'normal post' (36%) but the majority still chose advertising and marketing terms. For the remaining five posts (which all had some level of brand involvement), a very small minority described them as a 'normal post' (ranging between 4-6%).

- For four of the social media scenarios which described the person receiving something from a brand, the most commonly chosen description was 'sponsored post'.

Section One

Context:

This report examines the role that labels added to social media posts (e.g. #sponsored, #advert, #ad) and other factors play in helping social media users identify influencer advertising, as distinct from other influencer content. 'Influencer' is a term used to describe people who have a significant social media (or online) following. Influencers generally post about their daily lives – often talking about the topics that interest them, such as fashion, beauty, sport, travel and many other subjects.

Sometimes influencers mention specific products and brands. This might be just because they like the brand and they want to talk positively about it. In some circumstances though, influencers post about a brand because they've been given a product or service for free and/or because the brand mentioned is providing some other payment and, for that and potentially other reasons, exerting some level of control over what is being posted. The intention of the product or brand owner paying for the post is that the individual's social media followers will see their posts and be 'influenced' to take action – such as researching the brand, purchasing a product or signing-up to a service.

Where influencers are talking about products or services because they've been paid to do so (including payment in kind) then those posts are advertising and the Advertising Code requires that to be obviously the case. Wider consumer law requires similar levels of disclosure even when a product or service has been provided for free and there is no control by the brand.

However, often, influencer adverts will appear very similar to an influencer's other posts.

So there is room for ambiguity as to whether people are seeing an advert or a 'normal' post (not an advert). The Advertising Standards Authority (ASA) commissioned Ipsos MORI to undertake research to understand what people think about influencer advertising, how they identify it and what elements make this process of recognising advertising easier or more difficult.

Specifically, the objectives of the research, in relation to influencer advertising, were to:

- Look at how the audience interpret specific labels and the extent to which the wording, placement, visibility and style of labels impact on the audience's ability to identify the content as an advert.
- Review the extent to which the audience, including children, may differ in their ability to identify and interpret certain labels and the reasons for this.
- Draw out insights about what helps people understand when they are viewing an advert rather than organic (i.e. 'normal', not paid-for) content.

Section Two

Methodology:

The study comprised a qualitative, exploratory element and a quantitative element in which participants were asked about their online media behaviours, experiences of using social media and exposure to influencers. Both stages assessed participants' ability to identify influencer advertising. More detail is provided below.

Qualitative:

The online qualitative stage acted as an exploratory stage of the research; gathering information on the contextual issues at play and the core elements that matter in terms of comprehension and interpretation of influencer advertising. The qualitative stage provided an opportunity to explore the different elements (including labels, the style of the image and any call-to-action) that may impact on social media users' ability to help distinguish between advertising and non-advertising posts.

The qualitative methodology included online video interviews and an online forum, involving 35 participants from around the UK. Online video interviews took place between 6 August 2018 and 10 August 2018. The online forum took place between 13 August 2018 and 17 August 2018

Participants were recruited to take part and complete the qualitative stages of the study, split by life stage as follows:

Teens (13-18)	18-39 (without children). Mix of those living with parents, on their own and with a partner.	Adults 18+ with children 0-12 living at home with them	Adults 18+ with children 13+ living at home with them	Empty nesters/ without children 40-64
7	7	7	7	7

Within this, the following were ensured:

- A mix of gender, social grade and ethnicity
- A mix of heavy, medium and low internet users (to reflect digital literacy differences)

In addition to this, to ensure participants were able to both *evaluate examples with a critical eye* and *capture their own relevant examples*, the below sample controls were upheld during recruitment:

- 1/3 to read online news (range of sources e.g. Mail Online, Guardian, Buzzfeed),

- A mix of online social media platforms used (Instagram, Facebook, Twitter)
- At least half who follow 'influencers', covering a range of areas of interest (e.g. YouTubers, beauty vloggers, sports stars, musicians, etc.)
- A mix of search engines used (e.g. Google, Bing etc.)

To ensure that the research provided insight across the four nations and included rural and urban areas, five locations were selected to recruit from; two in England (London, Nottingham) and one in Scotland (Glasgow), Northern Ireland (Belfast) and Wales (Swansea).

Online video interviews were approximately 45 minutes in length and were conducted using a screen-share (whereby participants were able to share the content of their screen with the moderator). Participants initially browsed through the social media platforms they visited on a typical day and were asked to describe what they were seeing in their own words. From this initial stage, our moderators were able to study their awareness of influencer advertising and the language used when exposed to it.

The second stage of the online video interviews consisted of participants being shown 10 pieces of stimuli (for approximately 1 minute per piece), showing a variety of influencer advertising (and non-advertising) on social media platforms, news websites and search engine pages. Participants were again asked to explain what they were seeing and probed by our moderation team to determine whether they thought the stimuli shown depicted advertising content or not.

The following week, the same participants were invited to take part in a 4-day online forum where they were set individual and group based online tasks. The purpose was to evaluate influencer advertising in a natural context, analyse a greater range of stimuli in detail and encourage discussion among the group.

Quantitative:

The quantitative phase of this research was an online nationally representative sample of 1,999 participants from the United Kingdom aged 18-64. A further 301 13-17-year olds were also included in the survey. Quotas were set on age, gender, region and social grade, and data was weighted to represent the total UK online population, aged 13-64. Fieldwork took place between 4 March 2019 and 12 March 2019.

The quantitative phase comprised a c.12-minute online survey in which participants were asked about their online media behaviours, experiences of using social media and exposure to influencers. For the main task of the survey, participants were divided into 4 cells, of which only cells 1 and 2 included 13-17-year olds. Of the 1,999 participants aged 18-64, 1,600 were randomly allocated across the four cells - ensuring an even distribution of c. 400 in each. (The remaining 400 took part in a different module of the survey, which doesn't form part of this report,.) Participants in each cell were shown 12 different social media posts for a period of 10 seconds per image. They were then asked, on a scale of 1 to 10, with 1 being definitely not an advert and 10 being definitely an advert, the extent to which they thought the post was an advert or not.

Our survey was accessible on smartphones and tablets, which enabled the posts to be shown in the most real to life way possible, as the examples were presented as they would appear on an app (rather than via a browser).

Across both the qualitative and quantitative phases of the research, we selected influencer content which represented a range of different influencers, topics, presentational styles and audiences.

Technical note:

Fieldwork was conducted online through the Ipsos Access Panel between 4 March 2019 and 12 March 2019, amongst a quota sample of 2,300 participants aged between 13-64. Data has been weighted to be nationally representative of the 13-64 year old UK online population.

Confidence intervals:

Throughout this report, some data-points have been referred to as being "*significantly* greater than X". In its simplest terms, this means that in 95 participants out of 100, our findings will fall within our given range (i.e. with 95% confidence). Where findings are denoted as being "*directionally* greater than X", this means that the findings aren't significant with 95% confidence, but are noteworthy and will be significant at either 90% or 85% confidence intervals.

To access the data tables and questionnaire in full, please visit:
https://ipsos.uk/asa

Section Three

This section focuses on the internet usage habits of UK internet users ages 13-64. It first explores how often people claim to be accessing the internet and social media, and then outlines the type of content they claim to come across online. Finally, the section looks at awareness of social media influencer advertising, and how these tend to differ by age and frequency of internet/social media usage. This provides us with a better understanding of what the awareness of influencer advertising is amongst those who are online and social media users.

Online habits and awareness of influencer advertising:

Frequency of internet access:

KEY POINTS:
Claimed 'heavy' internet usage is stable across age groups. However, those aged 13-17 have the highest claimed incidence of using the internet 'multiple times an hour' (45%). This is significantly higher than for all UK internet users aged 18-64 (37%). Using the internet multiple times an hour decreases with age, with only 28% of 55-64 year old internet users claiming to do so with this level of frequency.

Q2: Which best describes your use of the internet (such as visiting websites, looking at social media, sending emails)?

	TOTAL	13-17	18-64	18-24	25-34	35-44	45-54	55-64	ABC1	C2DE
Base: All participants	*2,300*	*301*	*1,999*	*263*	*444*	*446*	*470*	*376*	*1,350*	*950*
Multiple times an hour	38%	45%	37%	44%	42%	40%	35%	28%	40%	36%
Heavy users	92%	94%	91%	88%	93%	92%	92%	90%	94%	89%

Table 1

NOTE: 'Heavy users' are defined as accessing the internet either multiple times an hour, around once an hour, every 2-3 hours, or several times a day.
NOTE: See Appendix C for social grade classification

- 2 in 5 (38%) participants aged 13-64 claim to use the internet 'multiple times an hour'
  - This increases significantly among 13-17-year olds (45%) and directionally among 18-24-year olds (44%). There is a significant drop-off among 55-64s (28%), which shows that they access the internet less frequently.
- 92% of UK internet users aged 13-64 claim to be 'heavy' internet users (they access the internet at least several times a day)
  - 'Heavy' use is significantly higher among ABC1s (94%) than C2DEs (89%). There is no significant difference by gender, with 92% of males claiming to be 'heavy' users and 91% of females.

Frequency of social media access:

KEY POINTS:
84% of UK internet users aged 13-64 claim to access social media daily, which increases significantly among 13-17-year olds (94%), 18-24-year olds (95%) and 25-34-year olds (91%). Facebook (65% for 'Total' vs. 61% for 13-17-year olds) and Twitter (32% for 'Total' vs. 33% for 13-17-year olds) are the only platforms where daily access among 13-17-year olds does not outweigh that of the total (UK internet users aged 13-64) . Instead, more 13-17-year olds access all other platforms listed on a daily basis, versus the total (13-64 year old participants) , with significantly higher daily access of Snapchat (71% of 13-17s vs. 30% of the total) and Instagram (69% of 13-17s vs. 43% of the total).

Q4: Which of the following best describes how often you access...?[1]

	TOTAL	13-17	18-64	18-24	25-34	35-44	45-54	55-64
Base: All participants	*2,300*	*301*	*1,999*	*263*	*444*	*446*	*470*	*376*
Any: Daily	84%	94%	82%	95%	91%	85%	76%	69%
Facebook: Daily	65%	61%	65%	62%	73%	70%	62%	56%
Instagram: Daily	43%	69%	40%	74%	62%	41%	21%	12%
Twitter: Daily	32%	33%	32%	41%	42%	35%	27%	17%
Snapchat: Daily	30%	71%	25%	63%	38%	24%	12%	5%
Other: Daily	43%	55%	41%	61%	52%	46%	33%	23%

Table 2

NOTE: "Any: Daily" score includes usage of 'Facebook', 'Instagram', 'Twitter', 'Snapchat' and 'Other social media sites/apps'. YouTube was initially asked in this question, though Ipsos MORI have removed it from the analysis as it was not included in the examples in section 3. The 'Daily' score is a combination of those who selected any one of codes 1-5 (anything from 'Multiple times an hour' to 'Around once a day'.

- 84% of UK internet users aged 13-64 claim to access any social media daily, with Facebook registering more daily users (65%) than any other platform listed
    o Claimed daily access of any social media platform peaks at 94% among 13-17s and 95% for 18-24s, but it is lowest among 45-54-year olds (76%) and those aged 55-64 (69%)
- Significantly more 13-17-year olds access Instagram and Snapchat daily when compared to the total *(UK internet users aged 13-64)*. The exceptions to this are for daily access of Facebook (65% for total vs. 61% for 13-17-year olds) and Twitter (32% for total vs. 33% for 13-17-year olds)
    o Claimed daily access of Snapchat among UK internet users aged 13-64 is 30%, rising to 71% among 13-17-year olds within this group; an increase of 41 percentage points
    o Claimed daily access of Instagram among UK internet users aged 13-64 is 43%, rising to 69% among 13-17-year olds within this group; an increase of 26 percentage points
- Claimed daily access of social media platforms is generally higher among girls than boys – 77% of girls who are UK internet users aged 13-17 report accessing Instagram daily, compared to 62% for boys within this group. The equivalent figures for Facebook are 67% (of girls) vs. 54% (of boys) and for Snapchat 77% (of girls) vs. 66% (of boys).

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[1] YouTube was initially asked in this question, though we have removed it from the analysis as it was not included in the examples in section 3.

Content regularly read about online:

KEY POINTS:
UK internet users aged 25 and over are more likely to regularly read about news and sport, whereas those aged 13-17 and 18-24 are primarily focussed on reading about music, comedy and fashion via the internet

Q5: Which, if any, of the following types of content do you regularly read about online? When answering, please consider the websites, apps, videos, social media accounts and anything else you access.

