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Consumer Awareness and Understanding of Influencer Marketing

Research Report

October 2025

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Executive Summary: Introduction

Background

The Advertising Standards Authority (ASA) commissioned MTM to update its 2019 research on influencer marketing disclosure. Since then, the social media landscape has evolved significantly - most notably, the rise of TikTok, increased user engagement, and new advertising formats. This study will inform a review of guidelines to ensure influencer marketing continues to comply with the Committee of Advertising Practice (CAP) Code requirement that all marketing communications are “obviously identifiable as such.”

Objectives

- To explore the scenarios when consumers are unable to identify ads without the use of a label
- To examine awareness, understanding and interpretation of the different labels used to describe ads across platforms
- To draw out insights as to which labels and methods of disclosure provide clarity for the UK online population to be able to distinguish ads from surrounding content
- To look at the extent to which different user groups may differ in their ability to identify ads and their interpretation of different labels - and the reasons for this.

Research Methodology

- Stage 1 (qualitative research): Seven-day online community discussion with 30 participants aged 13-64 across the UK
- Stage 2 (qualitative research): Follow-on individual depth interviews with eight respondents from Stage 1
- Stage 3: Using Stage 1 and 2 findings, an experimental framework of example stimulus was designed to support Stage 4
- Stage 4 (quantitative research): Online survey with 1,900 UK participants aged 13-64 involving a “Spot the Sell” exercise

Fieldwork took place between May-July 2025.

Executive Summary: Identifying influencer marketing

Influencer marketing is not always very clear

- Fundamental aspects of the social media experience **make influencer ads difficult for users to recognise**. These include;
  - having no natural ad 'break'
  - the similarity in paid promotions vs. genuine reviews
  - the algorithmically-led feed of relevant, but often unfamiliar, content.
- Experimental tests in this study have confirmed the issue: no type of ad is universally recognised, and many non-ad posts are mistaken for ads. **Brand ads, however, remain the gold standard** in terms of high levels of clarity.
- **In these tests, influencer ads fell significantly short of the standard set by brand ads,** when it comes to the UK online population being sure that a post is an ad (74% selected "Definitely an ad" for brand ads vs. 54% for influencer ads).

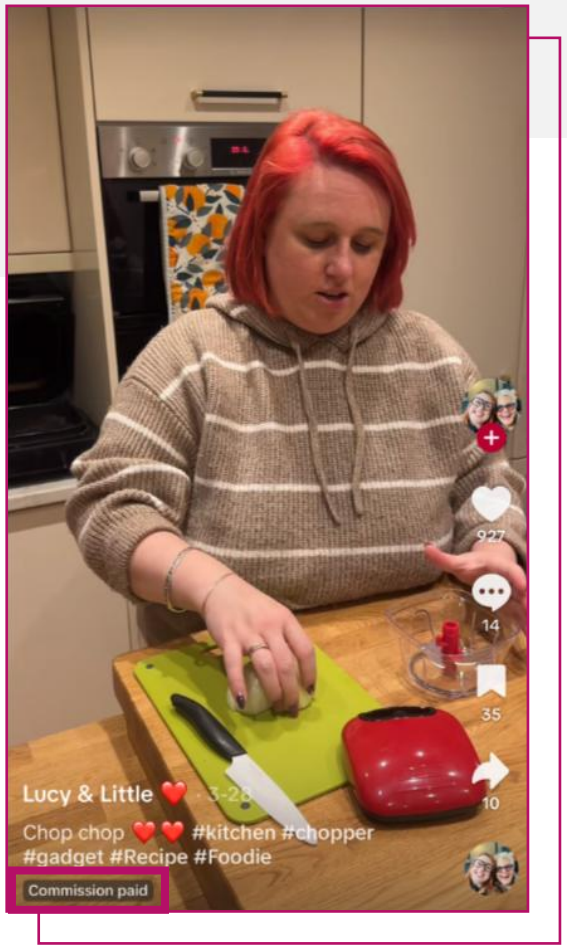
Both contextual signals and clear labels help the UK online population to identify ads

- When social media users are identifying ads, the **first signal is picking up a cue or cues from the content itself**, specifically:
  - mentions of a brand
  - the tone of voice
  - visual features of the brand/ product, including brand logos
  - familiarity with the brand
  - familiarity with the influencer indicating that the post is unusual in some way
  - calls to action.
- However, these context signals vary and are not consistently present in influencer posts. As a result, **labels help to increase recognition of ads in the absence of such signals and play a crucial, confirmatory, backstop role** to overtly signal an ad, bridging the "ad clarity gap" when the contextual signal from the content is weak or ambiguous.

Executive Summary: Benefits of adding prominent labels

The UK online population wants clearer labelling of influencer ads

- There is **widespread demand for clear labelling of ads.** 80% of the UK online population say they prefer it when influencers are clear about when they are advertising something - and 80% agree that clear labelling is essential to be able to identify influencer advertising. This helps users decide how to respond – whether to trust the recommendation / advice, act on it, or skip past it without even fully engaging with the post.
- Ensuring fully transparent influencer marketing will help to **support and maintain trust across the wider social media ecosystem**, benefiting audiences, influencers, platforms and brands alike.



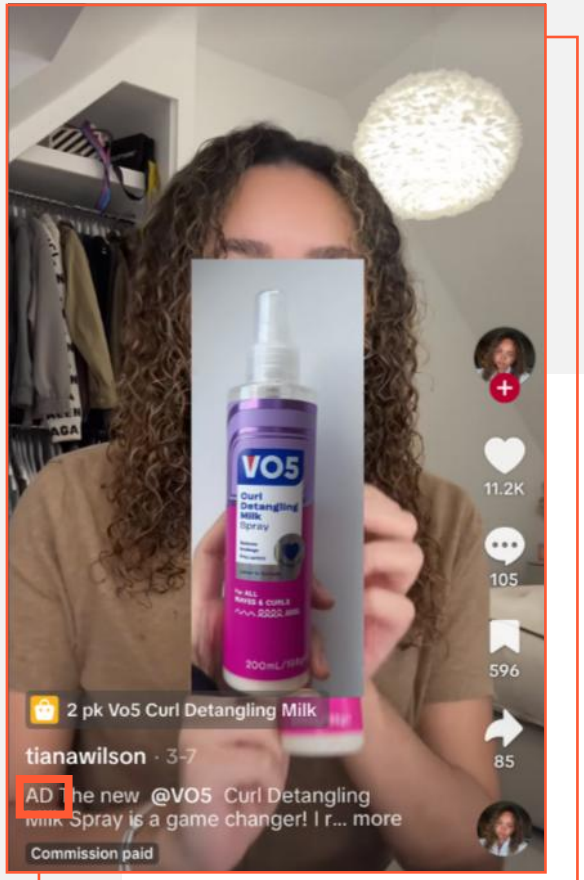
Placement is critical

- The placement of labels is just as important as their wording (see next slide for discussion of optimal wording).
- **Labels work best when placed upfront and when they require minimal effort to spot.** This means appearing either visually within the content itself (56% of the UK online population ranked this in their top 3 of 8 positions tested) or at the beginning of the caption (53% ranked in top 3).
- Reflecting this, 79% of the UK online population feel influencers should place ad labels upfront with no extra clicks needed to reveal them.

Executive Summary: How to improve clarity

Commission Paid, Paid Partnership and 'Ad' variants are consistently viewed as the clearest

- Certain labels stand out as clearer than others. **Paid Partnership is seen as offering the most clarity** (37% of the UK online population ranked it in their top 3 of the 16 labels tested), as it both signals that a post is an ad and helps to meet the desire (from 70% of the UK online population) to understand how influencers have been rewarded.
- **The next clearest are AD/#ad (27% of UK online population ranked in top 3) and Commission Paid (25% ranked in top 3).** These stand out along with Paid Partnership as being the most consistently effective labels from the in-situ experimental test.
- In contrast, **#gifted and #thanks were among the weakest performing labels for creating clarity that an influencer post is actually an ad, failing to sufficiently explain the nature of the influencer's relationship** with the brand and often ranking as poorly in the in-situ test as when a post has 'no label'.
- This reflects a pattern in the ranking of label clarity: labels with no indication as to whether an influencer was financially compensated were consistently ranked the lowest for perceived clarity.



SECTION 01

Introduction: Background, objectives and scope, overview of method

Background: examining consumer awareness and understanding of influencer marketing

Advertising Standards Authority (ASA)

The ASA is the UK's independent regulator of advertising. It applies the UK Advertising Codes written by the Committees of Advertising Practice (CAP) and Broadcast Committees of Advertising Practice (BCAP). The ASA ensures ads across all media are legal, decent, honest and truthful, and takes action where advertising is misleading, harmful, offensive or otherwise irresponsible.

The ASA commissioned MTM to conduct this research study on its behalf.

Advertising that is identifiable

The CAP Code requires that marketing communications are obviously identifiable as such.[1]

Ads should be designed and / or presented in a way that makes it easy for consumers to recognise what is and isn't advertising.

The close resemblance of influencer ads on social media to the surrounding editorial content means the labelling of ads has been considered, to this point, to be almost always crucial to ensuring they are obviously identifiable as advertising.

Previous body of work

The ASA's 2019 research on the labelling of influencer marketing found that people struggle to identify social media posts that are in fact ads. But the more noticeable the label, and the more its meaning is understood to refer to advertising, the more consumers are able to correctly identify them. The research helped to inform the ASA's guidelines for influencers, on how to deploy the Codes and ensure it is clear that ads are ads.

The ASA's 2024 research on host-read ads in podcasts reached similar conclusions.

Need for 2025 research

The social media landscape has changed considerably since that last research was conducted: more people are engaging with social media; new platforms have emerged (most significantly, TikTok); platforms are offering their own ad labelling tools; and user experience of this type of marketing and their media literacy is likely to have developed over time.

The ASA therefore decided to update its research in 2025 to inform a review of guidelines.

Notes: (1) The Competition & Markets Authority also offers guidelines for influencers and warns that they may be in breach of consumer protection law, as well as breaking industry rules on advertising, if is not clear to audiences that a post is an ad.

Research objectives and scope

Research objectives:

- Identify and explore scenarios where consumers struggle to recognise ads without labels
- Assess consumer awareness, understanding and interpretation of ad labels across platforms
- Determine which labels and disclosure methods help users distinguish ads from the surrounding content
- Analyse how different user groups vary in identifying ads and understanding labels—and why.

Project scope:

- Platforms: focus on TikTok and Instagram but also drawing on habits and perceptions from across further social media platforms
- Labels: Four broad categories of labels tested (examples on right), with nine labels overall (seven across TikTok & Instagram, two platform unique) tested in the experimental framework
- Sample: individuals aged 13-64 with different levels and patterns of social media usage.

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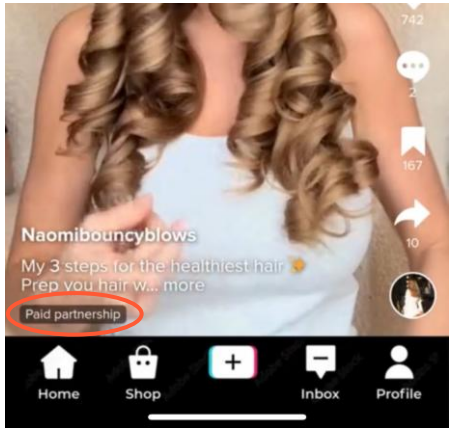
Notes: (1) Please see Appendix for more information about platform selection, stimulus used to explore participants' understanding and reactions within the research, and sampling.

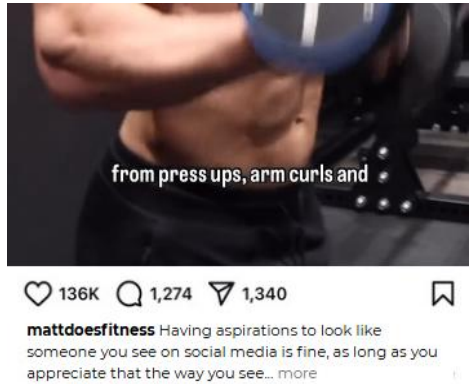
Variants of 'ad'

- Example: #Ad, AD, Advert



Platform specific labels

- Examples: 'paid partnership', joint 'brand x influencer' posts, 'commission paid'



No label

- Examples: could include mentioning or tagging brands / partners

All other labels

- Examples: 'gifted', 'prstay', 'own brand', 'affiliate', 'thanks'

Methodology: this was a four stage[1] study combining qualitative and quantitative research

01

Qualitative Community Discussion (May 2025)

What? Seven-day online community board with 30 consumers.

Who? 13-64-year-olds; all using social media at least once a day; mix of one or more platforms used.

Why? To gauge consumer awareness, understanding and interpretation of social media posts that are and are not ads, looking at influencer marketing in context with other types of posts.

02

Qualitative Depth Interviews (May-June 2025)

What? One-hour individual depth interviews (conducted online) with eight participants from Stage 1.

Who? 14-51-year-olds; mix of social media usage and types of content consumed; mix of ability to recognise ads.

Why? To gain a richer understanding of behaviours and attitudes. Interviews enabled open discussion and guided exploration of challenges in identifying influencer marketing.

03

Quantitative Experimental Design (June 2025)

What? Experimental framework built, based on insights from Stages 1 and 2, to test four categories of label conditions and multiple context features that have an impact on consumer ability to identify influencer ads. Examples of influencer posts used to populate the framework were jointly selected by the ASA & MTM

Why? To ensure a rigorous and comprehensive experimental design that tested all the key variables of interest to deliver a robust read on the insights emerging from the qualitative stages of the study.

04

Quantitative Survey (July 2025)

What? 20-minute online survey. Participants shown mock Instagram and TikTok reels with selected stimulus in a “Spot the Sell” exercise, followed by gauging direct response to those influencer posts and labels.

Who? 1,900 participants aged 13+ across the UK, including a boost of 300 13-17-year-olds. Sample profile weighted to be nationally representative.

Why? To robustly measure ability to identify influencer marketing based on different labels and context features.

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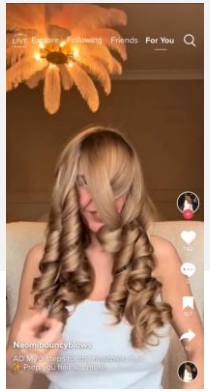
Notes: (1) Please see Appendix for more detail on study methodology, sample profiles, research questions and stimulus used to prompt participants.

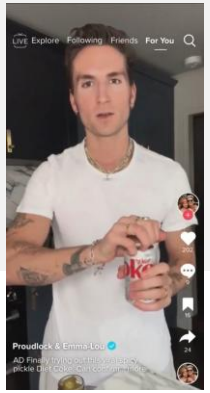
Influencer marketing stimulus

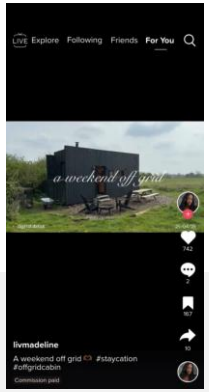
Testing a wide range of influencer marketing stimulus was integral to providing informed insights into how users identify marketing posts and to explore consumer awareness, understanding and interpretation of different ad labels.

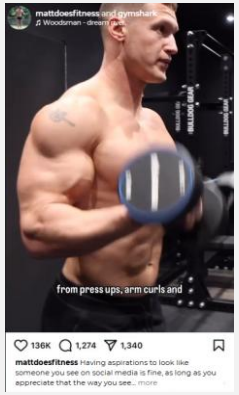
MTM worked closely with the ASA to select posts from UK-based influencers. These posts were selected purely to ensure the study considered a variety of different features and that findings represented posts from across the influencer marketing spectrum. Some of these related to post characteristics (e.g. the platform they were shown on, influencer gender, product sector), and others based on the features/style of the posts (e.g. labelling used, content type, whether if featured a voiceover, use of music, etc.)

We tested over 30 different influencer marketing posts across various stages of the study. The findings of the qualitative stages informed the selection of ads tested in the quantitative stage.









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Stage 3: We chose eight influencer marketing posts as stimulus, each with a range of different features

		Context Features included?				Characteristics of post					Type of content				
Influencer post[1]	Platform	Brand in voice-over	"Salesy" tone of voice[2]	Product inter-acted with	Familiar brand	Male	Fe-male	Voice-over	Music	Well-known influ-encer	Beauty	Fash-ion	Fit-ness	Cook-ing/ Food	Travel
Naomi Bouncy Blows[1]	TikTok	Featured	Featured	Featured	Featured	Not featured	Featured	Featured	Not featured	Featured	Featured	Not featured	Not featured	Not featured	Not featured
Proudlock & Emma Lou	TikTok	Featured	Not featured	Featured	Featured	Featured	Not featured	Featured	Not featured	Not featured	Not featured	Not featured	Not featured	Featured	Not featured
Lucy & Little	TikTok	Not featured	Featured	Featured	Not featured	Not featured	Featured	Featured	Not featured	Featured	Not featured	Not featured	Not featured	Featured	Not featured
Liv Madeline	TikTok	Not featured	Not featured	Featured	Not featured	Not featured	Featured	Not featured	Featured	Not featured	Not featured	Not featured	Not featured	Not featured	Featured
Trinny Woodall	Instagram	Not featured	Featured	Featured	Not featured	Not featured	Featured	Featured	Not featured	Featured	Featured	Not featured	Not featured	Not featured	Not featured
Kirthanaa	Instagram	Not featured	Not featured	Not featured	Featured	Not featured	Featured	Not featured	Not featured	Not featured	Not featured	Featured	Not featured	Not featured	Not featured
Alexandra Dudley	Instagram	Featured	Featured	Featured	Featured	Not featured	Featured	Featured	Featured	Featured	Not featured	Not featured	Not featured	Featured	Not featured
Matt Does Fitness	Instagram	Not featured	Not featured	Not featured	Not featured	Featured	Not featured	Featured	Featured	Featured	Not featured	Not featured	Featured	Not featured	Not featured

Featured | Not featured

Notes: (1) Click on influencer name to follow the hyperlink to the real post.
(2) "Salesy" was language that emerged directly from participants.

Stage 4: Advertising posts were tested in two ways; a mocked up in-situ test and a follow up section focusing specifically on the ad

Spot the Sell Exercise

Influencer ads were integrated into a simulated social media feed (which also featured brand ads, reviews and editorial content) and survey respondents were asked to respond by selecting buttons to signal whether they believed posts were an ad or not

Definitely an Ad

Maybe an Ad

Not an Ad

Followed by

Posts shown in isolation and participants asked about…

- Attributes associated with influencer
- Level of clarity that a brand was being advertised by the influencer
- Reason behind their response on clarity
- Level of brand stand-out
- Level of prior relationship with the influencer (if any)
- Level of prior relationship with the brand (if any)
- Perception of whether a reward was received by influencer

Stage 4: Each example post was adapted to robustly test the impact of different labelling conditions

In the survey, each participant was randomly assigned four of the eight influencer posts (two on Instagram, two on TikTok), each featuring a different label (or the 'No label' condition). This ensured a robust base size for each 'post x label' example – at least 100 per post/label – allowing detailed analysis of the impact of individual labels for each post. When combined, more sizeable bases (over 900), allowed robust analysis of patterns across individual posts and across different labels. Testing only one label at a time allowed the impact of each label to be assessed while holding the creative content constant.

Number of respondents seeing each label variant		Variants of 'ad'		Other Labels		Unlabelled		Platform specific labels		
	TOTAL	AD	#ad	#thanks	#gifted	@brand	No label	Paid Partner-ship	Commissi on Paid (TikTok only)	Brand x Influencer (Instagram only
TOTAL	**7600**	**982**	**918**	**903**	**997**	**950**	**950**	**965**	**486**	**449**
Naomi Bouncy Blows	**947**	121	110	115	118	120	110	119	134	-
Proudlock & Emma Lou	**953**	126	123	115	128	112	121	116	112	-
Lucy & Little	**956**	114	113	122	118	127	122	116	124	-
Liv Madeline	**944**	120	116	117	124	118	113	120	116	-
Trinny Woodall	**957**	121	107	115	127	119	127	122	-	119
Kirthanaa	**943**	132	121	101	137	119	111	120	-	102
Alexandra Dudley	**940**	126	107	107	121	119	122	117	-	121
Matt Does Fitness	**960**	122	121	111	124	116	124	135	-	107

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Notes: (1) Small variations in base sizes seen across different 'post x label' conditions due to complex cell allocation – minimum sample to achieve was set as opposed to an exact number to achieve, to allow for quotas to be distributed across cells

SECTION 02

Social Media Landscape: Mapping and understanding the UK's social media habits

Key Findings In This Chapter: 1 of 2

Social media is avidly used in the UK, although habits vary by platform

Ninety-eight percent of 13–64-year-olds use at least one of the eight social media platforms asked about in the survey. YouTube and Facebook are the most widely used, while Instagram and TikTok sit in a mid-tier of popularity (although this varies by age). Facebook, Instagram and TikTok are the most habitually used – and YouTube and TikTok hold user attention for the longest.

Age is a prime driver of platform choice and content consumed

Younger audiences are the most avid social media users and favour TikTok and Instagram for short-form, trend-driven content where they can connect with creators, celebrities and friends alike. Older audiences skew more towards using Facebook and YouTube, and are often motivated by different needs, including sustaining relationships with people they know, and consuming news.

Informing Insight: Age Focus

Given the significant role of age in shaping social media behaviour and attitudes, we highlight age differences throughout this report. Based on similarities in social media habits and motivations for consuming different content, we have defined age groups as **younger (13-24), mid-tier (25-44)** and **older (45-64) audiences** in the study.

Key Findings In This Chapter: 2 of 2

Platform interface and purpose determine the types of content consumed

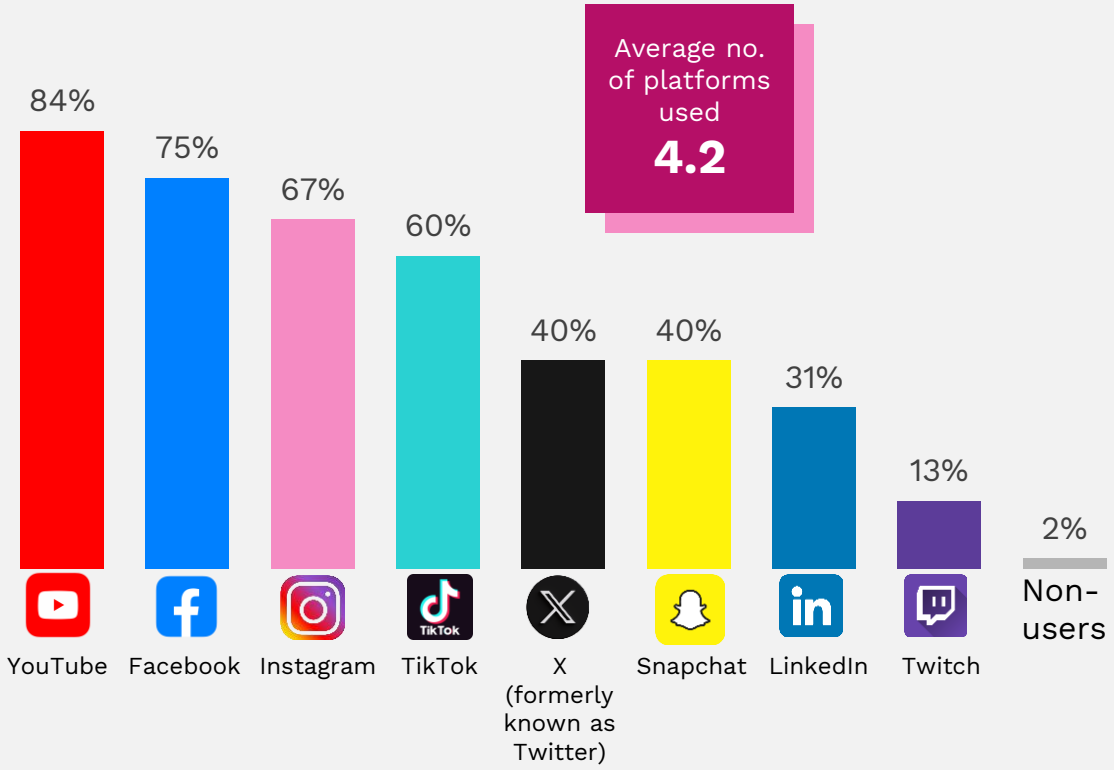
While Facebook, Snapchat and LinkedIn are geared towards content from people you know personally, YouTube, TikTok, Instagram, and Twitch offer more content from a variety of sources. TikTok and Instagram especially involve users being exposed to all kinds of content sources by the algorithm, whereas YouTube and Twitch users make more active personal choices about content to consume.

Informing Insight: Platform Focus

Because of the scrolling feed-based, algorithmic nature of TikTok and Instagram, that exposes users to a vast range of content that is often neither actively chosen nor familiar, it was decided to focus the research on the two platforms. YouTube & Twitch, the other creator-led platforms, were explored generally. All stimulus tested in the study was from Instagram & TikTok.

Social media is avidly used in the UK: 98% of 13–64-year-olds used at least one of these eight platforms in the last month

Social media apps used last month
UK online population (13-64 yrs)



YouTube is the most used of the eight social media platforms tested among the UK population, with 84% claiming that they used it in the last month. This was followed by Facebook.

This study focuses on Instagram and TikTok. They sit in the mid-tier of usage, with around 3 in 5 using these platforms.

When all eight platforms are 'netted' together, 98% of the UK online population use at least one of these.

There are other, newer social media platforms as well – but they tend to be smaller and this study focuses on the eight platforms listed as a broad representation of the social media category, in 2025.

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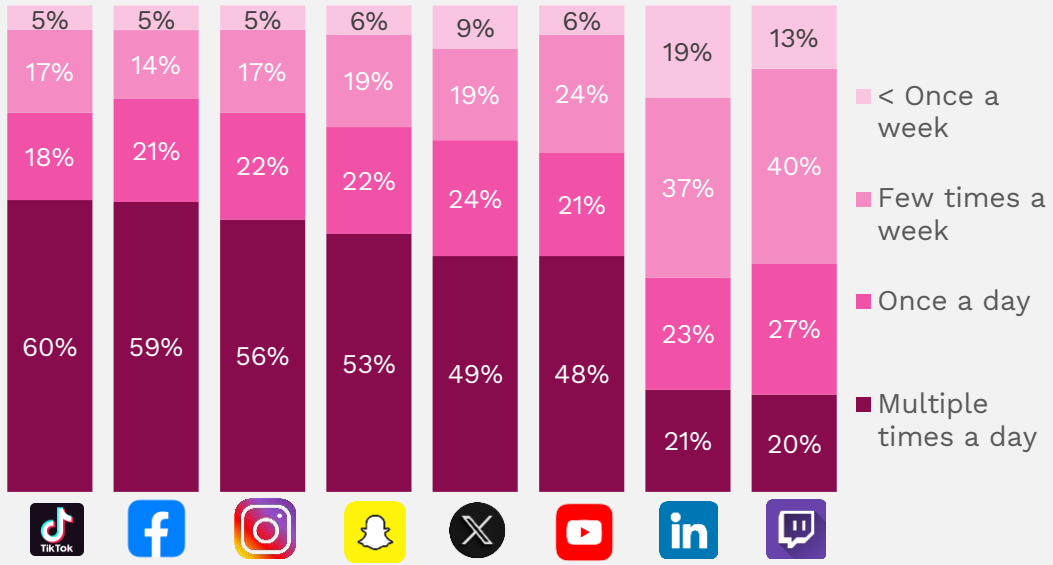
Source: MTM ASA Quantitative research. A1 Which, if any, of the following social media apps have you used in the last month?
Base: Online 13–64-year-old population (1900)

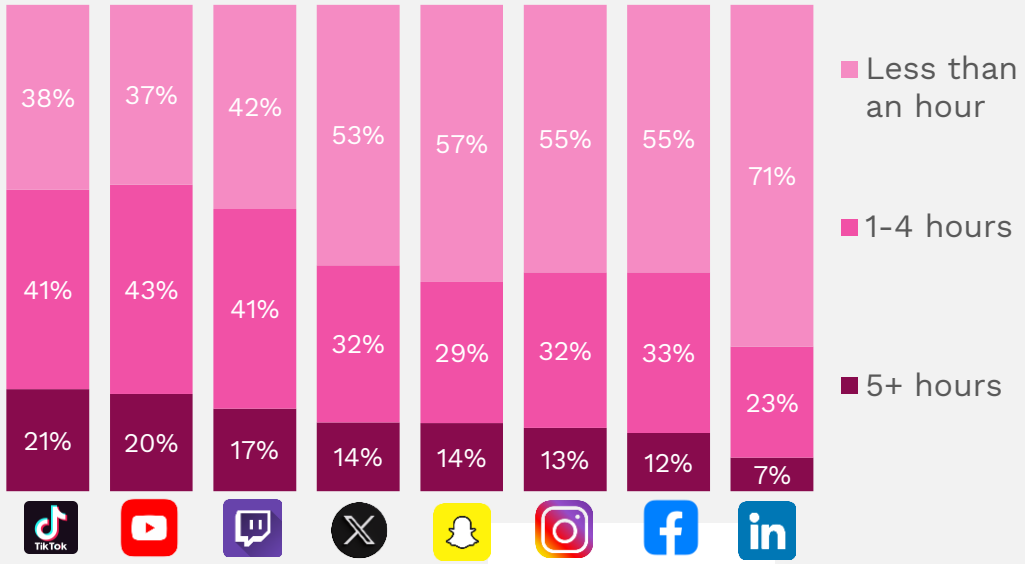
Usage patterns vary widely across platforms - TikTok, Instagram, YouTube and Facebook dominate

Frequency of use
UK current users of each platform (13-64yrs)



TikTok, Facebook and Instagram are habitually used, with the majority of users dipping in and out, multiple times a day. Use of Twitch and LinkedIn is less frequent and (along with YouTube and X to an extent) more session-based i.e. one session per day or every few days being a more common pattern.

Average time using platform per week
UK current weekly users of each platform (13-64yrs)



TikTok and YouTube users are on these platforms for longer periods compared with other platforms, with 1 in 5 users claiming 5+ hours per week (total across sessions). In contrast, Facebook and LinkedIn users are on these platforms for considerably shorter periods.

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Source: MTM ASA Quantitative research. A3 How frequently do you typically use the following social media platforms? A4 And, on average, how long do you typically spend on each of the following social media platforms each week?
Base: Online 13–64-year-old population who use social media (1862) TikTok (1177) Instagram (1291) Facebook (1404) YouTube (1599) X (744) Snapchat (813) Twitch (251) LinkedIn (567), Online 13-64-year-old population who use social media weekly, TikTok (1147), YouTube (1557), Twitch (236), X (712), Snapchat (789), Instagram (1261), Facebook (1375), LinkedIn (516)

Age is a major driver of which social media apps are used

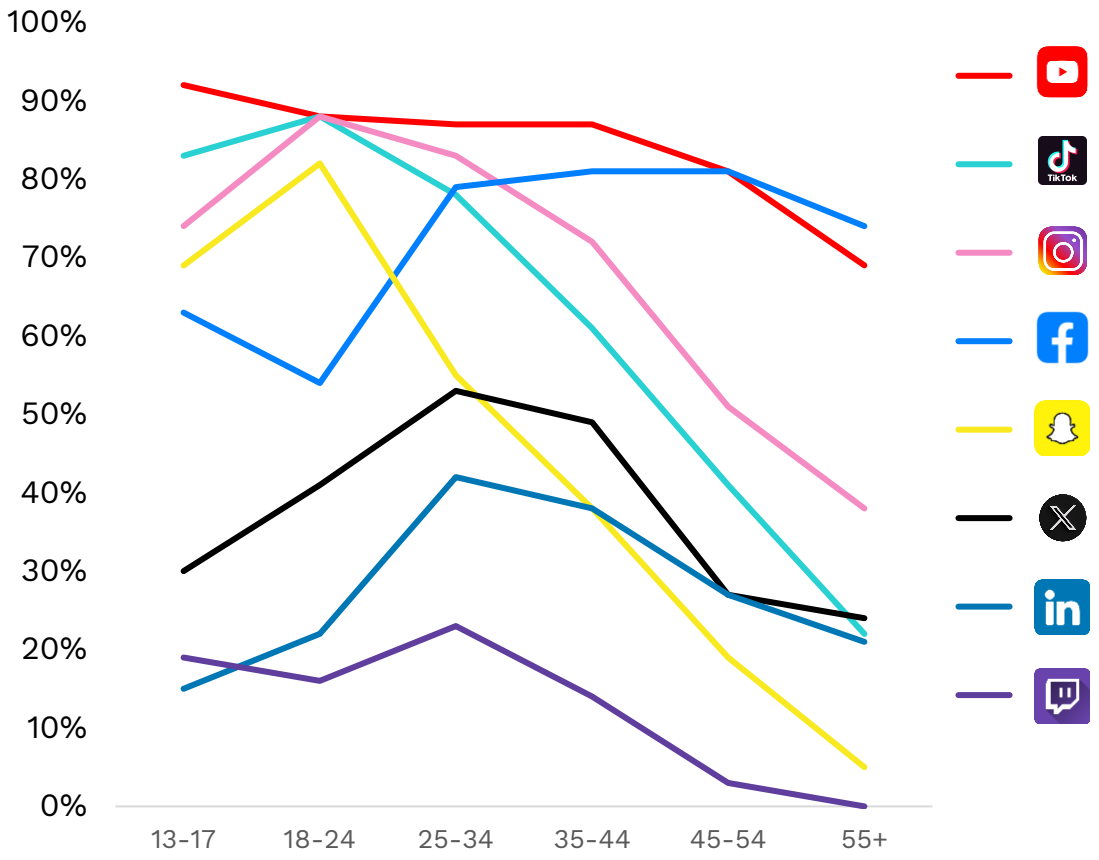
Younger audiences (13-24-year-olds) lean towards TikTok, Instagram and Snapchat, drawn by a mix of peer influence, quick entertainment, and a constant flow of digestible, short-form content. Algorithms reinforce trends and surface personally and culturally relevant content.

Older audiences (45–64-year-olds in particular) tend to favour platforms they adopted earlier (particularly YouTube and Facebook) to support relationships, follow local/interest-based groups and keep up with news or practical updates.

There is a **clear generational divide**; younger audiences embrace trend-driven content, while older audiences tend to be anchored to platforms that focus on connection and familiarity. YouTube spans both groups, offering trendy and current content while maintaining personalised, longform viewing experiences.

Social media apps used last month – by age group

UK online population per age group



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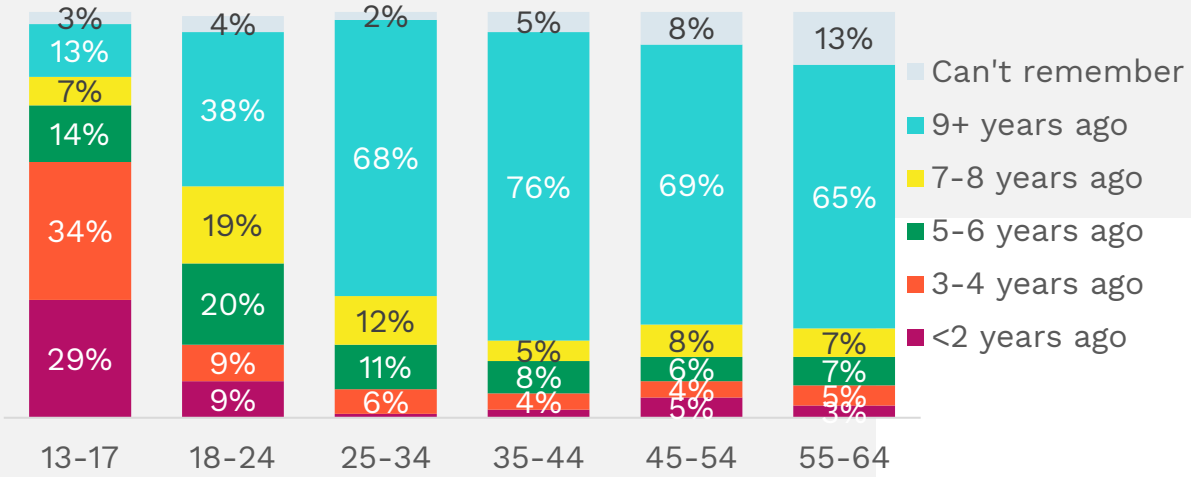
Source: MTM ASA Quantitative research: A1 Which, if any, of the following social media apps have you used in the last month?
Base: Online 13–64-year-old population in each age group; 13-17 (300) 18-24 (179) 25-34 (439) 35-44 (397) 45-54 (258) 55-64 (327)

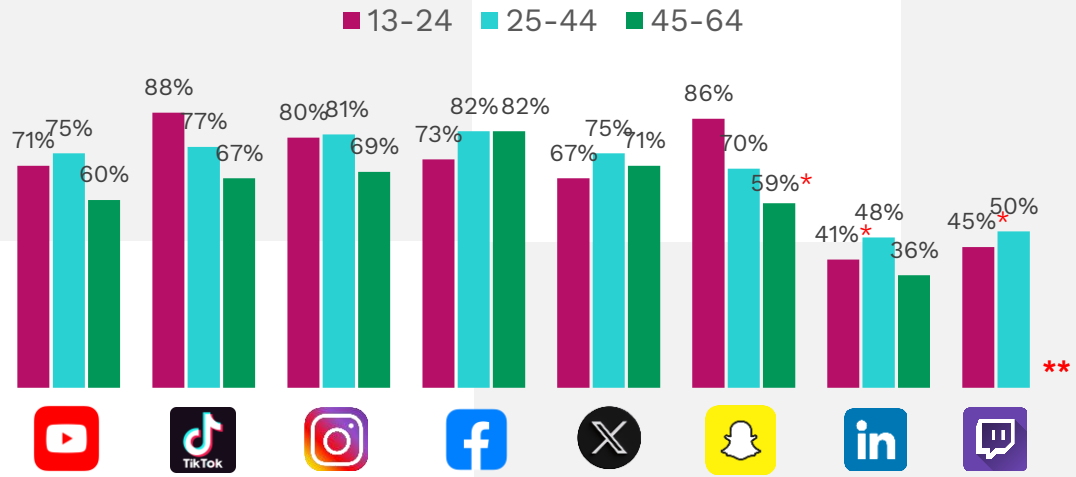
Younger audiences may be newest to social media - but they are the heaviest users

Time since first starting using social media – By age
UK current social media users per age group



The youngest age groups are unsurprisingly the newest to social media, having been introduced to it by family/friends or via platforms with child-friendly versions (e.g. YouTube). Few over-25s are coming to social media for the first time, with the majority having started over nine years ago.

