Sponsored editorial content in digital journalism: mapping the merging of media and marketing

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Abstract

Sponsored editorial content is material with similar qualities and format to content that is typically published on a platform or by a content provider, but which is paid for by a third party. The growth of sponsored content in digital journalism over the last two decades has attracted wide-ranging research into developing practices, arrangements and their industrial, cultural and societal consequences. This introduction to a special issue on sponsored editorial content discusses the phenomena and how it has been understood and addressed by academic researchers, industry practitioners, regulatory agencies and civil society stakeholders. The article discusses definitions and definitional debates, provides a mapping of research approaches and findings, and identifies paths for future research, including those developed by authors for this special issue.

Keywords: Sponsored content; branded content; native advertising; journalism

This introduction to a special issue on sponsored editorial content describes the evolving phenomena, considers definitional issues, provides an overview of the main research approaches, topics and findings, discusses the contribution of the researchers for this issue, and indicates some topics and issues for future research. *Sponsored editorial content is material with similar qualities and format to content that is typically published on a platform or by a content provider, but which is paid for by a third party*. This sponsored content covers two main, converging, forms. The first is advertising, where brand-controlled content and storytelling extends into formats that resemble editorial and where so-called native advertising builds on earlier integrations of advertising and editorial, such as advertorials. The second is sponsorship, where a sponsor pays for but does not control the journalistic output, formally at least: underwriting but not writing the content. Under institutionally sedimented arrangements, practices and expectations, advertisers have controlled advertising content and publishers have controlled editorial, including sponsored editorial. Those arrangements have been disrupted by the growth and proliferation of forms of content that are financed by brands or other sponsors but published, and variously "produced" and co-created, by news and other content publishers.

Amid falling display advertising and subscription revenues, brand sponsored editorial content has offered publishers the potential for increased earnings, and marketers a means to tackle ad-avoidance and boost engagement (Harms et al., 2017). Sponsored content was the second most important revenue generator (44%), after advertising (70%) and ahead of subscription (31%), according to a worldwide newsroom survey (ICFJ 2017). Since then, the continuing structural decline in advertising revenue, has intensified efforts to diversity revenue streams and develop readers' share of revenue. These trends were exacerbated by, but pre-date, precipitate falls in advertising, and other, revenues in 2020-21 arising from the Covid pandemic. A survey of 200 "digital leaders" in 29 countries in December 2018, found that native advertising (75%) was among the top three most important revenue sources for news publishers, with subscription (78%) behind display advertising (81%), yet native fell to 8% as a priority for the year ahead (Newman 2019: 5, 23). In the following year's survey, covering 43 countries, reader subscription was considered the most important revenue source (76%) followed by display advertising (66%) and native advertising (61%); yet, opinion was split, with 44 per cent considering that subscription models could only work for a minority of publishers (Newman 2021: 13-14). So, editorial-

like content funded by brands has not assuredly advanced as the saviour of journalism, yet most news publishers continue rely on advertising as their main funding source. As that funding diminishes, the struggle to attract marketers increases the drive to offer embedded "native" forms of advertising, including sponsored editorial content. This is occurring the context of a broader shift to "native" formats within advertising overall, with eMarker, for instance, estimating that native would represent nearly 65% of total US digital display advertising spending in 2020 (Benes 2019).

Over the last decade, news publishers have restructured newsrooms and established teams to produce content, funded by brands or others, that blur traditional demarcations between editorial and advertising. Advertising that resembles editorial long predates the digital age, but brands are increasingly involved in the production of publisher-hosted branded content, including a range of practices and artefacts described as paid content, sponsored content, native advertising, programmatic native, brand journalism, content recommendation and clickbait. While commercial publishers leverage the business opportunities of sponsored content, these activities are transforming journalistic practices and generating critical debates on their implications for the purposes and performance of journalisms and on the extension of marketers' voice and ventriloquism across communications spaces.