	TOTAL	13-17	18-64	18-24	25-34	35-44	45-54	55-64
Base: All participants	*2,300*	*301*	*1,999*	*263*	*444*	*446*	*470*	*376*
News	61%	30%	65%	49%	55%	66%	72%	74%
TV/Film	52%	69%	50%	49%	53%	52%	51%	47%
Music	46%	72%	42%	54%	45%	38%	44%	35%
Sport	39%	32%	40%	29%	39%	40%	44%	46%
Health & Beauty	36%	37%	35%	40%	45%	38%	31%	24%
Lifestyle	36%	33%	37%	41%	45%	42%	28%	27%
Comedy	30%	40%	29%	42%	37%	30%	24%	15%
Fashion	29%	41%	28%	40%	34%	30%	22%	17%
Home/DIY/Gardening	27%	8%	30%	14%	29%	31%	32%	35%
Finance	26%	6%	28%	20%	27%	29%	28%	34%
Showbiz	24%	31%	23%	22%	22%	26%	25%	17%
Blogs	17%	33%	15%	17%	23%	17%	12%	6%
Parenting	12%	6%	13%	5%	20%	24%	9%	3%
Other	10%	12%	10%	7%	8%	9%	11%	12%

Table 3

- 3 in 5(61%) UK internet users aged 13-64 claim to regularly read about the 'news' when accessing the internet
    o The tendency to do this increases significantly with age; within this group, 3 in 10 (30%) 13-17-year olds 'regularly' read about 'news' online, compared to more than 7 in 10 (74%) of those aged 55-64.
- Whilst 'news' is the type of content that people are most likely to claim to read regularly (61%), 'TV/Film' follows in second place (52%)
- 13-17 and 18-24-year olds are most likely to regularly read about music content online (72% for 13-17s and 54% for 18-24s)
- Regular reading of online music content decreases with age (72% for 13-17s and 35% among 55-64s), as does the incidence of reading fashion content (41% for 13-17s and 17% for 55-64s)

Awareness of influencer advertising:

KEY POINTS:
8 in 10 UK internet users aged 13-64 thought they knew or definitely knew that sometimes celebrities and other people with large social media followings are a) being given or loaned products for free by companies in the hope that the person might mention them in their posts (80%) and b) being paid by companies to post about their brand or its products in a positive way on social media (80%). Those aged 18+ *were more likely to say they "definitely knew" about both practices than 13-17s (55% vs. 49% and 54% vs. 47% (significant difference) respectively).*

Approach:

Participants were asked several questions to gauge their comprehension of influencer advertising and awareness of the process of payment (including 'in kind' payment) between brands and influencers. These questions were included at the end of the survey so as not to bias participants' answers or give them an improved understanding of influencer advertising whilst responding to earlier questions in the survey.

The figures detailed below help to put into context the wider findings from this research, as they give a sense of the levels of understanding of influencer advertising among internet users aged 13-64-years old in the United Kingdom.

Participants were presented with a brief explanation of how people on social media are sometimes **given or loaned products** in return for a social media post referencing the product, before asking the extent to which they were aware of this happening. The next question adhered to the same structure but focussed on **payment and control of the message** between brands and influencers.

Findings:

Awareness of celebrities and other people being given or loaned products:

Q13: Sometimes celebrities and other people with large social media followings are given or loaned products for free by companies in the hope that the person might mention them in their posts. Before today, were you aware of this happening?

	TOTAL	13-17	18-64	18-24	25-34	35-44	45-54	55-64
Base: All participants	*2,300*	*301*	*1,999*	*263*	*444*	*446*	*470*	*376*
Yes, I definitely knew about this	54%	49%	55%	67%	58%	51%	53%	50%
Aware (C. 1-2)	80%	83%	80%	88%	82%	80%	76%	78%

Table 4

'Aware (C. 1-2)' includes codes 'Yes, I definitely knew about this' and 'Yes, I think so'

- 8 in 10 (80%) UK adults aged 13-64 claimed to be aware that brands often gift or loan products to social influencers in return for a social media mention
  - o Whilst there was little difference between 13-17-year olds (83%) and those 18 years old and over (80%); within this group, awareness peaked among 18-24-year olds (88%)

- o This score was lowest among those aged 45-54 (76%)
  - o There was some difference by social media use. For example, 87% of 'heavy users' on Instagram (those who access the platform at least several times a day) claimed to be aware of this, compared to 75% of 'light users' (those who access the platform two or three times a week or less often)
- Just over half (54%) of UK adults aged 13-64 claimed to 'definitely know' about products being given or loaned to social influencers in the hope for social media mention
  - o There was a directional difference in the number of 13-17 (49%) and 18+s (55%) who had this claimed level of 'definite' awareness. This figure peaked among 18-24-year olds (67%)

Awareness of celebrities and other people being paid:

Q14: Sometimes celebrities and other people with large social media followings are paid by companies to post about their products in a positive way on social media. Before today, were you aware of this happening?

	TOTAL	13-17	18-64	18-24	25-34	35-44	45-54	55-64
Base	*2,300*	*301*	*1,999*	*263*	*444*	*446*	*470*	*376*
Yes, I definitely knew about this	54%	47%	54%	66%	55%	54%	54%	48%
Aware (C. 1-2)	80%	82%	79%	87%	82%	79%	76%	76%

Table 5

'Aware (C. 1-2)' includes codes 'Yes, I definitely knew about this' and 'Yes, I think so'

- As with the levels of awareness of social influencers being given or loaned products, those who say they 'definitely knew' or who were aware about payment is 8 in 10 (80%)
  - o Perhaps due to their increased tendency to access the internet 'multiple times an hour', 18-24-year olds (87%) were significantly more likely than the total population of UK adults aged 13-64 to be aware of this practice.
  - o Awareness of this is lowest among those aged 45-54 (76%) and 55-64 (76%) among 13-64s
  - o There was also some difference by social media use - with 86% of 'heavy users' on Instagram claimed to be aware of this, compared to 75% of 'light users' (those who access the platform two or three times a week or less often).
- Again, just over half (54%) said they were 'definitely aware' of influencers being paid money to promote brands
  - o Those 18 years-old and over (54%) were significantly more likely to say that they were 'definitely aware' of this happening versus 13-17-year olds (47%); a score which peaked amongst 18-24s (66%)

Similarly, the qualitative research found that most participants had a suspicion that the individuals posting the content or depicted in the content itself were receiving payment of some kind, but they were not sure how this would work exactly.

"I'm sure it's like YouTube, they must get paid for generating traffic to a website or for wearing a pair of trainers for a certain amount of time." Male, 29, Nottingham

"I've heard of the term influencer but I'm not exactly sure how it all works. Are they paid by brands or by Instagram? I know on YouTube they get money after a certain number of views, but I couldn't be sure who is paying them." Female, 34, Glasgow

Section Four

This section sets out whether UK internet users aged 13-64 can distinguish between different types of posts on social media, and whether they are able to identify those posts which are advertising. The stimuli that participants were shown included material which we had categorised as either:

- Brand adverts on social media
- Not adverts
- Influencer adverts

The section examines how responses to influencer advertising posts change when a label is added to the post, or the wording or position of an existing label is altered.

As well as quantitative findings, this section also includes responses from the qualitative research, which shed some light on why some forms of advertising are harder or easier to identify than others.

Ability to identify influencer advertising

Approach:

As mentioned in the Methodology section, participants surveyed within the quantitative research were divided into 4 cells, with participants being exposed to different versions of social media posts (stimuli) and asked questions about them. Only cells 1 and 2 included participants aged 13-17. The reason for this was to ensure there were a robust number of responses from 13-17-year olds to each of the adverts shown.

Each cell was shown 12 examples of posts on social media for a period of 10 seconds per image.

The images shown represented posts which, before being shown to participants, were categorised as being one of the following:

1. **Brand adverts on social media**: more traditional advertising content posted or placed directly by a brand and not involving influencers. Each cell was shown the same examples of brand adverts.
2. **Not adverts**: posts by individuals where no brand, product or label was mentioned. Each cell was shown the same examples of 'not adverts'.
3. **Influencer adverts**: These materials were sourced for inclusion because they featured influencers referring to brands and therefore allowed us to test what perception participants might have of those materials and whether the artificial addition or amendment of labels would change that perception in the testing.

   For each example, the post was shown to participants in one of the cells as it had appeared originally on social media. For most examples, participants in up to three of the other cells saw different versions of the post – with changes made by us (the researchers) to, for example, the wording of the label that indicated the post was an advert or the placement of the label. We did not investigate to what extent, if any, these posts had involved the brands who were mentioned. They were simply used to test our participants' understanding of the labelling the posts included (which Ipsos MORI either added or

adjusted). Ipsos MORI have no knowledge of whether the brands mentioned had actually provided any payment or exerted any control over the posts.

After exposure to each post, participants were asked:

1. The frequency at which they tend to see posts like this (QINF1)
2. How likely they would be to share a post like this (QINF2)
3. On a scale of 1 to 10, the extent to which they thought each post was an advert or not. Answering '10' meant they thought it was 'definitely an advert' and '1', 'definitely not an advert'. The following section of this report focuses on participants' answers to this question. **For analysis, Ipsos MORI have defined 'definitely an advert' based on a score of 9 or 10 out of 10 (QINF3)**

Findings:

Set out below are the findings for each of the examples included in the research. The scores are representative of the percentage of participants who said that these posts were 'definitely adverts'. This is defined as anyone who selected 9 or 10 out of 10 for each post. Cells 1 and 2 contained 550 participants in each, which included 150 13-17s. Cells 3 and 4 contained 400 participants each. There were no 13-17 year old participants in cells 3 and 4 and so there is no data for 'Children (13-17)' in the tables for those cells.

Brand adverts on social media:

Neutrogena

This brand advert by Neutrogena was shown to all four cells of participants:
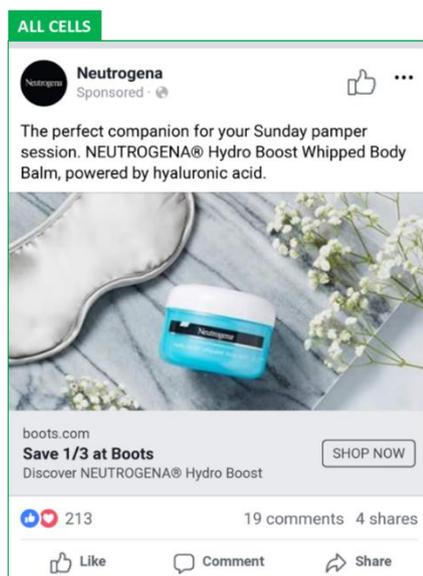
Source: @NeutrogenaUKIre, Facebook

DESCRIPTION	Sponsored upfront, brand mentioned				
CELL	1	2	3	4	Average
TOTAL: definitely an ad	Base: 550	Base: 550	Base: 400	Base: 400	
	67%	64%	-	-	
CHILDREN (13-17)	Base: 151	Base: 150	Base: N/A	Base: N/A	
	65%	66%	-	-	66%
ADULTS (18-64)	Base: 399	Base: 400	Base: 400	Base: 400	
	68%	64%	66%	67%	66%

Ikea

This post by Ikea was shown to all four cells of participants:
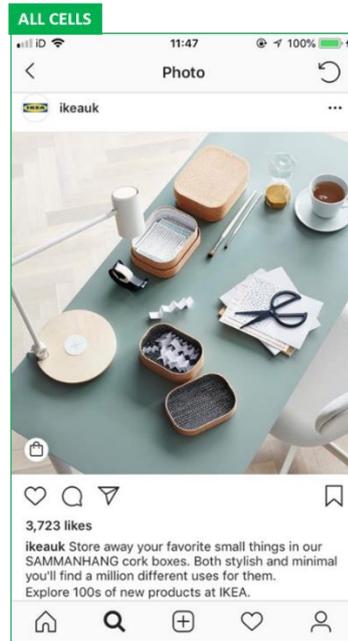
Source: @ikeauk, Instagram

DESCRIPTION	No label, brand mentioned				
CELL	1	2	3	4	Average
TOTAL: definitely an ad	Base: 550	Base: 550	Base: 400	Base: 400	
	57%	55%	-	-	
CHILDREN (13-17)	Base: 151	Base: 150	Base: N/A	Base: N/A	
	52%	49%	-	-	51%
ADULTS (18-64)	Base: 399	Base: 400	Base: 400	Base: 400	
	58%	57%	52%	57%	56%

- For the brand adverts on social media, fewer than 7 in 10 participants aged 18-64 (66% average across the 4 cells for Neutrogena and 56% average for IKEA) who saw them classed them as 'definitely adverts' (9 or 10 out of 10):
  o Neutrogena: There was no significant difference between participants aged 18-64 and 13-17s in their rating of each of these posts as 'definitely adverts' (AVERAGE: 18-64: 66% vs. 13-17: 66%)
  o Ikea: There was a directional difference between participants aged 18-64 and 13-17s in their rating of each of these posts as 'definitely adverts' (AVERAGE: 18-64: 56% vs 13-17: 51%)
  o Despite these posts coming amongst the highest in terms of being an advert, a notable proportion of participants could not confidently identify these brand adverts as 'definitely adverts'.

In the qualitative research, participants were more able to identify social media posts as adverts when they came directly from the brand owner and had a strong brand presence or brand imagery. This confidence increased when the participant was familiar with the brand or recognised the logo, service, or product.