Platform daily usage – By age
UK current users of each platform in each age



Younger age groups are the most frequent users of social media, particularly TikTok and Snapchat. 25–44-year-olds match them for YouTube and Instagram, while 45–64s post lower daily use across all platforms, except Facebook.

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Notes; (1)*Low base size warning (n<100) (2)**Too low base size warning (n<50)
Source: MTM ASA Quantitative research: A2 When did you first start using social media (e.g. YouTube, Facebook, Instagram)? A3 How frequently do you typically use the following social media platforms?
Base: Online 13–64-year-old population who use social media (1862), 13-17 (298), 18-24 (179), 25-34 (437), 35-44 (396), 45-54 (251), 55-64 (301), UK current daily users YouTube 13-24 (433), 25-44 (730), 45-64 (436), TikTok 13-24 (408), 25-44 (592), 45-64 (177), Instagram 13-24 (377), 25-44 (656), 45-64 (258), Facebook 13-24 (284), 25-44 (669), 45-64 (451), X 13-24 (162), 25-44(433), 45-64 (149), Snapchat 13-24 (353), 25-44 (394), 45-64 (66*), LinkedIn 13-24 (83*), 25-44 (342), 45-64 (142), Twitch 13-24 (86*), 25-44 (157), 45-64 (8**)

Entertainment, learning and social connection are the main drivers for social media use

Motivations for using social media – by age
UK current social media users per age group

#	13-24	25-44	45-64
1	To be entertained	To be entertained	Connect with friends/ family
2	Learn new things	Learn new things	To be entertained
3	Connect with friends/family	Connect with friends/family	Learn new things
4	Distract myself/pass time	Distract myself/pass time	Distract myself / pass time
5	Lift my mood/feel good	Lift my mood/feel good	Get tips on how to do something
6	Get tips on how to do things	Stay up-to-date with news/culture	Escape everyday life
7	To escape everyday life	Get tips on how to do something	Stay up-to-date with news/culture
8	Find people w/similar interests	Be inspired	Find people w/ similar interests
9	Be inspired	Get recommendations	Stay up-to-date with local events
10	Get recommendations	Find people w/ similar interests	Lift my mood/feel good
11	Connect with people I admire	Stay up-to-date with local events	Be inspired
12	Connect with celebrities/stars I like	Connect w/ brands I'm interested in	To get recommendations

Escapism & feel good | **Learning & news** | **Social connection** | **Inspiration & aspiration**

Social media's primary draw is its offer of **entertainment and mental escape,** particularly among the under-44s

Social connection is important across ages but is the top driver for older audiences

While use of social media to learn new things unites across the age groups, **news consumption** is more common as users get older

While not a core driver, younger audiences look to social media as a way of engaging with **aspirational figures**

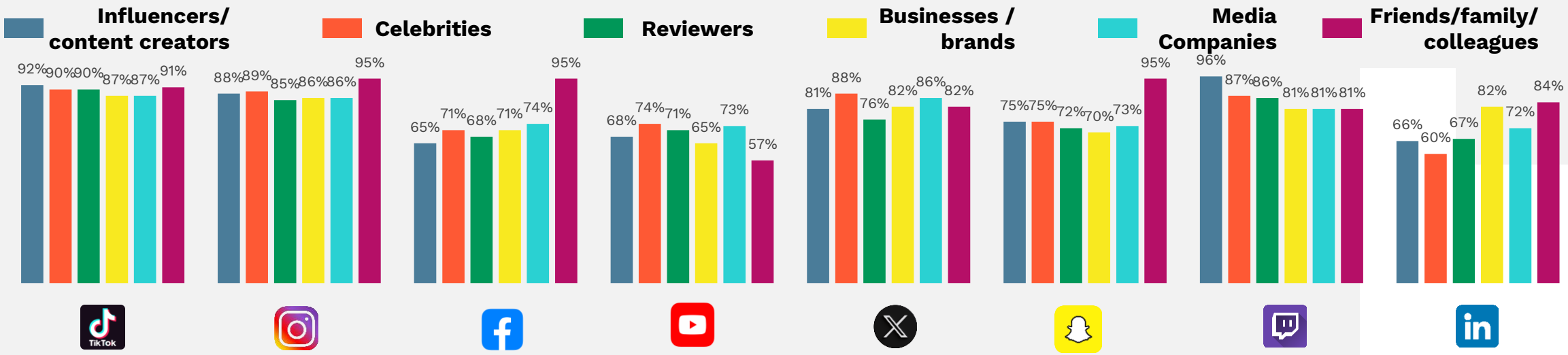
mtm

Source: MTM ASA Quantitative research: A6 And, which of the following reasons explains why you engage with social media platforms?
Base: Online 13–64-year-old population who use social media and are 13-24 (477) 25-44 (833) 45-64 (552)

While Facebook and Snapchat are used for connecting with others, TikTok and Instagram provide more varied content

Engagement with different content sources – by platform

UK current users of each platform (13-64yrs)



On Instagram and TikTok**, users experience content from a range of different sources**, with algorithm-driven newsfeeds exposing users to a wide variety of content. **Facebook and Snapchat stand out for friends/family content** - this is also a major feature of Instagram but seen less on TikTok. On YouTube, users engage with content more purposefully, actively choosing what they prefer to watch rather than relying on the newsfeed. This results in **YouTube users having lower overall engagement levels with content sources asked about** compared to other platforms

mtm

Source: MTM ASA Quantitative research: A7 How often do you engage with content produced by the following sources on [platform]? – Ever engaged
People who share content about their lives on social media/ Singers, sports stars, actors/ People who trial and share opinions of products/ Companies promoting/informing people about products/services / Media organisations post clips/ highlights from content they make / Friends/family/colleagues
Base: Online 13–64-year-old population who use TikTok (1177) Instagram (1291) Facebook (595) YouTube (603) X (378) Snapchat (411) Twitch (235) LinkedIn (368)

The interfaces of creator-led platforms determine user choices

TikTok

Most users **solely rely on the 'For You' page algorithm** to serve content which is simultaneously personalised, random, and broad. There is **little control over the content they watch**. On this platform we see users being less likely to find or follow the same creators again, or to feel they have a deep relationship with creators.

Instagram

While users **are more likely to follow creators on Instagram** than TikTok (partly due to its strong legacy as a connection-focused platform), their feeds feature content that has been **served based on the algorithm** (e.g. suggested posts, ads, Reels) rather than actively chosen. As a result, the content consumed is wide-ranging and diverse.

Instagram & TikTok: mostly algorithm-led content choices

YouTube

While the homepage serves users with a mix of subscription-based and algorithm-based suggestions, users commonly make **an active choice** when selecting a video. This, along with the longer-form nature of YouTube content, means users are more **personally invested in specific content creators** in a way that is not always seen on purely short-form video platforms.

Twitch

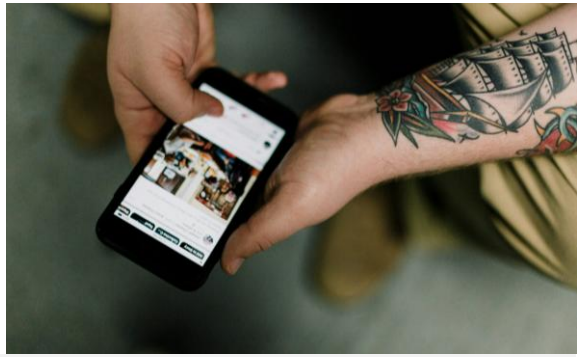
Compared to other platforms, **users choose content most purposefully on Twitch**. The live-streaming format and interactive chat create ongoing dialogue between creators and audiences, fostering **especially close-knit communities**. Because users often spend longer periods watching streams, this strengthens bonds and builds a high level of trust with creators.

Twitch & YouTube: mostly active user content choices

SECTION 03

Influencer Landscape: How do influencers fit into the social media experience?

Key Findings In This Chapter



Interaction with influencers varies by age and platform used

TikTok and Instagram users interact with influencers most frequently. Under-45s see influencer content frequently and organically – and are more likely to understand that this content can be either partnership- or trend-driven. For older users, influencers feature much less in their social media consumption and are seen as public figures primarily, rather than sources of content.

Influencer marketing may be expected but can still feel intrusive

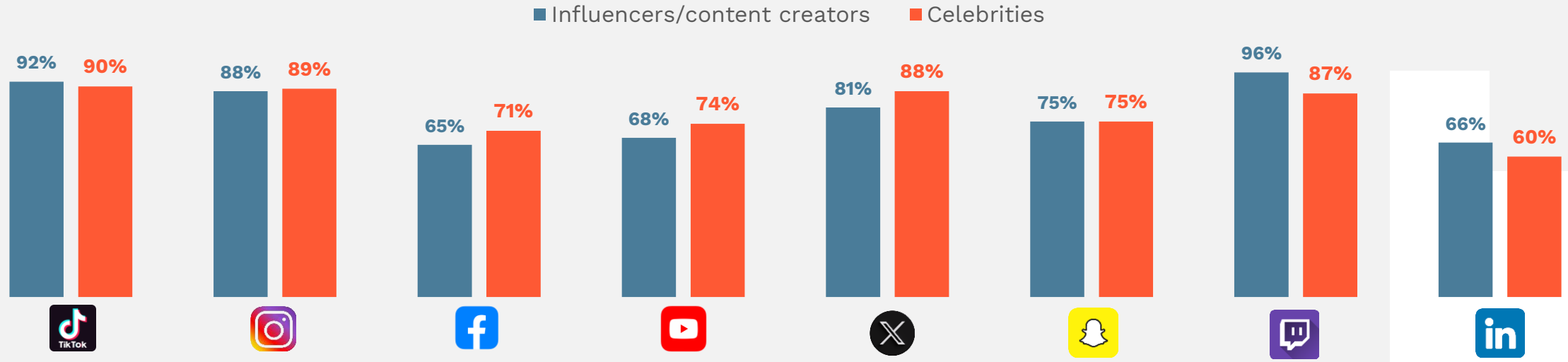
While understood to be a fundamental part of social media the, often unsolicited, nature of influencer ads in an otherwise user-directed content environment means that many feel it is more intrusive than other marketing. A typical social media feed's blend of ads with organic posts forces users to go an extra step when evaluating posts: determining whether a post is a 'genuine' recommendation or a paid promotion.

Trust is an important factor in the evaluation of influencer posts

Social media users constantly evaluate influencer content to decide whether or not to engage with it. Younger audiences are working out whether they can trust that the post reflects the influencers' true opinion, while older audiences want to trust that the platform is going to clearly delineate any commercial relationship. Helping the UK online population get to these answers quickly through transparent disclosure can help maintain trust throughout the social media ecosystem.

Although influencers and celebrities feature across social media, engagement with them varies by platform

Engagement with different content sources – Influencers/content creators and celebrities
UK current users of each platform (13-64yrs)

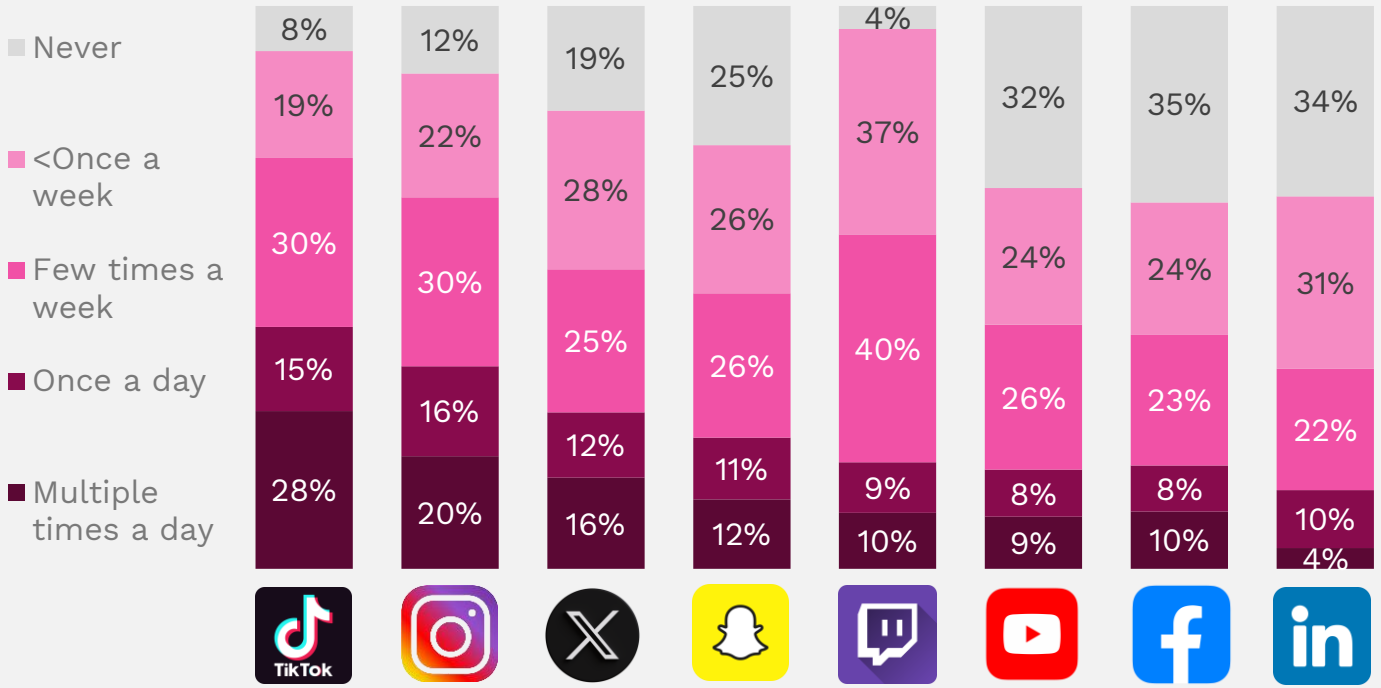


TikTok, Instagram and Twitch have the **highest proportion of users who have interacted with influencer/creator content. High proportions of Instagram and TikTok users are also engaging with celebrity content**, which can also fall within a typical definition of influencers when showing 'behind the scenes' of their lives. Facebook, LinkedIn and YouTube see the lowest levels of users saying they have engaged with influencers/content creators on these platforms, which involve more active navigation either to see friend/family/colleague content or other favoured types of content.

Source: MTM ASA Quantitative research: A7 How often do you engage with content produced by the following sources on [platform]? – Ever engaged - *People who share content about their lives on social media/ Singers, sports stars, actors* - Results for other content types were seen on previous slide.
Base: Online 13–64-year-old population who use TikTok (1177) Instagram (1291) Facebook (595) YouTube (603) X (378) Snapchat (411) Twitch (235) LinkedIn (368)

Frequency of engagement with influencers is highest on TikTok and Instagram

Frequency of engaging with content creators/influencers – per platform[1]
UK current users of each platform (13-64yrs)



TikTok and Instagram stand out as the main platforms for **daily** influencer engagement. Their **visual, short-form formats** and the perceived authenticity of the content on both platforms, allows users to feel constantly up-to-date with influencers' lives.

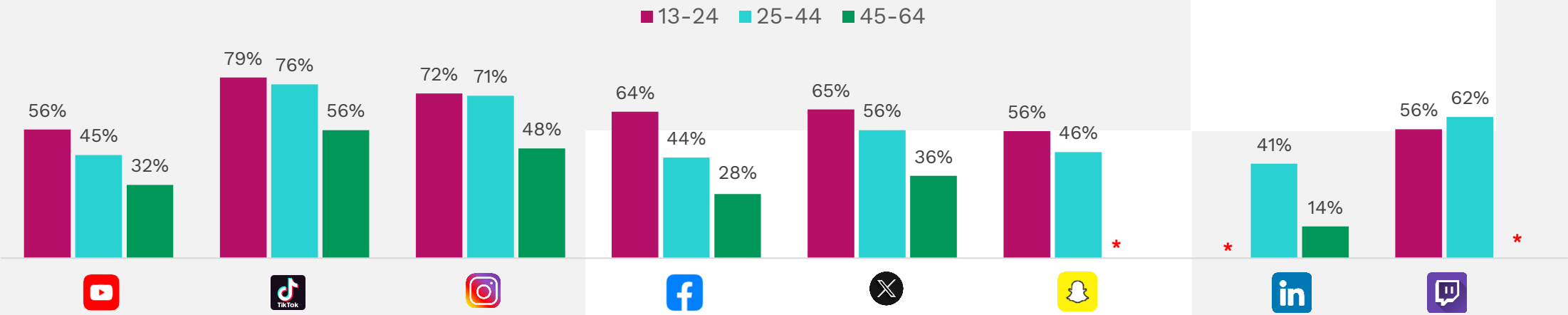
And the strong **trend culture** on both platforms encourages users to consistently check in to stay in the loop.

Although users generally feel **highly invested in individual creators** on YouTube, they consume their content less frequently as a result of the longer nature of many YouTube videos. Conversely, TikTok and Instagram can be dipped into throughout the day[2].

Source: (1) Quantitative research: MTM ASA Quantitative research: A7 How often do you engage with content produced by the following sources on [social media platform]?
(2) Qualitative research: Online communities & follow up depths.
Base: Online 13–64-year-old population who use TikTok (1177) Instagram (1291) Facebook (595) YouTube (603) X (378) Snapchat (411) Twitch (235) LinkedIn (368)

Under-45s are the most likely to be engaging with influencers on a weekly basis across all platforms

Weekly engagement with influencers/content creators – per platform, by age band
UK online population (13-64yrs) using each platform, in each age group



TikTok and Instagram are the main platforms where people engage with influencers. Younger audiences are generally more avid users of these platforms and with influencers being a big part of the content mix **younger users are highly literate when it comes to influencer content**. Older audiences are also most likely to come across influencers on TikTok and Instagram but at a much lower rate than younger audiences – a trend seen across different social media platforms. **With older audiences focusing on following people they actively know** – either creators in an area of interest or friends/family/colleagues – influencers play less of a role in their social media world.

Notes: (1)*Low base size warning
Source: MTM ASA Quantitative research: A7 How often do you engage with content produced by the following sources on [social media platform]?
Base: YouTube 13-24 (113), 25-44 (199), 45-64 (291), TikTok 13-24 (408), 25-44 (592), 45-64 (177), Instagram 13-24 (377), 25-44 (656), 45-64 (258), Facebook 13-24 (88), 25-44 (182), 45-65 (325), X 13-24 (72), 25-44 (189), 45-64 (117), Snapchat 13-24 (186), 25-44 (181), 45-64 (44*), LinkedIn 13-24 (51*), 25-44 (188), 45-64 (129), Twitch 13-24 (71), 25-44 (156), 45-64 (8*)

There are nuances to how different age-groups define and interact with 'influencers'

While all audiences view influencers as people who regularly create online content, and act as a source of inspiration and entertainment, there are clear generational nuances to how social media users will interact with influencers.

13-24

- Influencers are online creators who have **large followings** and post **frequently and consistently**
- Defined by **talkability**, both due to **algorithm-driven discovery** and recommendations from friends
- For this audience, brand partnerships / advertising are **integral parts of being an influencer**

> *What makes somebody an influencer is somebody that's got **a big amount of following**. They can reach a lot of people with what they're saying, and they **get sponsored and get brand deals**. They're well-known by people and **you often see them coming up on your 'For You' page**.*
>
> Female, 13-17, TikTok & Instagram User

25-44

- Influencers are online creators who **give their audience access to their lives**, providing inspiration and advice, via regular posting
- Discovered through the **algorithm** and sought out based on interests (fitness, beauty, etc.)

> *What makes someone an influencer is someone who **posts pretty much every day**, multiple times a day, and **shares their life**, products, goes to events, etc. My favourites are Shannon Mooney, Shauna Boylan, Molly Mae, who tend to just **talk about what they're doing that day**, going shopping, cleaning the house, etc.*
>
> Female, 25-34, TikTok & Instagram User

45+

- Influencers are defined by their **level of personal 'brand'** – there is little differentiation between celebrities and full-time content creators / career influencers
- This age group is **less likely to discover influencers organically**; those 45+ tend to come across influencers through exploring topics of interest

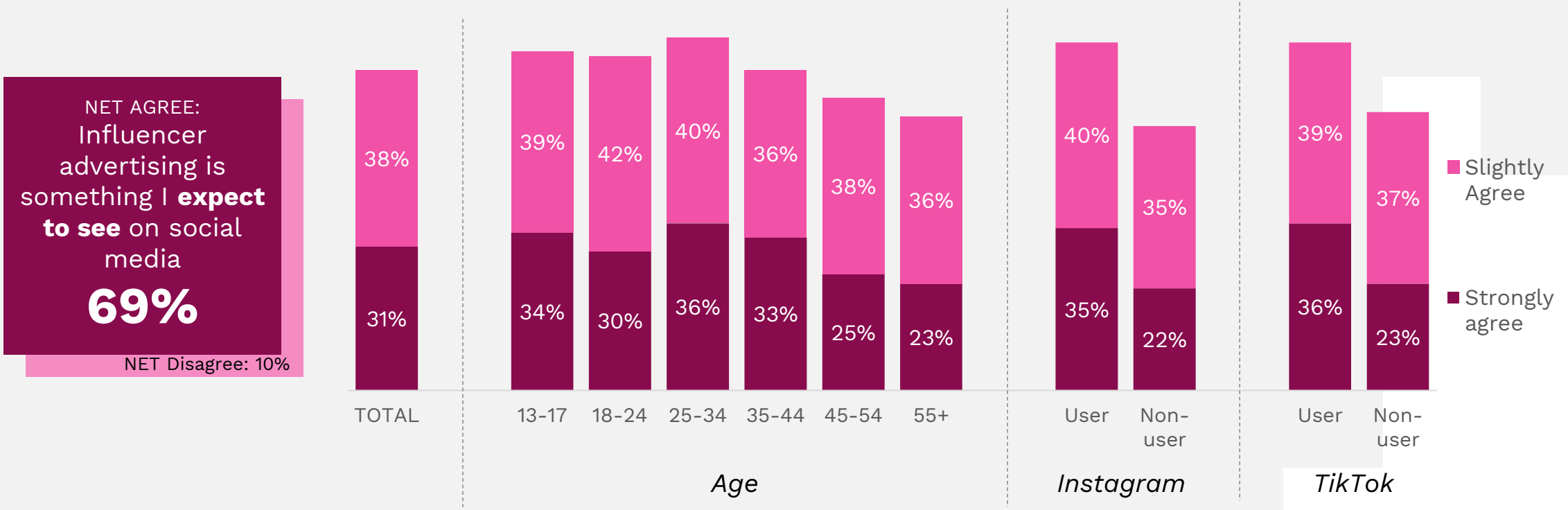
> *What makes someone an influencer is **when a person becomes a brand**. This normally happens through them **creating lots of videos**. I prefer comedic and educational influencers in the finance, cooking, and comedy niches. My favourite influencers are Samuel Leeds and Gordon Ramsay's cooking comedy.*
>
> Male, 55-64, TikTok User

mtm

Source: MTM ASA Qualitative research: Online communities & follow up depths

The majority, regardless of age or platform use, expect to see influencer marketing at least some of the time

Agreement with "Influencer advertising is something I expect to see on social media"
UK online population in each group



mtm

Notes: (1) "Strongly disagree," "slightly disagree", "neither agree or disagree" & "don't know" not included for presentation purposes
Source: MTM ASA Quantitative research: D1 Thinking about influencer advertising generally, please tell us to what extent you agree or disagree with the following statements.
Base: Online 13–64-year-old population (1900) 13-17 (300) 18-24 (179) 25-34 (439) 35-44 (397) 45-54 (258) 55+ (327) Instagram User (1291) Instagram Non-User (609) TikTok user (1177) TikTok non-user (723)

The UK online population react in many different ways when they see influencer marketing posts

> *It was sarcastic and **funny** which made it hard to tell.*
> *Gymshark, Matt Does Fitness*

> *I understood it was an advert but it just felt **boring**.*
> *The Productivity Method, Grace Beverley*

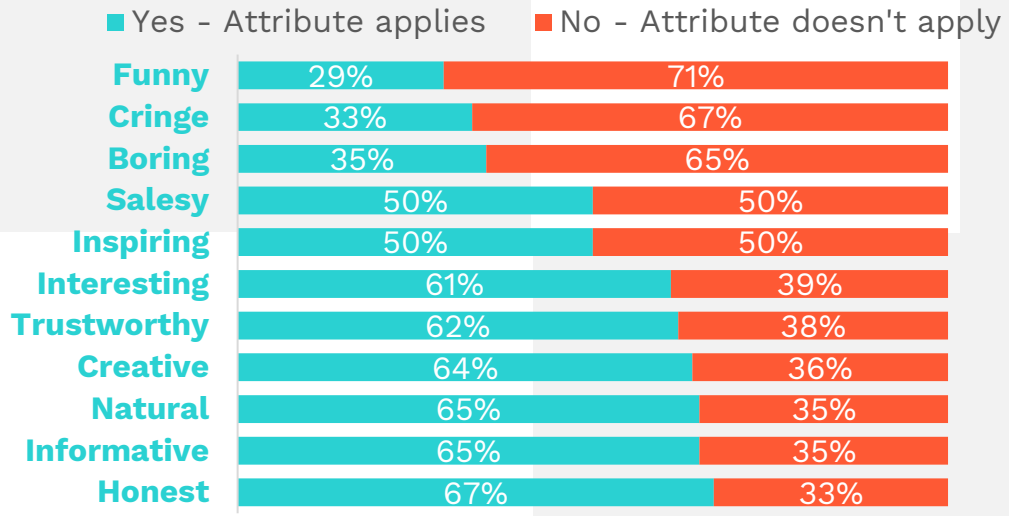
> The voiceover is very **sales-like** which made it obvious.
> *Octopus Energy, The Dadsnet*

> It's an **interesting** way to advertise the product as it's like a day in the life video.
> *Runna, Niamh Mackinnon*

> *It's **natural** and genuine with minimal product references.*
> *Gymshark, Matt Does Fitness*

> She was **honest** and clear it was an advert and gave a discount code as well.
> *Runna, Niamh Mackinnon*

Perceptions of Influencer Marketing Content
UK online population (13-64yrs) – across all influencers



Our qualitative research saw respondents describe influencer posts in all sorts of ways – natural, funny, interesting, honest - depending on what style the content took, which in turn proved to be hugely wide ranging. Their reactions laddered up to inform their evaluation of and reaction to the content, the influencer and the product advertised.

To mirror the evaluation process that users go through when looking at a post, the quantitative survey included a series of attributes based on participant reactions from qualitative research. For each influencer marketing post, survey participants were asked whether each attribute applied to that post. Findings show a wide range in how influencers are generally seen.

Notes: (1) Figures shown are aggregated across all eight influencer posts tested with all label conditions, netted together (2) "Salesy" and "Cringe" were terms that emerged directly from participants.
Source: MTM ASA (1) Qualitative research: Online communities & follow up depths; (2) Quantitative research: C1 We would like you to tell us whether you think the following words apply to the piece of content you saw.
Base: Online 13–64-year-old population who saw each post, ~950 per influencer post

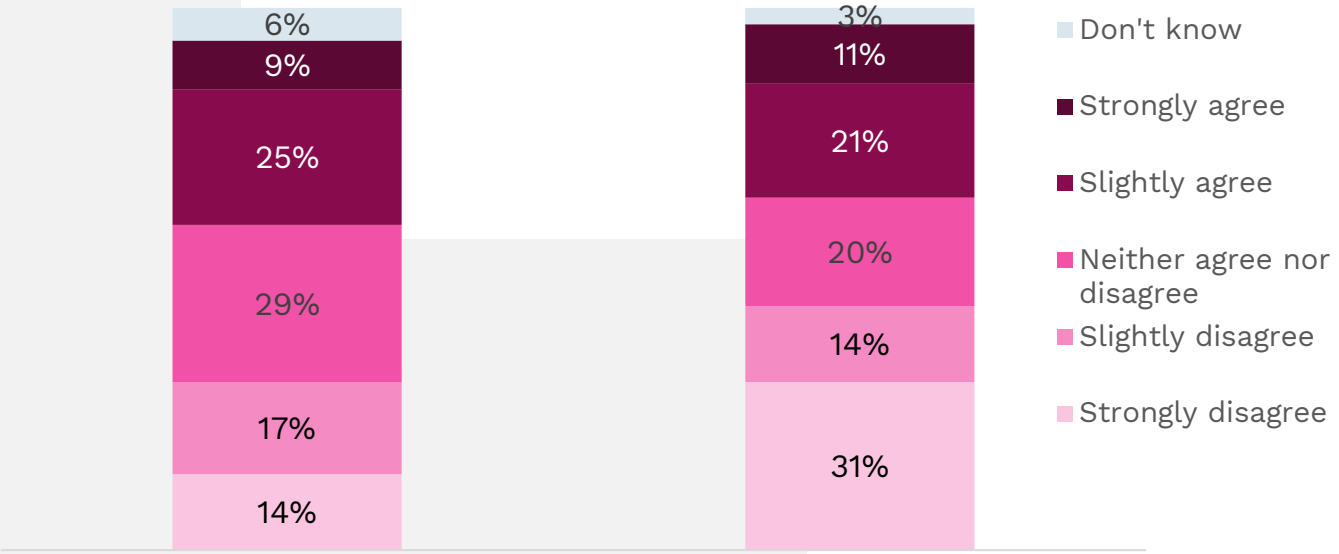
Influencer marketing can still feel intrusive, despite being native to social media – especially when unsolicited

Given that **influencer marketing feels native to creator-led social media platforms**, and is easy to scroll past, it is perhaps surprising that a third of the UK disagrees that influencer marketing is less intrusive than other forms of ads.

Findings from the qualitative research suggested a link between ads being **unsolicited**, and people finding those ads **more intrusive** (and less trustworthy). A third of the UK online population claim to actively follow influencers for their suggestions, suggesting many may be consuming influencer posts mainly when algorithmically served to them[1].

> *If it's someone I'm **fairly invested** in or have a parasocial relationship with them, I'm okay with ads, or even happy for them. [...] If it's **someone I don't follow**, that's where I have **a bit more trepidation** about trusting it.*
>
> Male, 25-34, Instagram and TikTok User

Perceptions of influencer marketing[2]
UK online population (13-64yrs)



Influencer advertising is less intrusive than other forms of advertising

NET: Agree 34%
NET: Disagree 32%

I actively follow influencers to get their suggestions on brands & products

NET: Agree 32%
NET: Disagree 46%

mtm

Source: MTM ASA (1) Qualitative research: Online communities & follow up depths; (2) Quantitative Research: D1 Thinking about influencer advertising generally, please tell us to what extent you agree or disagree with the following statements. Base: Online 13–64-year-old population (1900)

Qualitative interviews revealed a range of queries that go through users' heads when consuming an influencer's post

Is it worth interacting with?

Am I enjoying it, finding it interesting, is it going to inspire me?

Can I trust it?

Do the opinions feel genuine, is it their actual opinion, are they natural?

Does it feel relevant to me?

Is this post targeted, is it useful to me?

And, due to the prevalence and expectation for seeing influencer marketing, users also have to ask themselves an additional question: **is this an ad?**

Source: MTM ASA Qualitative research: Online communities & follow up depths

The content evaluation process helps inform whether users are going to trust the opinion of the influencer

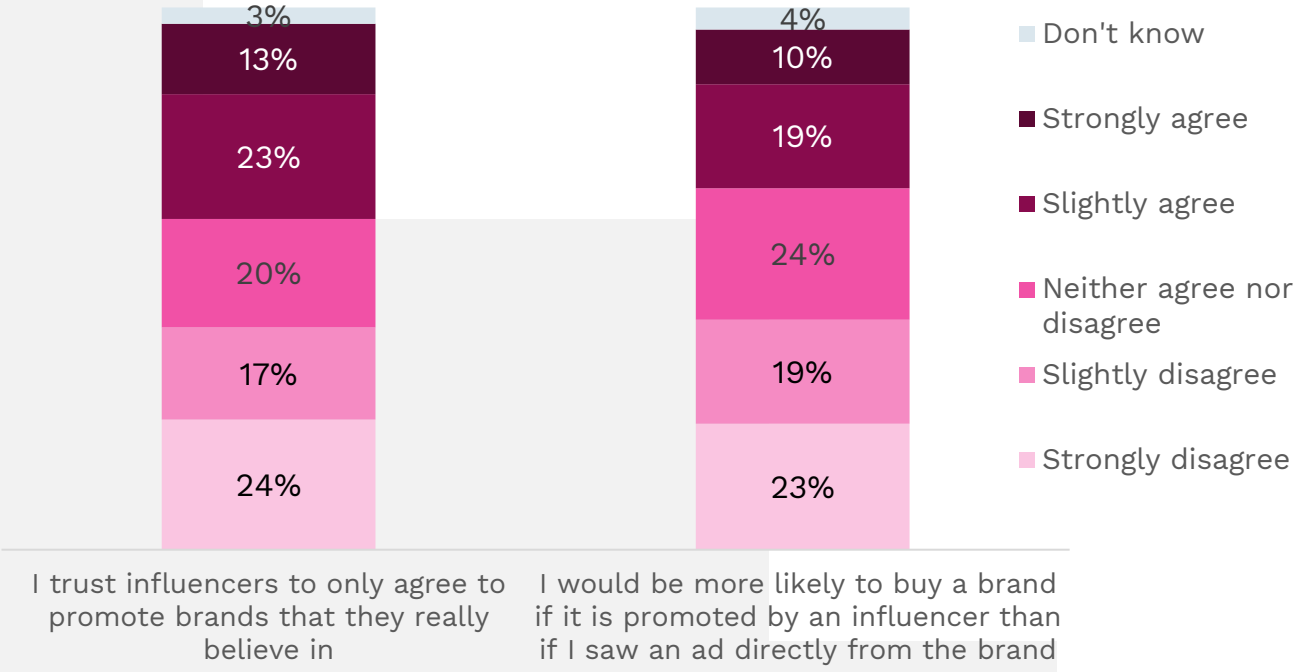
Trust is an important lever for influencers: users are driven towards influencers for genuine, authentic content. If that authenticity is undermined by promotion of a brand that doesn't align with the influencer's values, a disconnect could be created.

With a third believing that influencers limit themselves to only promoting brands they believe in, it's clear that this type of marketing isn't seen as an unconditionally trusted source of impartial advice. Instead, it is **judged with a degree of wariness** just like other types of commercial messaging[1].

We see a minority viewing influencer ads as being more effective than a brand ad – and **2 in 5 see them as less effective**[2].

Perceptions of influencer marketing[2]

UK online population (13-64yrs)



NET: Agree 36%
NET: Disagree 41%

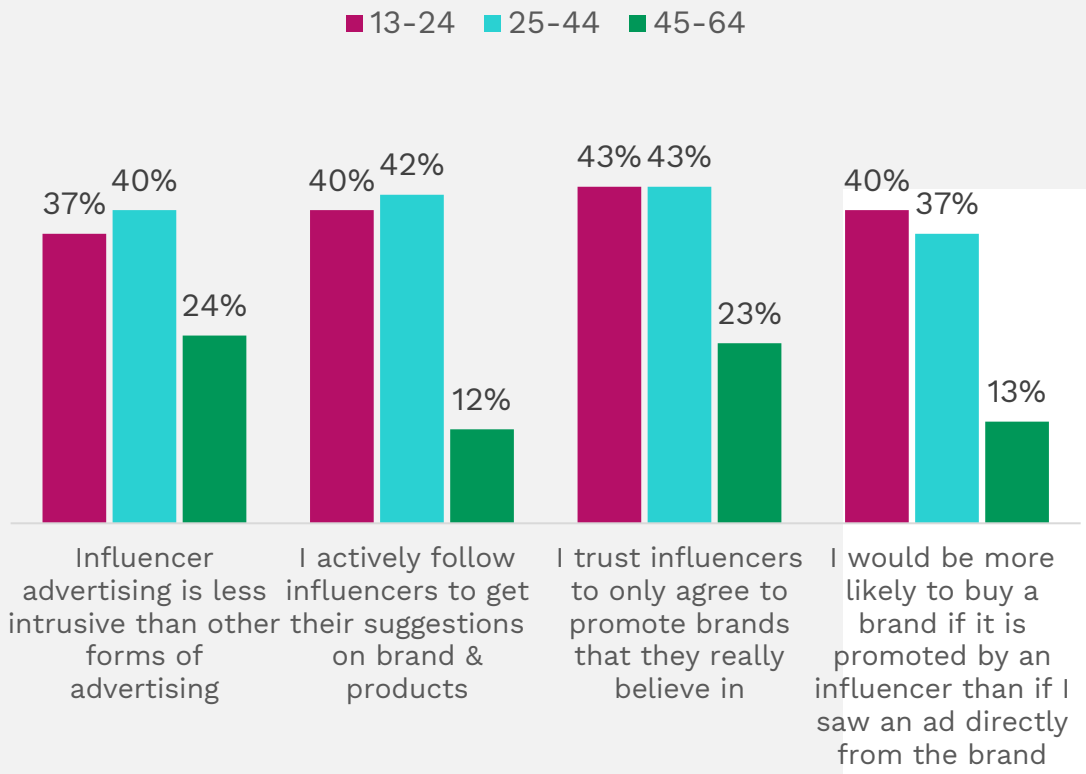
NET: Agree 30%
NET: Disagree 42%

mtm

Source: MTM ASA (1) Qualitative research: Online communities & follow up depths; (2) Quantitative Research: D1 Thinking about influencer advertising generally, please tell us to what extent you agree or disagree with the following statements
Base: Online 13–64-year-old population (1900)

However, trust manifests differently by age, with social media users evaluating influencers for different outcomes

Perceptions of influencer marketing – by age[1]
NET Agreement among UK online population in each group



Younger audiences are more motivated to use social media for recommendations/reviews and see this as part of an influencer's role. Therefore, influencer marketing is seen as less intrusive to their social media experience, leading them to focus less on the direct question of 'Am I being sold to?' and more on **'Do I *actually* trust their opinion?'**.