Overview

Content paid for by brands and produced in association with brands expanded in news publishing and wider journalistic output from the 2000s, increased in scale and scope from the 2010s, and is the focus of the research discussed in this article. However, the phenomena needs to be situated in the longer histories of media and marketing communication interrelationships, including the governance of their separation and integration. The integration of advertising in news publishing includes reading notices in the nineteenth century (Baldasty 1992), advertorials from the early twentieth century (Lynch 2018) and the expansion of brand publishing and custom publishing from the 1980s (Turow 1997). *Forbes*' Brand Voice started in November 2010 when it was originally named AdVoice. The *New York Times* (NYT) began its "Paid Posts" service in late 2013. In January 2014 when it ran its first native advertisement (for Dell) the NYT attracted over 40 advertisers, with native advertising, paid content integrated into the form and format of surrounding content, making

up nearly 10 per cent of its total annual digital advertising revenue, $128 million (Sebastian, 2015).

The period from 2012-2019 was one of rapid revenue growth, market action and debate in the US and other advanced economies. Native advertising was a key topic at the Cannes marketing festival in 2013 (Dvorkin 2013). BI Intelligence forecast spending on native advertising rising from $4 billion in 2013 to $7.9 billion in 2015 (Rosin 2015). An American Press Institute Report (Sonderman and Tran 2013) described how many commercial publishers placed "growing hopes for a new revenue stream….sponsored content", as they grappled with the prospect of declining revenue streams from display advertising and subscription. A survey of 4,000 US marketers by Salesforce found that native advertising was the third most popular publishing strategy, along with video ads, becoming "an important component of most major brands" marketing repertoire with a growth in the number of native advertising platforms (Richter 2017). With marketers able to reach consumers more directly and effectively online and becoming less reliant on doing so via publishers, commercial news brands moved to offer more integrated advertising opportunities (Marshall and Alpert 2016). Ad tracker MediaRadar found more than 1,000 US publisher sites selling native advertising in 2017, up from 218 in 2015 (Moses 2017).

Branded content has become an increasingly important revenue stream for news publishers. According to a WAN-IFRA global study, news providers secured on average 20 percent of their ad revenues from native content in 2017; the news executives surveyed expected that revenue share to increase to 36 per cent by 2021 (Carroll 2019). For some digital native publishers, branded content was the biggest source of advertising revenue. Buzzfeed, eschewed digital display ads until 2017 and instead depended for all its revenue on branded content, notably its listicles (Sonderman and Tran 2013). It had estimated revenue from native advertising of $120 million in 2014, with an average fee of $92,300 for each campaign (Agius, 2015). The following year Buzzfeed had an estimated income of $250m, mostly from branded content (Marshall and Alpert 2016). According to Chittum (2014) the economically successful adoption of native advertising by digital news outlets such as *The Huffington Post* and *Buzzfeed* influenced and encouraged adoption by established legacy publishers such as *The New York Times* and *The Guardian*. Publishers adopted a variety of models, with some larger publishers establishing content studios that integrated ad selling with content creation.

Publishers moved into activities traditionally undertaken by advertising agencies, carrying out research for brands, creating ads and promoting branded content across their own outlets and social media (Marshall and Alpert 2016; Feng & Ots 2018). The New York Times' T Brand Studio in 2015 employed 110 people and generated some $35 million revenue, approximately 18 per cent of total digital advertising revenue (Marshall and Alpert 2016). In Spain, the major news publishers launched branded content units between 2014-2016 (Palau-Sampio 2021). In the UK, the *Guardian* launched its content marketing agency, Guardian Labs in 2014, and remodelled it in 2017 to make it more integrated with the newsroom. The restructured 62-person Labs team increased revenue by 66 percent in the first half of 2018 (Davies 2018).