Not adverts:

Backpacker

This post was shown to all four cells of participants[2]:

Source: @fitbackpacker, Instagram

DESCRIPTION	Normal post				
CELL	1	2	3	4	Average
TOTAL: definitely an ad	Base: 550	Base: 550	Base: 400	Base: 400	
	7%	6%	-	-	
CHILDREN (13-17)	Base: 151	Base: 150	Base: N/A	Base: N/A	
	7%	4%	-	-	6%
ADULTS (18-64)	Base: 399	Base: 400	Base: 400	Base: 400	
	7%	7%	7%	7%	7%

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[2] In the stimulus shown to participants, the original name of the influencer was changed from @fitbacker to @SarahJones

Anthony Joshua

This post was shown to all four cells of participants:

Source: @anthonyfjoshua, Twitter

DESCRIPTION	Normal post				
CELL	1	2	3	4	Average
TOTAL: definitely an ad	Base: 550	Base: 550	Base: 400	Base: 400	
	12%	9%	-	-	
CHILDREN (13-17)	Base: 151	Base: 150	Base: N/A	Base: N/A	
	9%	4%	-	-	7%
ADULTS (18-64)	Base: 399	Base: 400	Base: 400	Base: 400	
	12%	10%	10%	12%	11%

Gary Barlow

This post was shown to all four cells of participants:

Source: @officialgarybarlow, Instagram

DESCRIPTION	Normal post				
CELL	1	2	3	4	Average
TOTAL: definitely an ad	Base: 550	Base: 550	Base: 400	Base: 400	
	9%	8%	-	-	
CHILDREN (13-17)	Base: 151	Base: 150	Base: N/A	Base: N/A	
	8%	3%	-	-	6%
ADULTS (18-64)	Base: 399	Base: 400	Base: 400	Base: 400	
	9%	9%	8%	8%	8%

- These examples were least likely to be deemed 'definitely an advert'. The average number of participants aged 18-64 who rated each of these posts as 'definitely an advert' are:

  - Backpacker: 7%
  - Anthony Joshua: 11%
  - Gary Barlow: 8%

The questionnaire included a number of examples of social media posts that were categorised as influencer adverts. It included posts from several sites (Facebook, Instagram, Snapchat and Twitter) and included examples from different interests, such as fashion, food and fitness.

The examples here included posts as they appeared originally on social media, plus versions which had been adjusted – such as the addition of a label, changes to the wording used for a label, or changing the position of a label.

<u>The purpose of this was to understand the extent to which changes to the wording and placements of labels has an impact on whether influencer posts can be identified by participants as advertising. The purpose of the research was not to make a judgement on the brands/individuals used (whose ads may or may not have been paid-for posts) or the original/amended labelling of their posts. Rather, it was to use their posts as templates for testing how certain labels, and the position of those labels, perform as indicators of paid-for posts.</u>

The examples also included posts which have been shown as they would appear in the feed and others as they would appear if you clicked on to the post. Where several versions of the same post have been included, the original post is denoted as being the image with the green outline.

Maria J

Four different versions of this post were shown. Each cell of participants saw a different version. Participants in cells 1 and 2 were shown the post as it may have appeared 'in-feed'. Participants in cells 3 and 4 were shown the post as it may have appeared in full.

Source: @mariajblogs, Instagram
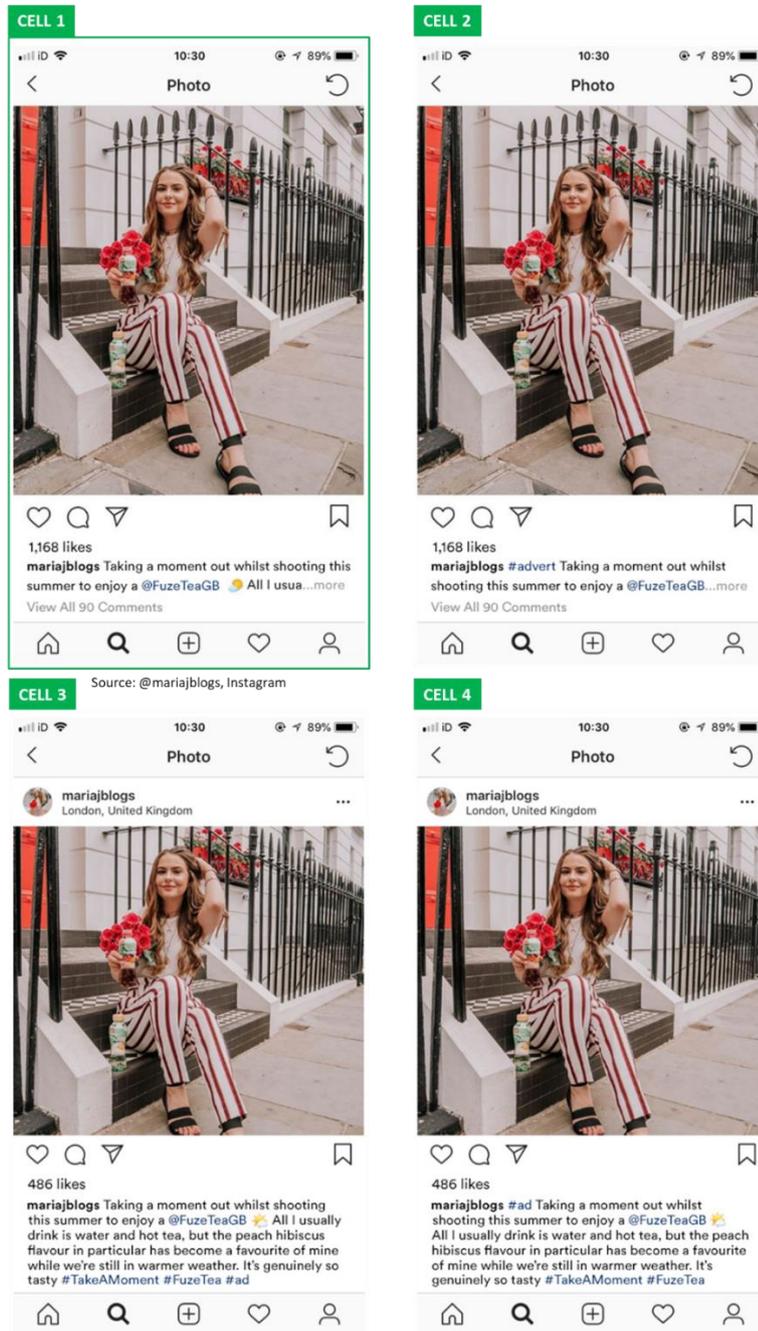
DESCRIPTION	No label, brand mentioned, in-feed	#advert upfront, brand mentioned, in-feed	#ad at the end, brand mentioned, more detail	#ad upfront, brand mentioned, more detail
CELL	1	2	3	4
TOTAL: Definitely an ad	Base: 550	Base: 550	Base: 400	Base: 400
	35%	42%	-	-
CHILDREN (13-17)	Base: 151	Base: 150	Base: N/A	Base: N/A
	30%	39%	-	-
ADULTS (18-64)	Base: 399	Base: 400	Base: 400	Base: 400
	37%	43%	40%	41%

- When considering the answers of **participants aged 18-64 only**, the iteration of the above advert that saw the highest proportion of participants select it as 'definitely an ad' was that which had #advert upfront (43%).
- Amongst the total *(13-64-year-old participants)*, a higher proportion said that the iteration with #advert upfront (42%) was 'definitely an ad' than the one with no label (35%)

Lorraine

Four different versions of this post were shown. Each cell saw a different version:

Source: @lorraine, Twitter
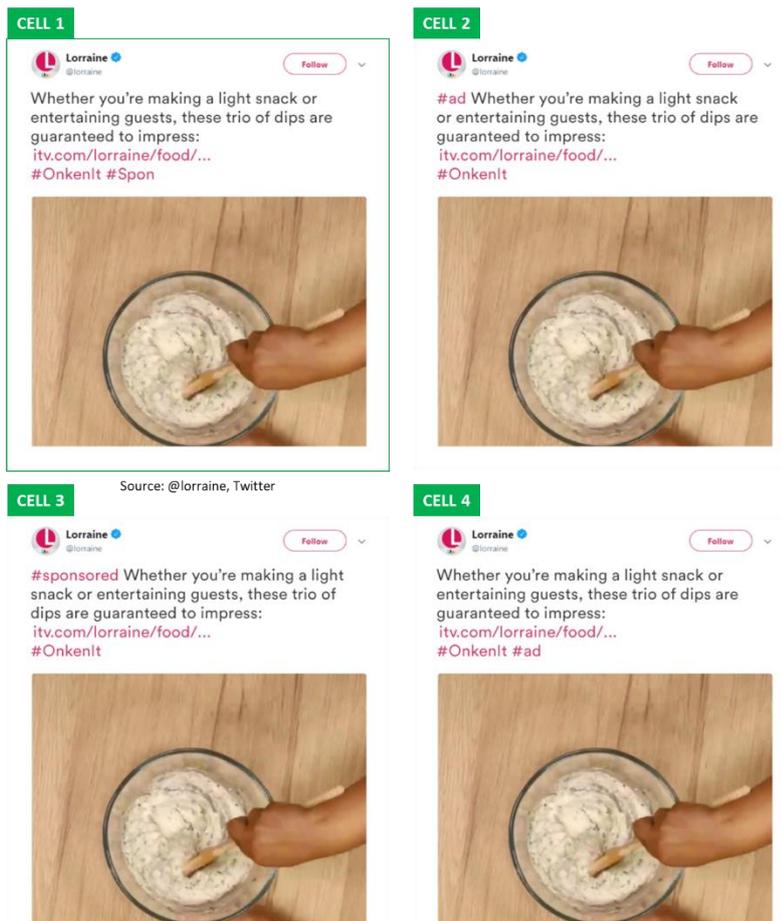
DESCRIPTION	#spon at the end, brand mentioned	#ad upfront, brand mentioned	#sponsored upfront, brand mentioned	#ad at the end, brand mentioned
CELL	1	2	3	4
TOTAL: definitely an ad	Base: 550	Base: 550	Base: 400	Base: 400
	28%	33%	-	-
CHILDREN (13-17)	Base: 151	Base: 150	Base: N/A	Base: N/A
	29%	29%	-	-
ADULTS (18-64)	Base: 399	Base: 400	Base: 400	Base: 400
	28%	35%	36%	38%

- Having #ad at the end of the post (above the photo) lead to the greatest proportion of participants classing it as 'definitely an ad' among participants aged 18+ (38%), across all 4 cells
- The post with #spon at the end scored significantly lower among participants aged 18-64 for being 'definitely an ad' than each of the alternatives

- However, in cells 1 and 2, 13-17-year old participants were as likely to rate the post with #ad upfront (29%) and the one with #spon at the end of the post (29%) (the original) as 'definitely an ad'
- Though there were no significant differences between the scores 13-17-year olds gave and the scores participants aged 18-64 gave in cells 1 and 2 who said this post was 'definitely an ad', participants aged 18-64 were *indicatively* more likely in cell 2 to say the post with #ad upfront was definitely an advert (35%) compared to 13-17s (29%)

Gina Burgess Nutrition

Four different versions of this post were shown. Each cell saw a different version:

Source: @ginabnutrition, Instagram

DESCRIPTION	#ad at the end, brand mentioned	#paidpartnership at the end, brand mentioned	#advertisement at the end, brand mentioned	No label, brand mentioned
CELL	1	2	3	4
TOTAL: definitely an ad	Base: 550	Base: 550	Base: 400	Base: 400
	21%	25%	-	-
CHILDREN (13-17)	Base: 151	Base: 150	Base: N/A	Base: N/A
	21%	13%	-	-
ADULTS (18-64)	Base: 399	Base: 400	Base: 400	Base: 400
	21%	29%	29%	19%

- Among participants aged 18-64 in cells 1-4, the post which the lowest proportion of people rated as being 'definitely an advert' was the one which had no label (19%)
- The inclusion of #advertisement (29%) or #paidpartnership (29%) at the end of the post encouraged the highest proportion of 9-10 scores among the participants aged 18-64
- When positioned at the end of the post, #ad (21%) performed better (but not significantly better statistically) than #paidpartnership (13%) in helping 13-17s to determine that this post was 'definitely an ad'
- Participants aged 18-64 (29%) were significantly more likely than 13-17-year olds (13%) to say that the post with #paidpartnership at the end was 'definitely an ad'
- The qualitative research found that where participants were not aware of a clear link to a brand, there was a tendency to assume the intentions of the post were genuine, meaning that the posts were often taken at face value as organic rather than advertising content:

"He's just posting what he's eating" - **Female, 45, London**

Zoe Sugg

Four different versions of this post were shown. Each cell saw a different version:

Source: officialzoella, Snapchat

DESCRIPTION	No label, brand mentioned	#ad at the end, brand mentioned	#Advert at the bottom in black, brand mentioned	#Advert at the bottom in white, brand mentioned
CELL	1	2	3	4
TOTAL: definitely an ad	Base: 550	Base: 550	Base: 400	Base: 400
	35%	50%	-	-
CHILDREN (13-17)	Base: 151	Base: 150	Base: N/A	Base: N/A
	37%	41%	-	-
ADULTS (18-64)	Base: 399	Base: 400	Base: 400	Base: 400
	34%	52%	50%	57%

- Among participants aged 18-64 in cells 1-4, the post which least resonated as 'definitely an advert' was the one which had no label (34%)
- In contrast, the post with #Advert in white writing was identified as 'definitely an advert' by 57%
- Among 13-17s, there is evidence of a directional increase when #ad is present (41%) compared to no label (37%)

Cozmo

This post was shown to cell one. Only one version of this post was shown:

Source: @genuineplacebo, Twitter

DESCRIPTION	#gifted at the end, brand mentioned	Not shown	Not shown	Not shown
CELL	1	2	3	4
TOTAL: definitely an ad	Base: 550	Base: N/A	Base: N/A	Base: N/A
	38%	-	-	-
CHILDREN (13-17)	Base: 151	Base: N/A	Base: N/A	Base: N/A
	38%	-	-	-
ADULTS (18-64)	Base: 399	Base: N/A	Base: N/A	Base: N/A
	38%	-	-	-