> *When an influencer I know posts an ad, I would be interested and look into the product **more** as I **trust** the influencer.* [2]
>
> Female, 13-17, Instagram User

Given their greater familiarity with traditional media, **older audiences** find influencer advertising more intrusive and dislike the, sometimes, cloudy delineation between advertising and content. They want to trust the ecosystem to make this delineation for them and confirm **'Does this have a commercial relationship behind it?'[2].**

> *I'm still **not confident** in knowing what posts are ads. I don't really understand it all at all, to be honest.*
>
> Female, 45-54, TikTok User

mtm

Notes: (1) "Strongly disagree," "slightly disagree", "neither agree or disagree" & "don't know" not included for presentation purposes
Source: MTM ASA (1) Quantitative research: D1 Thinking about influencer advertising generally, please tell us to what extent you agree or disagree with the following statements; (2) Qualitative research: Online communities & follow up depths
Base: Online 13–64-year-old population (1900) 13-24 (479) 25-44 (836) 45-64 (585)

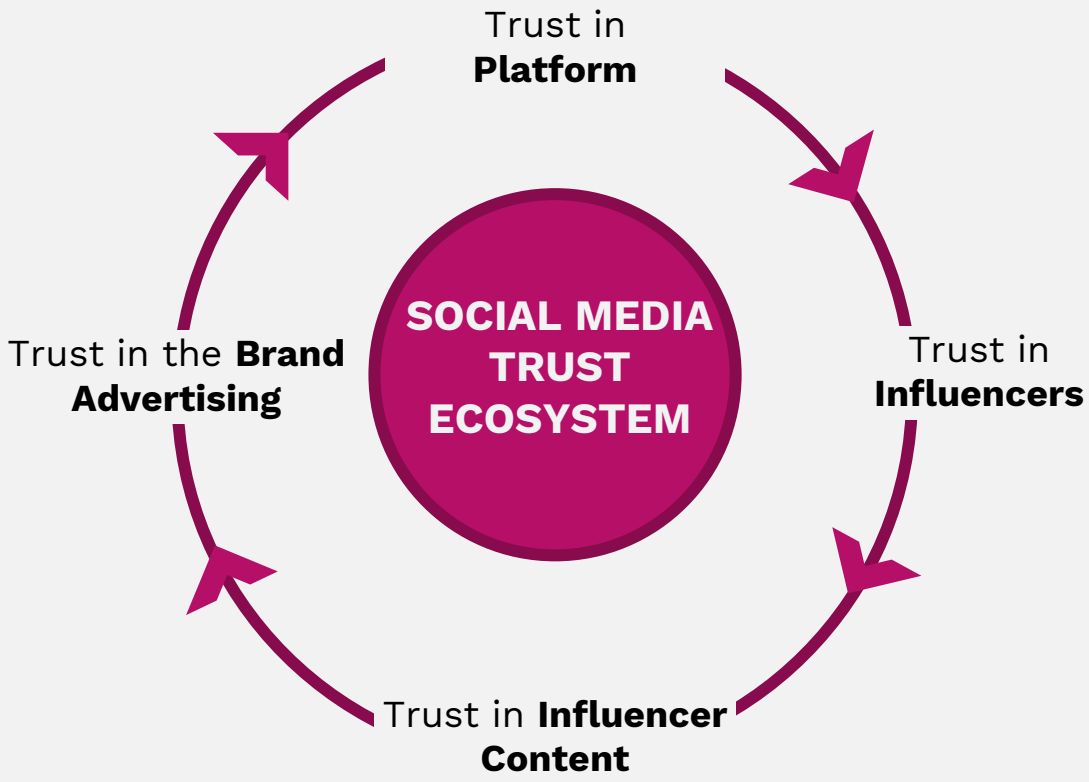
Emerging concept: Transparency about advertising helps build and maintain trust across the social media ecosystem.

The study points to the importance of maintaining a trusted relationship between the UK online population and influencers.[1] This can be challenging in an environment where social media users are being **served content they have not necessarily chosen to follow -** either by the platform's algorithm or by an influencer straying from their usual content – and are consistently having to apply **extra effort to evaluate** the nature of the content.

This research (and other publications across the media industry [2]) point to an ecosystem where trust in one component (the influencers' content, for example, or the platform on which it is published) can support trust in another (the influencer themselves, or the advertiser) – in a kind of **positive feedback loop**.

With 80% agreeing that they prefer it when influencers are clear they are advertising something[3], our study **demonstrates the importance of using transparency to maintain trust** across the ecosystem.

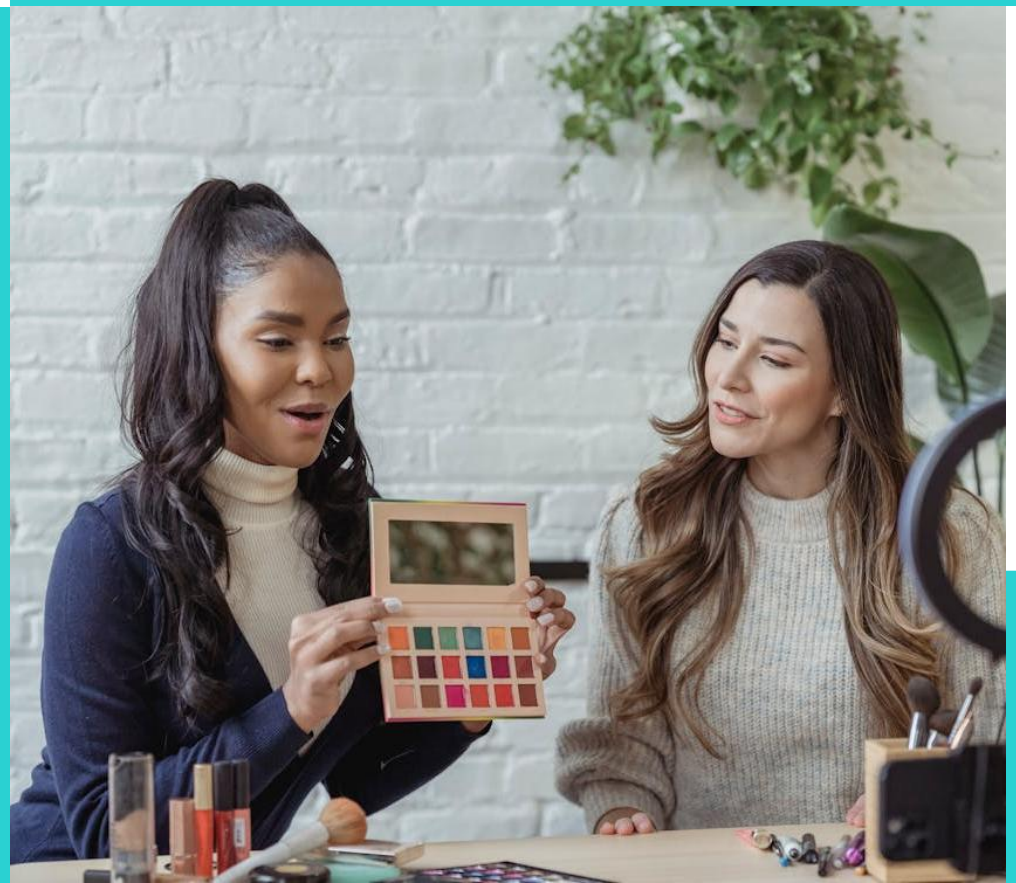
Illustrative Concept of a Feedback Loop



Source: (1) MTM ASA involving concepts emerging from analysis across Quantitative and Qualitative research combined. (2) Thinkbox/Map the Territory/Tapestry Research's Context Effects study (2024) found that people are more likely to trust advertising seen within quality content; YouTube's Why We Watch 2.0 study with MTM (2024) showed that people are more likely to feel the content is quality when they trust the source; Newsworks' Hard News study (2019) confirmed that people are more likely to trust advertisers when they trust the newsbrand delivering the content environment, following the Truly, Madly, Deeply study for Newsworks by MTM (2014); Advertising Association's Value of Trust study (2024) showed that trust is the 2nd most important driver of advertising's effectiveness
(3) Quantitative research: D4 Thinking still about labels used to identify influencer advertising, please tell us to what extent you agree or disagree with the following statements. Base: Online 13–64-year-old population (1900)

SECTION 04

Influencer Marketing: How obvious is it that these posts are advertising?



Key Findings In This Chapter

Aspects of social media make it difficult to spot advertising

The embedded nature of social media ads, the variety of content sources that blur the lines between advertising and genuine recommendations and the personalised nature of algorithms mean users are at a fundamental disadvantage when spotting ads. The level of the challenge varies by platform - with users finding it particularly difficult to spot ads on TikTok and Instagram as there is no “break” from content.

The UK online population are on high alert for spotting ads on social media

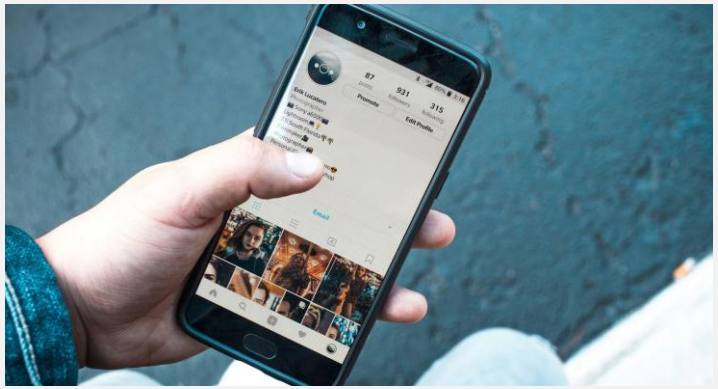
While brand ads are more likely to come to mind when people are asked to think about advertising (and are certainly the easiest to recognise), the UK online population are on alert that any kind of post could be marketing while scrolling through TikTok and Instagram. Despite not being paid-for advertising, the UK online population are particularly wary of certain examples of reviews and brand content that may happen to contain ad signals.

Influencer ads are not as easy to spot as brand ads

Despite half of the UK online population genuinely believing in their ability to spot influencer ads – though notably much of this confidence comes from younger audiences – the in-situ experiment showed that users on average had significantly less conviction and clarity that an influencer ad was an ad, compared with brand ads. This varies greatly across different influencer ads, harnessing a variety of content styles.

Fundamental aspects of social media make advertising harder to spot than seen for traditional media

Embedded scrolling vs ‘a break’



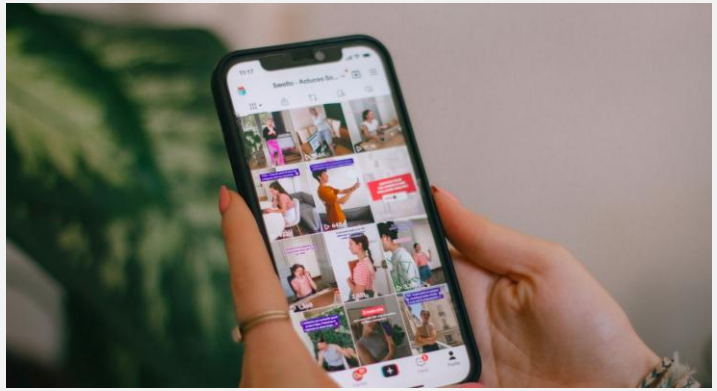
Unlike traditional media, the **nature of scrolling** means that there is not always a signified ‘break’ for an ad: it can appear within and as part of the scroll itself (known as ‘native’). Therefore, people do not anticipate exactly when ads will appear on their feed, in the same way as they can come to expect the ads in traditional media.

The role of an influencer

An influencer is **expected** to share recommendations, products and ideas.

As such, **users perceive a blurry line** between what is ‘advertising’ or ‘recommendation’ and what is paid for, vs. simply an opinion (or both simultaneously).

Algorithm-driven advertising



Algorithms make **content feel highly personal**, resulting in advertising that is more aligned with individual interests (unlike traditional media). This personalisation offers both benefits and drawbacks: while it increases the likelihood of encountering content you genuinely enjoy, it can obscure when/where you are being influenced or sold to.

Source: MTM ASA Qualitative research: Online communities & follow up depths

The structure of each of the platforms also plays a crucial role in how people interact with social media ads

TikTok and Instagram ads rarely provide the disruption or ‘break’ seen in traditional media or on YouTube and Twitch

TikTok

Content is often seen in a single stream from the ‘For You Page’ and therefore the **ads are not immediately discernible**. Ads ‘blend into’ the content itself, with no ‘break’ to indicate they are being served.

YouTube

Ads are perceived as easily noticed, either as a pre-roll, or within the content. Users suggest the creator will use a different tone, or provide a signal, if they are advertising, particularly in long form content. This provides a much clearer signal that it is a ‘break’ from content.

Instagram

In a feed, **brand ads are perceived as a ‘break’ from content** as they’re often clearly labelled as ‘sponsored posts’. **Influencer marketing is less clear**. Within Reels, it is perceived as harder to identify influencer ads because the platform labelling is less obvious.

Twitch

Ads are **associated with ‘pop-ups’** (either ads or call to action) which give a clear indicator that they’re a separate element to the content itself.

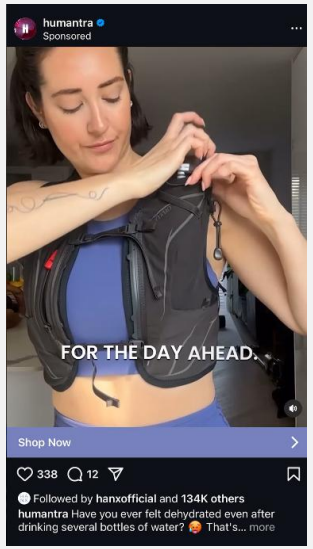
Source: MTM ASA Qualitative research: Online communities & follow up depths

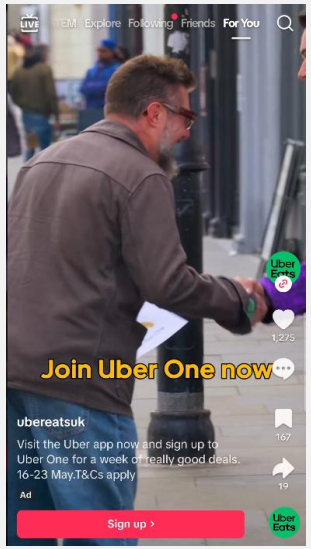
When asked to provide examples of ads, it was clear that people default to brand ads rather than influencer posts

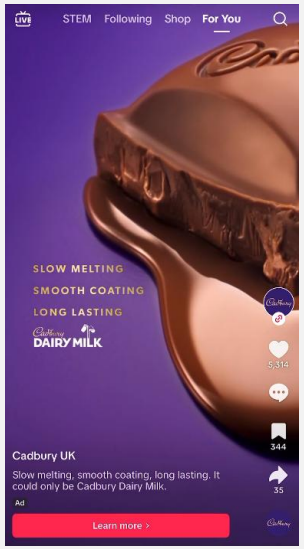
When we asked qualitative research participants to capture ads they came across organically on social media, the **majority of examples were brand ads**. These ads tended to feature the **most recognisable aspects of traditional advertising**: highly polished graphics, a central focus on the product, and what was described as "salesy"[1] language (e.g. "Sign up", "Shop now").

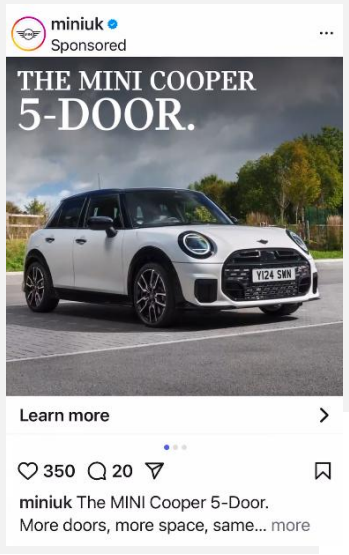
There were very few examples of influencer ads captured, highlighting the uncertainties around recognising these posts as advertising. When influencers were featured, it was usually content filmed by the individual creators but posted by the brand (e.g. Humantra), **demonstrating the usefulness of the brand page in validating whether something is an ad**.

Examples of brand ads on social media provided by qualitative respondents









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Notes: (1) "Salesy" was language that emerged directly from participants.
Source: MTM ASA Qualitative research: Online communities & follow up depths

Perhaps unsurprisingly, people feel more confident than not in their ability to recognise when they are being sold to

When asked to rate their ability to recognise influencer ads, a slight majority of users say it is as easy as spotting other kinds of ads. This reflects a **genuine belief in their ability to spot influencer ads**.

We do see this confidence break down somewhat with age**: a third of 45-64s think influencer advertising is as easy to recognise** as other social media ads / traditional media ads, compared with three-fifths of under-45s.

Even among the younger age cohorts with heavier social media use, there is **less confidence regarding product reviews**: around half of 13-24s are not sure when these posts are advertising and when they are genuine reviews. This points to the role labelling can play in providing that clarity between ads and reviews.

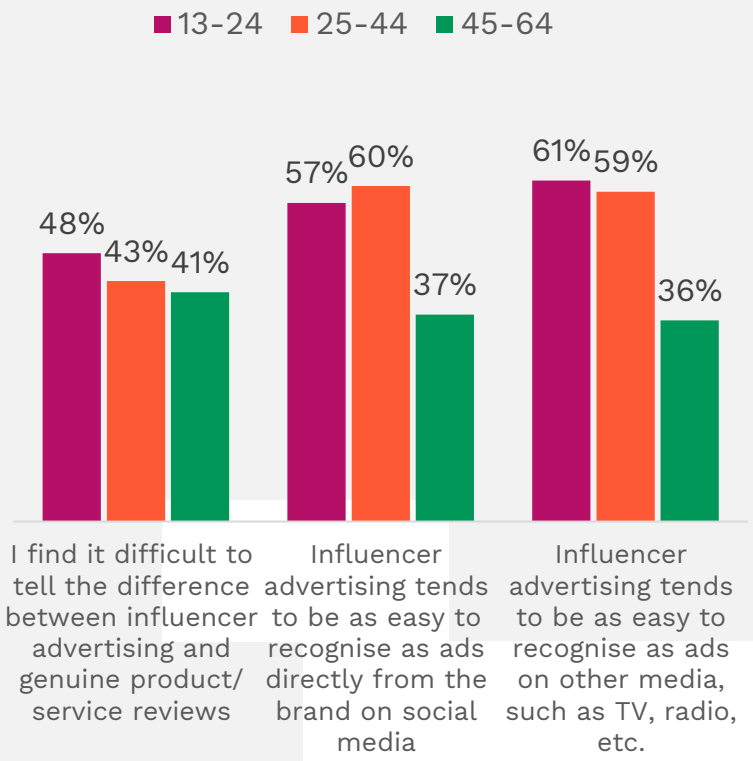
Recognising influencer ads – Total
UK online population (13-64yrs)

NET AGREE:
Influencer advertising tends to be as easy to recognise as ads directly from the brand on social media
52%
NET Disagree: 20%

NET AGREE:
Influencer advertising tends to be as easy to recognise as ads on other media, such as TV, radio, etc.
52%
NET Disagree: 21%

NET AGREE:
I find it difficult to tell the difference between influencer advertising and genuine product/ service reviews
43%
NET Disagree: 28%

Recognising influencer ads – By age
UK online population in each group (Agree)



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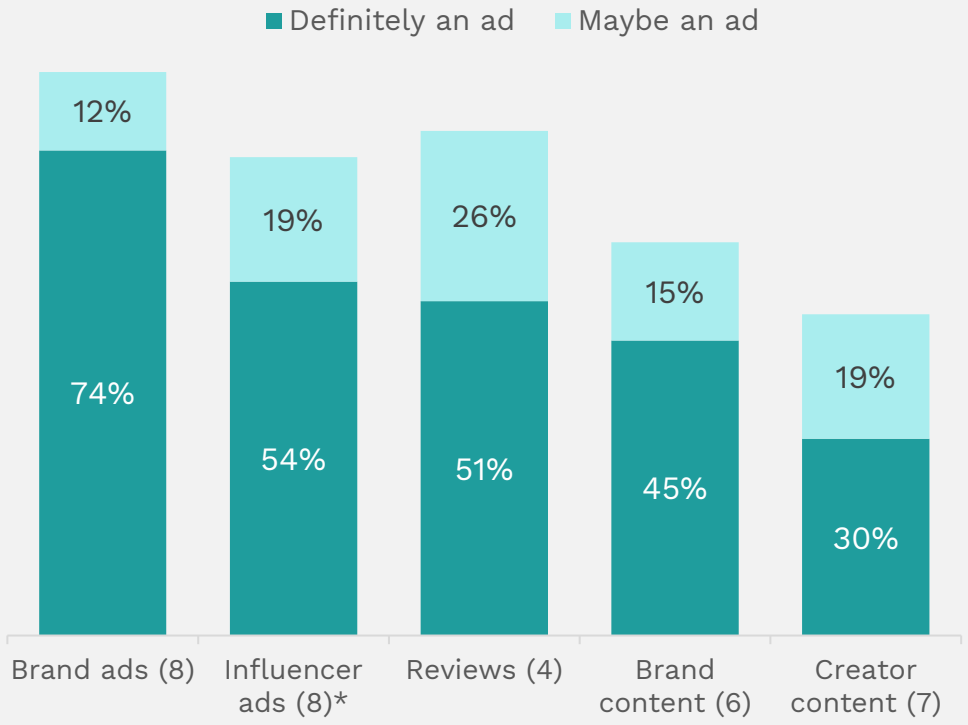
Notes: (1) "Strongly disagree," "slightly disagree", "neither agree or disagree" & "don't know" not included for presentation purposes
Source: MTM ASA Quantitative research: D1 Thinking about influencer advertising generally, please tell us to what extent you agree or disagree with the following statements.
Base: Online 13–64-year-old population (1900) 13-24 (479) 25-44 (836) 45-64 (585)

Yet, robust experimental results prove definitively that people's ability to identify an "ad" is not as good as they think

Spot the Sell: Definitely/Maybe an Ad – By post type[1]
UK online population (13-64yrs)



This study's experimental design has tested whether or not people can actually tell whether different kinds of posts are advertising to them in a 'Spot the Sell' survey exercise.

Findings show that **three-quarters of people could tell that a brand ad is "definitely an ad",** rising to 86% for "definitely" or "maybe" netted together. This type of ad is the clearest.

Beyond that, there is less clarity. **Around half could tell that influencer marketing is "definitely an ad"**, 19% "maybe an ad", with 27% not thinking that it was advertising at all.

A similar proportion **incorrectly** believed that review posts were advertising, which they were not. Many were also incorrect regarding editorial content from brands and creators.

Overall, **the experiment has demonstrated difficulties in recognising influencer ads[2]**.

> *Going into this I **thought**, "I'm going to be ace at this." And while I do think I'm still **fairly savvy** at it, when there's no mention of a post being an ad, **it made me really question it**.*
> Male, 25-34, TikTok & Instagram User

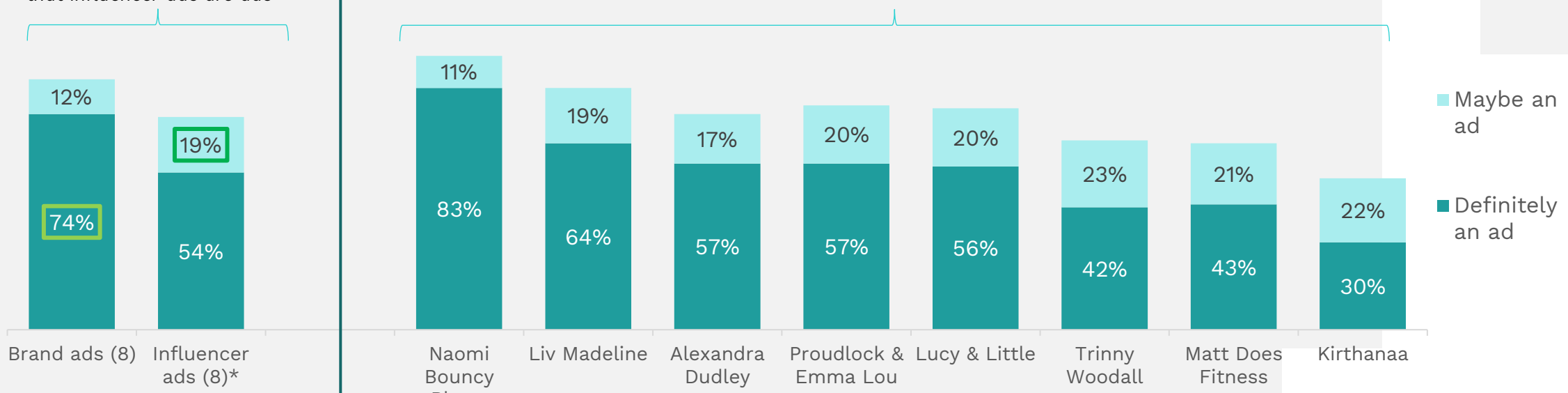
Notes: (1) Figures shown are aggregated across all posts tested, for each of the types, netted together. (2) "Not an ad" not included for presentation purposes.
(3) Number of posts shown in brackets (4) *Eight influencer ads each with the same label conditions
Source: MTM ASA (1) Quantitative research: Section B. For each post, please tell us your gut reaction of whether it is "Not an ad", "May be an ad" or "Definitely an ad";
(2) Qualitative research: Online communities & follow up depths.
Base: Online 13–64-year-old population who responded to each post; 1900 seeing each non-influencer post (~70% response rate), ~950 seeing each influencer post (~90% response rate). See appendix for more detail

Ad recognition of the influencer ads tested varied widely. Notably, most failed to hit the clarity level of brand ads

Spot the Sell: Definitely/Maybe an Ad – Brand ad vs. Influencer ad posts
UK online population (13-64yrs)

Influencer ads are significantly harder to identify than brand ads (which are always clearly signalled) - significantly fewer people are certain that influencer ads are ads

We see inconsistent levels of conviction in saying influencer posts are ads, across different examples of influencer marketing. While some are as obvious, if not more, than a brand ad – e.g. Naomi Bouncy Blows – others result in a minority of the UK online population being able to outright say it is an ad e.g. Trinny Woodall, Matt Does Fitness and Kirthanaa.



Average across all posts of this type

Results for the eight individual influencer marketing posts tested in Spot the Sell exercise

Significantly higher at the 95% level

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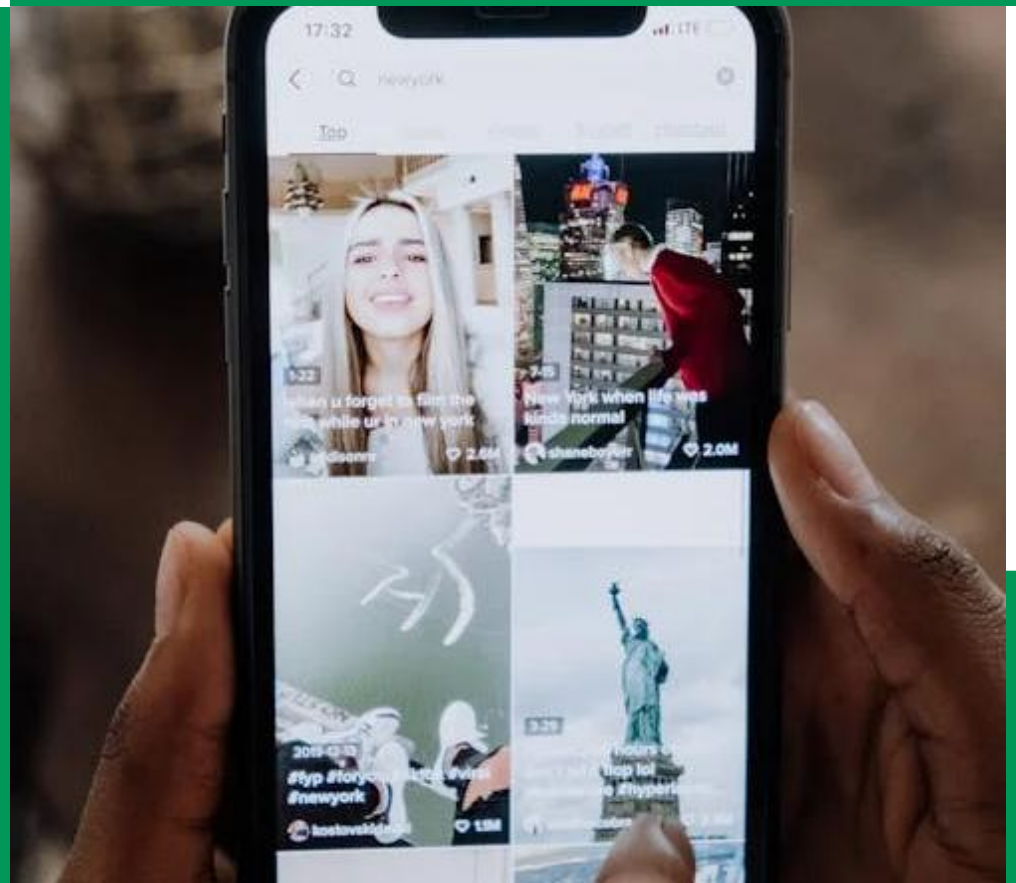
Notes: (1) "Not an ad" not included for presentation purposes. (2)Number of posts shown in brackets (3) *Eight influencer ads each with the same label conditions. (4) See appendix for more detail.
Source: MTM ASA Quantitative research: Section B. For each post, please tell us your gut reaction of whether it is "Not an ad", "May be an ad" or "Definitely an ad".
Base: Online 13–64-year-old population who responded to each post; 1900 seeing each non-influencer post (~70% response rate), ~950 seeing each influencer post (~90% response rate).

SECTION 05

Recognising Influencer Marketing: what makes it easier for people to spot an ad?



Key Findings In This Chapter

A post's content provides the first signals for users in working out whether a post is an ad

Content features that relate to what the UK online population traditionally see as advertising – mentioning the brand, an overly complimentary tone of voice, visually featuring the brand/product and calls-to-action – can alert them to influencer advertising. A prior relationship with the influencer or the brand promoted can also amplify signals, with familiar audiences better able to notice that something isn't quite "natural" in character or appearance.

However, these context features are not used consistently across influencer marketing posts

Influencers adopt a huge range of styles when posting their content and the approach they take to marketing is no exception. While some posts include several heavy context features, other posts either include more subtle versions of those cues (e.g. featuring the brand but not interacting with it) or do not have them included at all. This can mean users are either not alerted or left unsure as to whether an influencer post is an ad.

Labels act as a confirmatory backstop when context features are unclear or not present

The right influencer marketing label – both in terms of text and positioning – can help bridge an "ad clarity gap" created when a post's context doesn't obviously confirm whether a post is an ad. Labels can be used to quickly confirm a suspicion that a post *might* be an ad, or they can act as the only kind of alert that the influencer post *is* an ad. This means labels can have impact across different levels of initial clarity that has been generated from contextual features.

A wide range of signals can help people work out whether a post is advertising – aside from an outright ad label

Features that suggest to social media users that a post is an ad

Selected verbatim comments made by survey respondents, attributed according to the influencer under discussion

> I can clearly see the **product being used**
> *Naomi Bouncy Blows*

> **Promotional tone** made it clear
> *Proudlock & Emma Lou*

> Clearly showing the product, what it does and also **shows how to use it**
> *Lucy & Little*

> The **imagery**, the editing and the dialogue
> *Liv Madeline*

> Trinny is **associated with advertising her brand**
> *Trinny Woodall*

> It was the **subject of the video**
> *Proudlock & Emma Lou*

> The **gimmicky nature** and forced reaction
> *Lucy & Little*

> The **unnaturalness** of it
> *Lucy & Little*

> When the **dialogue is clearly not natural**
> *Trinny Woodall*

> The **way the guy is talking** and obvious **product placement**
> *Proudlock & Emma Lou*

> The post **showed a brand logo** and encouraged buying
> *Alexandra Dudley*

> The **content felt planned** rather than spontaneous
> *Matt Does Fitness*

> It was **showcasing the product** throughout
> *Kirthanaa*

> The **environment** was instrumental
> *Kirthanaa*

> The **close-up shots** of the product
> *Alexandra Dudley*

> The **product logo actively shown** on his clothing
> *Matt Does Fitness*

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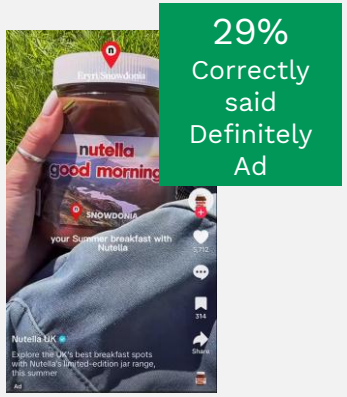
Source: MTM ASA Quantitative research: C2a. Please tell us what about this post made it clear to you it contained advertising.
Base: Online 13–64-year-old population who saw each post; ~950 per influencer post

This myriad of signals looked for in any social media post means regular posts can be mistaken for ads (& vice-versa)

Examples of Reactions to Different Post Types

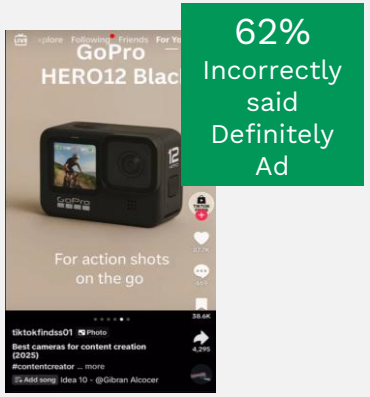


29% Correctly said Definitely Ad

Brand ad:

Nutella

This ad achieved the lowest score for brand ads included in the test. Despite the **brand being clearly visible** in the post and the **product being central** to the content, it is a very stylised post, which may feel **less typical of a brand ad**, making people think it is just ordinary content.

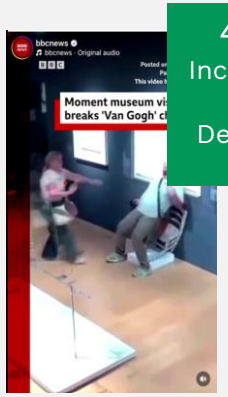


62% Incorrectly said Definitely Ad

Reviews:

TikTokFinds

Nearly 2 in 3 mistook this review for an ad. Despite a **variety of different brands** having their strengths spoken about in the review, the **products and brands being front and centre** may be causing the posts to feel like an ad.

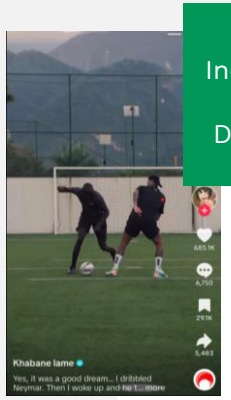


40% Incorrectly said Definitely Ad

Brand content:

BBC News

Despite showing a news story, 2 in 5 think this is an ad. There is a **"link in @'s bio"** in the caption that may play a role. Generally, however, the study shows that **brand content is relatively likely to be perceived as paid ads** as opposed to editorial content.



47% Incorrectly said Definitely Ad

Creator content:

Khabane Lame

This post achieved the highest score of all the content creator examples used in the study for people mistaking this as an ad. There is no brand in focus within the post, but it does **feature famous footballer,** Neymar, who users may recognise as often featuring in **paid partnerships.**

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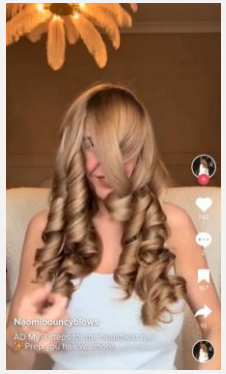
Notes: (1) "Maybe an ad" and "Not an ad" not icluded for presentation purposes
Source: MTM ASA Quantitative research: Section B. For each post, please tell us your gut reaction of whether it is "Not an ad", "May be an ad" or "Definitely an ad".
Base: Online 13–64-year-old population who responded to each non influencer post; 1900 (~70% response rate)

This study's qualitative research identified six key context features that can help to signal influencer marketing

Mentioning a brand

Seeing or hearing **a brand mentioned many times** in the content and/or the caption is a clear cue to advertising.

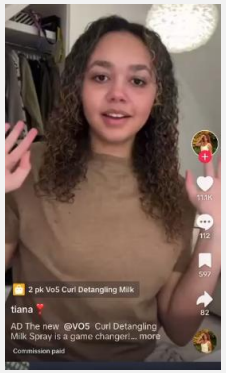
Without a brand mention, people **depend more on polished style**, "salesy" language, or tags to identify advertising.



Tone of voice

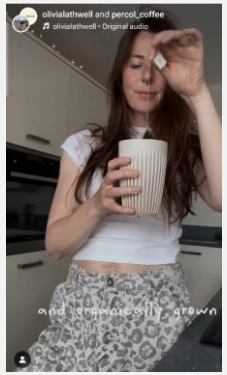
A strong indicator is both what, and how, an **influencer talks about the brand** in the content and/ or the caption.

When **overly positive** about a product, or focusing on the product benefits, people quickly deduce that something is advertising.



Visually featuring the brand/product

If **visual features of the brand** (e.g. logo, product itself) appear prominently in a post, most people quickly understand that something is advertising.

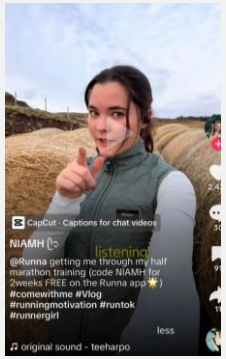


Influencer familiarity

The status of an influencer (e.g. celebrity-status) can cue expectation that they are promoting something. **Being familiar with the influencer**, usually because they follow them, allows people to 'spot' content that feels different to usual e.g. promotional or 'breaking the norms' for this type of content.

Calls to action

Calls to action, such as **links, brand tags, and discount codes**, are often perceived as clear indicators of advertising, particularly if **the influencer does not usually use them**.



Brand familiarity

When people are **familiar with a brand, its advertising, and its influencer partnerships**, their ability to recognise posts as advertising are sharpened.

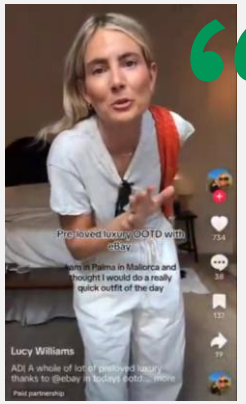
mtm

Source: MTM ASA Qualitative research: Online communities & follow up depths

Mentioning the brand: Stating a brand name within the post's content is a strong signal of advertising

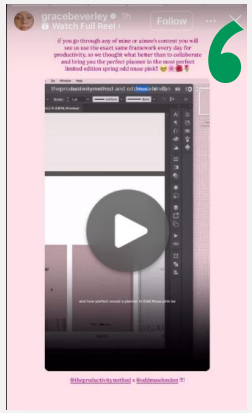
People are quick to recognise advertising **when a post repeatedly mentions a brand name or showcases multiple products from a brand**. This recognition often happens before they notice any formal disclosure or ad label, with the **label serving to confirm what they already suspect**. Directly mentioning the brand in a voice-over (or caption) strengthens this recognition, even when the influencer's tone and style remain casual, chatty, and in line with their usual content.

When a brand isn't directly mentioned, **people look for more traditional ad cues** (e.g. convincingly "salesy" language, more polished editing) as well as tags or labels, to discern whether a post is an ad[1].