- The Cozmo post – with #gifted included at the end of the tweet's text (above the photo) - was only shown to cell 1. The score for 'definitely an ad' categorisations was consistent between 13-17-year olds (38%) and participants aged 18-64 (38%)

James Lock #1

This post was shown to Cell 2. Only one version of this post was shown:

Source: @James Lock, Facebook

DESCRIPTION	Not shown	Brand mentioned, no label	Not shown	Not shown
CELL	1	2	3	4
TOTAL: definitely an ad	Base: N/A	Base: 550	Base: N/A	Base: N/A
	-	30%	-	-
CHILDREN (13-17)	Base: N/A	Base: 150	Base: N/A	Base: N/A
	-	29%	-	-
ADULTS (18-64)	Base: N/A	Base: 400	Base: N/A	Base: N/A
	-	31%	-	-

- 30% of all cell 2 participants considered this post, which included a mention of the brand and the offer (i.e. "NO CREDIT CHECK LEASE") but no label, to be 'definitely an ad'
- There were no significant differences between participants aged 18-64 (31%) and 13-17-year olds (29%)

James Lock #2

This post was shown to participants in cells 3 and 4. Two versions of this post were shown:

Source: @James Lock, Facebook

DESCRIPTION	Not shown	Not shown	#ad in the middle of hashtags	Brand mentioned, no label
CELL	1	2	3	4
TOTAL: definitely an ad	Base: N/A	Base: N/A	Base: 400	Base: 400
	-	-	-	-
CHILDREN (13-17)	Base: N/A	Base: N/A	Base: N/A	Base: N/A
	-	-	-	-
ADULTS (18-64)	Base: N/A	Base: N/A	Base: 400	Base: 400
	-	-	30%	29%

- The inclusion of #ad embedded into the middle of hashtags did not lead to a higher proportion of participants perceiving this post to be 'definitely an advert', when compared to the same post with no label (30% vs. 29%)

Liam McAleese

Four versions of this post were shown. Each cell saw a different version:
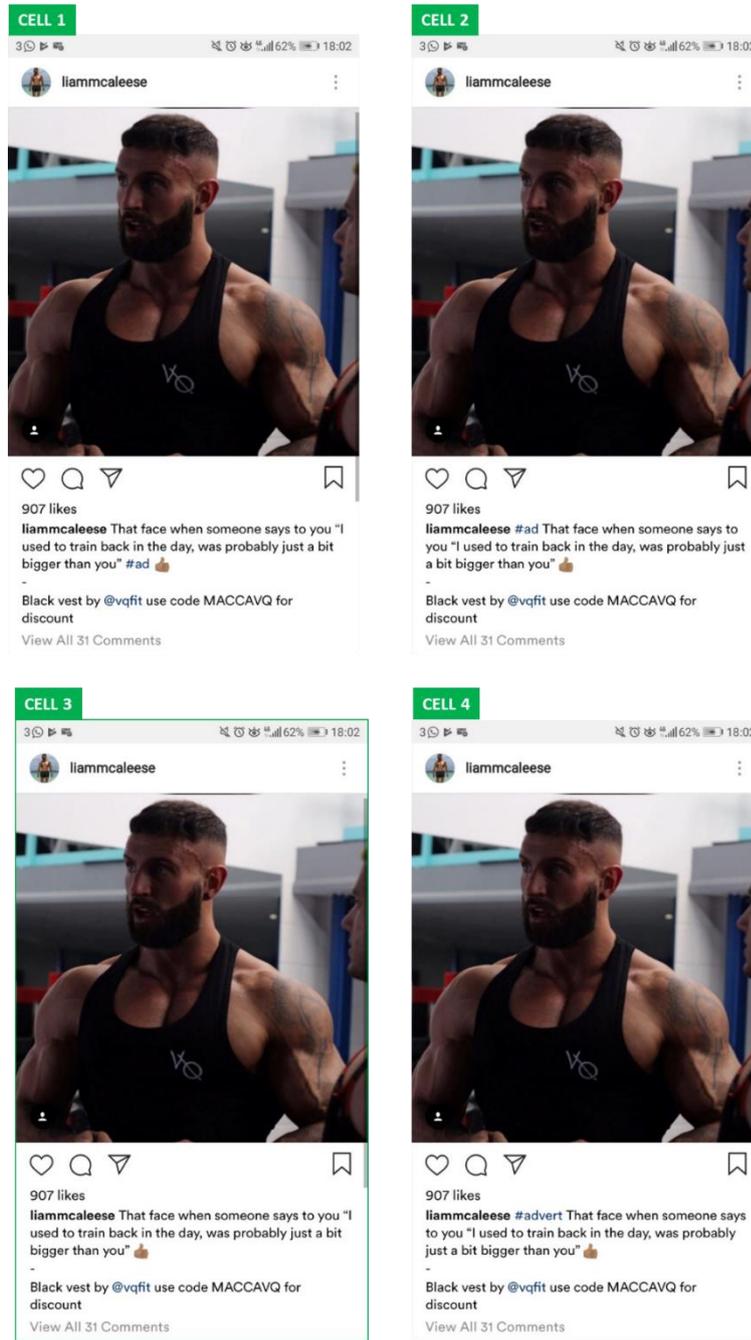
Source: @liammcaleese, Instagram

DESCRIPTION	#ad at the end, brand mentioned	#ad upfront, brand mentioned	No label, brand mentioned	#advert upfront, brand mentioned
CELL	1	2	3	4
TOTAL: definitely an ad	Base: 550	Base: 550	Base: 400	Base: 400
	29%	35%	-	-
CHILDREN (13-17)	Base: 151	Base: 150	Base: N/A	Base: N/A
	26%	31%	-	-
ADULTS (18-64)	Base: 399	Base: 400	Base: 400	Base: 400
	29%	36%	28%	40%

- Among participants aged 18-64, the version with #advert upfront had the highest proportion of participants saying it was 'definitely an ad' (40%)
- Among the same group of participants, #advert upfront (40%) and #ad upfront (36%) significantly outperformed #ad at the end (29%) and no label at all (28%)

Em Sheldon #1

This post was shown to participants in cells 1 and 2. Two versions of this post were shown:
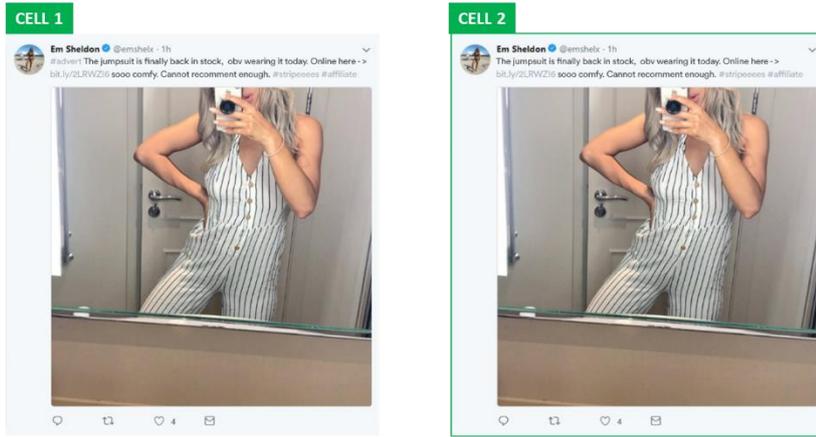
Source: @emshelx, Twitter

DESCRIPTION	#advert upfront, #affiliate at the end, brand not mentioned	#affiliate at the end, brand not mentioned	Not shown	Not shown
CELL	1	2	3	4
TOTAL: definitely an ad	Base: 550	Base: 550	Base: N/A	Base: N/A
	48%	44%	-	-
CHILDREN (13-17)	Base: 151	Base: 150	Base: N/A	Base: N/A
	47%	42%	-	-
ADULTS (18-64)	Base: 399	Base: 400	Base: N/A	Base: N/A
	49%	45%	-	-

- A higher proportion of participants aged 18-64 and 13-17-year olds identified the example with #advert upfront and #affiliate at the end as being 'definitely an ad' (48%) than the post with only #affiliate at the end (44%). However, the difference was directional rather than significant.
- There were also no significant differences in the two iterations of posts between the responses of participants aged 18-64 and 13-17-year olds.

Em Sheldon #2

This post was shown to participants in cells 3 and 4. Two versions of this post were shown:
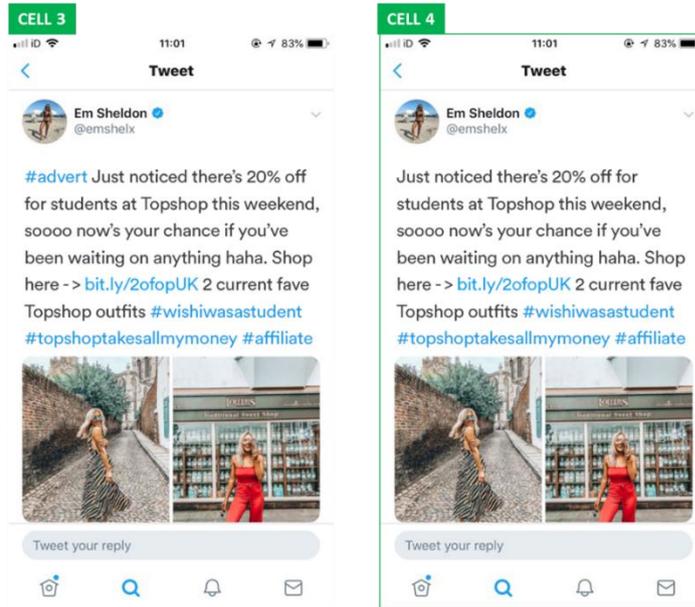
Source: @emshelx, Twitter

DESCRIPTION	Not shown	Not shown	#advert upfront, #affiliate at the end, brand mentioned	#affiliate at the end, brand mentioned
CELL	1	2	3	4
TOTAL: definitely an ad	Base: N/A	Base: N/A	Base: 400	Base: 400
	-	-	-	-
CHILDREN (13-17)	Base: N/A	Base: N/A	Base: N/A	Base: N/A
	-	-	-	-
ADULTS (18-64)	Base: N/A	Base: N/A	Base: 400	Base: 400
	-	-	41%	38%

- There was no significant difference in the proportion perceiving the post as 'definitely an ad' between the example with #advert at the start of the post (41%) and #affiliate at the end of the text (38%) (both above the photo).

Analysis

Overall, influencer adverts were less likely than brand adverts on social media to be identified as 'definitely adverts' – even when a label was included in, or added to, the post. The only exceptions were on the three versions of the Zoe Sugg original that had labels edited onto them. For comparison, the highest score for a Zoe Sugg post being identified as 'definitely an ad' was 57%, whereas the best achieving brand advert (Neutrogena) scored an average of 66%.

- The range for identifying brand adverts as 'definitely an ad' was 49% (13-17s) to 68% (18-64).
- The average score for participants aged 18-64 ranking the two brand adverts as 'definitely adverts is 61% (Neutrogena; 66% and IKEA; 56%).
- Of the eight influencer adverts that were tested alongside other versions with labels added or repositioned, the post as it was originally posted on social media scored the **lowest** across all eight posts. These posts achieved an average score of 32% for participants aged 18-64 who gave a score of 9 or 10 out of 10 ('definitely an ad').
- Scores for these influencer adverts increased when labels were added or changed.
- Of the eight influencer adverts that were **tested alongside other versions**, the highest scoring posts – which all had labels that had been added or changed – received an average score of 41% by participants aged **18-64** who gave a score of 9 or 10 out of 10 ('definitely an ad').
- For the posts deemed 'not adverts', the proportion of participants giving scores of 9 or 10 out of 10 ('definitely an ad') ranged between 3% and 12%.

The influencer advert which recorded the smallest proportion of participants saying it was 'definitely an advert' was the 'Gina Burgess Nutrition' post, with just 19% identifying the version with no label as advertising. Amongst 13-17s, the post which had #paidpartnership at the end of the post, along with a brand mention, performed worse (13% among 13-17s in cell 2).

The influencer advert with the highest proportion of participants able to identify the post as 'definitely an advert' was the Zoe Sugg post, with #Advert included in white (a clear colour contrast) at the bottom right hand corner of the Snapchat post (57% of cell 4 participants aged 18+).

Five examples included an iteration with no label (with at least one other iteration with a label for comparison). When compared to versions with a label, those without one were classed as the lowest scoring advert for all five examples (although not always significantly).

The five 'no-label' posts, which were classed as lowest in their respective sets were:

1. Maria J (Cell 1) – 35% (next closest was #ad at the end; 40%)
2. Gina Burgess Nutrition (Cell 4) – 19% (next closest was #ad at the end; 21%)
3. Zoe Sugg (Cell 1) – 34% (next closest was #Advert at the bottom in black; 50%)
4. James Lock #2 (Cell 4) – 29% (next closest was #ad in the middle of hashtags; 30%)
5. Liam McAleese (Cell 3) – 28% (next closest was #ad at the end; 29%)

This suggests that labels do have an impact in helping people to determine whether what they are seeing is an advert or not. Findings from the James Lock #2 example (with #ad in the middle of other hashtags) indicates that the placement of the label is important. If it is placed within a series of hashtags and not easily visible, then it may often be overlooked. It is also the case that where #ad at the end of the post has been the next worst performing (i.e. a low score for being identified as definitely an ad) after 'no-label' posts, this is always on Instagram, where a label at the end of the text truly is at the end of the post. (unlike, for example, Twitter, where due to the layout of the platform, the text is always visible *above* the image). However, even with a label, influencer adverts were less likely – and more often than not, significantly less likely on a post-by-post basis - than the brand adverts to be identified as advertising.