*Lucy Williams **mentioning eBay loads** while speaking in her post made it super obvious it was an ad - even though she was doing a **super informal, GRWM outfit video**.*

Female, 18-24, Instagram & TikTok User

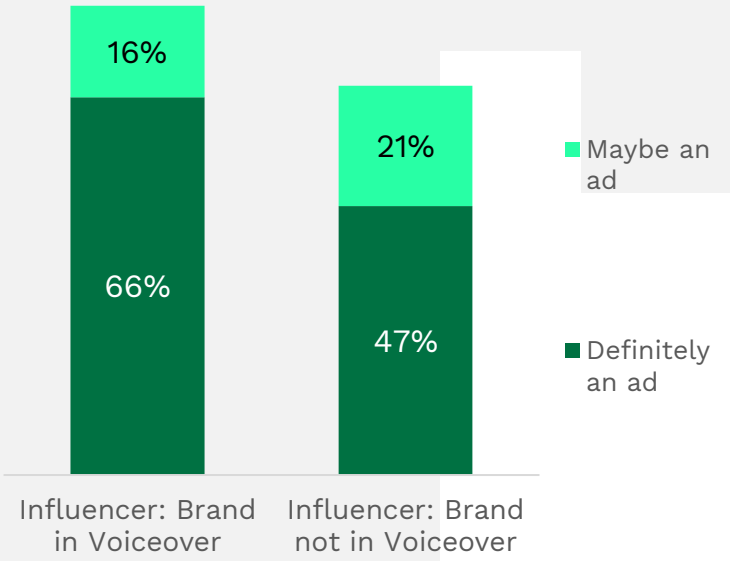


*The blurb at the top of the reel plus the @theproductivitymethod and @oddmuselondon [made it easier], and they mention 'planner' a lot **but never the name or the brand. References to the brand** would have made it more obvious it was an advert.*

Male, 65+, Instagram User

Spot the Sell: Voiceover vs. No Voiceover[2]

% of responses for each content type



When influencer content mentions the brand within the voiceover and centres the content around the products, people are much more likely to be confident in saying it is advertising[2].

Notes: (1) "Not an ad" not included for presentation purposes. (2) Data is aggregated across influencer posts tested (3) Three posts mentioned the brand in the voiceover (NaomiBouncyBlows, Proudlock & Emma Lou and AlexandraDudley) – the remaining five did not mention the brand in the voiceover/did not have a voiceover - all other factors kept comparable e.g. all label conditions are included. (4) "Salesy" was language that emerged directly from participants.

Source: MTM ASA (1) Qualitative research: Online communities & follow up depths; (2) Quantitative research: Section B. For each post, please tell us your gut reaction of whether it is "Not an ad", "May be an ad" or "Definitely an ad".

Base: Online 13–64-year-old population who responded to an influencer post with Brand in voiceover (2840 with ~90% response rate) Influencer post with Brand not in voiceover (4760 with ~90% response rate)

Tone of voice: If the influencer talks/writes about a brand in a "salesy" style it can trigger people into recognising an ad

People **are highly attuned to the language and tone influencers use.** This applies to both written content (such as captions or integrated text) and the voiceover (if a video post). The voice-over in particular acts as a key initial advertising giveaway as it is difficult to ignore if actively engaging with the post.

The key cues noted by respondents in this study are:

- Using **overly positive language** about a product / brand
- Focusing on or **only emphasising a product's benefits**
- Using **persuasive language** about purchasing a product

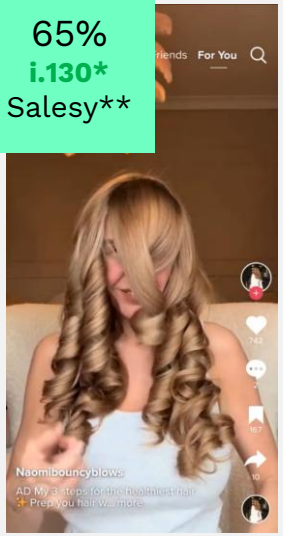
These elements are inherently aligned with the **markers of well-understood traditional advertising,** providing more explicit advertising delineation[1]. Those less familiar with influencer advertising (e.g., older audiences) feel more comfortable with recognising this kind of advertising[2] (as outlined on slide 43).

> *There's a type of ad that feels **scripted**, and they want to emphasise each word to make it sound perfect. That feels like the **obvious, classic approach** for an advert.*
>
> Male, 35-44, Instagram User

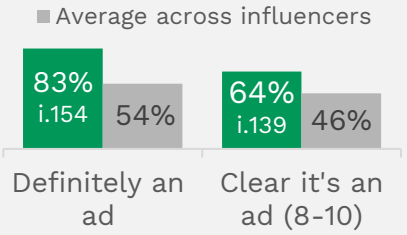
> *The influencers I prefer to watch do occasionally advertise a few products but rarely; I can identify [ads] through the language they're using, **persuading** people to buy the products, or **"overhyping"** it.*
>
> Female, 13-17, TikTok & Instagram User

Influencer Case Study: Naomi Bouncy Blows[2]

65%
i.130*
Salesy**



Ad Clarity Metrics
(% of responses)



> *The demeanour of the model made it clear*

> *Acting was unnatural and had a salesy vibe*

The Naomi Bouncy Blows post achieved the highest scores for ad clarity, with 83% of respondents confident it was an ad and 64% finding this very clear. People cited its "salesy" tone of voice (65% selected attribute as applying) as a core reason for this high ad clarity.

> *Clear the girl was reading from a script*

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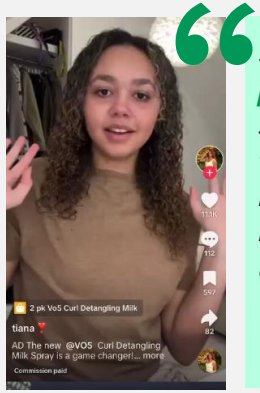
Notes: *The use of "i" indicates an index score to assist in comparisons, where 100=the average across the sample i.e. >100 is over-indexing. ** "Salesy" was language that emerged directly from participants.
Source: MTM ASA (1) Qualitative Research: Online communities & follow up depths; (2) Quantitative research: Section B. For each post, please tell us your gut reaction of whether it is "Not an ad", "May be an ad" or "Definitely an ad". C1 We would like you to tell us whether you think the following words apply to the piece of content you just saw. C2. Please tell us how clear you felt it was made to you that a brand was being advertised to you in this post.
Base: Online 13–64-year-old population who responded to each post, ~950 seeing each influencer post (~90% response rate); Online 13-64 population who saw each post, ~950 per influencer post

Featuring the brand/product: Visually signalling the brand with a logo or labelled product helps advertising stand out

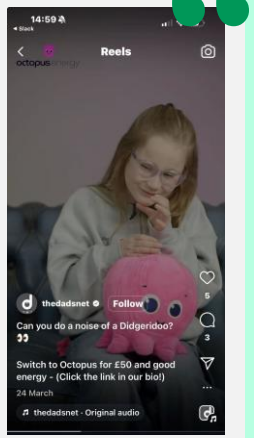
Qualitative research participants consistently highlighted visual cues, such as logos and clearly labelled products, that **serve as strong contextual evidence** a post may be advertising. These kinds of visual cues were felt to be more akin to traditional advertising formats that older audiences, in particular, are more accustomed to.

Such visual cues also **rely on context** (e.g. voiceovers, labels) to indicate a post is an ad for a specific product/service, rather than general brand marketing[1].



*She **inserted a clip of the product** as opposed to just showing it to the camera; this makes it seem like the brand wanted it to be really clear what it looked like.*

Male, 25-34, TikTok and Instagram User

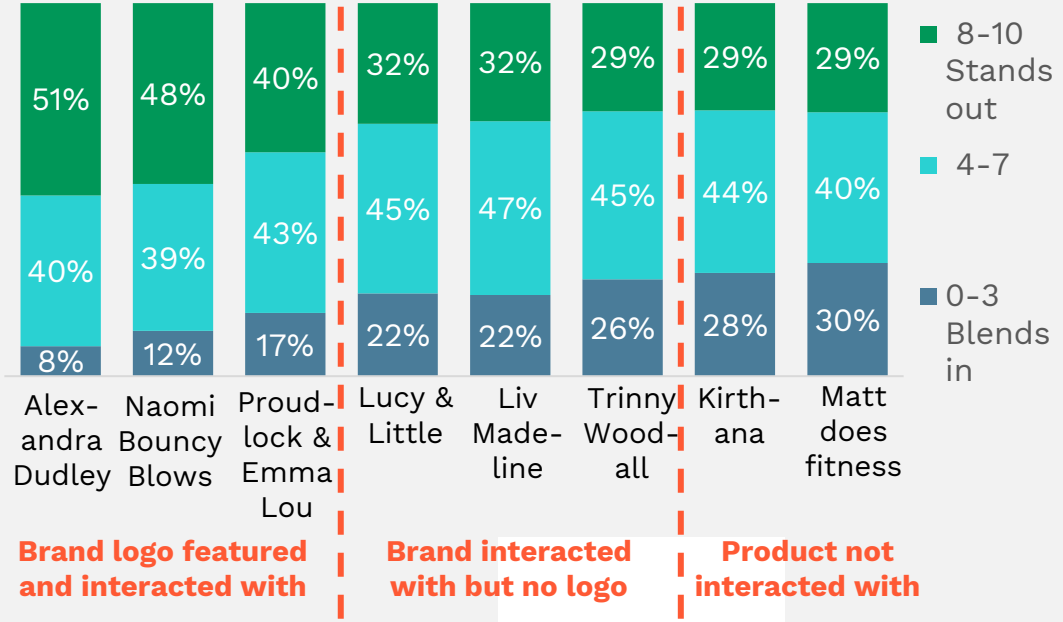


*Even though there was an Octopus logo and the girl was holding an Octopus stuffy in the video, the fact that it was two people **talking about something completely unrelated to the company** or one of their products made the whole thing feel confusing and out of context.*

Male, 25-34, TikTok and Instagram User

Advertising Standout[2]

% of responses for each influencer post



Active brand placement via the logo helps improve standout best, followed by the brand being interacted with by the influencer. Content where the product isn't central sees low advertising stand out[2].

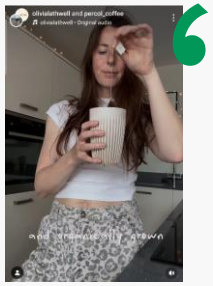
mtm

Source: MTM ASA (1) Qualitative research: Online communities & follow up depths; (2) Quantitative research: C3.
To what extent did the advertising of the brand stand out to you when you saw this post.
Base: Online 13–64-year-old population who saw each post, ~950 per influencer post

Influencer familiarity: Spotting that an influencer is “out of character” while promoting a brand is a sign of advertising

Being familiar with the influencer (due to following them or engaging with their content) enables frequent users to spot content that feels different to usual e.g. a change in setting, a different style of post, or a more polished finish.

Furthermore, **the status of an influencer** (e.g. celebrity who is not themselves seen as a “content creator”) can trigger the assumption that they must be promoting something.



*The video was slightly different to what she usually posts, so **stood out**. I follow her and she is a "frugal and environmentally friendly" mum. The ad was in line with her content and values, but the **format and quality of the video was different, more polished**.*

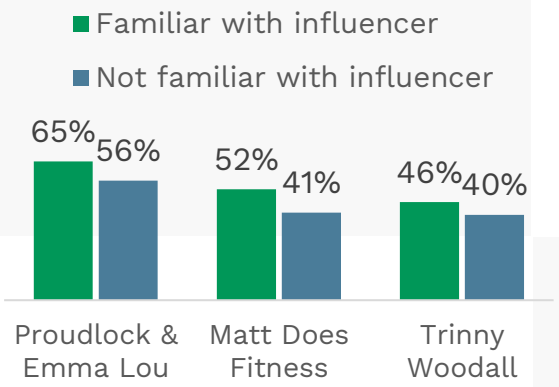
Female, 35-44, TikTok & Instagram User

*In my mind, as soon as I see a well-shot video of David Beckham on Instagram, I **assume** he’s promoting something as **he’s a figurehead for multiple brands**.*

Male, 35-44, Instagram User

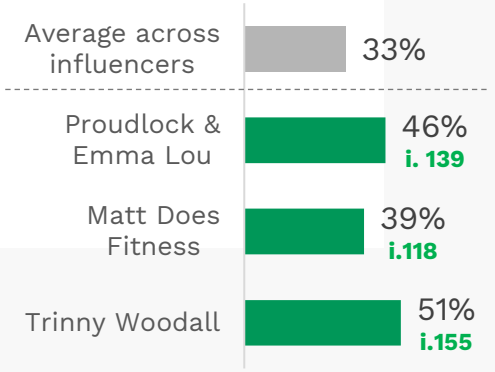
Definitely an Ad

% of responses for each post



Post described as “cringe”*

% of responses for each post



The three posts presenting the biggest differences in ad recognition (in the Spot the Sell exercise) when we consider whether respondents were familiar with the influencer or not **are also the ads that over-index for being seen as “cringe”** by respondents when asked what perceptions apply to the post. For those that know the influencer and are familiar with their typical personality/style in content, the style of trying to sell the product likely breaks from what they usually know them for, prompting suspicion it is an ad.

Notes: (1) *“Cringe” was language used in survey based on descriptions of influencers’ style given in online communities/follow up depths (2) **The use of “i” indicates an index score to assist in comparisons, where 100=the average across the sample i.e. >100 is over-indexing.

Source: MTM ASA (1) Qualitative research: Online communities & follow up depths; (2) Quantitative research: C4. Please select the statement that best describes your relationship with the person who made this content. C1 We would like you to tell us whether you think the following words apply to the piece of content you saw.

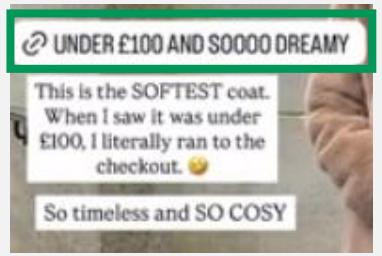
Base: Online 13–64-year-old population who saw each post, ~950 per influencer post; Online 13-64-year-old population who responded to each post (~90% response rate) Proudlock & Emma Lou Familiar (172) not familiar (779) Matt Does Fitness Familiar (211) not familiar (750) Trinny Woodall familiar (260) not familiar (696)

Calls to action: Signposted visual cues relating to the brand are useful in noticing ads, but labels aid confirmation

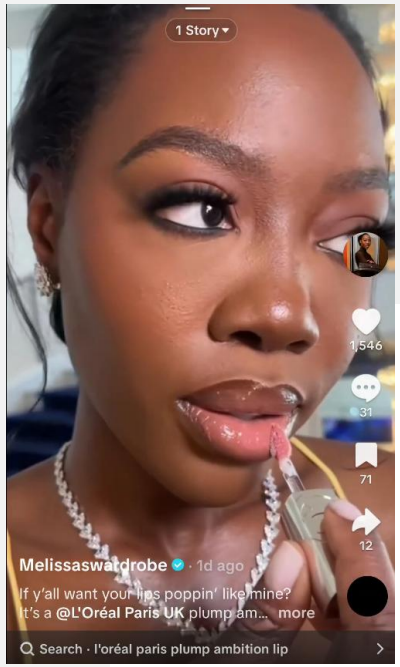
Alongside deviations in the style of their content, qualitative research revealed viewers noticed calls to action that their **familiar influencers would not typically use for non-ad content.** This includes:

- Links to shop / ‘Link in Bio’ / ‘Shop Now’
- Brand tags
- Discount codes.

Calls to action, much like visual brand cues**, feel aligned to traditional forms of advertising;** their “salesy” nature reinforces confidence in the creator’s honesty about it being an ad. Younger audiences naturally understand affiliate links to be an indication of commercial interest, citing that their inclusion creates a more collaborative feeling between the influencer and their audience.



> *I think it’s an ad as it’s **tagging the company**, she's advertising the lip gloss, [but I didn’t know until] I had watched it in its entirety. There was no #ad or sponsored banner, **so it’s difficult to tell**. It's Melissa's Wardrobe and I follow her, and I've found a lot of products through her, so some **things it's difficult to know whether it's a genuine recommendation or a paid partnership**, but I do trust her.*
>
> Female, 35-44, TikTok & Instagram User



> *A lot of them will say if it's an ad and they're selling something, or **maybe they'll give a code**, so you've got some money off.*
>
> Female, 55-64, TikTok & Instagram User

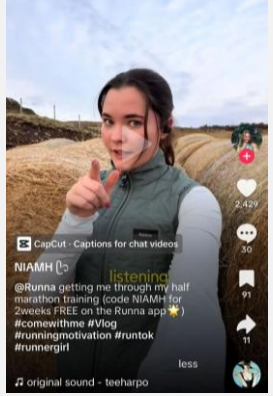
mtm

Notes: (1) “Salesy” was language that emerged directly from participants.
Source: MTM ASA Qualitative research: Online communities & follow up depths

Brand familiarity: Users are primed to notice brands they are aware of, unless the brand is so big it feels natural

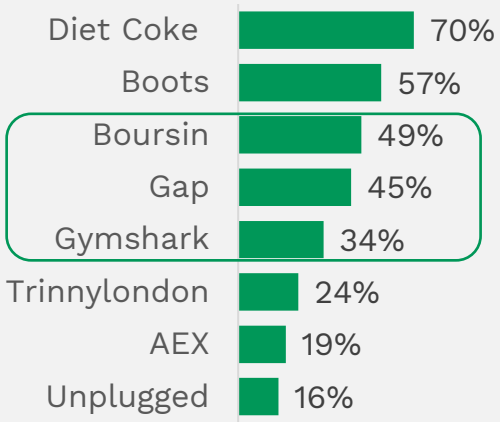
When a user is already familiar with a brand, and particularly if they have **repeatedly seen the brand partner with influencers**, they can identify ads more accurately.

Familiarity with a brand's marketing style, frequent appearances on their feeds, or typical collaborations with influencers sharpens users' awareness of advertising. As a result, subtle references or product placements from well-known brands still stand out for users who have **been primed to their ads previously**[1].

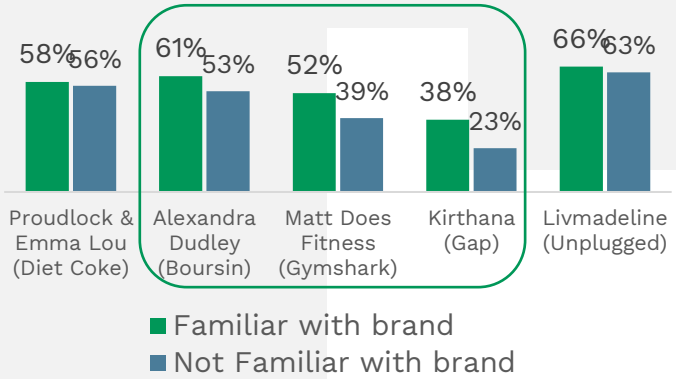


> *I've seen a lot of things for Runna recently. **The Internet is awash with their promotion stuff at the moment**. So as soon as I saw that, that one word, I was like, right, okay, another ad.*
>
> Male, 35, Instagram User

Familiar with brand
% of responses for each post



Definitely an Ad – by Familiarity[2]
% of responses for each post



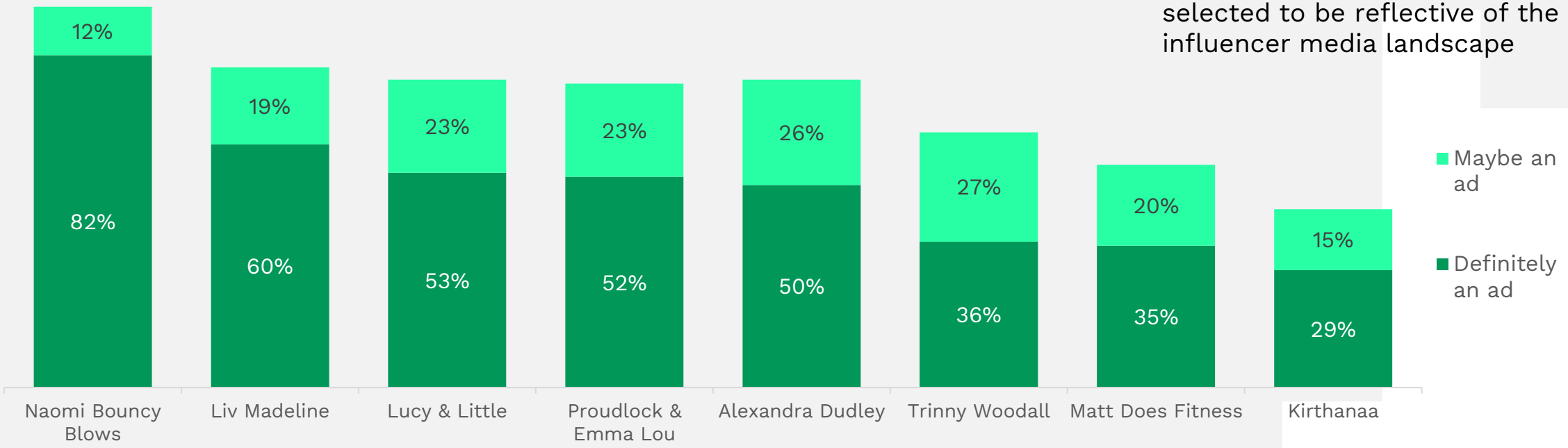
We do, however, see **a level of familiarity with some brands that is so high** – Diet Coke for instance - that including them in content **does not feel out of place** - it is just something that is seen as part of daily life. Brands seeing mid-table levels of awareness (Boursin, Gymshark and Gap) are where the biggest uplifts are seen in the ability to identify an ad, when comparing whether respondents know a brand or not.

Notes: (1) Figures shown as 'Familiar' are netted together responses for 'used' and 'seen advertising for' the brand.
Source: MTM ASA (1) Qualitative research: Online communities & follow up depths; (2) Quantitative research: C5 Please select the statement that best describes your relationship with the brand being advertised by the person who made this content?
Base: Online 13–64-year-old population who saw each post, ~950 per influencer post; Online 13-64-year-old population who responded to each post (~90% response rate) Proudlock & Emma Lou Familiar w/ brand advertising (665) not (286), Alexandra Dudley Familiar w/ brand advertising (464) not (474) Matt Does Fitness Familiar w/ brand advertising (328) not (633) Kirthanaa Familiar w/ brand advertising (425) not (519) Livmadeline Familiar w/ brand advertising (147) not (797)

With so many potential signals, people can sometimes identify an ad – even when a label is not used

Spot the Sell: Definitely/Maybe an Ad – Across influencer ad posts when shown with No Label
UK online population (13-64yrs)

We tested a range of videos selected to be reflective of the influencer media landscape



mtm

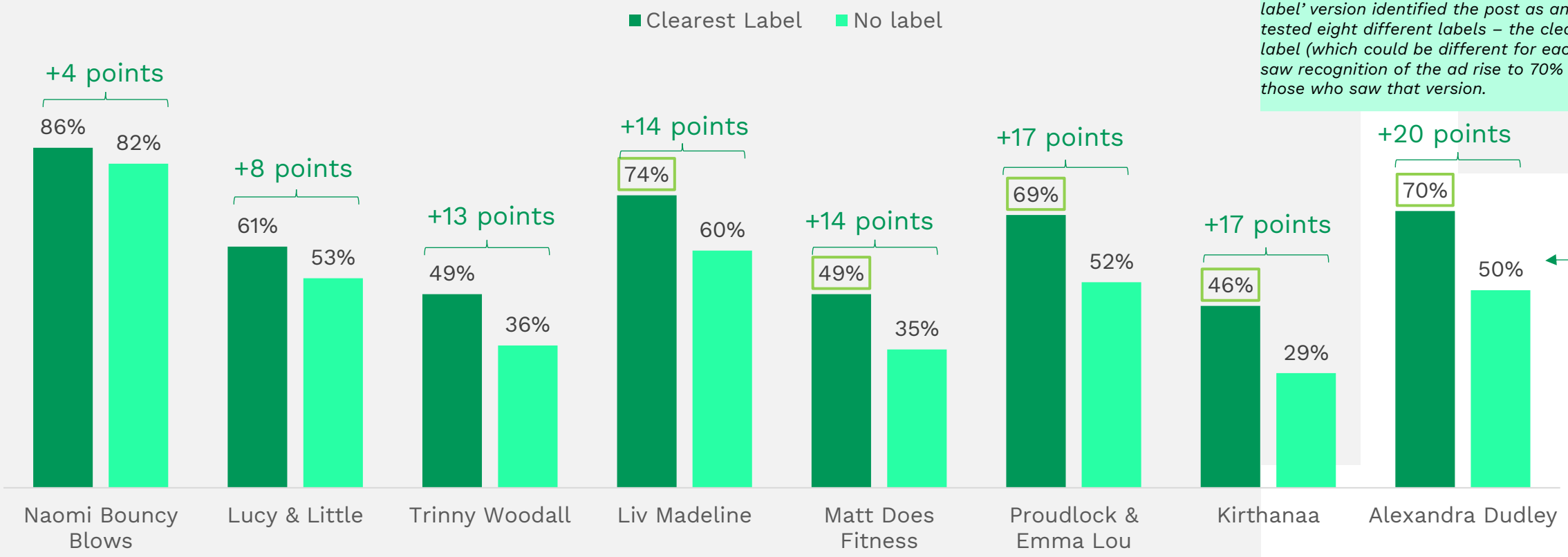
Notes: (1) "Not an ad" not included for presentation purposes.
Source: MTM ASA Quantitative research: Section B. For each post, please tell us your gut reaction of whether it is "Not an ad", "May be an ad" or "Definitely an ad".
Base: Online 13–64-year-old population who responded to each post; ~119 seeing in each influencer post for each label condition

But the right label can have a big impact as a confirmatory backstop; an indicator that can bridge a clarity gap

Spot the Sell: Definitely an Ad – Ordered by size of 'clarity gap': the difference between best performing label & no label

UK online population (13-64yrs)

***Explainer**: 50% of respondents who saw the 'no label' version identified the post as an ad. We tested eight different labels – the clearest label (which could be different for each post) saw recognition of the ad rise to 70% amongst those who saw that version.*



Significantly higher at the 95% level when compared to no label

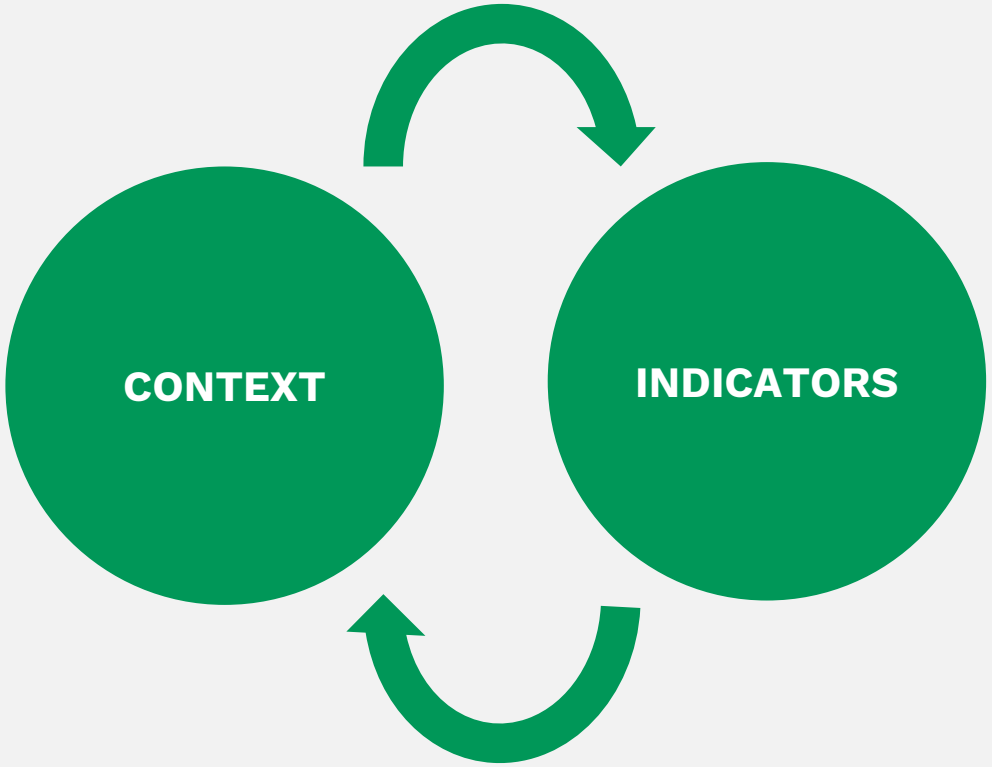
mtm

Source: MTM ASA. Quantitative research: Section B. For each post, please tell us your gut reaction of whether it is "Not an ad", "May be an ad" or "Definitely an ad".
Base: Online 13–64-year-old population who responded to each post; ~119 seeing in each influencer post for each label condition

Key Insight: This study suggests a two-part model to help us understand the identification of influencer ads

THE CONTEXT OF THE CONTENT COMES FIRST

The content itself is often the most intuitive cue to whether something is advertising, and these context signals are noticed first. For example: who the influencer is, how the product is shown, whether the tone in which the influencer describes the product is overly positive, etc.



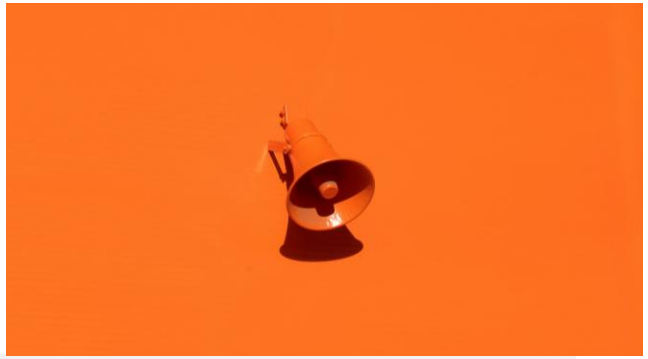
INDICATORS SUPPORT OR CLARIFY

Indicators go beyond the content to directly tell users whether something is advertising: for example, labels, tagging brands, brand links etc. These support or clarify the users' judgement of advertising content. **Their effectiveness depends on the clarity of the indicator, and context in which they're placed.**

Section 06

Role of labels: What is the impact of labels on identifying advertising?

Key Findings in this Chapter



There is a clear desire for influencer marketing labelling

Four in five of the UK online population feel that labels are key to identifying influencer marketing and labels are continually brought up in qualitative discussions as the way advertising could be made clearer. The inclusion of a label isn't enough however – the label needs to be worded and positioned in a way that clearly and quickly alerts users that the post is an ad, instilling trust in the influencer and informing users of the nature of the partnership.

Specific platform labels and 'Ad' offer the most clarity

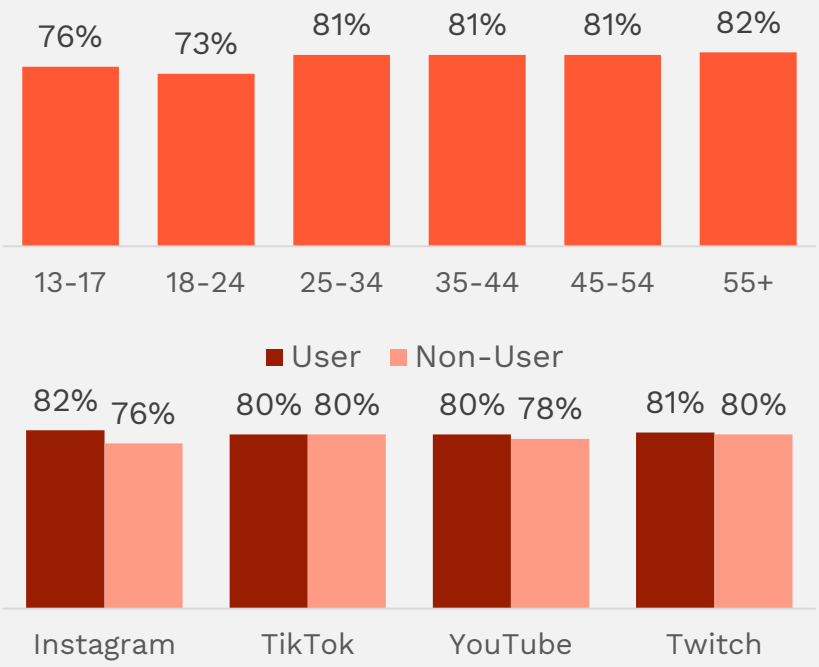
Across all research methods (qualitative interviews, the survey's in-situ Spot the Sell test, and the more direct label ranking), Commission Paid, Paid Partnership and 'Ad' variants are consistently seen as being the most effective at providing absolute conviction that a post is an ad. They provide a clear indication of a paid relationship between the brand and the influencer – unlike labels such as "thanks" and "gifted - and act as the most effective, consistent, confirmatory backstop when context features fail to confirm a post is an ad.

Users want labels upfront on influencer marketing posts

Label positioning is critical, with the UK online population favouring labels that require the least effort to find – either upfront or appearing within the content. The moment users have to start "hunting" for labels – either within the visible caption or by clicking "...more" – the UK online population feel less clarity is offered and can perceive it as a deliberate choice by the influencer to conceal the nature of the post.

There is demand, from across the UK audience, for labels to add more explicit clarity to influencer marketing

Clear labelling is essential to be able to identify influencer advertising[1]
Agreement among UK online population in each group



NET AGREE:
Clear labelling is essential to be able to identify influencer ads
80%

NET Disagree: 5%

Users' suggestions on how influencer ad posts could be clearer

"#Ad (indication)"

"A clear label or hashtag"

"Including a banner that says ad"

"Mentioning explicitly that they're advertising"

"An advertising symbol on the post"

"A clear label such as 'sponsored' or 'ad' at the beginning"

A sign in the corner telling you it's an ad"

"Including a banner that says ad"

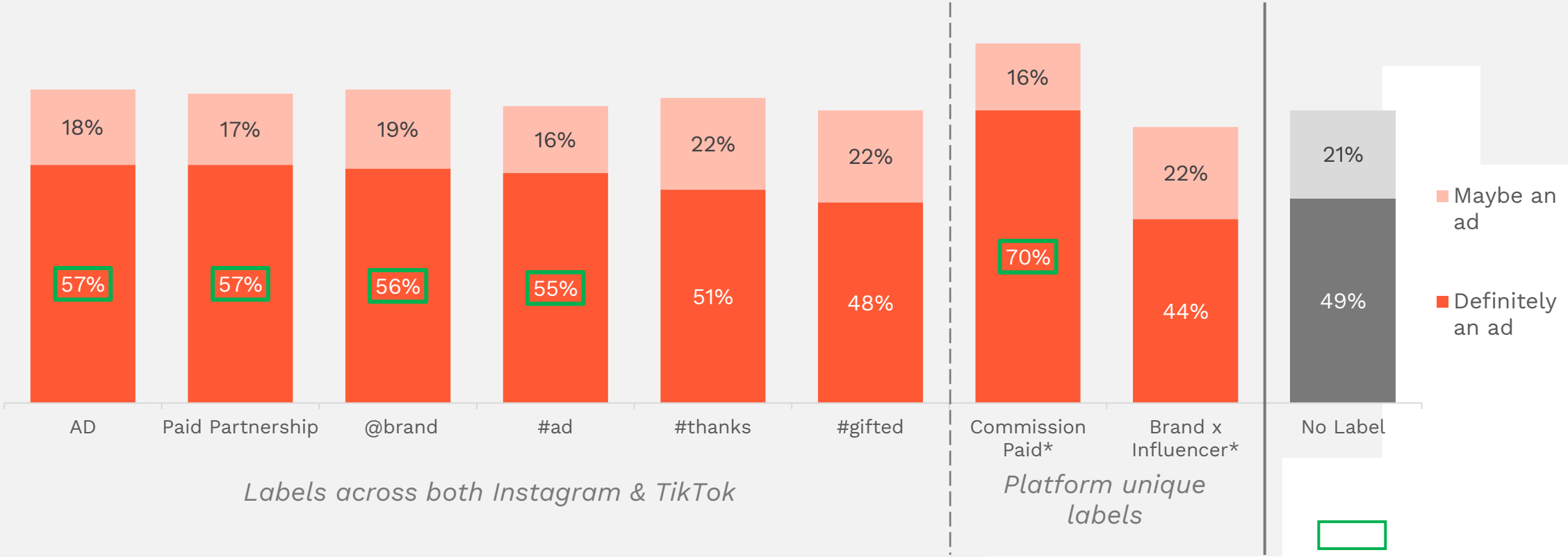
> *There **needed to be a reference to this being an ad or paid for trip**, as I don't feel this was made as clear as it could have been. There was only the one hashtag for Beaverbrook in the caption, and I think more could have been done, either in the video or in the captions, to make this more obvious.*
>
> Female, 35-44, Instagram User[2]

mtm

Notes: (1) "Strongly disagree," "slightly disagree", "neither agree or disagree" & "don't know" not included for presentation purposes
Source: MTM ASA (1) Quantitative research: D4 Thinking still about labels used to identify influencer advertising, please tell us to what extent you agree or disagree with the following statements; (2) Qualitative research: Online communities & follow up depths
Base: Online 13–64-year-old population (1900) 13-17 (300) 18-24 (179) 25-34 (439) 35-44 (397) 45-54 (258) 55-64 (327). Instagram User (1291) Instagram Non-User (609) TikTok user (1177) TikTok non-user (723) YouTube User (1599) YouTube Non-User (301) Twitch User (251) Twitch Non-User (1649)

Looking across influencers, some labels begin to stand out as being more effective – specific platform labels, 'Ad' variants and @brand

Spot the Sell: Definitely/Maybe an Ad[1] – By label shown[2] (aggregated across all eight[3] influencer ads tested)
UK online population (13-64yrs)



Significantly higher at the 95% level when compared to no label

Notes: (1) "Not an ad" not included for presentation purposes. (2) All caption labels were visible without having to click "…" more. #ad, #thanks, #gitfted and @brand were placed at a natural break in the caption, AD was shown upfront and platform labels where they sit on the platform. (3) *denotes label that only appears on EITHER TIkTok or Instagram – Commission Paid on TikTok, Brand x Influencer on Instagram.
Source: MTM ASA Quantitative research: Section B. For each post, please tell us your gut reaction of whether it is "Not an ad", "May be an ad" or "Definitely an ad".
Base: Online 13–64-year-old population who responded to each post, ~950 seeing each label condition (~90% response rate) bar Commission Paid + Brand x Influencer ~475 (~90% response rate)

More variation is seen when looking at the clearest labels by influencer – but 'Ad' variants, Commission Paid and Paid Partnership still come top

Spot the Sell: a simple ranking of labels by how much extra clarity they added to each influencer ad tested

Every influencer post is different in terms of how its contextual cues come across to users who engage with the content. Hence, we see varying results about which labels make a difference to the clarity that the post is an ad – because the labels are interacting with context.

	Labels with the **Highest** Selection of "Definitely Ad" for each influencer							
	Naomi Bouncy Blows (TikTok)	Liv Madeline (TikTok)	Proud - lock & Emma (TikTok)	Alexandra Dudley (Instagram)	Lucy & Little (TikTok)	Trinny Woodall (Instagram)	Matt Does Fitness (Instagram)	Kirthana (Instagram)
1	@brand	AD	C Paid	@brand	Paid P	@brand	#thanks	Paid P
2	#gifted	Paid P	#ad	Brand x infl	C Paid	AD	AD	Brand x infl
3	#thanks	C Paid	AD	#thanks	AD	#ad	@brand	AD

	Labels with the **Lowest** Selection of "Definitely Ad" for each influencer							
6	No label	No label	#thanks	Paid P	@brand	#thanks	Brand x infl	@brand
7	C Paid	#gifted	No label	#gifted	No label	No label	#gifted	#gifted
8	AD	#thanks	#gifted	No label	#thanks	#gifted	No label	#thanks

That said, on the whole, we see Advert and particular Platform-specific labels are usually the most effective at providing extra conviction that a post is an ad.
Particularly on TikTok, where it was felt videos needed extra context, 'Ad' variants, Commission Paid and Paid Partnership are a quick and clear way of confirming whether an influencer post is an ad or not. They very rarely appear in the weakest labels for driving clarity. The main example where they are ranked lower (Naomi) was somewhat anomalous – see next slide for analysis.

Other labels and no ad labels consistently cause posts to rank lower on ad clarity.
Labels that make it unclear as to whether an influencer financially benefited from posting about a brand (such as #thanks and #gifted) can throw the UK online population off the scent of whether a post is an ad - even more so than having no label at all.

Key*

- 'Ad' variant
- Other label
- Platform specific
- No ad label

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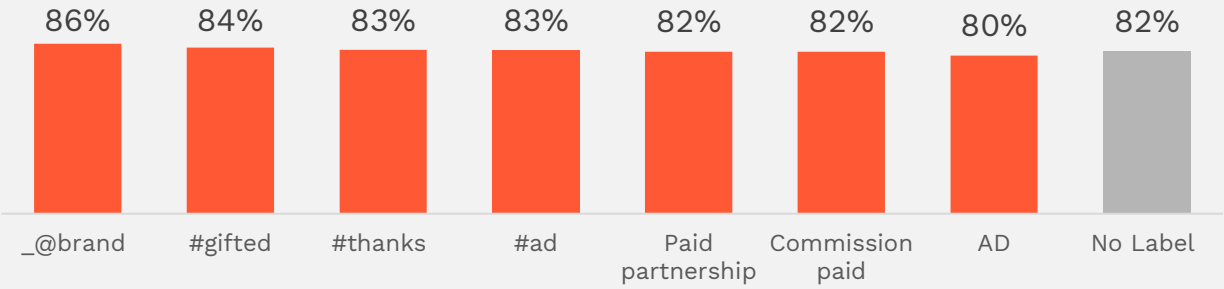
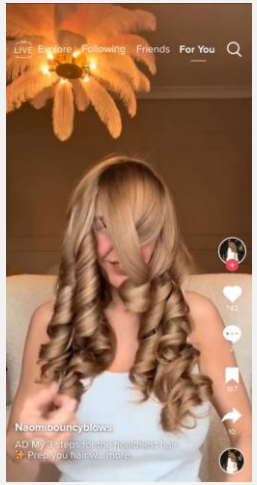
Notes: (1) Label Groupings Advert (AD, #ad) Other label (#thanks, #gifted) Platform specific (Commission Paid, Paid Partnership, Brand x Influencer), No ad label (@brand, no label)
Source: MTM ASA Quantitative research: Section B. For each post, please tell us your gut reaction of whether it is "Not an ad", "May be an ad" or "Definitely an ad".
Base: Online 13–64-year-old population who responded to each post, ~119 seeing each label condition for each post (~90% response rate)

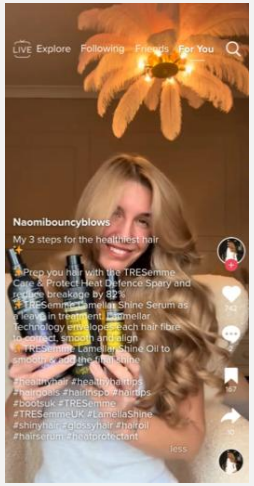
When the post contains as clear context signals as Naomi Bouncy Blows does, the specific label makes little difference

Naomi Bouncy Blows[1]: "Definitely an Ad" by label condition

% selecting when responding to Naomi Bouncy Blows post for each label condition







Naomi Bouncy Blows' ad for Boots (promoting a key brand they sell, TRESemmé) **incorporated many of the key context signals** identified within her content and used them so effectively that 80%+ of users knew definitively the post was an ad no matter the label condition, a significantly higher proportion than seen for any other influencer post tested and above the standard set by brand ads. Signals included:

- Frequently mentioning product/brand names in the voiceover
- A clear "salesy" tone[2] as she talks through in the voiceover and writes up in the caption the benefits of each product, that are all from the same brand
- Obvious product placement as she goes beyond just demonstrating how to use the product and waves the products in front the camera to draw attention to them

---

In such cases where the influencer post has utilised context features that so clearly indicate the post is an ad, **no label has a statistically significant additive effect on ad clarity**.

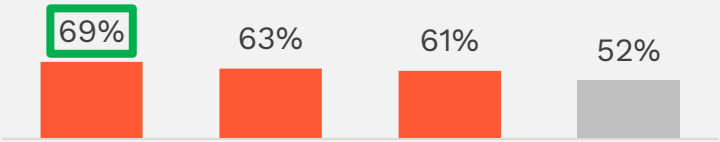
mtm

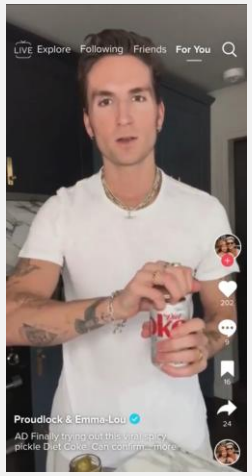
Notes: (1) More Detail on Naomi Bouncy Blows post in Appendix Slide 97 (2) "Salesy" was language that emerged directly from participants.
Source: MTM ASA Quantitative research: Section B. For each post, please tell us your gut reaction of whether it is "Not an ad", "May be an ad" or "Definitely an ad".
Base: Online 13–64-year-old population who responded to each post, ~119 seeing each label condition for each post (~90% response rate)

For TikTok posts that have more subtle context signals, ‘Ad’, Commission Paid and Paid Partnership consistently stand out as more effective

TikTok Posts[1] : “Definitely an Ad” by label condition – Top 3 labels[2] vs. No Label

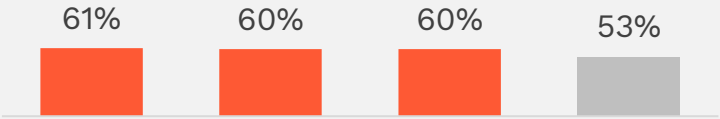
Proudlock & Emma Lou





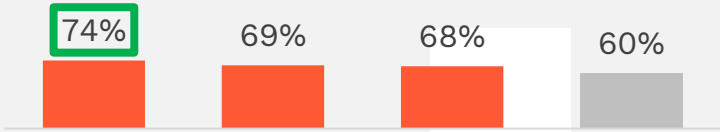
Although the Diet Coke product being advertised is constantly in view, the post’s primary focus is on the influencer following the viral “pickle Diet Coke” trend. In instances where the content mimics a genuine, trend-driven post, **labels that clearly signal the influencer’s received financial compensation** (Commission Paid & ‘Ad’ labels) are most effective at clarifying that the post is, in fact, advertising.

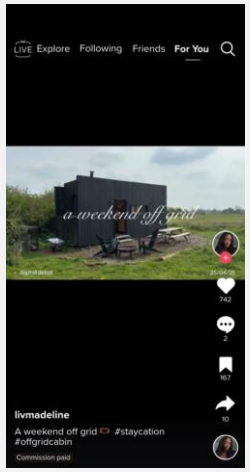
Lucy & Little



The performative nature of Lucy & Little’s post as she tries out the AEX vegetable chopper product and talks to its effectiveness suggests it may be an ad, but there is no obvious mention/visibility of the brand name despite the product being in central focus. ‘Ad’ and the Commission Paid or Paid Partnership platform labels can **indicate that a post is in fact an ad, even when brand visibility is low.**

Liv Madeline





Although the brand name is not shown/spoken in the post, the holiday cabin itself is so central – focusing purely on how the place facilitated her time “off grid” - and the style so highly produced, in a way that is typical of promotional travel content, that the context strongly indicates it is an ad. **Labels that quickly explain the nature of the relationship** – ‘Ad’ and Platform labels – help to confirm this.

mtm

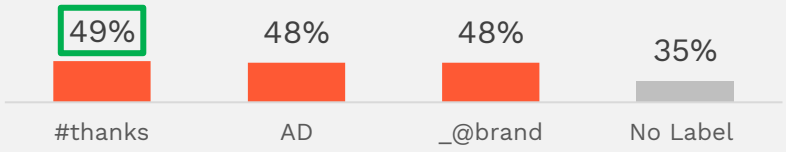
Notes: (1) More Detail on each influencer post in Appendix Slide 98-100 (2) Charts display the labels ranking as the top 3 (for each ad), among the set tested, for delivering high scores on “Definitely an Ad”.
Source: MTM ASA Quantitative research: Section B. For each post, please tell us your gut reaction of whether it is “Not an ad”, “May be an ad” or “Definitely an ad”.
Base: Online 13–64-year-old population who responded to each post, ~119 seeing each label condition for each post (~90% response rate)

Significantly higher than no label at 90% confidence level

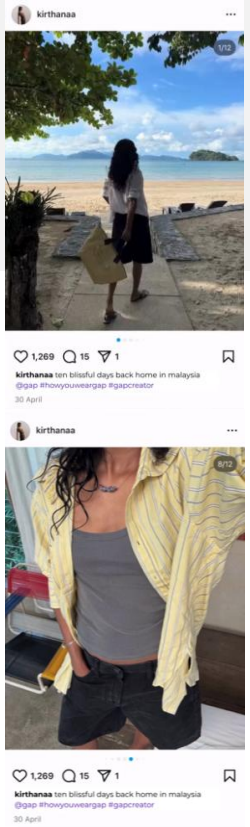
When the brand is not central to the post, viewers lean on vague context signals or spontaneously noticing ad labels

Brand Not Central Posts[1]: Definitely an Ad by label condition – Top 3 labels[2] vs. No Label

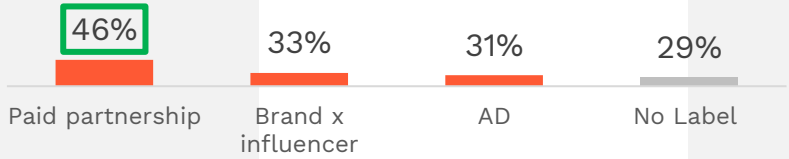
Mattdoesfitness



The post is not focused on the brand being advertised – Gymshark – but on how using specific lighting and filming techniques can cause a complete body transformation when taking gym photos. While the Gymshark logo and item can be seen to some degree throughout the post, it only appears on clothing that does not feel out of place to see the influencer wearing and therefore does not stand out against the content focused on a completely different topic. The only subtle advertising indications from the content is the fact it is **highly polished and feels more "cringe"[1] in tone, which can be jarring**, particularly to those who are familiar with the influencer. In this case, **more vague signifiers can work (e.g. #thanks/@brand) but otherwise there are few signals to look for a label**.



Kirthanaa



Although several Gap clothing items feature in some of the photos/videos in the post, the clothes either blend in very naturally with the other travel content featured or when the outfit is the main focus, the fact there is no visible Gap logo on any of the items causes the post to feel more like a genuine "outfit of the day" picture. This causes the post to have the lowest levels of ad clarity of all influencer advertising posts tested. Because there are **no obvious content cues, labels have to be spontaneously noticed** while the viewer consumes the post. The labels, therefore, that perform best are the ones **most likely to attract the attention of the viewer -** AD (upfront) or platform labels where "Sponsored" would usually appear for a brand ad.

mtm

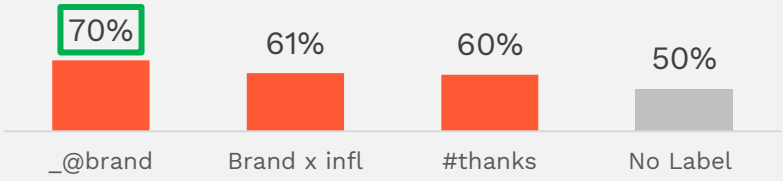
Notes: (1) More Detail on each influencer post in Appendix Slide 102 & 104 (2) Charts display the labels ranking as the top 3 (for each ad), among the set tested, for delivering high scores on "Definitely an Ad". (3) "Cringe" was language that emerged directly from participants.
Source: MTM ASA Quantitative research: Section B. For each post, please tell us your gut reaction of whether it is "Not an ad", "May be an ad" or "Definitely an ad".
Base: Online 13–64-year-old population who responded to each post, ~119 seeing each label condition for each post (~90% response rate)

Significantly higher than no label at 90% confidence level

A “salesy” tone can indicate advertising well enough that more vague disclosure signals like @brand work

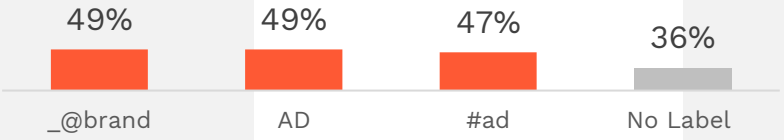
Posts with a “Salesy[1]” Tone[2]: Definitely an Ad by label condition – Top 3 labels[3] vs. No Label

Alexandradudley



Boursin is very much at the heart of the post, being the central ingredient in the crudité board being constructed by Alexandra Dudley. The brand name is said, the logo is clearly presented to the camera and the product itself is shown and talked about in an attractive light. This leads to the post have a **“salesy[1]” and informative[1] tone that acts as a core indicator alongside the product placement** that this could be an ad. **Vague disclosure signals directed towards the brand (such as @brand) or upfront brand x influencer labels make the post stand out from a genuine product recommendation** and quickly give the extra context needed to confirm the relationship between the brand and the influencer without needing to go into extra detail that the advertising was paid for.

Trinnywoodall



Trinny Woodall’s post talks through her “stand out and fab” sweatpants look, showing clothing items from a range of different brands and detailing her makeup look (without naming or showing a brand). While the post does feel “salesy[1]” in tone due to the brand & product mentions and the general perception of the influencer’s content style, the mention of a range of brands and no clear brand attributed to the make up being spoken about **sends mixed advertising signals which can misdirect some away from labelled signals.** The signals that then have the most impact are ones in the caption that **clearly alert viewers to an advertising relationship (such as ad labels) or that quickly confirm an initial judgement the post is an ad (like @brand)**.

Notes: (1) “Salsey” was language that emerged directly from participants. (2) More Detail on each influencer post in Appendix Slide 100 & 102 (3) Charts display the labels ranking as the top 3 (for each ad), among the set tested, for delivering high scores on “Definitely an Ad”.
Source: MTM ASA Quantitative research: Section B. For each post, please tell us your gut reaction of whether it is “Not an ad”, “May be an ad” or “Definitely an ad”.
Base: Online 13–64-year-old population who responded to each post, ~119 seeing each label condition for each post (~90% response rate)

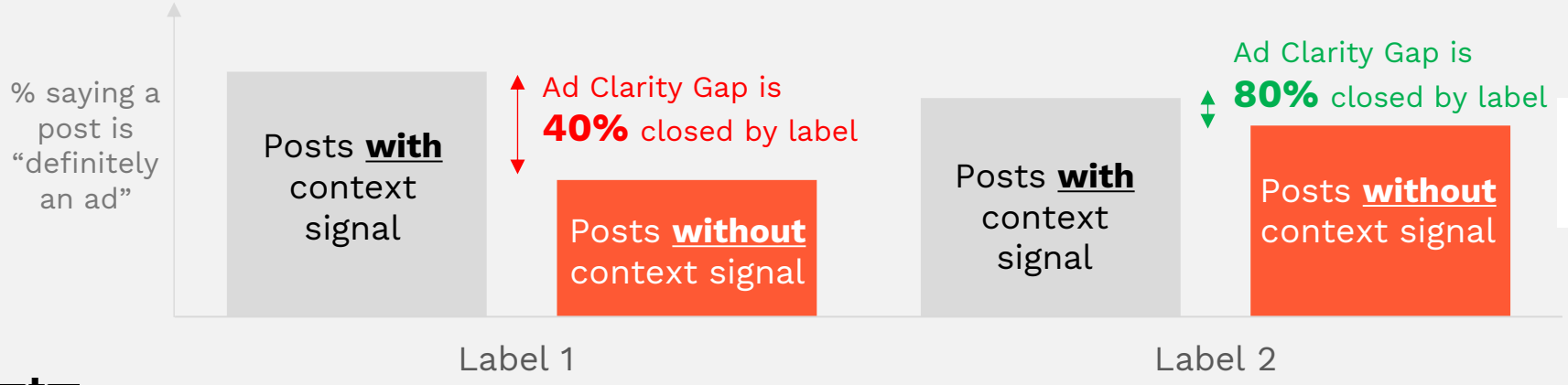
Significantly higher than no label at 90% confidence level

Analysis explainer: How labels can close the Ad Clarity Gap

As we've seen from the previous section, there are some **clear context signals** (mentioning the brand, tone of voice etc.) within the content of influencer posts, that can sometimes help users tell whether a post is an ad. We also know that **labels can help to increase recognition of ads** in the absence of such context signals - and **act as confirmatory backstop to help remove doubt** as to whether the post is an ad.

The following analysis looks at posts that contain a clear context signal (acting as a benchmark for the ability of a social media user to instinctively tell whether a post is an ad) in comparison to posts that do not contain the signal. When a context signal is not featured, labels need to act as that important confirmatory backstop. By comparing influencer posts that contain a context signal vs those that do not, for each ad label (to nullify the impact of those using the label as a backstop even when they have high context), we can begin to see **which labels can best help bridge the "ad clarity gap" for a low context post**.

To do this, we've shown ***to what extent* a label is able to bridge the clarity gap on a scale from 0% to 100%** - 100% means the gap has entirely been closed by the inclusion of a clear label, 0% would mean that label (and the post) are entirely ineffective at signalling the influencer is marketing.



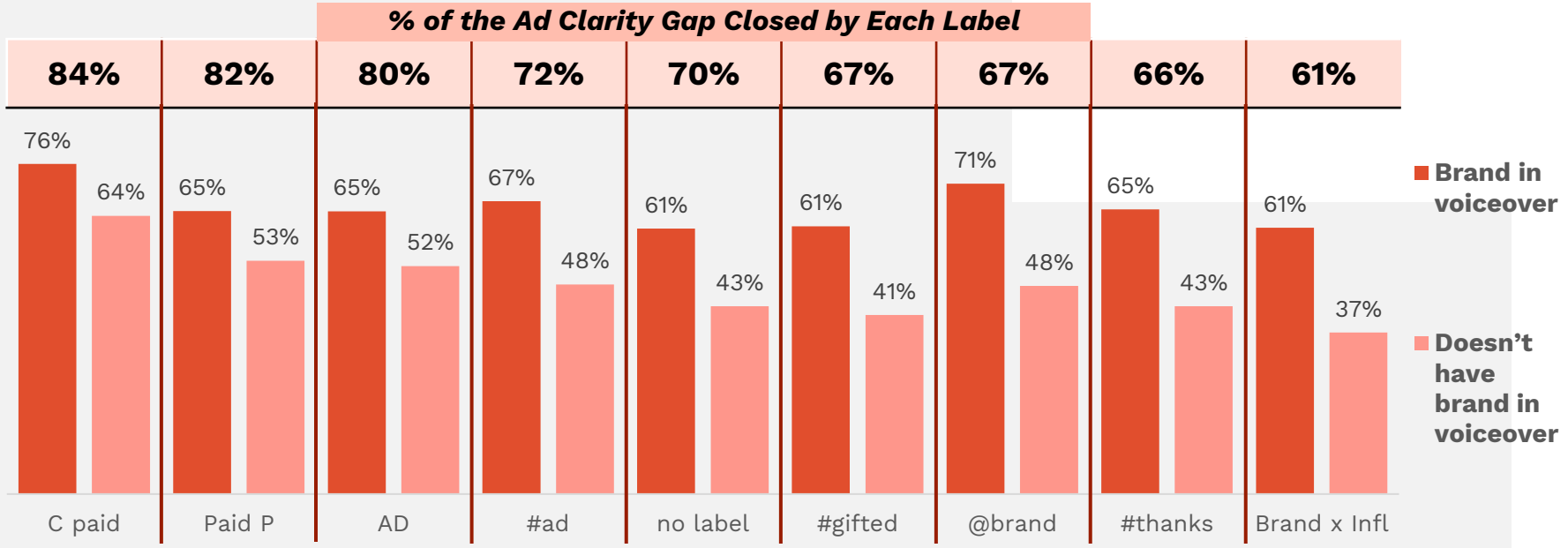
CONCLUSION:
Label 2 is more effective than Label 1 at closing the ad clarity gap.

mtm

To show the Ad Clarity Gap concept in action, we've compared posts that have the brand spoken out loud, vs not

Spot the Sell: The difference that labels can make when brand is not mentioned in voiceover

Bar chart shows % selecting "Definitely An Ad" for posts that include the brand name in the voiceover[1] vs. those that don't



"Commission Paid" and Paid Partnership are the **most successful** labels at closing the ad clarity gap between posts that say the brand name vs. posts that do not.

Brand x Influencer is the **least successful** label at closing the ad clarity gap between posts that say the brand name vs. posts that do not.

Explainer:

- *Three ads mentioned the brand in the voiceover, five did not.*
- *'Brand x Infl' - 37% of those who saw ads without a voiceover mention of the brand but with the Brand x Infl label were able to identify the ads. This rose to 61% for the 'Brand x Infl' ads with a voiceover mention.*
- *Commission Paid - 64% of those seeing the (same) ads without a voiceover mention but with the inclusion of a 'Commission Paid' label were able to identify the ads. This rose to 76% for the 'Commission Paid' ads with a voiceover mention.*
- *This demonstrates both the impact of mentioning the brand in the voiceover and, importantly, the impact of the different labels on recognition of the same ads. Commission paid is more effective in helping identify ads – whether or not they feature a voiceover.*

CONCLUSION:

The Commission Paid or Paid Partnership platform labels, or **variants of the 'Ad' label,** can offer a clear signal to help identify an ad, even when brands aren't obviously mentioned out loud. Conversely, indicators that speak to the brand itself: like a "thanks" label, or tagging the brand, can get lost without the verbal cue.

mtm

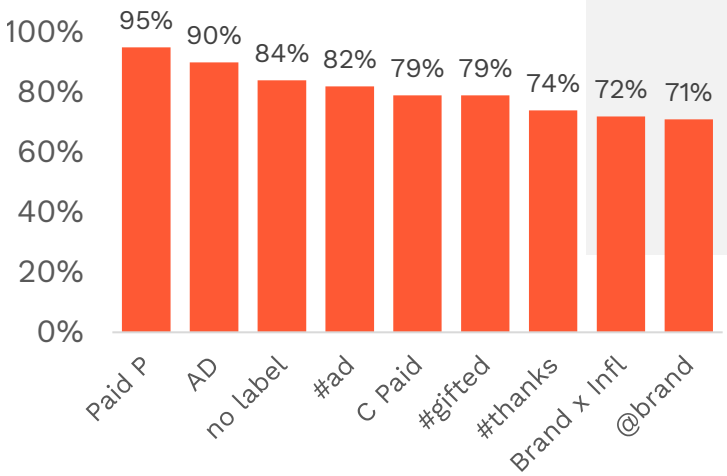
Notes: (1) Three posts mentioned the brand in the voiceover (NaomiBouncyBlows, Proudlock & Emma Lou and AlexandraDudley) – the remaining five did not mention the brand in the voiceover or did not have any voiceover

Source: MTM ASA Quantitative research: Section B. For each post, please tell us your gut reaction of whether it is "Not an ad", "May be an ad" or "Definitely an ad".

Base: Online 13–64-year-old population who responded to each post, ~950 seeing each influencer post (~90% response rate).

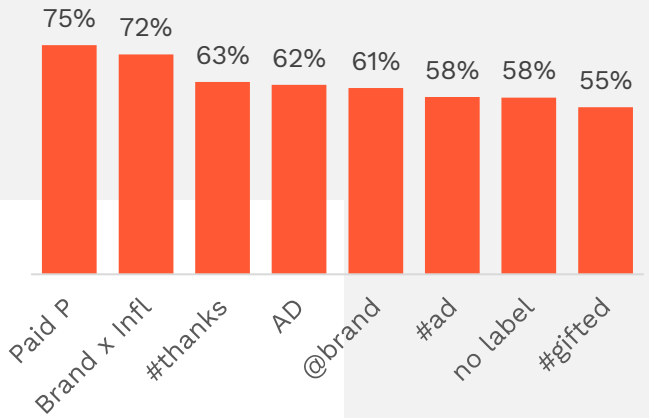
‘Ad’ and Paid Partnership consistently stand out as making up the ad clarity gap across other contextual factors too

Tone of Voice: “Salesy” vs. Not[1, 2]
% of ad clarity gap closed by each label



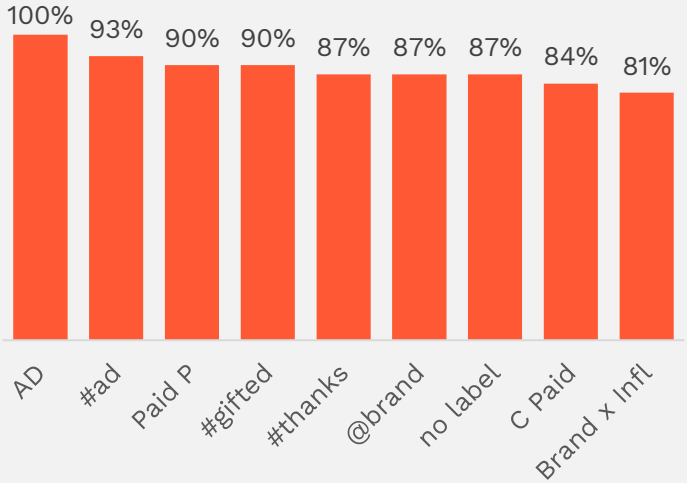
Paid partnership and AD best close the gap when a post **doesn’t have the cue of a “salesy” tone of voice**. “Salesy” tone isn’t always enough on its own, but a brand signal can help identify an ad. Conversely, with no tone, brand signals do not suffice.

Brand Featured Centrally vs Not
% of ad clarity gap closed by each label



When the brand is not interacted with in the content, most labels struggle to close the clarity gap. Those that do best are likely **spotted** due to being in more standout places – **mirroring Brand Ads (platform labels)** or at the **start of the caption (AD).**

Well Known Brand vs Not
% of ad clarity gap closed by each label



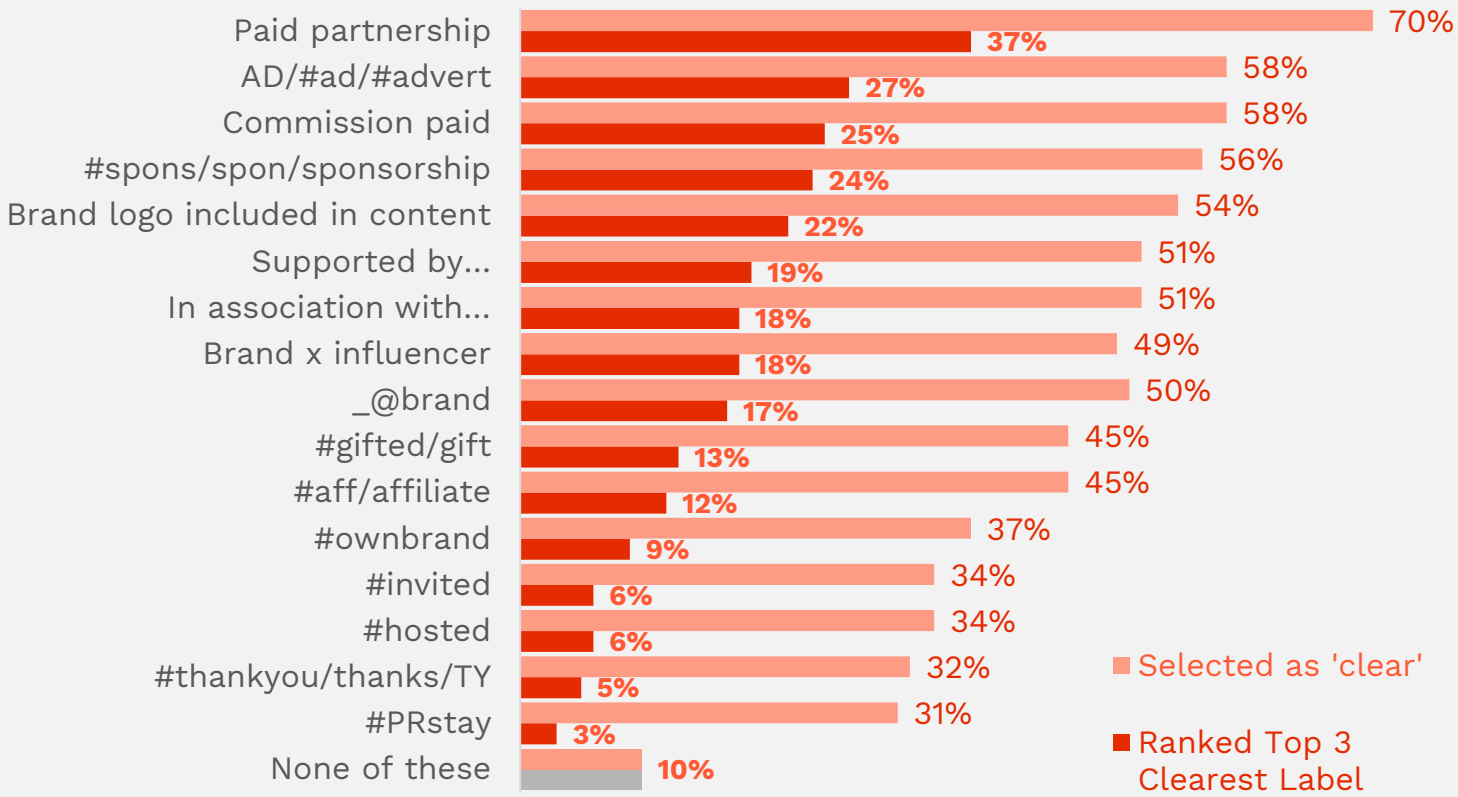
Influencers don’t have complete control over how well their audience know brands but can make a reasonable guess. When a brand is not likely to be well known by the audience, **the best way of delivering clarity** is to clearly state this is an **Ad/Partnership/Gift**.

mtm

Notes: (1) Three posts could be described as ‘salesy’ (Naomi Bouncy Blows, Trinny Woodall, Alexandra Dudley), five were not; six posts featured the brand centrally in the content (Naomi Bouncy Blows Proudlock & Emma Lou, Lucy & Little, Liv Madeline, Trinny Woodall, Alexandra Dudley) vs. 2 not; four posts featured brands that were relatively more well known (Proudlock & Emma Lou, Naomi Bouncy Blows, Alexandra Dudley and Kirthanaa), four were not (2) Notes: “Salesy” was language that emerged directly from participants.
Source: MTM ASA Quantitative research: Section B. For each post, please tell us your gut reaction of whether it is “Not an ad”, “May be an ad” or “Definitely an ad”.
Base: Online 13–64-year-old population who responded to each post, ~950 seeing each influencer post (~90% response rate)

‘Paid Partnership’ and variations of ‘Ad’ also rank highest when directly asked what labels are found to be the clearest

Label Clarity – Selection/Ranking of ad labels that clearly let you know a post contains advertising
UK online population (13-64-years-old)



Paid partnership is considered the gold standard label by the largest proportion of the audience

The mid-table labels all speak to there being a direct relationship with a brand, either by clearly signalling there’s a partnership (ad, commission paid, sponsorship), or by actively calling out the brand name

The least acceptable labels don’t directly explain whether financial compensation was received – they only talk to receiving some kind of benefit from the brand which may not always be seen as actively and clearly signalling advertising

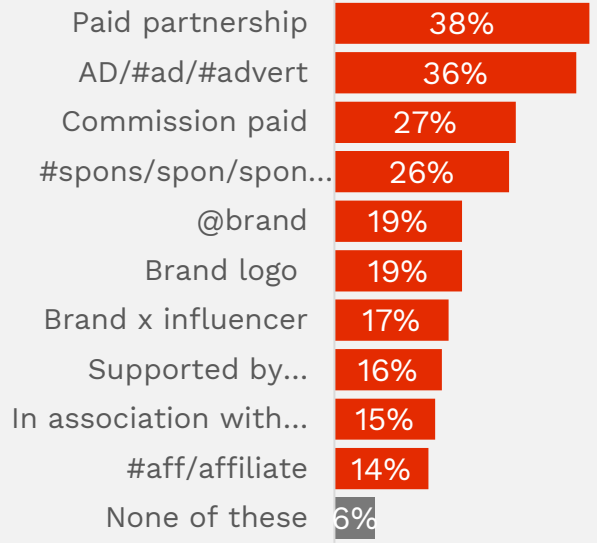
1 in 10 of the UK audience feel none of the current conventional ad labels are acceptably clear

mtm

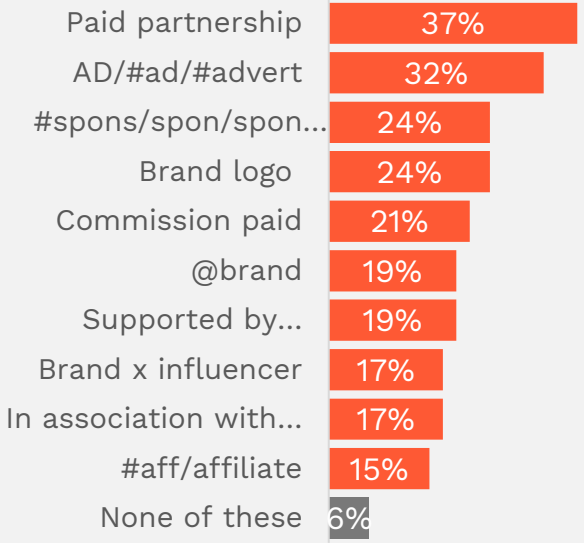
Source: MTM ASA Quantitative research: D2 Thinking across social media platforms, please select all the labels that you feel clearly let you know a post contains advertising or is an advert. Please select in order of ranking, with your first pick being the most clear (*Respondents chose as many answers as they liked from prompted list of 17 labels)*
Base: Online 13–64-year-old population (1900)

‘Paid Partnership’ is ranked the clearest label across age groups but 45-64s don’t feel ‘Ad’ is as clear as 13-44s do

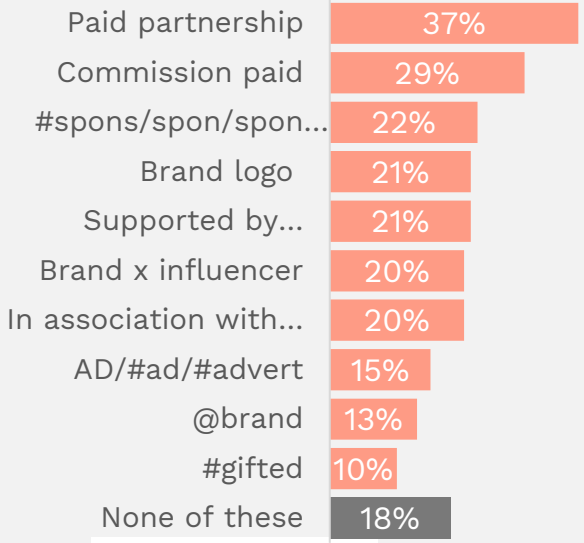
Top 10 for label clarity – among 13-24
UK online 13-24-year-olds who ranked label in Top 3



Top 10 for label clarity - among 25-44
UK online 25-44-year-olds who ranked label in Top 3



Top 10 for label clarity – 45-64
UK online 45-64-year-olds who ranked label in Top 3



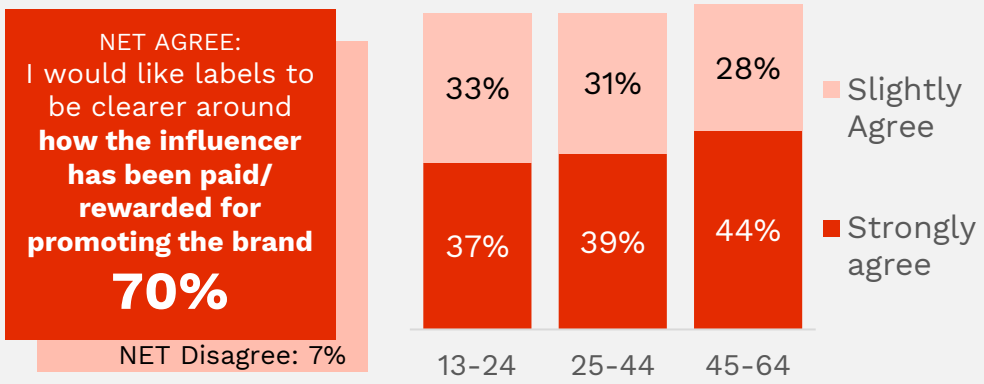
Paid Partnership consistently ranks highest across all three age groups in terms of delivering clarity, with just under 2 in 5 in each age group feeling it sits within the top 3 for delivering clarity. While AD/#ad/#advert comes 2nd for both 13-24s and 25-44s, it achieved a much lower ranking for 45-64s. Our qualitative research suggests that this finding speaks to their desire to know with absolute certainty whether they are watching pure, influencer-generated, content or a post where an influencer has been financially rewarded to make the content – and that a simple “ad” label might not be specific enough to help them appreciate the exact nature of the relationship.

mtm

Source: MTM ASA Quantitative research: D2 Thinking across social media platforms, please select all the labels that you feel clearly let you know a post contains advertising or is an advert. Please select in order of ranking, with your first pick being the most clear (*Respondents chose as many answers as they liked from prompted list of 17 labels)*
Base: Online 13–64-year-old population (1900)

There is a desire for labels to clearly say how an influencer has been paid/rewarded, particularly among 44-64s

Agree: Labels needing to offer more clarity on reward[1]
Agreement among UK online population, and by age group



Over two-thirds of the UK online population say they would like labels to tell them what the influencer received from the brand for making the post, with less than 1 in 10 actively disagreeing with the statement. This demand is consistent across age groups, though those aged 45+ are strongest in their conviction.