Placement and visibility of labels: Qualitative findings

Placement and visibility of labels had a notable impact on qualitative participants' ability to firstly identify advertising by influencers and secondly to help confirm this. In the online forum, participants were shown differing executions of influencer advertising and asked to highlight on the post the labels that were either helping or not helping them to be certain about whether a post was advertising.

The positive marks highlighted by participants tended to be on labels placed clearly, often at the top of the post. An example of this was platform-led labelling, which are the words/phrases that social media platforms provide when an influencer/brand owner wants to identify their post as an advert before publication. The examples below show, via heatmaps, the labels and other signifiers that participants noticed.

Source: @songofstyle, Instagram

Source: @dele, Instagram

Elements noted by participants include labels that contrasted or stood out from the visual content, or those that were at the beginning of the caption of the post. This positioning of labels was most obvious to participants and therefore helped them identify a post as advertising (when they understood the wording being used).

"The labels at the top of the post stand out the most" - **Male, 14, Glasgow**

"I can clearly see that it's an advert. I can see the '#Ad' at the start of the description so I actually read and noticed it this time" - **Female, 34, Glasgow**

"At least the location of the hash tag is such that my eye finds it fairly easily, and it isn't buried in a lot of other text" - **Male, 51, Nottingham**

Participants negatively marked areas on posts that were either unclear, felt to be hidden, or did not stand out or contrast from the rest of the content on the post. Where this was apparent, participants felt the use of labels in this way was arbitrary and ineffective in helping them to identify advertising content.

This was exacerbated further when words or abbreviated words, which were not intuitively comprehended as alluding to advertising, were used as hashtags amongst other hashtags.

"When it is done in a way that isn't up-front like a tiny '#ad' thrown into a sea of hashtags, the use of hashtags is arbitrary and hidden amongst the post. These are unclear, not transparent and ineffective" - **Male, 32, Nottingham**

"I don't think '#ad' lets the viewer know it's an advert. Three characters can be easily missed" - **Female, 37, Nottingham**

Colour also played an important role in helping participants to notice labelling. In several cases in the 'compare and contrast 'mark-up' task' (online community), participants were more likely to notice and react positively to a label in a different colour i.e. red or blue that differed to background and other text contained within the advert. Though this does come with the caveat that they should also not be crowded out by other content, as to appear hard to see.

"The single hashtag on its own in blue does stand out and I noticed it, but when there are loads of them it can easily be missed" - **Male, 14, Swansea**

This aligns with participant recommendations for clearly labelling adverts, with red being the colour of choice for most participants.

"Labels should be larger than the main copy font in a different colour. A bolder colour such as red" - **Male, 49, Swansea**

"The advert label should be a different colour to the rest of the page, so it clearly identifies that it is marketing"- **Female, 50, Swansea**

"Red is quite good. You can see it clearly and it's like a polite warning" - **Male, 33, London**

"Don't make it a small font don't camouflage it into the colour of the page"- **Female, 13, Belfast**

Other elements that impact on people's ability to recall influencer advertising on social media

In addition to labelling, the qualitative research identified several factors that may contribute to participants' ability to identify a paid-for influencer post as advertising.

- The style of the image is staged, as opposed to naturalistic
- Mentioning brands in posts
- The wording in the description includes a call to action / sales language or is directional, as opposed to a simple description
- The post is from someone famous/an influencer, as opposed to a non-famous person
- Contextual knowledge: the web user's familiarity with the platform or influencer raises suspicions as to the nature of the post

These qualitative findings informed our selection of adverts to test in the subsequent quantitative survey that has been reported here. It was ensured there was a good mix of styles, brand mentions, labelling, tone of voice, number of followers and level of fame.

Section Five

Familiarity and understanding of labels used in social media:

Focusing specifically on social media users, section five of this report explores familiarity and understanding of the labels currently used on social media.

To start with, the section outlines which labels participants in the quantitative research can remember seeing on social media, before looking at how confident they are in explaining what these labels mean. The section then looks at how social media users describe what these labels mean in their own words, before concluding with an analysis of how participants categorise different types of posts often seen on social media.

This allows for a better understanding of how familiar social media users are with labels and how they interpret them when they are seen on social media posts.

For the purpose of this research, 'social media users' are defined as those who say that they access any one of the brands below at a frequency of at least 'Less often that once a month' (see codes 1-11 at Q4 in Appendix D at the end of the report).

- Facebook, Instagram, Twitter, Snapchat, YouTube or 'Other social media sites/apps'

Labels that participants could recall having seen previously in social media posts

Approach:

Social media users aged 13-64 were presented with a list of 14 different words or phrases that they may have seen on social media posts. For each word or phrase, they had to select whether they had seen it previously ('Yes'), or not ('No') or whether they were unsure ('Don't know').

Findings:

The proportion of social media users aged 13-64 who said they had previously seen specific labels are set out in the table below.

Q7: Before today, do you recall seeing the below word or phrase on social media posts? They could be written with a hashtag (#).

	TOTAL	13-17	18-64
Base: All who access social media	*1,869*	*245*	*1,623*
Ad	68%	74%	67%
Sponsored	67%	74%	66%
Advert	65%	67%	65%
Advertisement	64%	67%	63%
Sponsorship	54%	59%	53%
Paid Ad	48%	45%	49%
Brand Ambassador	43%	43%	43%
Collaboration	39%	43%	39%
Gifted	39%	50%	37%
Affiliate	37%	32%	38%
Paid Partnership	35%	27%	37%
Collab	28%	33%	27%
Spon	14%	17%	14%
Sp	11%	10%	11%

Table 6

- The top four most recalled terms seen alongside social media posts are 'ad' (68%) 'sponsored' (67%), 'advert' (65%) and 'advertisement' (64%).
  - o 13-17s are significantly more likely than those aged 18-64 to have seen the following words/phrases on social media:
    - ▪ 'Ad' (74% vs. 67% for UK social media users aged 18-64)
    - ▪ 'Sponsored' (74% vs. 66% for UK social media users aged 18-64)
    - ▪ 'Gifted' (50% vs. 37% for UK social media users aged 18-64)
    - ▪ 'Collab' (33% vs. 27% for UK social media users aged 18-64)
  - o On the other hand, those aged 18-64 were more likely than 13-17-year olds to have seen the following:
    - ▪ 'Paid Partnership' (37% vs. 27% for 13-17s)
- Among all social media users aged 13-64, recall of full words on social media is generally stronger than any abbreviated iteration. The only exception here is 'ad' (68%), which is recalled by as many as 'advert' (65%) and a higher proportion of participants than 'advertisement' (64%).
  - o People are much more likely to recall 'sponsored' (67%) and 'sponsorship' (54%) over 'spon' (14%), which is more likely to be recalled than 'sp' (11%). 'Collaboration' (39%) is more likely to be recalled than 'collab' (28%).

<u>Confidence in explaining what the words or phrases mean (among those who recall seeing them)</u>

Approach:

Thinking specifically about the words/phrases that social media users aged 13-64 recall seeing on social media, they were asked how confident they felt in explaining what they meant when displayed on social media; plotting their score on a 1-10 scale, with 1 meaning 'Not at all confident' and 10 meaning 'Extremely confident'.

The following nets have been applied for our analysis:

- Not confident / Not sure (codes 1-6)
- Very confident (codes 9-10)

Findings:

'Advertisement' (60%) and 'Advert' (59%) were the words/phrases that UK internet users aged 13-64 were most likely to feel 'very confident' in explaining. There were four words/phrases where those aged 18-64 were more likely than those aged 13-17 to feel 'very confident' in explaining. But in two of these cases ('Advert', which 60% of 18-64s and 51% of 13-17s felt 'very confident in explaining' and 'Ad', which 53% of 18-64s and 44% of 13-17s felt 'very confident' in explaining), despite the variation between UK internet users aged 18-64 and those aged 13-17, the latter still classed them among those that they felt most confident in explaining. The other two words/phrases are 'Brand Ambassador' and 'Gifted', which 34% and 24% of 13-17s felt 'very confident' in explaining, versus 45% and 37% for 18-64s, respectively.

The proportion of UK internet users aged 13-64 who said they felt 'very confident' in explaining what each word/phrase meant (having said that they had seen the word/phrase previously) is set out below.

Q8: How confident, if at all, would you feel explaining what each of the following words mean when displayed on social media?

Base: All who access social media and recall each word	Very confident (C. 9-10)		
	TOTAL	13-17	18-64
	Differs by word/phrase		
Advertisement	60%	56%	60%
Advert	59%	51%	60%
Sponsored	53%	47%	54%
Ad	51%	44%	53%
Sponsorship	50%	44%	51%
Paid Ad	50%	43%	51%
Brand Ambassador	44%	34%	45%
Paid Partnership	44%	43%	44%
Collaboration	40%	35%	40%
Collab	39%	34%	41%
Affiliate	38%	34%	39%
Gifted	35%	24%	37%
Spon	34%	31%	34%
Sp	19%	Base too low	18%

Table 7

- Of the words which participants said they had seen on social media, they were most likely to feel 'very confident' in explaining the following words or phrases:
    o 'Advertisement' (60%)
    o 'Advert' (59%)
    o 'Sponsored' (53%)
    o 'Ad' (51%)
    o 'Sponsorship' (50%)
    o 'Paid Ad' (50%)

    It could be argued that these words/phrases are those that people have a more natural familiarity with, as opposed to 'Sp', 'Gifted' and 'Spon', etc., which tend not to be used in other media or in everyday life.

- UK internet users aged 13-64 were more likely to feel 'very confident' in explaining what full words meant, as opposed to any abbreviated iteration.

    o 'Advertisement' (60%) and 'Advert' (59%) scored higher than 'Ad' (51%)
    o 'Sponsored' (53%) and 'Sponsorship' (50%) scored higher than 'Spon' (34%), which in turn scored higher than 'Sp' (19%)

    This was also evident in the online video interviews and the online forum stages of the qualitative research. When words that participants intuitively understood as referring to advertising content (e.g. 'advertising' and 'sponsorship') were used, this meant participants didn't need to rely as much on wider contextual information to help inform their judgement as to whether or not a post was advertising:

"I think 'Sponsored' would be a great word to be used as this gives a very good indication that it is an advert"- **Female, 43, Belfast**

Full words were also a lot clearer to participants in the qualitative phase, with the participants favouring the word 'sponsored' or 'advert' in their recommendations. Abbreviated words tended to cause confusion for participants as they were not always intuitively understood outright and were often misinterpreted.

"It says 'sponsored' quite clearly there, so they must be getting paid or something. I prefer this over '#spon' as that could mean a number of different things to people"- **Female, 50, London**

"Using words that you wouldn't normally associate with adverts such as 'affiliate' and further shortening it to '#aff' makes it become more grey"- **Male, 29, Nottingham**

- The quantitative research found significant differences in the proportions of UK internet users aged 13-17 and those aged 18-64 who felt 'very confident' in being able to explain 4 out of the 14 words or phrases. Those aged 18-64 were more likely to feel 'very confident' in explaining the words/phrases below than those aged 13-17:
    o 'Advert' (60% vs. 51% for 13-17s)
    o 'Ad' (53% vs. 44% for 13-17s)
    o 'Brand Ambassador' (45% vs. 34% for 13-17s)
    o 'Gifted' (37% vs. 24% for 13-17s)

Among the words/phrases asked about, there are some which participants were likely to say that they do not feel confident or are unsure about. The most noticeable of these were 'Sp', 'Gifted' and 'Spon'.

The proportion of UK internet users aged 13-64 who said they were 'not confident' or unsure about explaining what each word/phrase meant (having said that they had seen the word/phrase previously) is set out below:

Q8: How confident, if at all, would you feel explaining what each of the following words mean when displayed on social media?

Base: All who access social media and recall each word	Not confident / Unsure (C. 1-6)		
	TOTAL	13-17	18-64
	Differs by word/phrase		
Sp	48%	Base too low	50%
Gifted	36%	43%	35%
Spon	35%	35%	35%
Collab	33%	34%	33%
Affiliate	33%	36%	32%
Paid Partnership	32%	33%	32%
Collaboration	29%	34%	28%
Brand Ambassador	27%	33%	26%
Ad	23%	27%	22%
Paid Ad	22%	31%	21%
Sponsorship	22%	25%	22%
Sponsored	21%	22%	21%
Advertisement	18%	19%	18%
Advert	18%	19%	18%

Table 8

- The majority of UK internet users aged 13-64 (i.e. greater than 50%) were confident (C.7-10) in explaining all words and phrases. However, the five words that they were most likely to feel 'Not confident' or 'Not sure' when it came to explaining what they meant were:
    o 'Sp' (48%)
    o 'Gifted' (36%)
    o 'Spon' (35%)
    o 'Affiliate' (33%)
    o 'Collab (33%)

Participants' explanations of what the different words or phrases mean

Approach:

Each surveyed participant was shown one of the words they claimed to have seen on social media and asked to explain in their own words what they thought it meant[3]. Our analysis below focuses on the definitions given by participants who said they were 'very confident' (C. 9-10) and who were 'not confident / unsure' (C. 1-6) – examining differences in response by level of confidence.