As highlighted, the nature of social media – especially platforms where consumption is mostly from a feed of algorithmically-served posts that may come from unfamiliar sources - makes it challenging for users to distinguish some of the advertising from genuine user-generated or influencer-generated (but not paid-for) content.

Labels such as 'Paid Partnership' go that bit further than 'Ad' because they leave no doubt about the post's commercial nature. This may explain why 'Ad' ranks lower among older audiences in terms of clarity as a label – this group wants labels to be more explicit and remove uncertainty[2]

> *Seeing the little 'Paid Partnership' thing is great as it **explains** that **the brand is paying them**. Not necessarily the 'Commission Paid' one because sometimes that feels a little bit more ambiguous.*
>
> Male, 25-34, TikTok & Instagram User

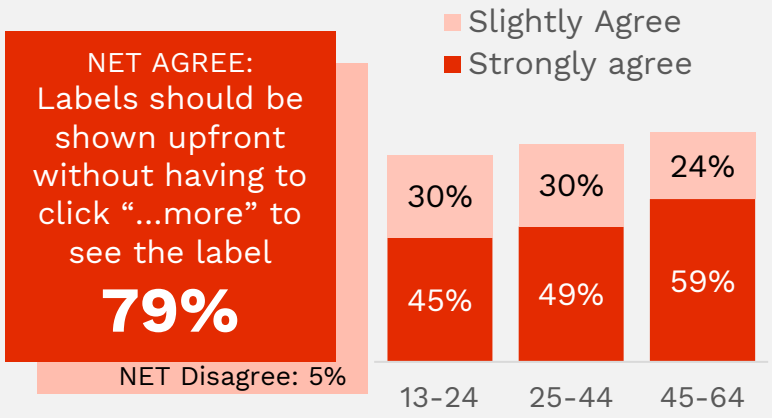
> *I don't think it's obvious that it's an ad. **Obviously she's had the meal for free**, but she's only put 'Gifted' in small letters. I think the 'Paid Partnership' label is much clearer for me.*
>
> Female, 45-54, TikTok & Instagram User

mtm

Notes: (1) "Strongly disagree," "slightly disagree", "neither agree or disagree" & "don't know" not included for presentation purposes
Source: MTM ASA (1) Quantitative research: D1 Thinking about influencer advertising generally, please tell us to what extent you agree or disagree with the following statements; (2) Qualitative research: Online communities & follow up depths.
Base: Online 13–64-year-old population (1900) 13-24 (479) 25-44 (836) 45-64 (585)

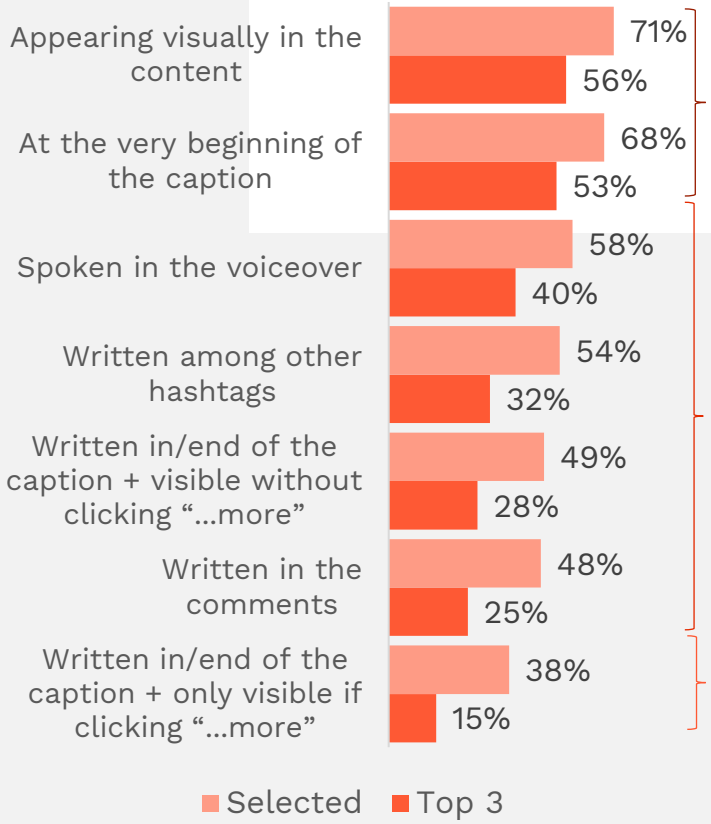
Label positioning is important to people – they don't want to have to go to extra effort to find the label

Agree: Labels should be shown upfront
Agreement among UK online population, and by age group



The vast majority think that ad labels should be as visible as possible in a post, not hidden away behind the "..." more button. This opinion is seen across age groups, but the highest level of strong agreement is seen among 45-64-year-olds.

Clearest place to signal an ad – Selection/Ranking of placement in Top 3
UK online population (13-64-year-olds)



The positioning of ad signals where they require the least effort to find is deemed clearest. This is thought to be either while visually taking in the content or at the beginning of the caption

Having to put extra effort into finding the ad signals – turn sound on, scanning through the caption/hashtags/comments - is deemed less clear and acceptable

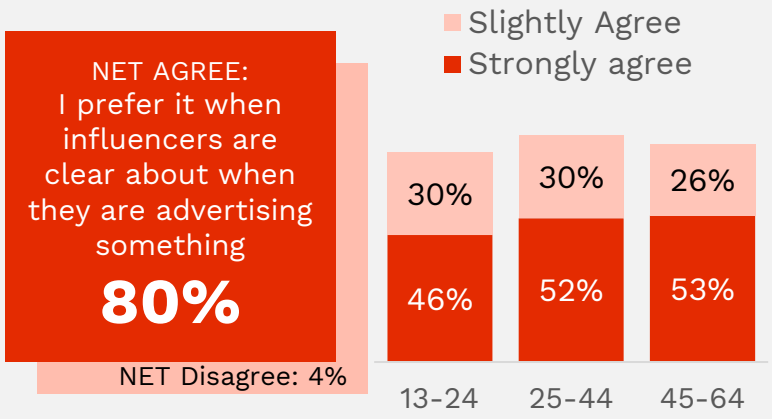
Placing the label somewhere you have to press an extra button to find it, and it wouldn't been seen otherwise, is deemed unclear label placement by **62%** of the UK audience.

mtm

Notes: (1) "Strongly disagree," "slightly disagree", "neither agree or disagree" & "don't know" not included for presentation purposes
Source: MTM ASA Quantitative research: D1 Thinking about influencer advertising generally, please tell us to what extent you agree or disagree with the following statements. D3 We would like you to consider where a label(s) should appear to make it clear influencer content includes advertising. Please select all the places where you think it would be effective to add a label to signal advertising. Please select in order of ranking, with your first pick being the most effective placement.
Base: Online 13–64-year-old population (1900) 13-24 (479) 25-44 (836) 45-64 (585)

People prefer clearly-positioned ad labels: to minimise confusion and the feeling of being misled by influencers

Perceptions of influencer advertising[1]
Agreement among UK online population, and by age group



Four in five actively prefer influencers to be clear they are advertising from the outset, removing the feeling that the influencer is trying to hide something to protect their own image/promote the brand more effectively[2]. This opinion is held strongly across age groups.

The positioning of ad labels in captions **is often perceived as a deliberate choice by the creator**, either to clearly disclose the ad or subtly conceal it. Positioning labels so that they are visually salient will allow users to understand what they are watching, take the content at face value, and avoid feeling misled by influencers. That being said, when posts are 'clearly' ads (due to other labels or contextual cues), the positioning of the ad label feels less essential[2].

> *The actual use of the word "ad" wasn't used until the end of a rather long caption to go along with the post, so **if you don't read through all this you won't notice it**. I think not many people will tend to read all the caption. They are more likely to skim through it at best or only read the first few lines.*
>
> Female, 35-44, Instagram User

> *It's always gonna be a better idea to try and put [the label] at the front or as close to the top as possible for people to notice. But I do also think that, with the kind of style of this ad, **it maybe doesn't feel as shady as some of the other ones, because it feels like it's obvious that it is an ad**: he's got the 'Paid Partnership' thing, and Adobe is tagged near the top of the caption, as well as the style of the video.*
>
> Male, 25-34, TikTok & Instagram User

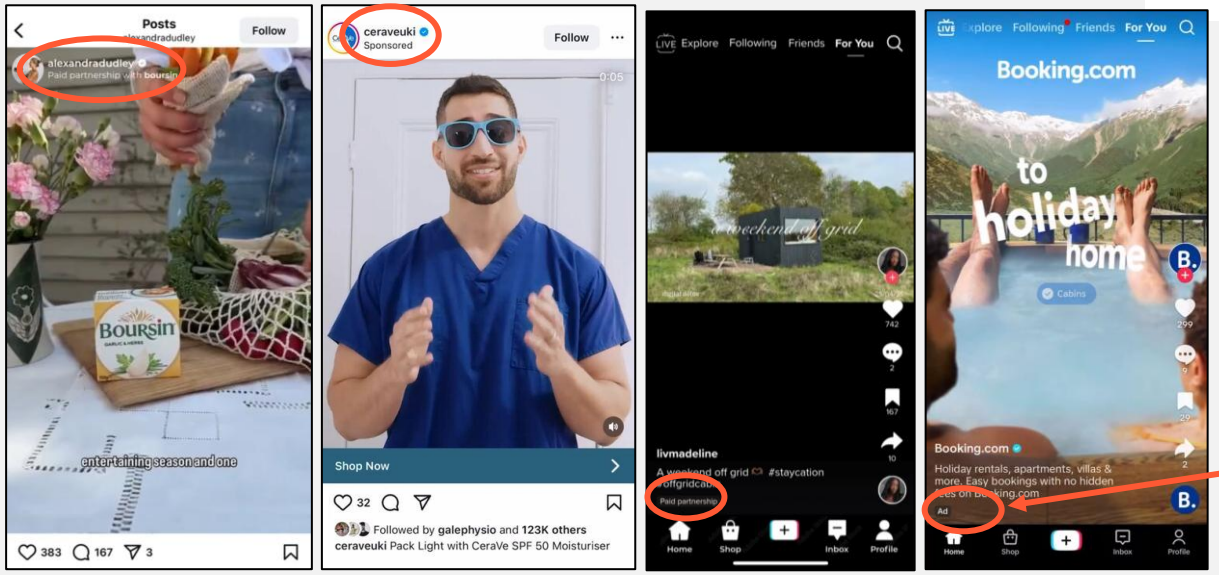
mtm

Notes: (1) "Strongly disagree," "slightly disagree", "neither agree or disagree" & "don't know" not included for presentation purposes
Source: MTM ASA (1) Quantitative research: D1 Thinking about influencer advertising generally, please tell us to what extent you agree or disagree with the following statements. (2) Qualitative research: Online communities & follow up depths.
Base: Online 13–64-year-old population (1900) 13-24 (479) 25-44 (836) 45-64 (585)

Platform labels always provide the desired placement consistency, and appear in the same spot as for brand ads

Across the study, we saw the platform labels, Commission Paid and Paid Partnership (along with variations of the 'Ad' label), consistently seen as being the most effective at providing absolute conviction that a post is an ad. These platform labels always appear in **the same place** whenever they are applied to an Instagram or TikTok post, unlike other labels which influencers may use but that may not be prominently positioned in the post. Their style (e.g. colour coding, font, size) also offers a **consistency** which people have **become attuned to spotting**. On the other hand, labels positioned within the content of the ad can be easily missed due to size, placement, or prominence. Given that this is also where brand advertising labels (e.g. 'sponsored' or 'Ad') are placed, these platform labels provide the desired consistency in experience across the social media advertising landscape.

Instagram influencer | Instagram ad | TikTok influencer | TikTok ad



> *I think ad is obvious, but some people might need to see the 'ad' **bigger and bolder** on the screen for **transparency**.*
>
> Female, 55-64, TikTok & Instagram User

> *I **always notice** that it says 'ad' in bottom corner.*
>
> Female, 55-64, TikTok & Instagram User

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Source: MTM ASA Qualitative research: Online communities & follow up depths

While many qualitative participants were unaware of the ASA, they supported having clear rules around influencer ads

In the qualitative depth interviews, the end of the discussion explored **understanding and reactions to the ASA in the context of regulating influencer marketing**.

Most people were unfamiliar with the ASA by name but supported its role once they understood it.

They felt that clear ad labels are important so consumers **can immediately recognise when content is promotional** rather than personal opinion (particularly for reviews or more subtle product placement). Participants believed this transparency helps protect people, **especially younger users**, from being misled or unduly influenced. Ultimately, it was felt that clear and prominent ad disclosures build trust and allow users to make informed decisions about what they see on social media.

> *I've never heard of the ASA, but I'm assuming in advertising there has to be some sort of regulator. I agree with it, because **there are certain things that you probably couldn't advertise**, especially to young audiences.*
>
> Male, 35-44, TikTok & Instagram User

> *I've not heard specifically of the organisation, but I did know that there are laws in place. I guess **I didn't really know to what extent it's enforced** or how strict it is. For the longest time, people were saying, 'I'm being paid to talk about this thing but it's really cool', and I'm really okay with that. But I feel like we're seeing more people doing **really subtle product placement** and trying to sneak it in there, **subliminal messaging** almost, and I really don't like that.*
>
> Male, 25-34, TikTok & Instagram User

Source: MTM ASA Qualitative research: Online communities & follow up depths

Section 07

Conclusions

Conclusions: Labels play a valuable role for all user groups, confirming the context signals that help identify influencer ads

There is demand from across the UK online population **for clearer signalling of influencer posts -** with social media users wanting to quickly tell whether a post is commercially driven to inform how they respond to it.

The average influencer marketing post is **currently falling short of the standard set by brand ads,** in terms of the UK online population being able to definitively tell that these posts are ads.

Clear labelling provides a crucial confirmatory backstop when the signals which are noticed first – context features from the content itself - fail to confirm outright when a post is an ad.

Particular platform labels and variants of 'Ad' are the most effective at clearly signalling/ confirming to the UK online population that an influencer post is an ad, with Paid Partnership being the gold standard as it also confirms the nature of the relationship.

The UK online population want labels to be placed in a **consistent, easy to spot location** – they don't want to have to go to any extra effort to find labels. Best practice: they should appear upfront before the caption.

Section 08.01

Appendix 1: Further detail on methodology

Qualitative methodology: Approach rationale

The qualitative approach allows us to tap into real-world, unprompted experiences of engaging with social media content, while also gauging the reactions and levels of understanding of different labels vs no labels among a range of users, using stimulus provided by ASA.

1. Online community – Natural ad exploration

To capture behaviour in a real-world setting and get a sense of what respondents view as an ad, participants were asked to collate examples of influencer and brand ads they came across naturally on their feed. By asking respondents to screen-record the feed before and after ad discovery, we could understand the impact of the whole feed context on ad clarity.

2. Online community – Prompted ad exploration

To get insights into consumer awareness, understanding and interpretation of different ad labels on different platforms of interest, we put a wide variety of influencer marketing stimulus in front of respondents. Responses to the stimulus were collected in a range of different ways to really understand what makes an influencer ad clearer / more obvious.

3. Follow up depths

By working with the ASA to pick the eight most eloquent community participants who offered a representative view of the sample, we could explore in more depth the nuances of different ad labels, tackle responses to influencer marketing and build on our picture of how this advertising fits into the lived social media experience on different platforms.

4. Findings to inform the quantitative stage

Initial topline results from the qualitative stage were used to focus the scope of both the survey and the stimulus tested to answer the key research questions. It identified critical themes to quantify, lines of analysis to consider by asking the right questions and selecting a range of stimulus that represents the influencer marketing landscape.

Qualitative methodology: online community

Research Design

- N=30 (7 days, ~20 mins/day)

Fieldwork Timing

- 21st-28th May

Sample Profile

10 x 13–17-year-olds: Min 5-6 to use both TikTok and Instagram, approx 2-3 to only use one of TikTok/ Instagram (include min 2 users of YouTube and/ or Twitch)
10 x 18-36-year-olds: Min 4-5 to use both TikTok and Instagram, approx 2-3 to only use one of TikTok/ Instagram (include min 2 users of YouTube)
10 x 37-64-year-olds: Min 2-3 to use both TikTok and Instagram, approx 2-3 to only use one of TikTok/ Instagram (include min 2 users of YouTube)

Overall Criteria

- All to enjoy browsing/ consuming content on social media amongst other activities
- Majority per age bracket to be using social media at least once a day
- All must be familiar with influencers/ influencer content on social media
- All must not be rejecters of influencer/ social media marketing/advertising
- Mix of demographics to reflect national sample

Community Task Overview

Day 1: Introductions to social media and ad engagement

- Examples of questions include: 'how confident do you feel using [Instagram/TikTok]?', Do you think you're able to tell between posts that are ads / not ads?'
- Each participant was then asked to capture 3-4 ads they came across organically on TikTok and/or Instagram, answering for each:
- 'How did you know this was an ad?'
- 'How easy was this to identify as an ad?'
- 'What made it harder or easier to identify as an ad?'

Day 2: Perceptions of influencers and introduction to influencer marketing

- Examples of questions include: 'tell us what makes someone an "influencer" for you?', 'What type(s) of influencer / creators do you prefer to follow and why?', 'When an influencer you are familiar with posts an ad, how do you feel about the ad? How much do you trust it? Does it impact your opinions of the product being advertised?'.
- Included same task as Day 1 to upload 3-4 ads, but focusing only on ads posted by influencers/creators/celebrities.

Day 3: Perceptions of influencer advertising

- Examples of questions include: "how would you describe your current understanding of influencer advertising?', 'how confident you are of your ability to know when you're being advertised to', 'Can you tell us about some of the different ways that influencers / creators / celebrities will work with or promote certain brands and products on social media?'.
- Included same task as Day 1 to upload 3-4 ads, but focusing only on ads posted by influencers/creators/celebrities.

Day 4-7: Testing specific ads (See Slides 107, 114, 121, 128 for stim tested)

Respondents were shown 20 ads over 4 days, and asked to answer the following questions for each ad:

On a scale of 1-10, how obvious is it that this is an ad? (1 being not obvious at all to 10 being immediately recognisable)

- 'What in particular made it easier to tell that it was an advert?'
- 'What in particular made it harder to tell that it was an advert?'
- 'What (if anything) could have made this even more obvious that it was an advert?'

Qualitative methodology: Zoom depths

Research Design

- N=8 (60 mins each)

Fieldwork Timing

- 30th May, 2nd June, 4th June

Sample Profile

8 x most engaged online community respondents:

2 x 13–17-year-olds: Both to use TikTok and Instagram (include min 1 user of Twitch/YouTube)
4 x 18-36-year-olds: 2 to use both TikTok and Instagram, 2 to only use one of TikTok/ Instagram (include min 2 users of YouTube/Twitch)
2 x 37-64-year-olds: Both to use both TikTok and Instagram, (include min 1 user of Twitch/YouTube)

Overall Criteria

- All to enjoy browsing/ consuming content on social media amongst other activities
- Majority per age bracket to be using social media at least once a day
- All must be familiar with influencers/ influencer content on social media
- All must not be rejecters of influencer/ social media marketing/advertising
- Mix of demographics to reflect national sample

Discussion Guide

- **Introduction to the project**
  - Welcome and project background
  - How social media fits into daily routine
  - Attitudes towards advertising and confidence in spotting social media ads
- **Influencer marketing context**
  - Relationship with influencers
  - Feelings towards influencers promoting brands/products
  - Confidence in spotting social media ads from influencers
  - Relationship with influencer marketing on YouTube and/or Twitch
- **In-depth exploration of influencer ads**
  - Reflections on online community e.g. stand-out signs of ads
  - Gauging initial awareness of different ad cues and their usefulness through stimulus
    - Theme 1: Testing positioning of #ad or variant
    - Theme 2: Testing platform / post labelling
    - Theme 3: Testing no label / subtle indicators
    - Theme 4: Testing other labels
  - Creating the clearest influencer ad
- **Wrap-up and road to clarity**
  - Understanding what makes a good influencer ad
  - How to increase confidence
  - Role of ASA

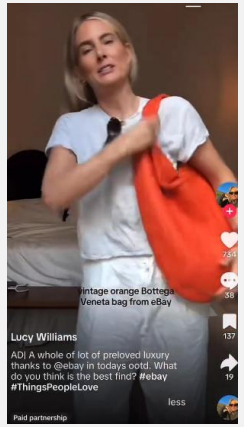
Qualitative methodology: stimulus for depths

Theme 1: Positioning of #ad (or variant)

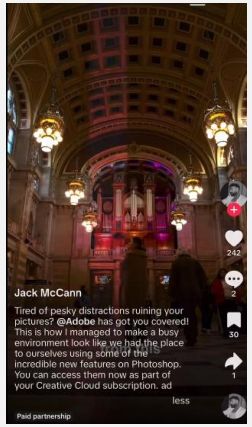
Instagram: Joe Sugg / Strava
Testing 'ad gifted', caption, voiceover references

Instagram (story): Miss Meldrum / Teapigs
Testing use of Ad and visibility (muted text colour)

Theme 2: Platform / post labelling

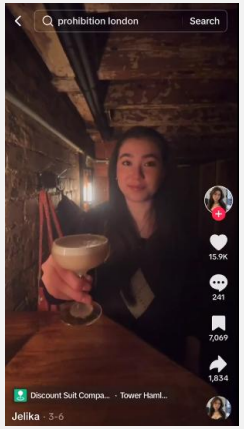


TikTok: Lucy Williams / eBay
Testing multiple labels – AD at start, Paid Partnership platform label, brand hashtags, 'thanks to @ebay'



TikTok: Jack McCann / Adobe
Testing style of ad

Theme 3: No label

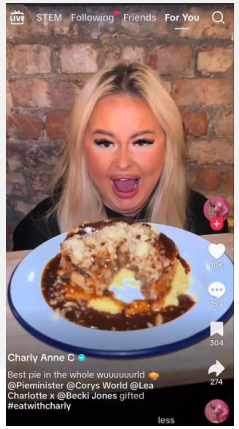


TikTok: Jelika / Discount Suit Company
Testing no label or subtle indicators e.g. voiceover, location tag

Theme 4: Other labels

Instagram (story highlights): Jess Sheppard / various brands
Testing affiliate links

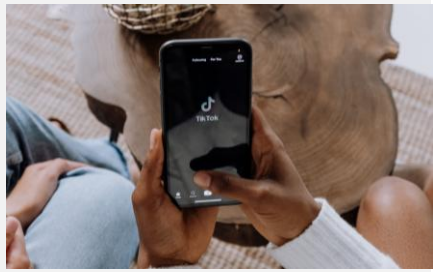
TikTok: Style Me Sunday / Sitting Suits
Testing 'affiliate link' top left corner and promotion of own book/brand



TikTok: Charly Ann Collard / Pieminster
Testing 'gifted' at end of caption

Quantitative methodology: Approach rationale

The quantitative survey was designed to quantify and uncover the extent to which different labels can aid the clear recognition of influencer ads. The approach was designed to make sure findings were fully contextualised and information about labels were gathered from all different angles - in-situ, system 1 and system 2 reactions.



1. Social media habits

Understanding how the UK's 13-64-year-old population use and interact with social media to contextualise later findings on influencer marketing and to segment results by different social media behaviours.

2. "Spot the Sell" in-situ social media task

Mimicking the real-world experience of how influencer marketing would be seen in a TikTok/Instagram newsfeed to understand whether users could instinctively spot they were being sold to. Asking whether every post was "Definitely", "Maybe" or "Not" an ad gave benchmarks to compare influencer ad clarity against.

3. Influencer marketing in isolation.

Directly calling out the influencer marketing examples seen in the in-situ test to gather System 1 (instantaneous) reactions to the post, scaled responses to give clear comparison points for advertising clarity and stand out, plus gather further information that may help people tell something is an ad (e.g. relationship with brand/influencer)

4. Attitudes towards influencer marketing and labels

Gather rationalised, System 2 (more considered) responses to influencer marketing and labelling methods to further contextualise findings, explain trends seen in the in-situ test and offer a ranking of acceptable labels in isolation of any visual context.

Quantitative methodology: Online survey

Research Design

- **N=1900 UK 13 to 64-year-olds**
- **20-minute online survey**

Fieldwork timing

- **17th – 31st July 2025**

Sample Profile

- **18-64 year olds:**
  - N=1600
  - UK nationally representative sample (based on ONS data) was achieved. Quotas on gender, age, region, social grade, children in household and ethnicity
  - Platform usage fell out naturally but with the confidence there would be robust samples of both users and non-users of each social media platforms
- **13–17-year-olds:**
  - N=300
  - Boosted to get a robust view on a critical group who have unique marketing rules applying to them and heightened vulnerability to the effects of advertising
  - Recruited via parent panellist who were asked to give permission for their 13–17-year-old to take part in the survey
  - Group downweighted when looking at overall sample results to ensure a representative 13–64-year-old sample

Survey Structure

- **Demographics and Screening**
  - Questions to ensure complete representation of the UK's 13-64-year-old audience
  - Questions asking for parental permission if under 18
- **Social media habits**
  - Social media platforms currently used and length of time since first started using social media
  - Frequency of usage and time spent per week for each platform used
  - Types of content followed and motivations for using social media
  - Frequency of interaction with different types of content for each platform used
- **"Spot the Sell" In-Situ Social Media Task**
  - Four environments seen, two TikTok and two Instagram. Respondents asked whether they felt each post was "Definitely", "Maybe" or "Not" an ad
  - Different influencers tested in each environment, each with a different label condition
- **Influencer marketing post in isolation (still from 4 influencer posts in the in-situ environment)**
  - Implicit phrases associated with influencer (e.g., honest, creative)
  - Level of clarity that content contained advertising and reasons behind clarity/lack of.
  - Level of advertising stand out in the post
  - Relationship with brand and influencer featured
  - Compensation received by influencer for making post
- **Attitudes towards influencer marketing and labels**
  - Agreement with statements about influencer marketing
  - Ranking which influencer marketing labels are the clearest
  - Ranking which label positioning is the clearest
  - Agreement with statements about influencer marketing labels

Quantitative methodology: Quotas

Quotas were based on 2021 ONS data to ensure the sample was representative of the UK population.

They were applied to the adult audience and the boost audience separately, with the 13–17-year-old boost portion weighted back down when looking at total results to ensure it was reflective of the UK population profile for 13-64s.

Quotas were distributed equally across influencer marketing posts/labels tested to ensure results were not influenced by demographic profiles.

Sample group	Sample Definition	% of Sample	Sample Size
Total	**UK Nat Rep 18-64**	**100%**	**1,600**
Gender	Female	50%	800
	Male	50%	800
Age	18-34	38%	608
	35-54	42%	672
	55-64	20%	320
Region	Scotland, North England & NI	34%	544
	Midlands & Wales	30%	480
	South	36%	576
Social Grade	ABC1	57%	912
	C2DE	43%	688
	Prefer not to say	<5%	~80
Children in HH	Children aged <16	29%	464
	No children aged <16	71%	1136
Ethnicity	White	78%	1248
	Other	22%	352

Sample group	Sample Definition	% of Sample	Sample Size
Total	**UK 13-17**	**100%**	**300**
Gender	Female	50%	150
	Male	50%	150
Age	13-15	60%	200
	16-17	40%	100

Sample group	Sample Definition	% of Sample
Total	**Total Sample: 13-64 (weighting profile)**	**100%**
Age	13-17	9%
	18-34	34%
	35-54	39%
	55-64	18%

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Quantitative methodology: Influencer marketing post allocation

In the survey, each participant was randomly assigned four of the eight influencer posts (two on Instagram, two on TikTok), each featuring a different label (or the 'No label' condition). This ensured a robust base size for each 'post x label' example – at least 100 per post/label – allowing detailed analysis of the impact of individual labels for each post. When combined, more sizeable bases (over 900), allowed robust analysis of patterns across individual posts and across different labels. Testing only one label at a time allowed the impact of each label to be assessed while holding the creative content constant.

Number of respondents seeing each label variant		**Variants of 'ad'**		**Other Labels**		**Unlabelled**		**Platform specific labels**		
	TOTAL	AD	#ad	#thanks	#gifted	@brand	No label	Paid Partner-ship	Commissi on Paid (TikTok only)	Brand x Influencer (Instagram only
TOTAL	**7600**	**982**	**918**	**903**	**997**	**950**	**950**	**965**	**486**	**449**
Naomi Bouncy Blows	**947**	121	110	115	118	120	110	119	134	-
Proudlock & Emma Lou	**953**	126	123	115	128	112	121	116	112	-
Lucy & Little	**956**	114	113	122	118	127	122	116	124	-
Liv Madeline	**944**	120	116	117	124	118	113	120	116	-
Trinny Woodall	**957**	121	107	115	127	119	127	122	-	119
Kirthanaa	**943**	132	121	101	137	119	111	120	-	102
Alexandra Dudley	**940**	126	107	107	121	119	122	117	-	121
Matt Does Fitness	**960**	122	121	111	124	116	124	135	-	107

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Notes: (1) Small variations in base sizes seen across different 'post x label' conditions due to complex cell allocation – minimum sample to achieve was set as opposed to an exact number to achieve, to allow for quotas to be distributed across cells

Quantitative methodology: In-situ environment stimulus

Four social media feeds (two Instagram, two TikTok) were created using real world, public domain posts to situate influencer posts within the natural environment they'd be consumed in. A range of different posts were chosen including:

- **Brand Ads:** Ads that brand's have paid Instagram/TikTok for (labelled "Sponsored" on Instagram, "Ad" on TikTok)
- **Brand Content:** Content from brand accounts
- **Creator Content:** Content from content creators/influencers that didn't include advertising
- **Reviewers:** Product/service reviews that were not paid

Each reel was a maximum of two minutes and included up to eight posts. A scrolling effect was added to best mimic reality and ads were placed at intervals that reflect the frequency in which they tend to appear when normally scrolling.

Respondents were shown each post and its caption in full, with enough time given to fully take it in.

A range of different content categories were shown in the posts and were designed to have something suitable for all genders and ages:

Instagram 1	Instagram 2	TikTok 1	TIkTok 2
Champions League Sport	**The Noah Nator** DIY	**Tennis TV** Sport	**Brookeandjess** Dance
Allocated Influencer Marketing Post	**Allocated Influencer Marketing Post**	**Allocated Influencer Marketing Post**	**Allocated Influencer Marketing Post**
WeRateDogs Animals	**Runna** Fitness	**Booking.com** Travel	**Prime Video** TV/Film
CeraVe Beauty	**F1** Sport	**TikTokfindss01** Tech	**Khabane Lame** Influencer
Ennice_c.h Food	**Motorola** Telecoms	**ChocsPodBits** Podcast	**Tenlife2** Lifestyle
NatGeo Science/Nature	**Lego** Toys	**Nutella** Food	**Jack Edwards** Books
Massimo Dutti Fashion	**BBC News** News	**CHELSEA** DIY	
Sam Thompson Influencer	**What to Wear For** Fashion		

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Quantitative methodology: In-situ environment functionality

For each post seen in the Spot the Sell exercise reel, respondents were asked to give their instinctive response as to whether the post was “Definitely an Ad”, “Maybe an Ad” or “Not an Ad”.

By calculating to the millisecond when each post appeared within the reel video, the time stamp of each click could be assigned to a specific post. Respondents could change their mind while consuming a post, with the last response pressed while watching the post being the response taken.

Respondents could not be forced to click for each post because of the video feed functionality, but each post received a strong response rate (averaging 70%). Final results are based on all those who responded to the post, as opposed to all who saw the post, which still met the requirement for robust base sizes across each post.

Spot the Sell Exercise

Definitely an Ad

Maybe an Ad

Not an Ad

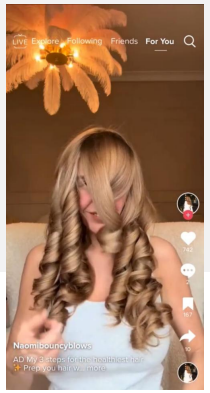
Quantitative methodology: Influencer marketing stimulus

The second post in each in-situ environment was one of our eight influencer marketing posts with a specific label condition (e.g., AD, #thanks). The same influencer marketing posts and label conditions were then asked about in the follow up “influencer marketing in isolation” section.

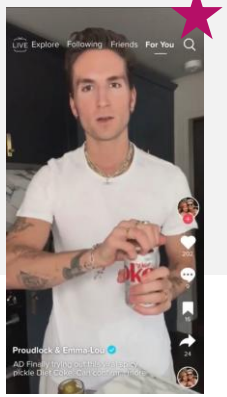
As with the qualitative phase, MTM worked carefully with the ASA to select posts from UK-based influencers and included a variety of different features to ensure findings represent posts across the influencer marketing spectrum. Some of these related to post characteristics (e.g., influencer gender, content type, voiceover featured), and others based on context features identified in our qualitative phase as providing advertising clarity beyond labels.

Four of the eight influencer marketing posts tested in the quantitative phase were also tested in the qualitative phase.

Naomi Bouncy Blows

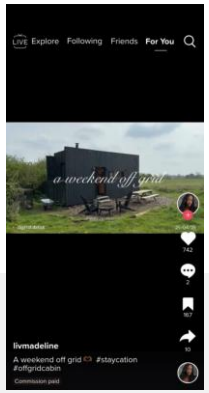


Proudlock & Emma Lou ★



Lucy & Little ★

Liv Madeline

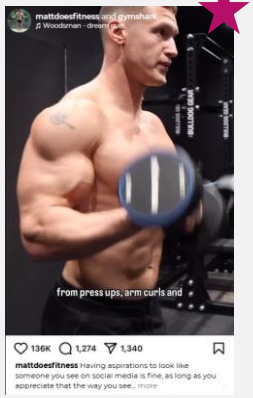


Trinny Woodalll

Kirthanna ★

Alexandra Dudley

Matt Does Fitness ★



★ Also tested in qualitative phase

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Quantitative methodology: Label stimulus

Nine label conditions were tested in our influencer marketing examples, with labels from each group of interest:

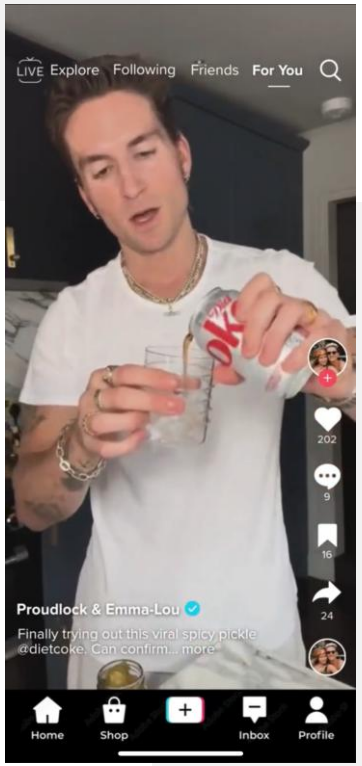
- ‘Ad’ variation: AD (upfront), #Ad
- Platform labels: Paid Partnership, Commission Paid (TikTok) Influencer x Brand (Instagram)
- Other labels commonly used: #thanks, #gifted
- Non-labels: @brand or no label at all

The captions were kept the same as the original post bar removing any ad labels and replacing them with one of our test label conditions. All caption labels were visible without having to click “…” more. #ad, #thanks, #gitfted and @brand were placed at a natural break in the caption, AD was shown upfront and platform labels where they sit on the platform.

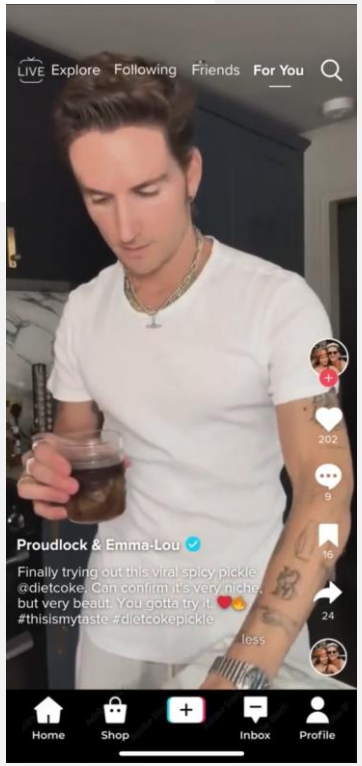
Respondents were shown the “…” in the in-situ environment at a certain point during the post but only shown the shortened caption in section of the survey looking at the ad in isolation.