Findings:

When looking at the words or phrases that people are most likely to feel 'very confident' in explaining, such as 'Advertisement', 'Advert', 'Sponsored' and 'Ad', etc. (as per the previous section), participants were generally able to articulate a definition that related to a company promoting a product or a service. There was not a clear distinction between the descriptions provided for 'sponsorship' and 'advert' – but there was a broad understanding that a third party is involved in an attempt to sell a product or service.

For example:

'Advertisement':
- "That a particular product or service is being shown for the purpose of trying to sell it to you"

'Advert':
- "Where a product or service is promoted and shown to the public to gain exposure and sales"

Participants were also able to identify third party involvement as a means to selling a product or service for 'Sponsored', 'Ad', 'Paid Ad', 'Sponsorship', 'Collaboration', 'Brand Ambassador' and 'Spon'.

However, even among those who felt 'very confident' in explaining what words/phrases mean, there were a few words that some participants defined incorrectly. The most noticeable of these was 'Gifted' – which was referred to in the context of 'being talented'. There were a number of participants who were unable to apply their understanding of the word to a marketing context (i.e. an influencer being given a product for free to post about):

'Gifted':
- "Someone very clever"
- "Talent, ability to do something out of the extraordinary"

Generally, as may be expected, participants who had said they were 'very confident' about the meaning of a word/phrase were more likely to be broadly accurate in their descriptions than those who said they were 'not confident / unsure'. Although the majority of participants who said they were 'not confident / unsure' were able to provide broadly accurate descriptions, some chose to write in 'Don't know' rather than providing a description. There were also examples, as set out above, of descriptions that were clearly wrong.

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[3] The word or phrase participants were asked to define was asked using a rotational system, as to ensure that Ipsos MORI could achieve a broadly equal split in definitions.

Those with lower degrees of confidence were more accurate when explaining what full words meant versus any shortened iterations. The majority of participants who were 'not confident' / 'unsure' were generally able to define correctly what 'Ad', 'Advert' and 'Advertisement' meant.

Participants who were 'not confident' / 'unsure' were most likely to struggle to provide a description for 'Gifted' and 'Affiliate'. Descriptions given for 'Sp' and 'Spon' were also incorrect. Participants were more likely to struggle the shorter the abbreviation became (e.g. they were more able to describe 'sponsored' than 'spon' and to describe 'spon' than 'sp'). Those who said they were 'not confident' or 'unsure' as to how they would define 'Sp' were more likely to give an incorrect definition:

'Sp':
- "Special"
- "Social people"
- "Spot on"
- "Starting price"

There were also a larger number of "don't know" responses to 'Sp' among those who had previously said they were 'not confident' about the meaning of this.

Participants in the qualitative phase also struggled with 'Sp':

"I did notice the '#sp' but I thought it was his initials. It could literally mean anything, but it certainly doesn't mean advert, it doesn't even mean sponsored to me" - **Male, 49, Swansea**

The qualitative research also found that although some words may be intuitively understood, they were not instinctively attributed to advertising.

When talking about '#ambassador':

"The choice of words makes it tough, especially if people are not aware of what that word means" - **Male, 29, Nottingham**

Some participants in the qualitative research also felt the word 'collaboration' was unclear and even deceptive in some cases. They said that the word's meaning does not equate to that of a transaction between the influencer and the brand or service being advertised.

"It's not a collaboration if someone's being paid to do something - it's business" - **Female, 37, Nottingham**

Applying these labels to real-life social media scenarios

Approach:

Six different scenarios were described, in which an influencer references a brand in their social media post and asked participants to select which word or phrase (from a list of seven, including 'Other' and 'Don't know') they thought best defined each one.

Of the scenarios explained, participants were able to label them as:
- Normal post (not an advert)
- Sponsored post
- Affiliate post
- Collaboration
- Advert
- Other
- Don't know

Findings:

Q17: Please look at the scenario explained below. Please let us know which word you would use to best describe this type of social media post.

Scenario #1	A reality TV star who posts about fashion buys herself a new handbag. She decides to post a picture of herself with the bag on her Instagram account and tags the brand's Instagram name in the post.		
	TOTAL	13-17	18-64
Base: All participants	*2,300*	*301*	*1,999*
Normal post (not an advert)	36%	39%	35%
Advert	15%	14%	15%
Affiliate post	14%	19%	13%
Sponsored post	13%	9%	14%
Collaboration	12%	13%	12%
Other	1%	0%	1%
Don't know	9%	7%	10%

Table 9

- 36% of UK internet users aged 13-64 described this scenario as a 'normal post' – the highest scoring answer for this example.
- The tendency to refer to this post as a 'sponsored post' (13%), an 'affiliate post' (14%), a 'collaboration' (12%) and an 'advert' (15%) was broadly equal. Taking these words/phrases together, more than 50% selected a label for this scenario which relates to a form of advertising or marketing.
- Although 'normal post' came highest for both 13-17s (39%) and those aged 18-64 (35%), 13-17s were more likely to say that it was an affiliate post' (19% vs. 13% for participants aged 18+) and those aged 18-64 were more likely to say it was a sponsored post' (14% vs. 9% for 13-17s).

Q17: Please look at the scenario explained below. Please let us know which word you would use to best describe this type of social media post.

Scenario #2	A cricketer is sent a free mobile phone worth £1,000 from a technology company. The cricketer posts about it on his Instagram account, including a photo of the phone and a mention of the brand's Instagram account.		
	TOTAL	13-17	18-64
Base: All participants	*2,300*	*301*	*1,999*
Sponsored post	33%	36%	33%
Advert	21%	18%	21%
Collaboration	16%	16%	17%
Affiliate post	13%	18%	13%
Normal post (not an advert)	6%	4%	6%
Other	1%	1%	1%
Don't know	9%	8%	10%

Table 10

- This type of post was most likely to be classified as a 'sponsored post' (33%), but 1 in 5 (21%) also referred to it as an 'advert'.
- UK internet users aged 13-17 and 18-64 were both most likely to refer to this scenario as a 'sponsored post', but 13-17s were significantly more likely than those aged 18+ to refer to is as an 'affiliate post' (18% vs. 13%).
- 6% of UK internet users aged 13-64 labelled this scenario as a 'normal post'.

Q17: Please look at the scenario explained below. Please let us know which word you would use to best describe this type of social media post.

Scenario #3	A food blogger agrees to promote a brand of yoghurt. She is paid by the company and her contract with them requires her to post pictures of herself eating the yoghurt and saying how tasty it is.		
	TOTAL	13-17	18-64
Base: All participants	*2,300*	*301*	*1,999*
Sponsored post	36%	38%	36%
Advert	30%	24%	30%
Collaboration	14%	16%	14%
Affiliate post	9%	10%	8%
Normal post (not an advert)	4%	4%	4%
Other	1%	1%	1%
Don't know	7%	8%	7%

Table 11

- UK internet users aged 13-64 were most likely to refer to this scenario as a 'sponsored post' (36%), with slightly fewer (30%) labelling it as an 'advert'.
- Only 4% thought this was a 'normal post'.
- The only significant difference between those aged 18+ and 13-17s was that those aged 18+ increased likelihood of referring to this post as an 'advert' (30% vs. 24% for 13-17s).

Q17: Please look at the scenario explained below. Please let us know which word you would use to best describe this type of social media post.

Scenario #4	A beauty blogger buys makeup online and posts about it on Twitter, along with the brand's Twitter name and a link to its website. The blogger receives a small percentage of the sale price if someone follows this link and makes a purchase.		
	TOTAL	13-17	18-64
Base: All participants	*2,300*	*301*	*1,999*
Affiliate post	25%	20%	25%
Collaboration	23%	27%	22%
Sponsored post	22%	26%	22%
Advert	15%	11%	16%
Normal post (not an advert)	6%	6%	6%
Other	1%	1%	1%
Don't know	8%	9%	8%

Table 12

- This post divided opinion more than any other, with UK internet users aged 13-64 most likely to either refer to it as an 'affiliate post' (25%), a 'collaboration' (23%) and, to a lesser extent, a 'sponsored post' (22%).
- Again, the only significant difference between those aged 18-64 and 13-17s was that those' aged 18-64 had heightened likelihood of referring to this post as an 'advert' (16% vs. 11% of 13-17s).
- Only 6% considered this to be a 'normal post'.

Q17: Please look at the scenario explained below. Please let us know which word you would use to best describe this type of social media post.

Scenario #5	A celebrity is given a car worth £60,000 by the manufacturer. He posts about it on his Instagram account, with photos of himself standing next to the car. In his posts he thanks the manufacturer and links to their Instagram account.		
	TOTAL	13-17	18-64
Base: All participants	*2,300*	*301*	*1,999*
Sponsored post	33%	34%	33%
Advert	23%	18%	23%
Collaboration	17%	17%	18%
Affiliate post	12%	19%	12%
Normal post (not an advert)	5%	5%	5%
Other	1%	0%	1%
Don't know	8%	8%	8%

Table 13

- This post was most likely to be referred to as a 'sponsored post' (33%), which was consistent between UK internet users aged 18+ (33%) and those aged 13-17 (34%).
- The second most common answer was 'advert', which was how 23% this post
- Only 5% referred to this as a 'normal post'.

- 13-17s were more likely to refer to this as an 'affiliate post' (19% vs. 12% for UK internet users aged 18+), which represented the only significant difference between those aged 18+ and 13-17s in this post.

Q17: Please look at the scenario explained below. Please let us know which word you would use to best describe this type of social media post.

Scenario #6	A well-known footballer gets a pair of football boots from his sponsor, a famous sports brand. He posts a picture of the boots with the brand's motto in a hashtag.		
	TOTAL	13-17	18-64
Base: All participants	*2,300*	*301*	*1,999*
Sponsored post	48%	54%	47%
Advert	18%	13%	19%
Collaboration	13%	16%	12%
Affiliate post	8%	8%	8%
Normal post (not an advert)	5%	3%	6%
Other	1%	0%	1%
Don't know	7%	6%	8%

Table 14

- The classification of this scenario as a 'sponsored post' was the highest score any scenario received (48%)
  o 13-17s (54%) were more likely to say this than those aged 18-64 (47%)
- 13-17s were also significantly more likely than those aged 18-64 to refer to this post as a 'collaboration' (16% vs. 12% for participants aged 18+)
- Around 1 in 5 (18%) referred to this post as an 'advert', which was driven mainly by those aged 18-64 (19% vs. 13% of 13-17s)
- Only 5% listed this as a 'normal post'

For five of the six scenarios, a significant majority of UK internet users aged 13-64 agreed that these were not 'normal' posts and that there was at least some degree of advertising/marketing involved. It was only the first post (with the reality TV star who bought herself a new handbag), in which 'normal post' was the most popular answer. However, slightly fewer than 2 in 5 (36%) said this was a 'normal post', whilst other definitions relating to advertising or marketing accounted for more than 50%.

When UK internet users aged 13-64 didn't consider the post to be a 'normal' one, they were most likely to refer to the post as a 'sponsored post'. This was the case in 4 out of the remaining 5 scenarios explained:

  o A cricketer is sent a free mobile phone worth £1,000 from a technology company. The cricketer posts about it on his Instagram account, including a photo of the phone and a mention of the brand's Instagram account
  o A food blogger agrees to promote a brand of yoghurt. She is paid by the company and her contract with them requires her to post pictures of herself eating the yoghurt and saying how tasty it is

- A celebrity is given a car worth £60,000 by the manufacturer. He posts about it on his Instagram account, with photos of himself standing next to the car. In his posts he thanks the manufacturer and links to their Instagram account
- A well-known footballer gets a pair of football boots from his sponsor, a famous sports brand. He posts a picture of the boots with the brand's motto in a hashtag

In all but one of these, it was specified that the person posting the content either received a product, whether that be a mobile phone, a car or a pair of football boots, or money, from a brand.

For the final scenario, opinions were most divided. Similar proportions of UK internet users aged 13-64 referred to the post as an 'affiliate post' (25%), a 'collaboration' (23%) and a 'sponsored post' (22%):

- A beauty blogger buys makeup online and posts about it on Twitter, along with the brand's Twitter name and a link to its website. The blogger receives a small percentage of the sale price if someone follows this link and makes a purchase

It should be noted that there was a range of responses across all the given scenarios, which indicates there is a lack of understanding as to what particular labels mean in different contexts.

Appendix

Appendix A: Using the findings from the qualitative research to inform the design of the quantitative research

The qualitative research was used to help identify the variations of influencer posts to include in the quantitative stage of the research.

The qualitative research found that labels have an impact on people's ability to identify influencer advertising posts on social media posts as adverts – with participants more likely to rate 'influencer posts' as adverts when a label was included.

- **Hashtags, and standalone words or abbreviations** – Use of hashtags and abbreviated words including #ad #sponsored were helping those participants that understood them to identify content as adverts but these were not always seen.

  "I didn't notice all the hashtags there, but when I looked again I noticed one said #ad, so it must be an advert" Male, 34, Glasgow

- **Platform-led partnerships** - When noticed by participants in the qualitative research, were felt to be the most intuitive labels. Platform approaches gave a sense of officiality to participants of whether something is or is not a form of advertising. Examples of this include 'sponsored' on Facebook and 'paid partnership' on Instagram which occurs beneath the name of the advertiser.