Original Post

Post for test (without clicking …more)



Post for test (after clicking …more)



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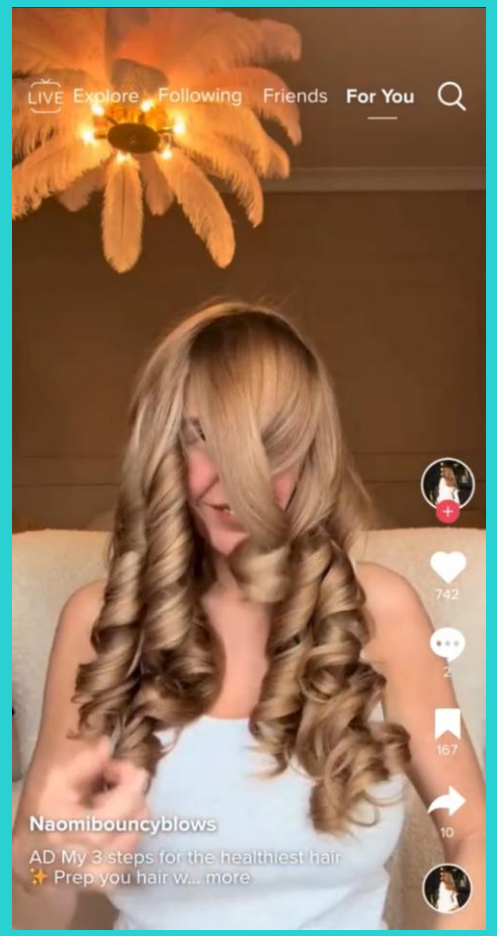
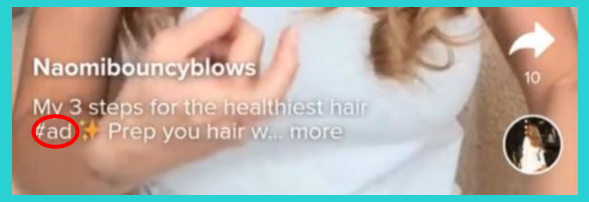
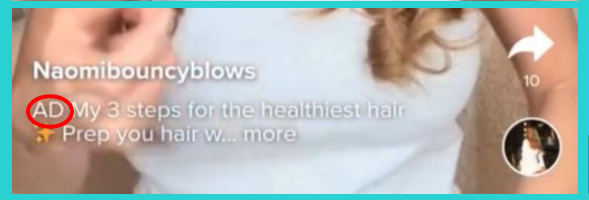
Labelling example - TikTok



Advert Label

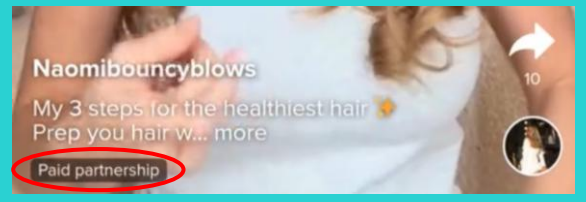


#ad

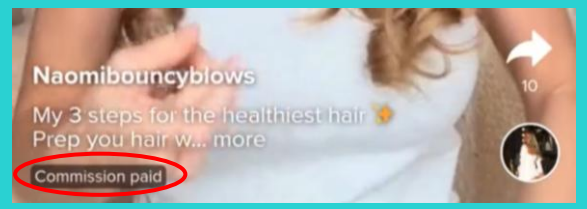


AD

Platform Label

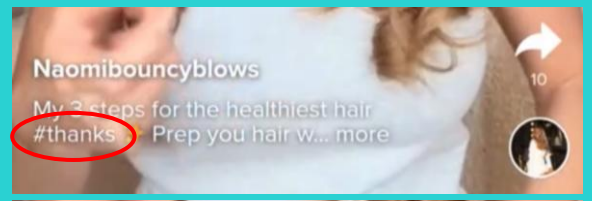


Paid partnership

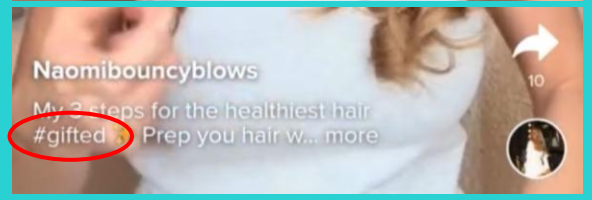


Commission paid

Other Label

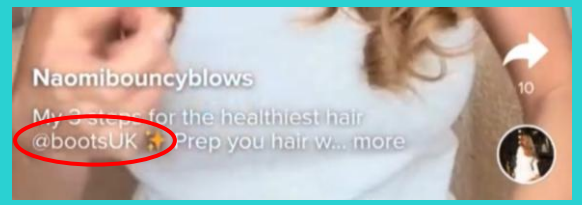


#thanks

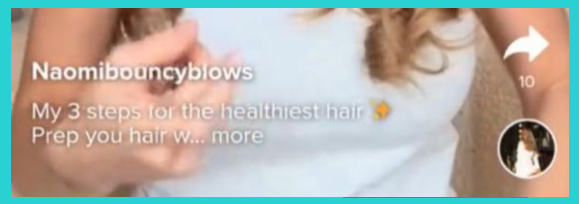


#gifted

Not labelled



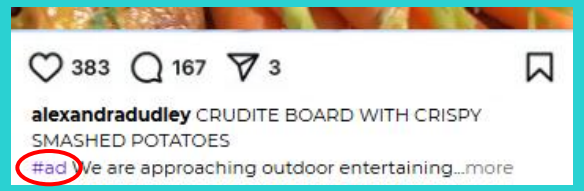
@brand



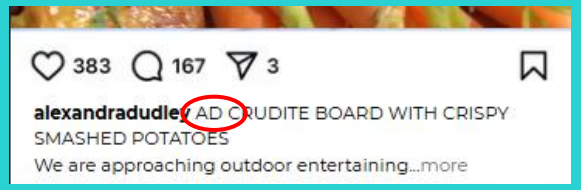
No label

Labelling example - Instagram

Advert Label



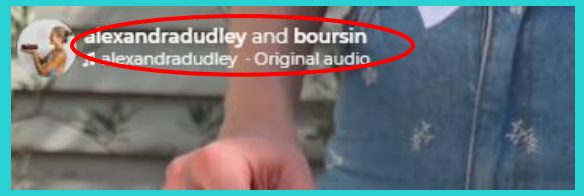
#ad



AD

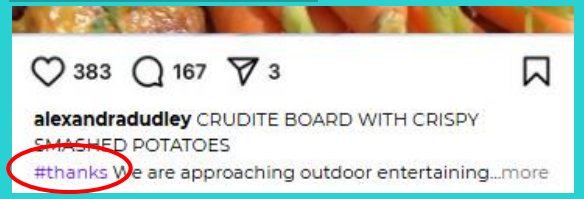
Platform Label

Paid partnership

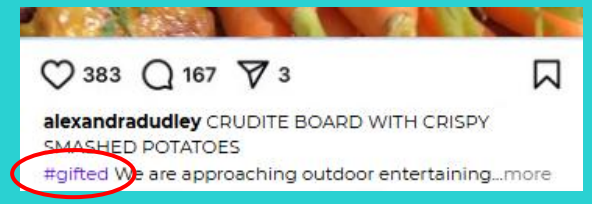


Brand x influencer

Other Label

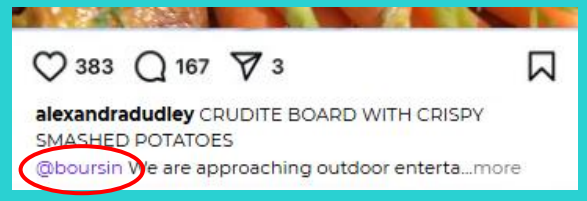


#thanks

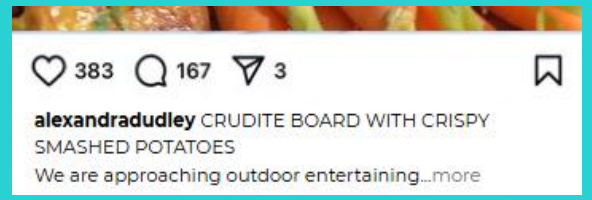


#gifted

Not labelled



@brand

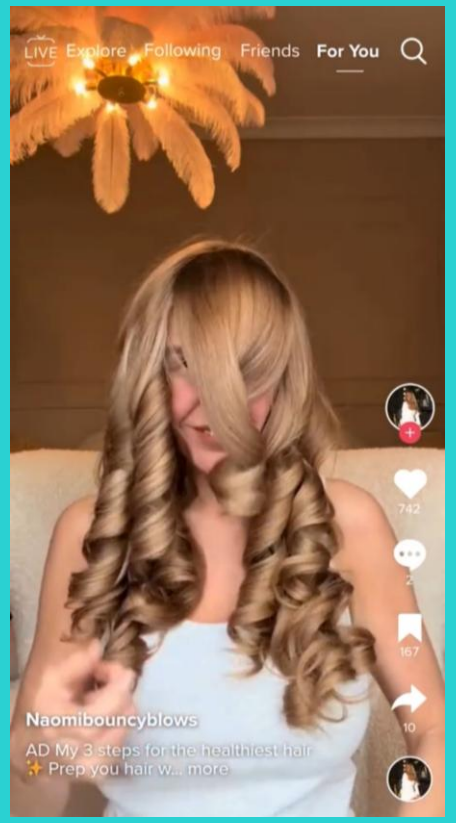


No label

Section 08.02

Appendix 2: Quantitative survey stimulus and key results for those posts

naomibouncyblows – Boots



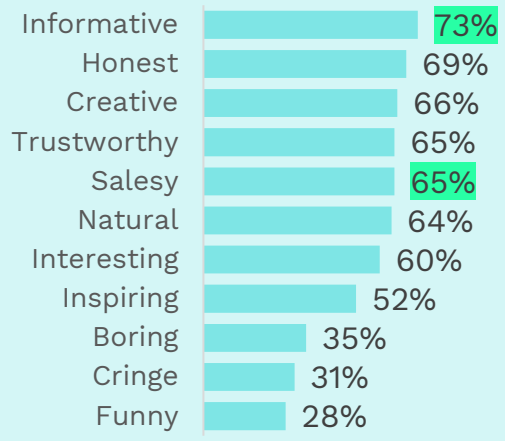
651.1k followers on TikTok
Posted 19/03
Original Label: @Boots_UK (middle, visible), ad ("...more")

CONTENT DESCRIPTION

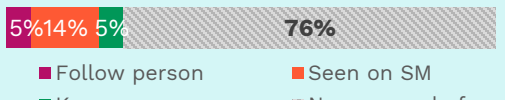
Demonstrates hair care routine ("let me tell you my three steps for the healthiest hair"), involving three TRESemme products from Boots. She explains the benefits of each product ("can reduce breakage by 82%) while showing how to use it, holding each product close to the camera. Finishes the post by explicitly referring to purchasing these products from Boots,

TAGS: Brand mentioned, brand logo featured (N.B. not for retailer advertising), high context given for product in post

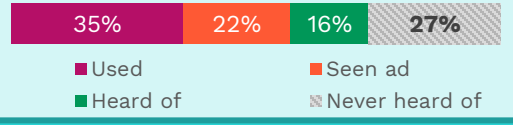
STYLE PERCEPTION



INFL. RELATIONSHIP



BRAND RELATIONSHIP



REWARD FROM BRAND

CLARITY OF IDENTIFYING POST AS AN AD

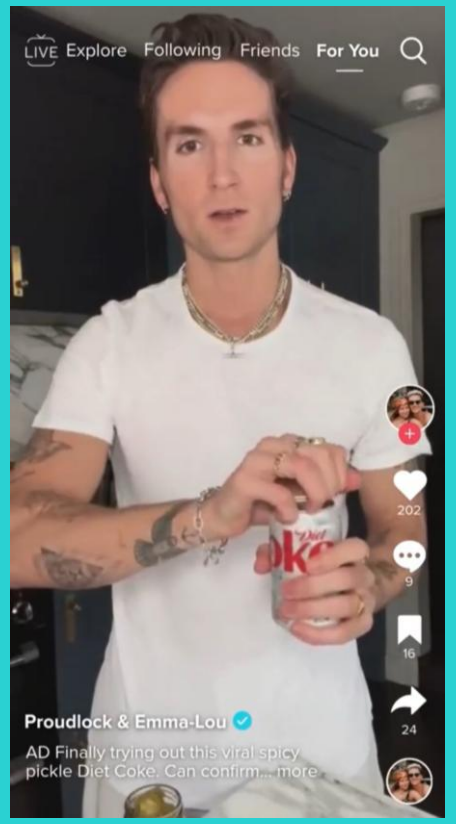
	TOTAL	Ad	#ad	#thanks	#gifted	@brand	No label	Paid P	C Paid
% selecting Definitely An Ad	83%	80%	83%	83%	84%	86%	82%	82%	82%
% selecting Definitely/ Maybe An Ad	94%	94%	93%	93%	96%	95%	93%	92%	97%
8-10 Ad Very Clear	64%	67%	63%	61%	62%	64%	63%	68%	66%
8-10 High Stand out	48%	49%	47%	43%	44%	46%	46%	56%	51%

mtm

Notes: (1) Words tested in the Style Perception survey question included language/descriptors used by respondents in the online community/follow up depths
Source: MTM ASA. This is one of the specific eight influencer posts chosen to exemplify influencer marketing in the quantitative survey.
Base: Online 13–64-year-old population who responded to each influencer post (~950) ~112 seeing in each influencer post for each label condition

Over index vs average score across influencers
Under index vs average score across influencers

Proudlock & Emma Lou – Diet Coke



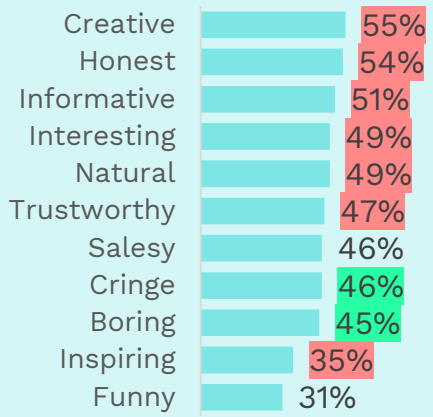
41.1k followers on TikTok
Posted 10/12/24
Original Label: @DietCoke ("...more"), ad ("...more")

CONTENT DESCRIPTION

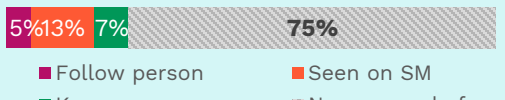
Following a viral TikTok trend, Proudlock mixes Diet Coke with pickles, pickle juice, and jalapenos. He starts by opening the Diet Coke ("cold and fresh from the fridge") before adding the extra ingredients for the cocktail. Narrates throughout the content what he is doing and the finally tries the cocktail saying, "that is delicious".

TAGS: Brand mentioned, brand logo shown, low context given for product in post

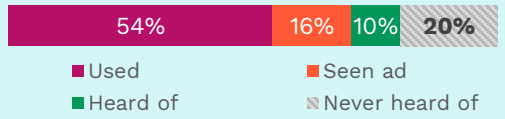
STYLE PERCEPTION



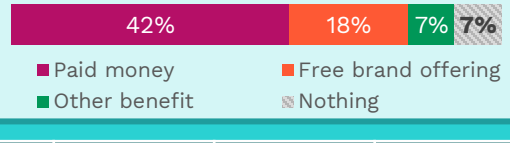
INFL. RELATIONSHIP



BRAND RELATIONSHIP



REWARD FROM BRAND



CLARITY OF IDENTIFYING POST AS AN AD

	TOTAL	Ad	#ad	#thanks	#gifted	@brand	No label	Paid P	C Paid
% Selecting Definitely An Ad	57%	61%	63%	53%	50%	55%	52%	59%	69%
% Selecting Definitely/ Maybe An Ad	77%	81%	78%	76%	74%	72%	75%	77%	83%
8-10 Ad Very Clear	50%	42%	53%	52%	48%	51%	56%	46%	56%
8-10 High Stand out	40%	38%	35%	42%	40%	38%	46%	40%	43%

mtm

Notes: (1) Words tested in the Style Perception survey question included language/descriptors used by respondents in the online community/follow up depths
Source: MTM ASA. This is one of the specific eight influencer posts chosen to exemplify influencer marketing in the quantitative survey.
Base: Online 13–64-year-old population who responded to each influencer post (~950) ~112 seeing in each influencer post for each label condition

Over index vs average score across influencers
Under index vs average score across influencers

Lucy & Little – AEX

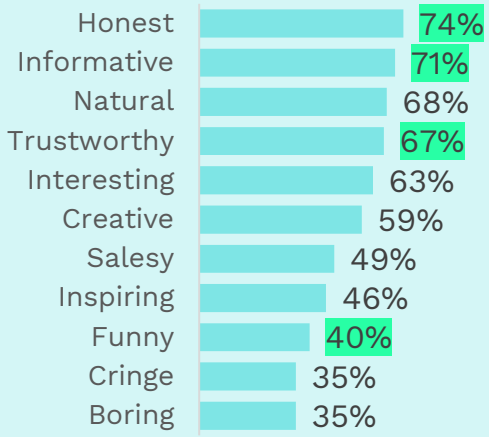
104.3k followers on TikTok
Posted 28/03/25
Original Label: Commission
Paid platform label

CONTENT DESCRIPTION

Lucy & Little uses a new kitchen product for the first time, explaining she's "wanted one of these for ages". She places sliced onion in the gadget and starts using it. She shows surprise and excitement at the result, opening the lid to show to the camera the result from a few seconds of using, asking "we need anything else for tea that I can chop again?".

TAGS: No brand mention, no brand logo shown, high context given for product in post

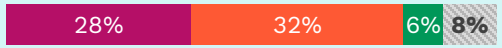
STYLE PERCEPTION



INFL. RELATIONSHIP

BRAND RELATIONSHIP

REWARD FROM BRAND



CLARITY OF IDENTIFYING POST AS AN AD

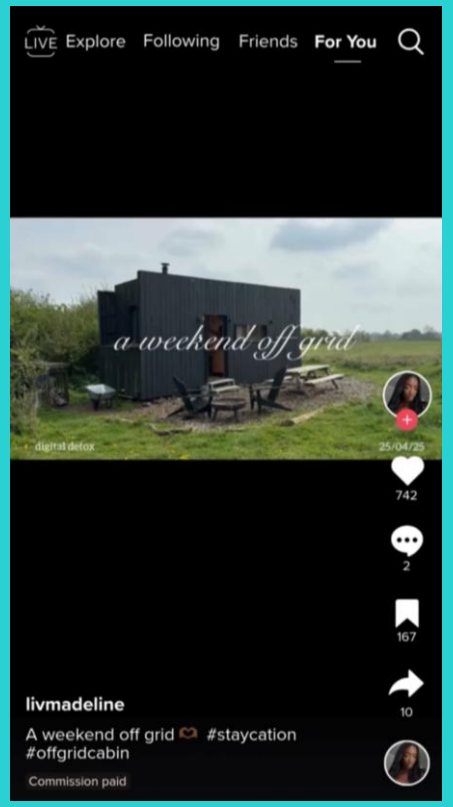
	TOTAL	Ad	#ad	#thanks	#gifted	@brand	No label	Paid P	C Paid
% Selecting Definitely An Ad	56%	60%	56%	50%	54%	53%	53%	61%	60%
% Selecting Definitely/ Maybe An Ad	76%	78%	75%	71%	75%	77%	76%	74%	80%
8-10 Ad Very Clear	46%	59%	54%	38%	43%	48%	34%	48%	43%
8-10 High Stand out	32%	38%	38%	30%	30%	36%	22%	36%	26%

mtm

Notes: (1) Words tested in the Style Perception survey question included language/descriptors used by respondents in the online community/follow up depths
Source: MTM ASA. This is one of the specific eight influencer posts chosen to exemplify influencer marketing in the quantitative survey.
Base: Online 13–64-year-old population who responded to each influencer post (~950) ~112 seeing in each influencer post for each label condition

Over index vs average score across influencers
Under index vs average score across influencers

livmadeline – Unplugged

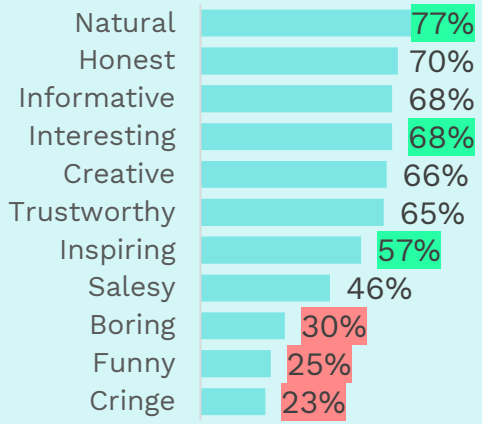


57k followers on TikTok
Posted 27/04/25
Original Label: @unplugged (middle visible)

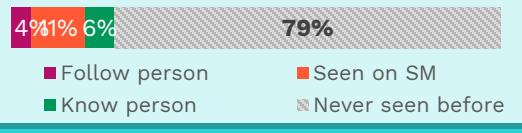
CONTENT DESCRIPTION

The post is made up of a compilation of short clips from a weekend in an 'off-grid' cabin, with *a weekend off grid* written across the screen throughout the video. The clips feature activities livmadeline participated in throughout her weekend including painting, cooking, reading, sitting by the fire, and more. Relaxing music plays in the background with the lyrics "looking for a place to rest my soul".
TAGS: No brand mention, no brand logo shown, high context given for product in post

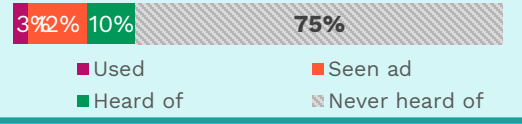
STYLE PERCEPTION



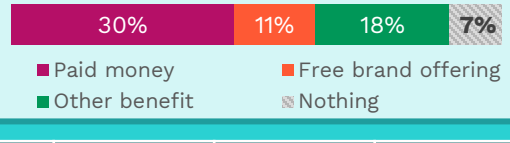
INFL. RELATIONSHIP



BRAND RELATIONSHIP



REWARD FROM BRAND



CLARITY OF IDENTIFYING POST AS AN AD

	TOTAL	Ad	#ad	#thanks	#gifted	@brand	No label	Paid P	C Paid
% Selecting Definitely An Ad	64%	74%	67%	53%	58%	61%	60%	69%	68%
% Selecting Definitely/ Maybe An Ad	82%	91%	79%	81%	82%	81%	79%	82%	83%
8-10 Ad Very Clear	39%	42%	42%	40%	35%	42%	34%	40%	36%
8-10 High Stand out	32%	32%	32%	39%	28%	31%	31%	28%	34%

mtm

Notes: (1) Words tested in the Style Perception survey question included language/descriptors used by respondents in the online community/follow up depths
Source: MTM ASA. This is one of the specific eight influencer posts chosen to exemplify influencer marketing in the quantitative survey.
Base: Online 13–64-year-old population who responded to each influencer post (~950) ~112 seeing in each influencer post for each label condition

Over index vs average score across influencers
Under index vs average score across influencers

Trinnywoodall – Trinny London

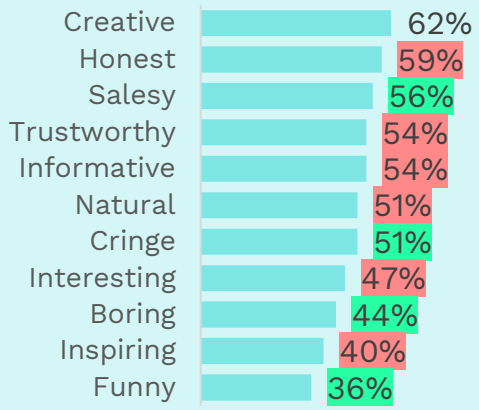
1.5m followers on Instagram
Posted 26/03/25
Original Label: @trinnylondon (middle visible)

CONTENT DESCRIPTION

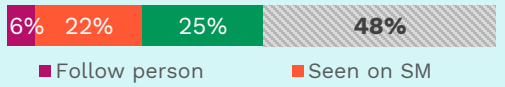
Trinnywoodall walks through a get-ready-with-me video on how to style up a pair of sweatpants using a sparkly top, a jacket and earrings 'that pop', mentioning where each of the products is from. Following this, she brings her makeup artist on screen and jokes around with him while he explains her makeup look and what products are used to achieve this.

TAGS: No brand mention, no brand logo shown, low context given for product in post

STYLE PERCEPTION

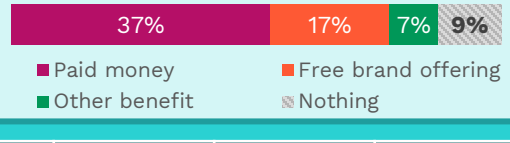


INFL. RELATIONSHIP



BRAND RELATIONSHIP

REWARD FROM BRAND



CLARITY OF IDENTIFYING POST AS AN AD

	TOTAL	Ad	#ad	#thanks	#gifted	@brand	No label	Paid P	Brand x infl
% Selecting Definitely An Ad	42%	49%	47%	39%	34%	49%	36%	41%	40%
% Selecting Definitely/ Maybe An Ad	65%	65%	69%	67%	57%	72%	63%	65%	63%
8-10 Ad Very Clear	35%	37%	31%	35%	27%	34%	37%	41%	37%
8-10 High Stand out	29%	27%	30%	36%	25%	28%	32%	27%	27%

mtm

Notes: (1) Words tested in the Style Perception survey question included language/descriptors used by respondents in the online community/follow up depths
Source: MTM ASA. This is one of the specific eight influencer posts chosen to exemplify influencer marketing in the quantitative survey.
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Over index vs average score across influencers
Under index vs average score across influencers

Kirthanaa – Gap

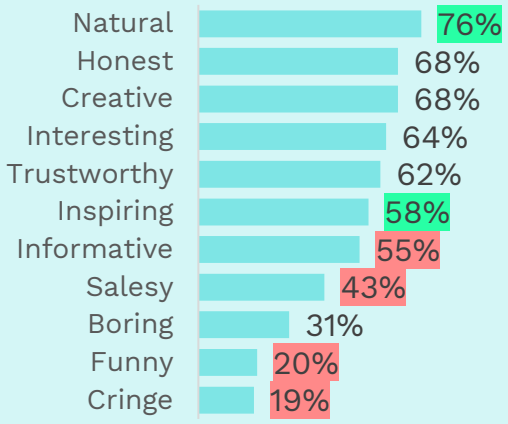
79.8k followers on Instagram
Posted 30/04/25
Original Label: @gap (middle, visible), ad ("...more")

CONTENT DESCRIPTION

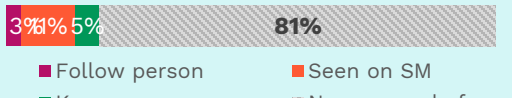
The post features a variety of photos and videos of Kirthanaa, a UK based influencer, on her trip back home to Malaysia. The posts include food, locations (e.g., beach), nature & clothes (no brand label featured on the clothing), either being worn by her or hanging on different objects. There is no audio in the first image of the post, some videos included have background noises.

TAGS: No brand mention, no brand logo shown, low context given for product in post

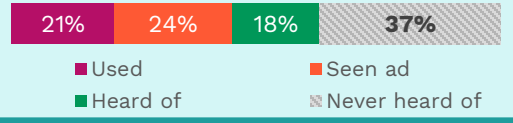
STYLE PERCEPTION



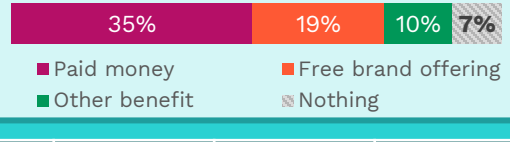
INFL. RELATIONSHIP



BRAND RELATIONSHIP



REWARD FROM BRAND



CLARITY OF IDENTIFYING POST AS AN AD

	TOTAL	Ad	#ad	#thanks	#gifted	@brand	No label	Paid P	Brand x infl
% Selecting Definitely An Ad	30%	31%	30%	18%	22%	28%	29%	46%	33%
% Selecting Definitely/ Maybe An Ad	52%	56%	46%	48%	46%	52%	43%	68%	56%
8-10 Ad Very Clear	35%	38%	37%	14%	27%	42%	37%	43%	36%
8-10 High Stand out	29%	29%	28%	22%	28%	28%	29%	30%	33%

mtm

Notes: (1) Words tested in the Style Perception survey question included language/descriptors used by respondents in the online community/follow up depths
Source: MTM ASA. This is one of the specific eight influencer posts chosen to exemplify influencer marketing in the quantitative survey.
Base: Online 13–64-year-old population who responded to each influencer post (~950) ~112 seeing in each influencer post for each label condition

Over index vs average score across influencers
Under index vs average score across influencers

Alexandra Dudley – Boursin

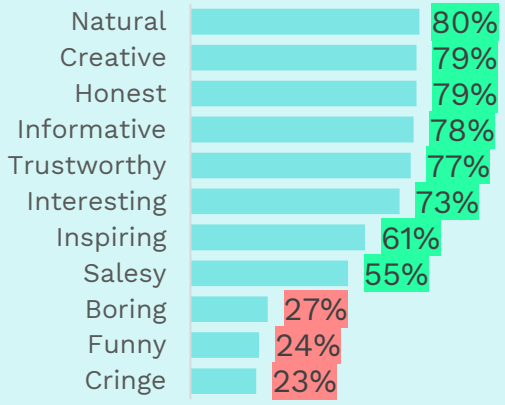
183k followers on Instagram
Posted 30/04/25
Original Label: ad ("...more"), @boursinuk ("...more")

CONTENT DESCRIPTION

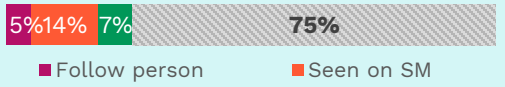
Alexandradudley shows the steps and ingredients of her favourite crudité board to make in summer. Light-hearted jazz music plays in the background as she explains her recipe, mentioning that *Boursin* is at the heart of it. The post entails short clips of her assembling the board in the video, with full ingredients and details in the caption. At the end she shown smiling as she tucks in to the board.

TAGS: Brand mentioned, brand logo shown, high context given for product in post

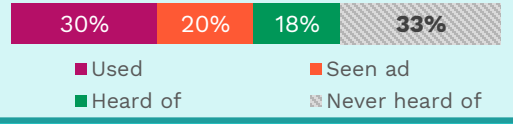
STYLE PERCEPTION



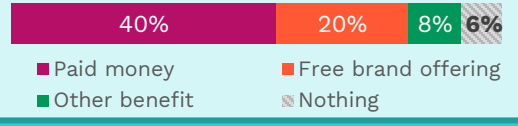
INFL. RELATIONSHIP



BRAND RELATIONSHIP



REWARD FROM BRAND



CLARITY OF IDENTIFYING POST AS AN AD

	TOTAL	Ad	#ad	#thanks	#gifted	@brand	No label	Paid P	Brand x infl
% Selecting Definitely An Ad	57%	55%	56%	60%	52%	70%	50%	53%	61%
% Selecting Definitely/ Maybe An Ad	75%	71%	69%	80%	73%	81%	76%	71%	77%
8-10 Ad Very Clear	65%	64%	64%	72%	70%	59%	68%	66%	62%
8-10 High Stand out	51%	47%	52%	58%	57%	51%	43%	48%	53%

mtm

Notes: (1) Words tested in the Style Perception survey question included language/descriptors used by respondents in the online community/follow up depths
Source: MTM ASA. This is one of the specific eight influencer posts chosen to exemplify influencer marketing in the quantitative survey.
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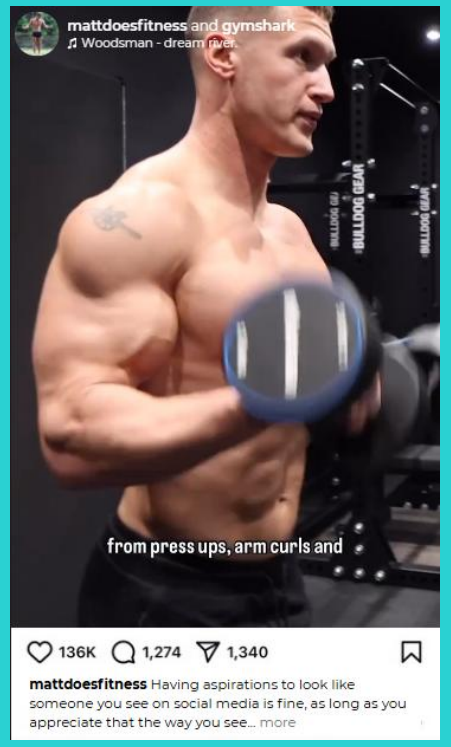
Over index vs average score across influencers
Under index vs average score across influencers

mattdoesfitness – Gymshark



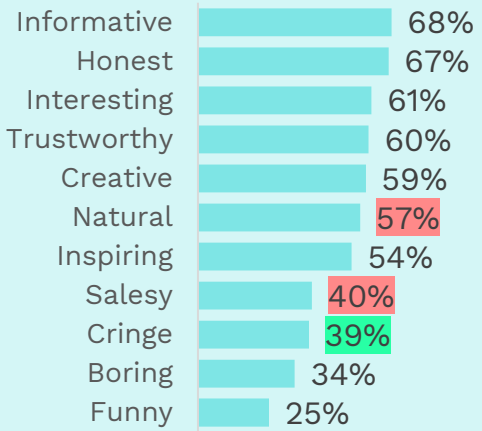
1.2m followers on Instagram
Posted 26/03/25
Original Label: @gymshark ("...more"), ad ("...more")

CONTENT DESCRIPTION

Mattdoesfitness does an explanatory video of how to achieve the look of a body transformation in under 10 minutes. He explains this includes using the best angles, lighting, poses, and doing a quick workout to look your best. He explains the importance of not comparing yourself to people online because of how you can craft your image.

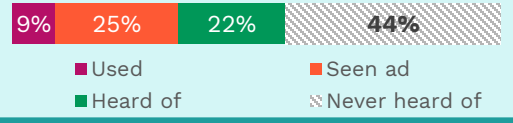
TAGS: No brand mention, brand logo shown, low context given for product in post

STYLE PERCEPTION



INFL. RELATIONSHIP

BRAND RELATIONSHIP



REWARD FROM BRAND

CLARITY OF IDENTIFYING POST AS AN AD

	TOTAL	Ad	#ad	#thanks	#gifted	@brand	No label	Paid P	Brand x infl
% Selecting Definitely An Ad	43%	48%	43%	49%	39%	48%	35%	47%	39%
% Selecting Definitely/ Maybe An Ad	64%	68%	62%	68%	64%	71%	55%	64%	64%
8-10 Ad Very Clear	32%	30%	35%	29%	30%	40%	23%	35%	33%
8-10 High Stand out	29%	24%	31%	33%	31%	31%	25%	28%	35%

mtm

Notes: (1) Words tested in the Style Perception survey question included language/descriptors used by respondents in the online community/follow up depths
Source: MTM ASA. This is one of the specific eight influencer posts chosen to exemplify influencer marketing in the quantitative survey.
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Over index vs average score across influencers
Under index vs average score across influencers

Section 08.03

Appendix 3: Qualitative Community findings Day 4-7

mtm

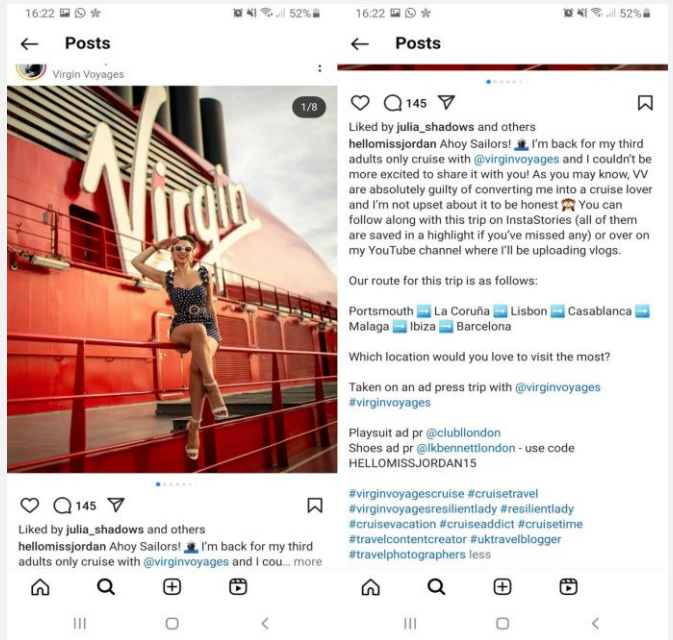
Day 4: #ad (or variant)

Ad upfront	Ad in middle	Ad at end	Ad + other label	Ad label below fold

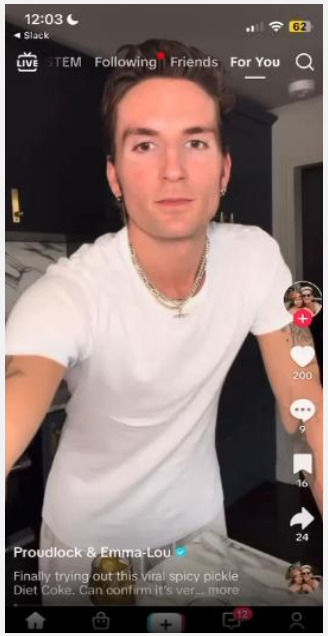
Please rate the ads we showed you today in order of “most obviously an ad” to “least obviously an ad”

#1

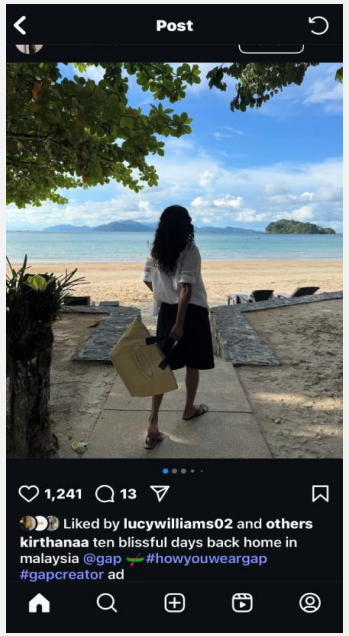
#2



#3



#4



#5

mtm

#1: TikTok - VO5/xtiana7x

How to make it more obvious

- Make video feel more professional, less like blog
- Add more detail on product
- Include verbal disclosure or verbal mention of the brand partnership (x 4)
- Make links bolder
- Starting with product

What made it **more** obvious?

- Felt solely about the product, making it easily identifiable as an ad
- The ‘AD’ caption is the giveaway (x3)
- The tagged account, TikTok shop link, product placement, and mentioning the product name signalled it was an ad (x3)
- Product basket and single-product focus
- Product tagging
- Commission paid disclosure
- Unnatural feel
- Repeated mentions of “VO5" helped identify it as an ad

What made it **less** obvious?

- Blog-like quality made it less obvious
- Video's resemblance to a regular post / GRWN format slightly obscured its nature
- Unconventional setting
- Low relatability / familiarity / recognition of influencer

#2: Instagram - Virgin Voyages/hellomissjordan

How to make it more obvious

- Putting ad or “paid partnership” at the top
- Making photo more detailed and specific
- Adding big logo or adding ad sign on the picture

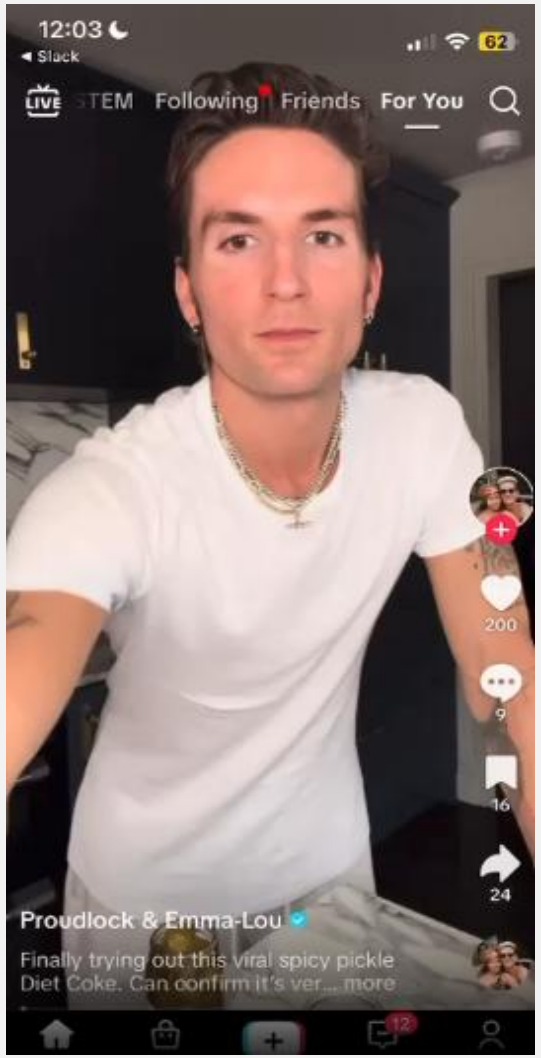
What made it **more** obvious?

- Tagging the brand and about the brand.
- Saying ‘taken on ad press trip…’
- Photo felt professional / part of photoshoot
- Persuasive wording
- Hashtags
- PR ad code / discount code
- Logo on ship

What made it **less** obvious?

- Normal photo you’d see on Instagram
- Still feels authentic and approachable, as though she’s genuinely excited to be there. It doesn’t immediately come across as sponsored but rather gives the impression of a natural influencer presence.

#3: TikTok - Diet Coke/The Proudlocks



How to make it more obvious

- More prominent AD label (higher up, bolder, bigger)
- More direct product promotion/ brand mention
- A purchase link
- Higher production quality
- On-screen text stating "ad for ____"
- Explicitly stating "this is an advert" at the start

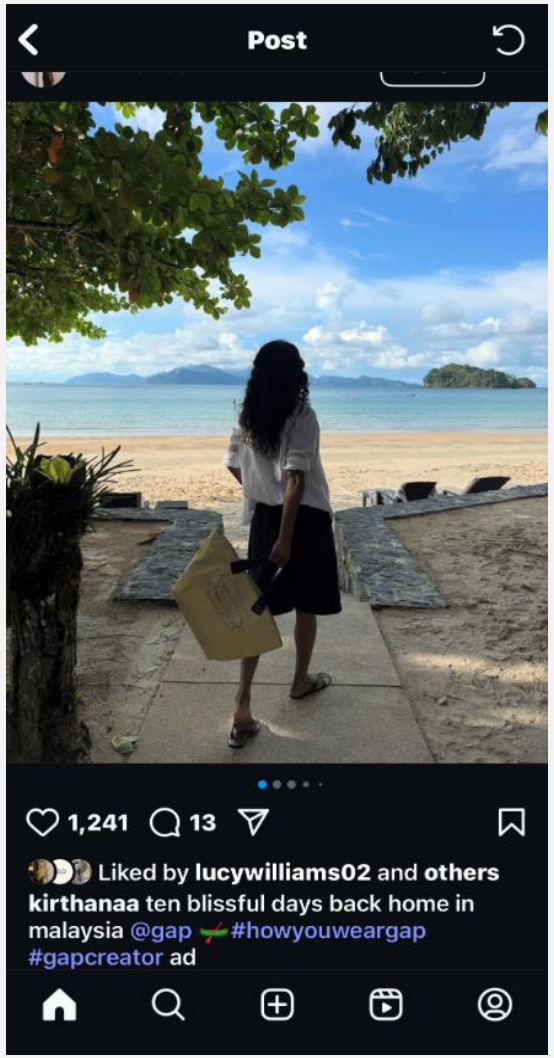
What made it **more** obvious?

- Caption
- Tagging of Diet Coke and the word ‘ad’
- Diet Coke and hashtags hinted it was an ad
- Presenter's promotional language
- Familiarity with the product and creators

What made it **less** obvious?

- Lack of a sales pitch, combined with additions to the Coke
- Lack of explicit product promotion or placement (x3)
- Lack of ‘commission paid’ or ‘sponsored’ signs
- Content's resemblance to a regular challenge made it harder (x6)
- Lower placement of ad label

#4: Instagram - Gap/Kirtanaa Naidu



How to make it more obvious

- Bringing product closer to camera/more obvious in picture
- Say something about the product and brand
- Including some sort of logo in image
- Add more info in the caption
- Provide link to website
- Put / tag brand at start

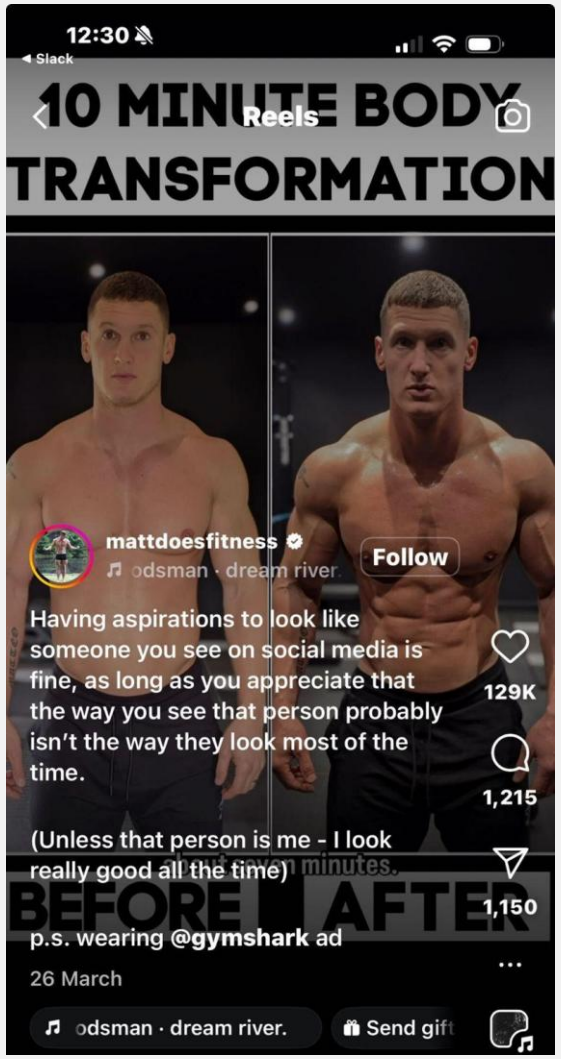
What made it **more** obvious?

- The caption
- Stating it's an 'ad'
- Tagging the brand

What made it **less** obvious?

- Normal picture and caption 'blissful day back at home" that you'd typically see on Instagram
- No obviously identifiable Gap products in image
- Unclear what #gapcreator means
- Felt more like a holiday ad or influencer showing their holiday clothing
- No obvious brand image

#5: Instagram - Gymshark/Matt Morsia (aka Legend)



How to make it more obvious
▪ Obviously stating product and/or brand being promoted ▪ More Gymshark branding ▪ Add more detail on product / service or including links ▪ Visible ad label / sponsored label ▪ Explicitly mentioning brand ambassadorship
What made it more obvious?
▪ Gymshark tag ▪ Description (though unclear) ▪ Ad caption ▪ Positive nature felt like an ad ▪ Familiarity with influencer
What made it less obvious?
▪ Product wasn't mentioned or shown ▪ Lacked specific product promotion ▪ Lacked ad-like qualities ▪ More like general tips rather than an ad ▪ Lack of brand or product mentions ▪ Influencer wasn't overly "salesy" - felt more like self-promotion ▪ Absence of clearly advertised product ▪ Content felt unrelated to Gymshark (influencer should be wearing it)

mtm

Day 5: Platform/post labelling

Paid partnership

Commission Paid

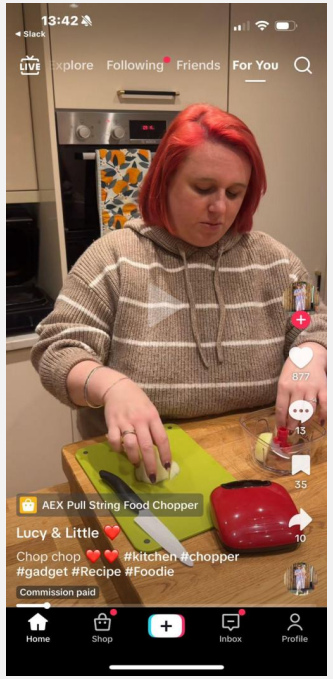
Platform label & Ad

Joint post

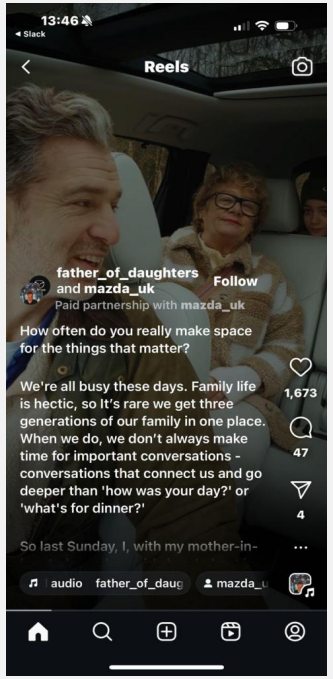
Please rate the ads we showed you today in order of “most obviously an ad” to “least obviously an ad”

#1

#2

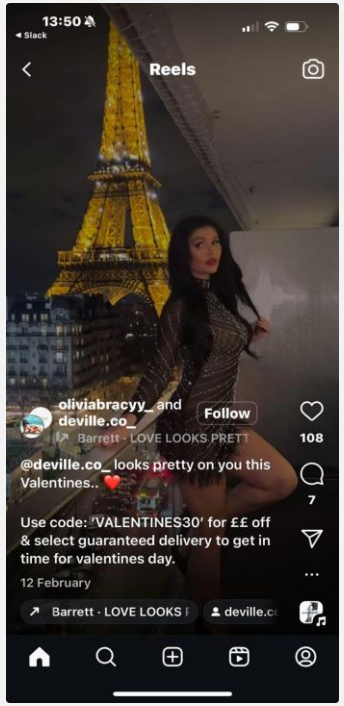


#3



#4

#5



mtm

#1: Instagram - Ninja Kitchen/David Beckham

How to make it more obvious

- Have David speak about product/ stronger product introduction in voiceover
- Include paid partnership tag
- Explicit label it as an ad

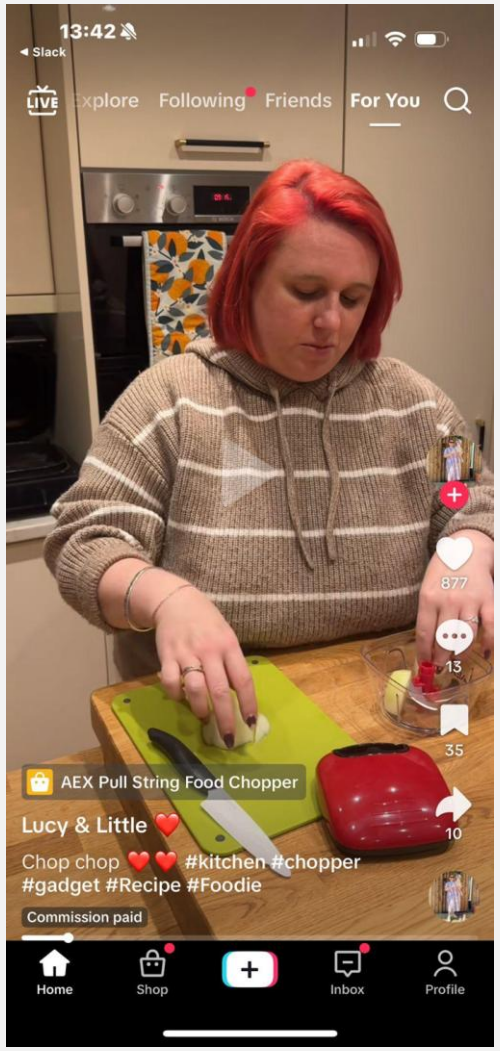
What made it **more** obvious?

- Product's prominence over David Beckham
- Brand name and product description
- “Cinema-like" voiceover and David Beckham's presence
- ‘Paid partnership’ label
- High production value

What made it **less** obvious?

- Lack of an ad label or hashtag

#2: TikTok - Ultimate Chopper / Lucy & Little



How to make it more obvious

- More explicit product promotion
- More professional presentation with product packaging
- Add ‘ad’ to caption
- Include more info (e.g. price, product description / name)

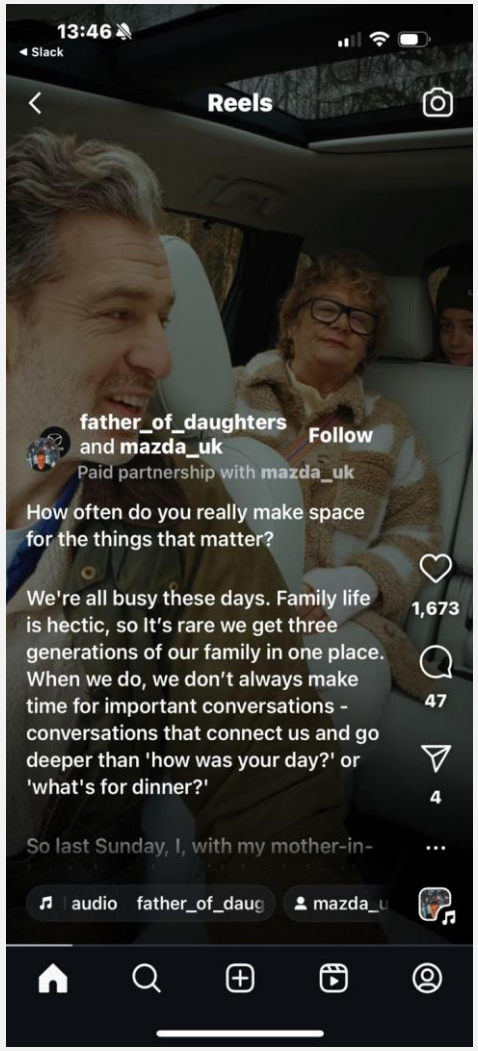
What made it **more** obvious?

- Caption indicated it was an ad
- ‘Commission paid' caption / disclosures (x3)
- Product tags
- Product / shop links (x5)
- Overly enthusiastic promotion
- Presence of product in video

What made it **less** obvious?

- Video felt genuine because the product wasn't immediately promoted (x3)
- Lack of specific product information detracted from its obviousness
- Casual vlog style /conversational style (x5)
- Lack of an ‘ad’ label and uncertainty around paid commissions
- Lack of explicit advertising language / purpose

#3: Instagram - Mazda/father of daughters



How to make it more obvious

- Directly discussing product
- Include more traditional product showcase / review format
- Create shorter, more product-focused video
- Use ‘ad’ instead of ‘paid partnership’

What made it **more** obvious?

- Repeated mentions
- Car visuals
- Brand links and mentions at the end
- Joint post / mention of Mazda UK
- ‘Paid Partnership' label and the word "advert” (x6)
- High production value
- "Making Space for..." blurb, car emphasis, ‘paid partnership’ tag, symbols, hashtags, Mazda logo

What made it **less** obvious?

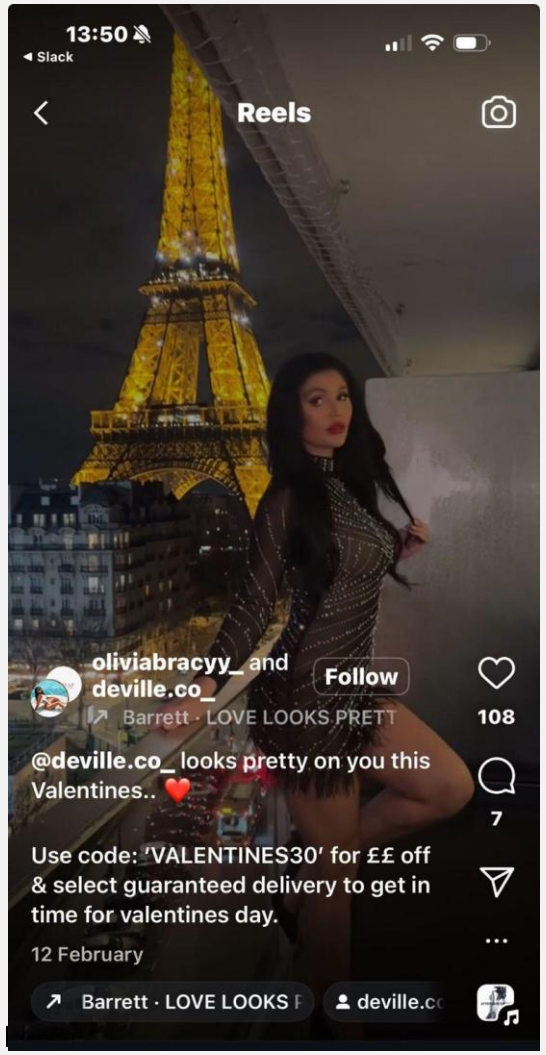
- Unrelated audio to car brand / product (x4)
- Lack of product focus
- Lack of visible brand
- More "wholesome", family-focused content and less overt ad style (x6)
- Video’s length and slow pace
- Placement of ad related wording at the end of the caption

#4: Instagram - Fashion Nova/Anna Vakilli

How to make it more obvious
▪ Clarifying dress is from Fashionnova ▪ Including a logo ▪ Highlighting clothing website more obviously
What made it more obvious?
▪ Tagging the brand ▪ Inclusion of Paid partnership ▪ Influencer being verified on Instagram
What made it less obvious?
▪ Normal photo you'd see on Instagram / nothing about it is obvious an ad ▪ Muted / less descriptive caption apart from brand mention ▪ No 'ad' label in the caption ▪ No call to action in the caption

mtm

#5: Instagram - Deville/Olivia Braccy



How to make it more obvious

- More branding and direct product mentions
- Detailed product description or presentation of outfit
- ‘Paid partnership' tags, hashtags or on-screen text
- Collaboration info

What made it **more** obvious?

- Account linkages / linked profiles
- Discount code (x4)
- Company tag

What made it **less** obvious?

- Influencer-style video / resemblance to a normal night out in Paris
- Lack of explicit wording of advert
- Lack of product relevance and a purchase link
- Absence of an ad tag
- Lack of explanation, dialogue or narrative
- Short video length

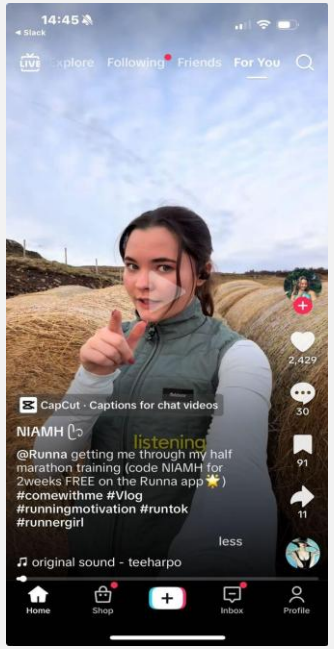
mtm

Day 6: No label/Subtle indicators

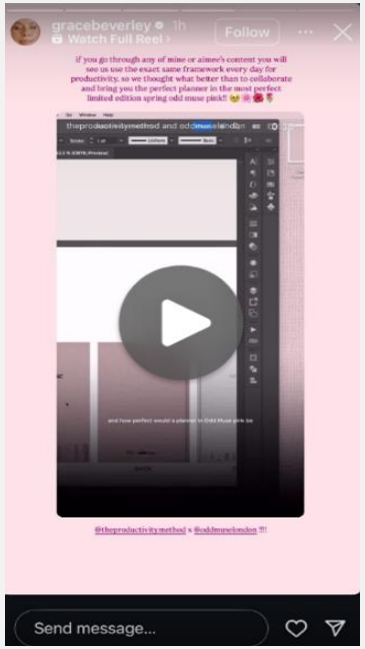
No label | Own brand | Logo | Taken on... | Voice Over | Discount codes

Please rate the ads we showed you today in order of “most obviously an ad” to “least obviously an ad”

#1

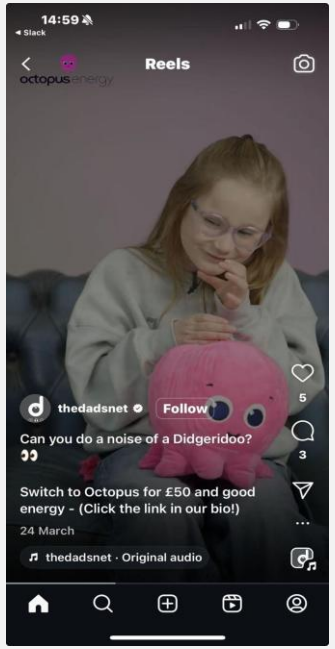


#2

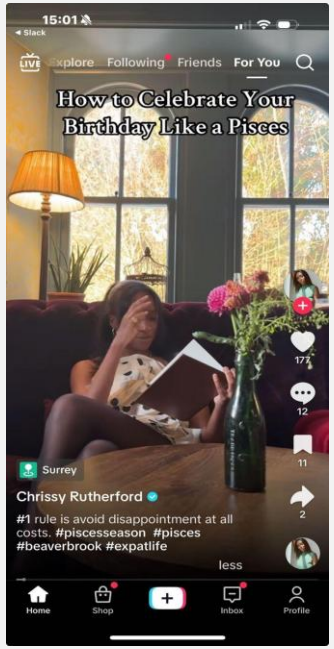


#3

#4

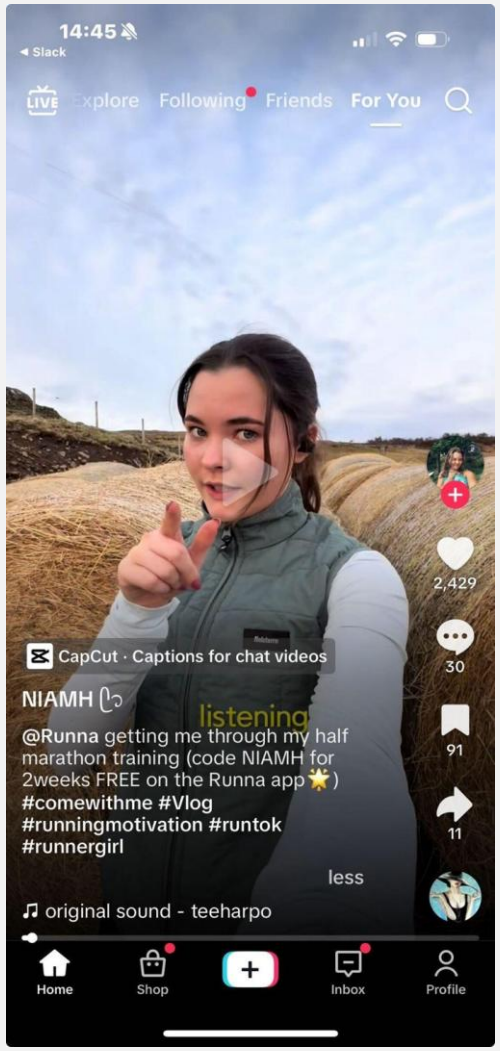


#5



mtm

#1: TikTok - Runna/niamhmackinnon



How to make it more obvious

- Starting with/mentioning brand name in voiceover
- Stating partnership explicitly and ‘Paid partnership’ links or familiar product tags
- Stating it’s an ad
- Have picture of app on screen throughout

What made it **more** obvious?

- The caption -tagging brand straight away
- Showing the app interface in video
- Tone of voice - positive app mentions and explanation of purpose / usage (x3)
- Discount/download code/hashtags
- App link in bio and logo in video content
- Sales images
- The number of followers she has and comments on the post

What made it **less** obvious?

- Relatable/vlog like introduction made it unclear
- Not mentioning app straight away means people could miss it if disengaged or disinterested
- Lack of ‘ad’ label
- Lack of explicit app promotion
- Unfamiliar products/influencers

#2: Instagram - The Productivity Method/Grace Beverley

How to make it more obvious

- Include ‘ad’ label
- Explicitly stating why they’re posting it - to promote product and getting paid

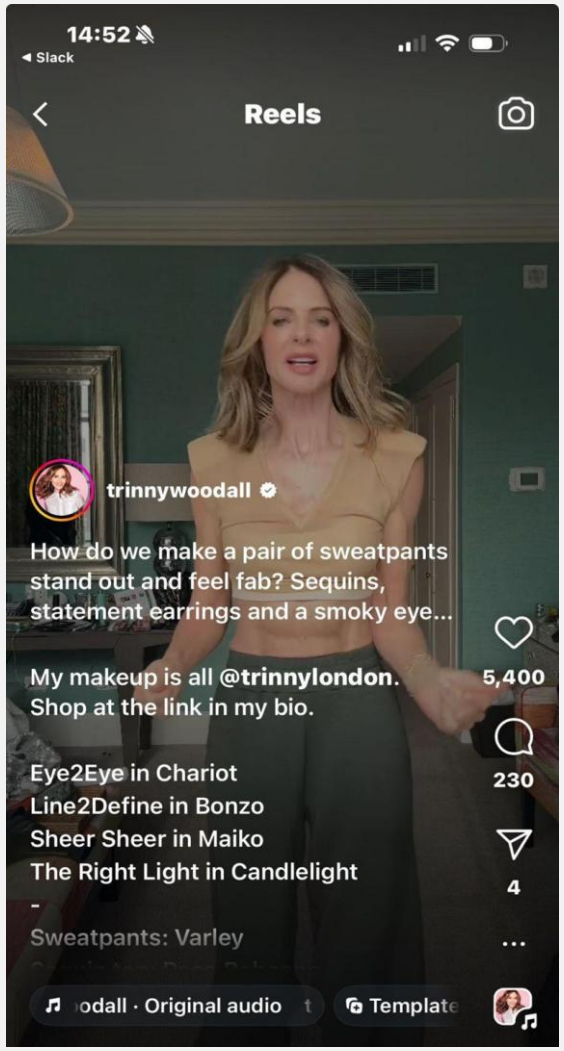
What made it **more** obvious?

- Explicitly states / talks about the planner
- Tone of voice / language - “just come out of a meeting with the team” implies product being created / promoted
- Collaboration links - consistently staging everything / everyone related to product

What made it **less** obvious?

- Doesn’t state anywhere that it’s an ad
- Seems more like a promotion rather than typical advertisement, particularly as product has been reshared
- Low production quality / poor visibility of product
- Focusing more on pink / colour than product (x2)

#3: Instagram - Trinny London/Trinny Woodall



How to make it more obvious

- Linking to products
- State it's an ad in voiceover
- Focusing on makeup more than outfit
- Include 'ad' or 'paid partnership' labels

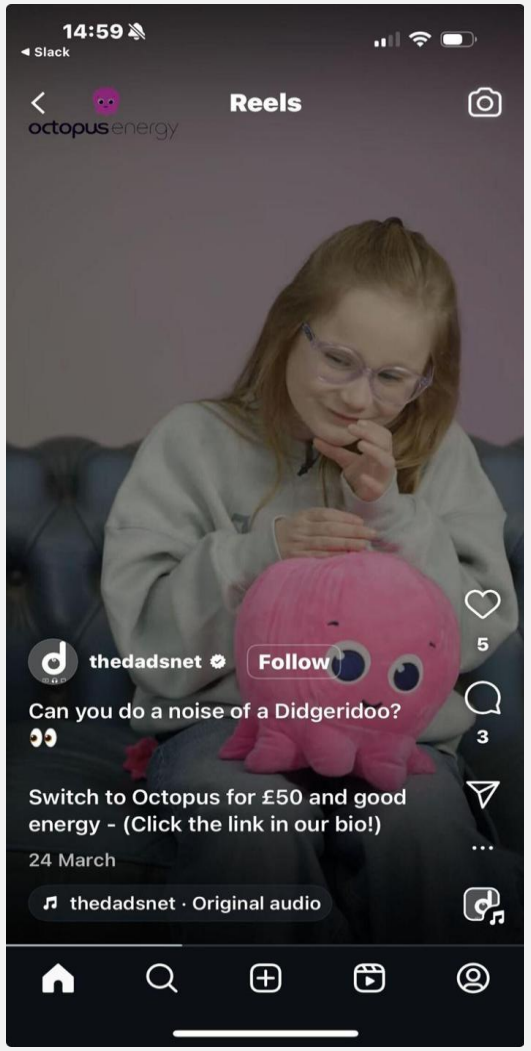
What made it **more** obvious?

- Caption - inclusion of 'Shop at the link in my bio'
- Familiarity with Trinny - prior knowledge / awareness of her promoting her own products
- Subject matter

What made it **less** obvious?

- No 'ad' sign or label
- Content was about her outfit which wasn't linked or explicitly advertised in caption - confusing as to what she's advertising

#4: Instagram - Octopus/thedadsnet



How to make it more obvious

- Talk about the product
- Mention why / who they're filming for at start of voiceover
- Include 'ad' or 'paid partnership' labels
- Include hashtags
- Present it more as an advert (e.g. higher quality filming)

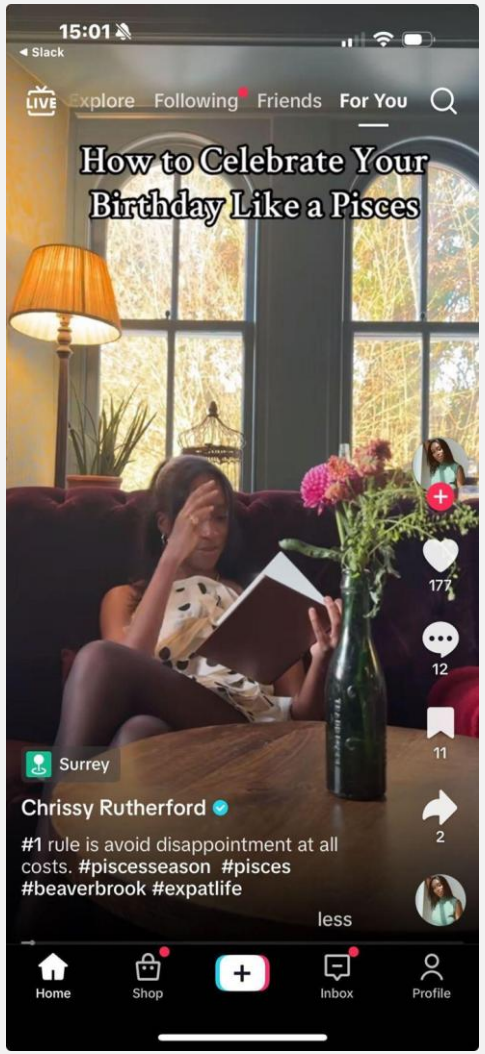
What made it **more** obvious?

- Octopus stuffy / logo (x3)
- Caption - explicitly saying 'Switch to Octopus' (x2)
- Click the link in caption

What made it **less** obvious?

- Subject matter - nothing about the company or product - only see two people chatting (x3)
- Ad format - interview style - confusing and out of context
- No mention of the product (e.g. what it's called, what it does, what its purpose is, etc.)
- Felt more like promotional marketing - not selling anything in particular but keeping brand top of mind

#5: TikTok - Beaverbrook/Chrissy Rutherford



How to make it more obvious

- Provide more detail on the hotel / how to book
- Tag hotel / add hotel as location
- Include ‘ad’ label
- Mentioning being ‘paid’ or ‘gifted’
- Link hotel

What made it **more** obvious?

- Mentions where she is staying a few times
- Tone of voice - positively talks about hotel (e.g. ‘no better place)
- Blue tick implies that she has enough of a following to advertise something

What made it **less** obvious?

- Subject matter - felt disconnected / irrelevant to the product
- Vlog style content
- No mention or inclusion of ad label
- Gift in room could have been a giveaway or just part of guest experience

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Day 7: Other labels

pr ...

Gifted

Thanks/Thank you

Affiliate links

Hosted

Invited

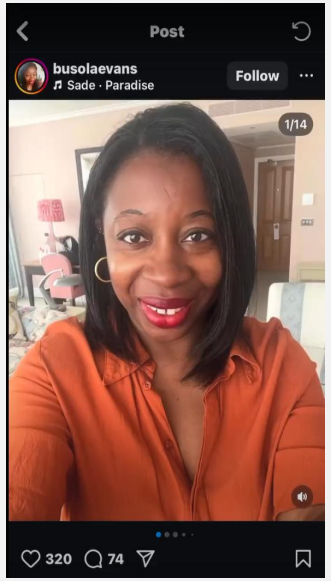
Please rate the ads we showed you today in order of “most obviously an ad” to “least obviously an ad”

#1

#2

#3

#4



#5

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#1: Instagram - Sezanne/Anna Whitehouse

How to make it more obvious

- Include picture / video of the interview itself to provide more context
- Mention 'ad'
- Focus on brand instead of topics / people
- Add clothing links / prices

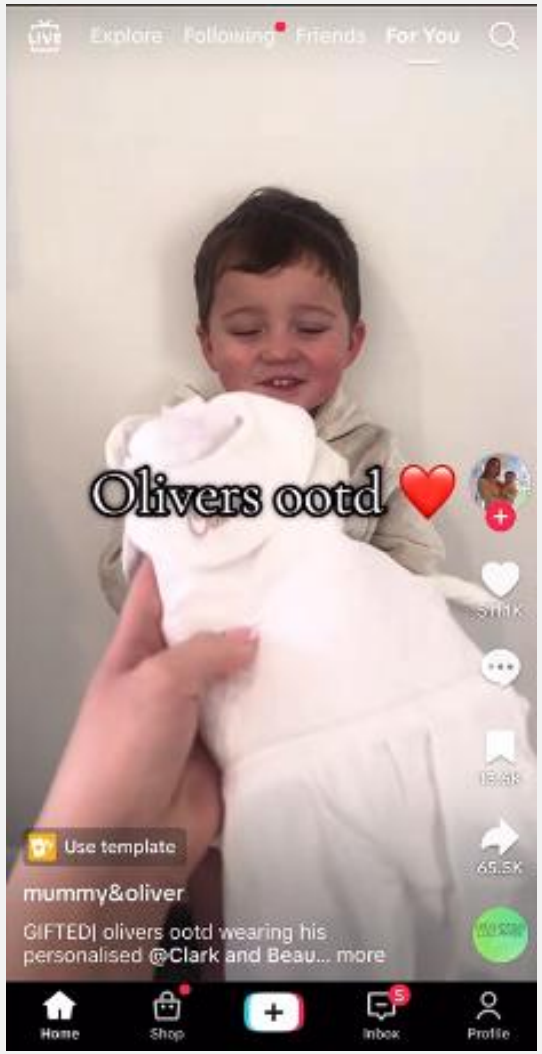
What made it **more** obvious?

- Mentions / tags brand in caption
- Blue tick influencer
- Inclusion of word 'collaboration' (x6)
- Formal setting / professional photograph
- Long, detailed description about partnership
- Hashtag (at end of caption style)

What made it **less** obvious?

- Event photography doesn't necessarily mean ad
- Unclear whether it's an ad or collaboration

#2: TikTok - Clark & Beau/Mummy & Oliver



How to make it more obvious
▪ Logo or labels featured on the actual video ▪ Include clear, voice over ▪ More professional filming
What made it more obvious?
▪ Branding / tagged brand ▪ Caption - ‘GIFTED’ at start (x2)
What made it less obvious?
▪ No voiceover ▪ Style / nature of content - feels organic / natural - something that would already be on her feed

#3: Instagram - Atlanta Trevone Bay/Aconsideredspace

How to make it more obvious

- Add purchase links / shop links
- Include discount codes

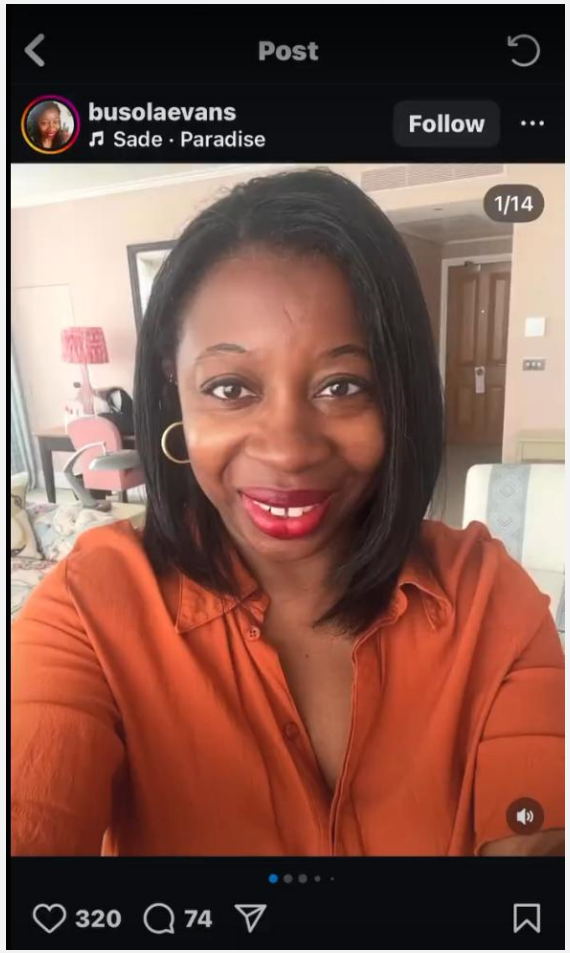
What made it **more** obvious?

- Showing fabric product pictures / in-situ photos
- Professional hotel / interior photos
- Saying shoppable designs
- Inclusion of hosted stay in caption
- Tagging hotel / company in caption

What made it **less** obvious?

- Initially seemed like hotel advert
- A lot of people post hotel pictures without it being an ad
- Have to read full long caption to understand

#4: Instagram - Firmdale Hotels/Busola Evans



How to make it more obvious

- Include branding in video
- Feature short tag / label upfront
- Include ‘ad’
- Feature words on images or video voiceover

What made it **more** obvious?

- Mentions / tags everyone involved
- ‘Thank you for great stay’ in caption
- Positive tone of voice
- The depth / detail provided on hotel

What made it **less** obvious?

- Videos / photos didn’t mention any hotel or product
- A lot of detail / lengthy description created more effort to understand what was being advertised
- ‘Thank you’ felt like ambiguous language - would have preferred to see ‘gifted’ or ‘paid’
- Unclear of what she actually got in exchange for this post - free stay? paid?
- Could be an unpaid recommendation / review

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#5: Instagram - The Langhams/ Grace Shadrack

How to make it more obvious

- Mention brand/hotel in caption
- Include ‘ad’ / ‘commission’ / ‘partnership’ labels
- Put ‘ad’ label upfront

What made it **more** obvious?

- Inclusion of ‘gifted stay’ (though still felt like could have been more transparent)
- Tagged post - both influencers shared same content
- Tagging hotel

What made it **less** obvious?

- No voiceover
- Looks like a standard / regular post
- Ambiguous caption description (‘dinner date’)
- Post / picture doesn’t clearly promote or have anything to do with the hotel
- “Random” song that felt completely unrelated to ad

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