  'I wasn't sure if it was an advert because what she has written sounds more like a recommendation. However, the 'paid partnership' at the top showed me it was an advert' – Female, 45, Swansea

  'They are clear that they are adverts due to the word it has above every advert which is "Sponsored"- Female, 33, Nottingham

The research also identified other factors that could play a role in participants' ability to differentiate between normal posts and advertorial content. Participants noted other elements that added to the complexities of categorising the post as an advert or not – these included:

- **The style of the image (naturalistic vs. staged)** – Whether or not the image appeared to be natural or staged was a factor that participants in the qualitative research took into account when trying to work out whether a post was advertising.

  "It just feels really unnatural, why would you hold a product like that and then post about it. He's obviously trying to make us buy it" – Female, 45, Swansea

- **Mentioning brands in posts** – Whether or not a brand appeared in the post was also a factor in distinguishing between a post that was likely to be a 'normal' post and one that was likely to be

advertising. For example, when the brand had an @ (mention) and appeared in a contrasting colour to the rest of the post.

"You see this type of advertising all the time on Instagram now. People trying to get you to click on the brand so you'll follow it and probably end of earning the person who posted it some money too" Female, London, 26

- **The wording (call to action/directional/'sales language' vs. simply a description)** - Some participants identified posts as potential adverts because of the perceived 'salesy' / 'ad-speak' language that formed in the description text below the image. This was typically when they seemed overly positive or complimentary about a product or post. Posts that highlighted competitions or links to competitions were also an indicator to some participants that the post may be an advert of some kind.

''It's really sales-y language, trying to make you buy it '- Male, 33, London

"With the image and the fact it mentions a competition suggests to me it is probably an ad" Male, 32, London

- **Who the post is from (someone famous/an influencer vs. a non-famous person)** – In cases where the person behind the post was known to the participant they were often more confident in being able to identify the content as advertising. This was often as they were familiar with that person posting similar content and their links to the brands they are posting.

"I know Hector Bellerin is a footballer for Arsenal so he's just advertising some Puma products." – Male, 32, London

''I know this YouTuber does this a lot so I assumed he was paid '- Male, 39, Belfast

- **Contextual knowledge (Familiarity with platform or influencer raising suspicion)** – In posts on platforms participants had familiarity with, they would notice some indicators that would suggest the person had a large following and could subsequently be advertising to them. This came in the form of looking at the number of likes a post had, the number of followers the person making the post had, and / or whether they had blue tick status on the platform.

Participants were generally drawn to the imagery of a post and it was the visual elements of the post that may indicate advertorial content. However, the imagery alone was not enough to give them full confidence that a post was advertising. This meant they would often look to other elements of the post to feel more assured. Platform-led labelling and influencers' own labelling were often missed at first. However, if participants had a suspicion that the posts were adverts, these labels, if understood, helped them to confirm their suspicion and identify the posts as adverts.

Appendix B: Survey sample profile

Table 15.1 Survey sample profile (weighted and unweighted)

		Weighted (%)	Unweighted (%)
Gender & Age	Male 13-15	4	2
	Female 13-15	4	3
	Male 16-24	8	8
	Female 16-24	9	8
	Male 25-34	10	10
	Female 25-34	10	11
	Male 35-54	20	20
	Female 35-54	20	20
	Male 55-64	8	9
	Female 55-64	9	9
Social Grade	ABC1	59	59
	C2DE	41	41

These tables are significance tested at 95% confidence. *It is important to note that, strictly speaking, confidence interval calculations relate only to samples that have been selected using strict probability sampling methods, which were not used for this study. However, in practice it is reasonable to assume that these calculations provide a good indication of the confidence intervals relating to this survey.*

Appendix C: Brief guide to social grade definitions

Listed below is a summary of the social grade definitions on all surveys carried out by Ipsos MORI. These are based on classifications used by the Institute of Practitioners in Advertising.

A   Professionals such as doctors, surgeons, solicitors or dentists; chartered people like architects; fully qualified people with a large degree of responsibility such as senior editors, senior civil servants, town clerks, senior business executives and managers, and high ranking grades of the Services.

B   People with very responsible jobs such as university lecturers, hospital matrons, heads of local government departments, middle management in business, qualified scientists, bank managers, police inspectors, and upper grades of the Services.

C1   All others doing non-manual jobs; nurses, technicians, pharmacists, salesmen, publicans, people in clerical positions, police sergeants/constables, and middle ranks of the Services.

C2   Skilled manual workers/craftsmen who have served apprenticeships; foremen, manual workers with special qualifications such as long distance lorry drivers, security officers, and lower grades of Services.

D   Semi-skilled and unskilled manual workers, including labourers and mates of occupations in the C2 grade and people serving apprenticeships; machine minders, farm labourers, bus and railway conductors, laboratory assistants, postmen, door-to-door and van salesmen.

E   Those on lowest levels of subsistence including pensioners, casual workers, and others with minimum levels of income.

Appendix D: Topline results

Q2
Which best describes your use of the internet (such as visiting websites, looking at social media, sending emails)?

Unweighted Base: All respondents	2300
Multiple times an hour	877
	38%
Around once an hour	322
	14%
Every 2-3 hours	315
	14%
Several times a day	596
	26%
Around once a day	117
	5%
4 or 5 times a week	32
	1%
2 or 3 times a week	22
	1%
Around once a week	10
	0%
Less than once a week	9
	0%
NET: Heavy users (Multiple times an hour to several times a day)	2109
	92%
NET: Medium users (Around once a day to 4 or 5 times a week)	149
	6%
NET: Light users (Around 2 or 3 times a week to less than once a week)	41
	2%
Never	0
	0%

Q4
Which of the following best describes how often you access...?

	Facebook	Instagram	Twitter	Snapchat	YouTube	Other social media sites/apps	News websites
Unweighted Base: All respondents	**2300**	**2300**	**2300**	**2300**	**2300**	**2300**	**2300**
Multiple times an hour	313	237	136	196	250	143	90
	14%	*10%*	*6%*	*9%*	*11%*	*6%*	*4%*
Around once an hour	216	145	115	76	134	139	124
	9%	*6%*	*5%*	*3%*	*6%*	*6%*	*5%*
Every 2-3 hours	227	171	118	125	177	148	181
	10%	*7%*	*5%*	*5%*	*8%*	*6%*	*8%*
Several times a day	427	266	196	184	409	316	488
	19%	*12%*	*9%*	*8%*	*18%*	*14%*	*21%*
Around once a day	302	166	175	116	307	241	539
	13%	*7%*	*8%*	*5%*	*13%*	*10%*	*23%*
4 or 5 times a week	63	78	82	58	205	97	165
	3%	*3%*	*4%*	*3%*	*9%*	*4%*	*7%*
2 or 3 times a week	110	97	89	56	228	112	163
	5%	*4%*	*4%*	*2%*	*10%*	*5%*	*7%*
Around once a week	84	69	93	52	163	83	126
	4%	*3%*	*4%*	*2%*	*7%*	*4%*	*5%*
2 or 3 times a month	37	28	66	31	110	52	61
	2%	*1%*	*3%*	*1%*	*5%*	*2%*	*3%*
Around once a month	54	48	73	34	90	60	54
	2%	*2%*	*3%*	*1%*	*4%*	*3%*	*2%*
Less often than once a month	70	84	154	96	115	144	93
	3%	*4%*	*7%*	*4%*	*5%*	*6%*	*4%*
Never	397	910	1003	1276	113	764	218
	17%	*40%*	*44%*	*55%*	*5%*	*33%*	*9%*
NET: Daily (C. 1-5)	1485	986	740	697	1276	988	1422
	65%	*43%*	*32%*	*30%*	*55%*	*43%*	*62%*
NET: Weekly (C. 1-8)	1742	1230	1004	863	1872	1279	1875
	76%	*53%*	*44%*	*38%*	*81%*	*56%*	*82%*
NET: Less frequently than weekly (C. 9-10)	161	160	293	162	315	256	207
	7%	*7%*	*13%*	*7%*	*14%*	*11%*	*9%*
NET: Ever (C. 1-11)	1903	1390	1297	1024	2187	1536	2082
	83%	*60%*	*56%*	*45%*	*95%*	*67%*	*91%*

Q5

Which, if any, of the following types of content do you regularly read about online? When answering, please consider the websites, apps, videos, social media accounts and anything else you access.

Unweighted Base: All respondents	**2300**
News	1401
	61%
Sport	905
	39%
Fashion	671
	29%
Lifestyle	834
	36%
Home/DIY/Gardening	625
	27%
Comedy	694
	30%
Showbiz	541
	24%
TV/Film	1206
	52%
Music	1049
	46%
Finance	593
	26%
Blogs	393
	17%
Health and beauty	819
	36%
Parenting	284
	12%
Other	227
	10%

Q13

Sometimes celebrities and other people with large social media followings are given or loaned products for free by companies in the hope that the person might mention them in their posts.
Before today, were you aware of this happening?

Unweighted Base: All respondents	2300
Yes, I definitely knew about this	1251
	54%
Yes, I think so	599
	26%
I thought this might happen, but I wasn't sure	233
	10%
NET: Aware (C. 1-2)	1849
	80%
No, I didn't know this happened	218
	9%

Q14

Sometimes celebrities and other people with large social media followings are paid by companies to post about their products in a positive way on social media.
Before today, were you aware of this happening?

Unweighted Base: All respondents	2300
Yes, I definitely knew about this	1233
	54%
Yes, I think so	598
	26%
I thought this might happen, but I wasn't sure	271
	12%
NET: Aware	1831
	80%
No, I didn't know this happened	198
	9%

QINF3

Please slide the bar to where you think the image you have just seen sits.
1 = Definitely NOT an advert
10 = Definitely IS an advert

Cell 1:

	1 - Definitely NOT an advert	2	3	4	5	6	7	8	9	10 - Definitely IS an advert	NET: Definitely an advert (C. 9-10)
Unweighted Base	550	550	550	550	550	550	550	550	550	550	550
Weighted Base	532	532	532	532	532	532	532	532	532	532	532
01a. mariajblogs short_1 no change	40	19	21	22	59	53	46	86	71	117	187
	7%	4%	4%	4%	11%	10%	9%	16%	13%	22%	35%
02. Neutrogena	6	5	10	10	28	25	36	54	82	275	357
	1%	1%	2%	2%	5%	5%	7%	10%	15%	52%	67%
03. Backpacker_no change	172	78	62	36	40	46	37	25	18	18	36
	32%	15%	12%	7%	8%	9%	7%	5%	3%	3%	7%
04. Lorraine_1 spon	30	20	29	31	71	57	73	73	57	91	149
	6%	4%	5%	6%	13%	11%	14%	14%	11%	17%	28%
05. ginabnutrition brand mention_1 ad	42	55	30	44	62	66	64	58	44	70	113
	8%	10%	6%	8%	12%	12%	12%	11%	8%	13%	21%
06. IKEA	16	10	12	17	28	36	50	60	80	223	303
	3%	2%	2%	3%	5%	7%	9%	11%	15%	42%	57%
07. Zoe Sugg_1 no change	26	33	17	32	47	62	61	69	61	124	185
	5%	6%	3%	6%	9%	12%	11%	13%	11%	23%	35%
08. COZMO_1 no change	16	22	19	33	41	48	69	84	76	124	201
	3%	4%	4%	6%	8%	9%	13%	16%	14%	23%	38%
09. AJ	103	62	42	51	74	57	40	44	23	39	61
	19%	12%	8%	10%	14%	11%	7%	8%	4%	7%	12%
10. Liammcaleese discount code_1 ad	42	31	36	25	71	52	53	72	42	110	152
	8%	6%	7%	5%	13%	10%	10%	13%	8%	21%	29%
11. Gary Barlow	109	82	48	43	72	46	51	34	24	24	48
	21%	15%	9%	8%	14%	9%	10%	6%	5%	4%	9%
12. Em Sheldon topshop_1 advert	10	20	18	22	36	40	52	77	85	172	257
	2%	4%	3%	4%	7%	8%	10%	15%	16%	32%	48%

Cell 2:

	1 - Definitely NOT an advert	2	3	4	5	6	7	8	9	10 - Definitely IS an advert	NET: Definitely an advert (C. 9-10)
Unweighted Base	550	550	550	550	550	550	550	550	550	550	550
Weighted Base	534	534	534	534	534	534	534	534	534	534	534
01a. mariajblogs short_2 Advert	31 / 6%	11 / 2%	23 / 4%	22 / 4%	45 / 8%	53 / 10%	64 / 12%	61 / 11%	67 / 13%	158 / 30%	225 / 42%
02. Neutrogena	10 / 2%	12 / 2%	5 / 1%	9 / 2%	31 / 6%	36 / 7%	41 / 8%	48 / 9%	73 / 14%	269 / 50%	342 / 64%
03. Backpacker_no change	196 / 37%	79 / 15%	60 / 11%	39 / 7%	41 / 8%	25 / 5%	29 / 5%	33 / 6%	18 / 3%	14 / 3%	32 / 6%
04. Lorraine_2 ad	21 / 4%	22 / 4%	20 / 4%	29 / 5%	65 / 12%	63 / 12%	66 / 12%	69 / 13%	60 / 11%	119 / 22%	179 / 33%
05. ginabnutrition brand mention_2 paidpartnership	28 / 5%	33 / 6%	42 / 8%	34 / 6%	63 / 12%	57 / 11%	70 / 13%	72 / 13%	43 / 8%	92 / 17%	135 / 25%
06. IKEA	19 / 4%	10 / 2%	12 / 2%	20 / 4%	44 / 8%	41 / 8%	35 / 7%	60 / 11%	80 / 15%	213 / 40%	293 / 55%
07. Zoe Sugg_2 Ad	21 / 4%	13 / 2%	17 / 3%	12 / 2%	46 / 9%	39 / 7%	50 / 9%	72 / 13%	78 / 15%	187 / 35%	265 / 50%
08. JamesLock3_2 no change	25 / 5%	25 / 5%	37 / 7%	29 / 5%	64 / 12%	58 / 11%	59 / 11%	76 / 14%	53 / 10%	109 / 20%	162 / 30%
09. AJ	110 / 21%	70 / 13%	40 / 7%	50 / 9%	70 / 13%	60 / 11%	53 / 10%	36 / 7%	19 / 4%	27 / 5%	46 / 9%
10. Liammcaleese discount code_2 ad	53 / 10%	27 / 5%	28 / 5%	30 / 6%	58 / 11%	44 / 8%	53 / 10%	53 / 10%	65 / 12%	122 / 23%	188 / 35%
11. Gary Barlow	144 / 27%	57 / 11%	55 / 10%	50 / 9%	64 / 12%	44 / 8%	41 / 8%	39 / 7%	22 / 4%	18 / 3%	40 / 8%
12. Em Sheldon topshop_2 no change	20 / 4%	17 / 3%	15 / 3%	25 / 5%	44 / 8%	35 / 7%	52 / 10%	91 / 17%	63 / 12%	172 / 32%	236 / 44%

Cell 3:

	1 - Definitely NOT an advert	2	3	4	5	6	7	8	9	10 - Definitely IS an advert	NET: Definitely an advert (C. 9-10)
Unweighted Base	400	400	400	400	400	400	400	400	400	400	400
Weighted Base	414	414	414	414	414	414	414	414	414	414	414
01a. mariajblogs full post_3 Ad	18	18	21	17	29	41	55	48	40	127	167
	4%	4%	5%	4%	7%	10%	13%	12%	10%	31%	40%
02. Neutrogena	8	7	8	6	21	19	35	37	53	219	273
	2%	2%	2%	1%	5%	5%	9%	9%	13%	53%	66%
03. Backpacker_no change	132	58	46	29	37	32	32	21	14	14	28
	32%	14%	11%	7%	9%	8%	8%	5%	3%	3%	7%
04. Lorraine_2 sponsored	18	19	20	16	38	52	46	54	38	113	151
	4%	5%	5%	4%	9%	13%	11%	13%	9%	27%	36%
05. ginabnutrition brand mention_3 advertisment	24	35	17	29	43	47	46	52	27	93	120
	6%	9%	4%	7%	10%	11%	11%	13%	7%	22%	29%
06. IKEA	15	10	9	14	23	34	39	53	42	175	217
	4%	2%	2%	3%	6%	8%	9%	13%	10%	42%	52%
07. Zoe Sugg_3 Advert black	14	14	18	15	31	27	38	51	42	164	206
	3%	3%	4%	4%	8%	7%	9%	12%	10%	40%	50%
08. JamesLock6_3 ad	35	31	17	21	51	41	41	52	44	80	124
	8%	7%	4%	5%	12%	10%	10%	13%	11%	19%	30%
09. AJ	85	45	36	39	62	41	28	36	15	28	43
	20%	11%	9%	9%	15%	10%	7%	9%	4%	7%	10%
10. Liammcaleese discount code_3 no change	32	47	26	12	41	47	44	51	36	78	114
	8%	11%	6%	3%	10%	11%	11%	12%	9%	19%	28%
11. Gary Barlow	101	61	35	34	52	39	32	25	16	18	35
	24%	15%	8%	8%	13%	9%	8%	6%	4%	4%	8%
12. Em Sheldon stripey_3 advert	32	20	23	15	34	28	46	46	53	118	171
	8%	5%	5%	4%	8%	7%	11%	11%	13%	29%	41%

Cell 4:

	1 - Definitely NOT an advert	2	3	4	5	6	7	8	9	10 - Definitely IS an advert	NET: Definitely an advert (C. 9-10)
Unweighted Base	400	400	400	400	400	400	400	400	400	400	400
Weighted Base	414	414	414	414	414	414	414	414	414	414	414
01a. mariajblogs full post_4 Ad	33	19	12	16	37	30	41	56	52	117	169
	8%	5%	3%	4%	9%	7%	10%	14%	13%	28%	41%
02. Neutrogena	18	10	1	7	21	20	31	27	62	217	279
	4%	2%	*	2%	5%	5%	7%	7%	15%	52%	67%
03. Backpacker_no change	133	94	26	27	38	26	18	24	15	12	27
	32%	23%	6%	6%	9%	6%	4%	6%	4%	3%	7%
04. Lorraine_4 ad	23	29	18	17	31	40	48	51	49	108	157
	6%	7%	4%	4%	8%	10%	12%	12%	12%	26%	38%
05. ginabnutrition brand mention_4 no label	32	37	31	39	60	39	49	48	42	36	79
	8%	9%	7%	9%	15%	9%	12%	12%	10%	9%	19%
06. IKEA	12	10	10	11	26	27	33	48	51	186	237
	3%	2%	3%	3%	6%	6%	8%	12%	12%	45%	57%
07. Zoe Sugg_4 Advert white	8	19	5	11	33	24	32	44	58	180	238
	2%	5%	1%	3%	8%	6%	8%	11%	14%	44%	57%
08. JamesLock6_4 no change	49	30	19	23	47	47	36	43	32	89	121
	12%	7%	5%	5%	11%	11%	9%	10%	8%	21%	29%
09. AJ	74	53	41	35	60	41	29	33	27	21	48
	18%	13%	10%	8%	15%	10%	7%	8%	6%	5%	12%
10. Liammcaleese discount code_4 advert	30	21	17	21	53	32	29	44	38	130	167
	7%	5%	4%	5%	13%	8%	7%	11%	9%	31%	40%
11. Gary Barlow	116	50	38	40	41	33	32	35	13	19	31
	28%	12%	9%	10%	10%	8%	8%	8%	3%	5%	8%
12. Em Sheldon stripey_4 no change	38	20	16	26	35	30	35	59	45	112	157
	9%	5%	4%	6%	8%	7%	8%	14%	11%	27%	38%

Q7

Before today, do you recall seeing the below word or phrase on social media posts? They could be written with a hashtag (#).

	Base	Yes	No	Don't know
Unweighted base: Cells 1-4 only: All who ever uses social media				
Ad	**1869**	1268	441	159
		68%	24%	9%
Advert	**1869**	1214	491	164
		65%	26%	9%
Advertisement	**1869**	1189	506	173
		64%	27%	9%
Sp	**1869**	207	1342	319
		11%	72%	17%
Spon	**1869**	268	1324	277
		14%	71%	15%
Sponsored	**1869**	1260	457	152
		67%	24%	8%
Sponsorship	**1869**	1000	643	226
		54%	34%	12%
Collab	**1869**	515	1090	263
		28%	58%	14%
Collaboration	**1869**	737	897	235
		39%	48%	13%
Paid Partnership	**1869**	660	955	254
		35%	51%	14%
Brand Ambassador	**1869**	810	845	213
		43%	45%	11%
Gifted	**1869**	722	916	231
		39%	49%	12%
Paid Ad	**1869**	906	749	214
		48%	40%	11%
Affiliate	**1869**	691	901	276
		37%	48%	15%

Q8 (Codes 1-7)

Unweighted base: Those who recall each label at Q7

How confident, if at all, would you feel explaining what each of the following words mean when displayed on social media?

	Ad	Advert	Advertisement	Sp	Spon	Sponsored	Sponsorship
Unweighted Base	**1281**	**1223**	**1196**	**211**	**277**	**1272**	**1006**
1 - Not at all confident	16	9	8	15	5	18	13
	1%	1%	1%	7%	2%	1%	1%
2	16	11	10	9	6	14	14
	1%	1%	1%	4%	2%	1%	1%
3	20	15	13	10	13	18	19
	2%	1%	1%	5%	5%	1%	2%
4	46	34	29	13	20	44	34
	4%	3%	2%	6%	7%	3%	3%
5	80	68	66	21	25	72	58
	6%	6%	6%	10%	9%	6%	6%
6	114	87	91	31	26	97	87
	9%	7%	8%	15%	10%	8%	9%
7	139	131	94	31	44	154	125
	11%	11%	8%	15%	17%	12%	13%
8	188	145	166	36	40	179	147
	15%	12%	14%	18%	15%	14%	15%
9	215	214	190	13	27	189	173
	17%	18%	16%	6%	10%	15%	17%
10 - Extremely confident	436	501	522	26	63	475	330
	34%	41%	44%	13%	24%	38%	33%
Net: Not confident / Unsure (1-6)	291	224	217	100	94	263	224
	23%	18%	18%	48%	35%	21%	22%
Net: Very confident (9-10)	651	715	712	39	90	664	503
	51%	59%	60%	19%	34%	53%	50%

Q8 (Codes 8-14)

Unweighted base: Those who recall each label at Q7

How confident, if at all, would you feel explaining what each of the following words mean when displayed on social media?

	Collab	Collaboration	Paid Partnership	Brand Ambassador	Gifted	Paid Ad	Affiliate
Unweighted Base	**530**	**752**	**657**	**816**	**734**	**914**	**690**
1 - Not at all confident	9	9	12	8	9	14	16
	2%	1%	2%	1%	1%	1%	2%
2	11	11	13	17	16	11	20
	2%	2%	2%	2%	2%	1%	3%
3	16	20	20	17	29	17	22
	3%	3%	3%	2%	4%	2%	3%
4	24	26	44	35	38	34	31
	5%	4%	7%	4%	5%	4%	4%
5	48	61	50	68	79	53	60
	9%	8%	8%	8%	11%	6%	9%
6	63	86	74	75	92	73	78
	12%	12%	11%	9%	13%	8%	11%
7	74	116	76	93	103	99	98
	14%	16%	11%	11%	14%	11%	14%
8	67	116	79	141	103	152	101
	13%	16%	12%	17%	14%	17%	15%
9	62	99	99	121	94	132	98
	12%	13%	15%	15%	13%	15%	14%
10 - Extremely confident	141	192	193	234	159	321	167
	27%	26%	29%	29%	22%	35%	24%
Net: Not confident / Unsure (1-6)	172	214	212	220	263	201	227
	33%	29%	32%	27%	36%	22%	33%
Net: Very confident (9-10)	203	291	292	355	254	453	265
	39%	40%	44%	44%	35%	50%	38%

Q17

Please look at the scenario explained below. Please let us know which word you would use to best describe this type of social media post.

"A reality TV star who posts about fashion buys herself a new handbag. She decides to post a picture of herself with the bag on her Instagram account and tags the brand's Instagram name in the post."

Unweighted base	Normal post (not an advert)	Sponsored post	Affiliate post	Collaboration	Advert	Other (please specify)	Don't know
2300	820	307	318	280	345	16	214
	36%	13%	14%	12%	15%	1%	9%

"A cricketer is sent a free mobile phone worth £1,000 from a technology company. The cricketer posts about it on his Instagram account, including a photo of the phone and a mention of the brand's Instagram account."

Unweighted base	Normal post (not an advert)	Sponsored post	Affiliate post	Collaboration	Advert	Other (please specify)	Don't know
2300	127	769	309	378	481	22	215
	6%	33%	13%	16%	21%	1%	9%

"A food blogger agrees to promote a brand of yoghurt. She is paid by the company and her contract with them requires her to post pictures of herself eating the yoghurt and saying how tasty it is."

Unweighted base	Normal post (not an advert)	Sponsored post	Affiliate post	Collaboration	Advert	Other (please specify)	Don't know
2300	88	828	197	332	679	14	163
	4%	36%	9%	14%	30%	1%	7%

"A beauty blogger buys¬ makeup online and posts about it on Twitter, along with the brand's Twitter name and a link to its website. The blogger receives a small percentage of the sale price if someone follows this link and makes a purchase."

Unweighted base	Normal post (not an advert)	Sponsored post	Affiliate post	Collaboration	Advert	Other (please specify)	Don't know
2300	140	510	567	526	347	15	195
	6%	22%	25%	23%	15%	1%	8%

"A celebrity is given a car worth £60,000 by the manufacturer. He posts about it on his Instagram account, with photos of himself standing next to the car. In his posts he thanks the manufacturer and links to their Instagram account."

Unweighted base	Normal post (not an advert)	Sponsored post	Affiliate post	Collaboration	Advert	Other (please specify)	Don't know
2300	121	766	286	402	521	18	185
	5%	33%	12%	17%	23%	1%	8%

"A well-known footballer gets a pair of football boots from his sponsor, a famous sports brand. He posts a picture of the boots with the brand's motto in a hashtag."

Unweighted base	Normal post (not an advert)	Sponsored post	Affiliate post	Collaboration	Advert	Other (please specify)	Don't know
2300	120	1100	183	290	418	16	172
	5%	48%	8%	13%	18%	1%	7%

To access the data tables and questionnaire in full, please visit:
https://ipsos.uk/asa

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