Multiple factors shape these ongoing changes, yet underlying the growth of branded content are the opportunities and challenges arising from transformations in digital communications. The migration of users from legacy media to new digital sites and activities has continued to disrupt all marketing communications. In digital media, so-called banner blindness and the notoriously low click-through rates for banner ads prompted efforts to develop more attractive and effective ad formats. Native advertising formats can evade the increasingly mainstream use of Adblocking software. Brands have sought to produce or sponsor content to meet a wide range of informational or entertainment purposes. Embedded advertising is also integral to the business models of the major social media platforms, whose growing share of advertising revenue increases pressures on ad-dependent publishers (Couldry and Turow 2014; Couldry and Mejias 2020; author 2021). Formatting "native" ads to match the surrounding content, or reassembling programmatic native ads based on response data, is increasingly easy, inexpensive and automated for marketers. The regulatory conditions that have enabled, or failed to constrain, integrated advertising are also important factors (Casale 2015; Lynch 2018; Hardy 2021).

Sponsored content needs to be understood in the context of evolving political economies affecting relations between advertisers, marketing agencies, media publishers and platforms (Sinclair 2020). A core triad of actor types remain: marketers, marketing agencies and media, around which an expanding range of intermediary actors provide specialised services, and where activities associated with the triad are combined. Further, the core actors themselves incorporate hybridity, by offering services historically associated with other institutionally constituted actors: publishers becoming advertising agencies, while marketers and agencies

become media content providers. Finally, all processes are affected by automation and the rise of ad tech firms involved in programmatic advertising buying, selling, creation, distribution and promotion (IAB 2019).

Definitions and debates

Some accounts suggest that definitions are clear and that terms such as native advertising are "not contested" (Bachman et al 2019: 96), others that overlapping terms are used interchangeable. Neither is wholly accurate. Instead, definitional clarity exists but it is circumscribed, applicable only across specific contexts of usage by industry practitioners, regulators, academics and others. A broad term that encompasses brand sponsored editorial, is branded content, the practice of marketing by the creation of content that is funded or produced by marketers. This refers to all forms of brand involvement in the production and reception of communications content and experience. Other general terms include content marketing, or consumer content marketing (CCM), the latter described as "[p]aid marketing messages developed to simulate a news story or entertainment program that is cohesive with the media's content structure, including assimilated design that is consistent with the media platform. Also known as native advertising and custom publishing" (PQ Media 2018).

Advertising company Sharethrough (n.d) defines native advertising as "a form of paid media where the ad experience follows the natural form and function of the user experience in which it is placed". The term is used is used to refer to "paid advertising content that is designed to look like, and published alongside, nonpaid editorial content" (Wojdynski, 2019) and as "any paid advertising that takes the specific form and appearance of editorial content from the publisher itself" (Wojdynski and Evans 2016: 157). Reviewing US practice in the mid 2010s, Wojdynski (2016) identifies sponsored content, partner content, advertorials, and branded journalism, as among the key terms used, but argues native advertising became the most widely adopted. He suggests this is because the two words convey its inclusion criteria: messages that are "native" to non-paid content, while at the same time being paid advertising. However, the core claim of being "native" is itself promotional, and so definitions that represent it as a putatively neutral description are problematic, at least as a foundation for research. Some definitions are too particular, combining or excluding elements that need to be differentiated. For instance, Ferrer-Conill (2016: 905) defines native advertising as "a

form of paid content marketing, where the commercial content is delivered adopting the form and function of editorial content with the attempt to recreate the user experience of reading news instead of advertising content". However, only some native advertising seeks to recreate "reading news", as the continuities with advertorials and "reason why" advertising copy demonstrate.

There are then a range of terms used, and definitional inexactitude. The problems are compounded for comparative research, as discussed below. I suggest that the best approach is to identify and differentiate the components in practices and to engage reflexively and critically with the terms used in relevant practice and governance discourses, in specific media system contexts. Key differential features include advertising placement type, content type, content location and publisher type. All these are subject to formal, informal and increasingly part-automated transactional arrangements between parties and so the other key differentiators can be summarised as actors, payment, disclosure and control.

The Interactive Advertising Bureau Playbook, first produced in 2013 and since updated (IAB 2019), provided a useful, operational guide to terms that are influential in English language usage. The IAB (2019: 7) defines branded content (and native content) as "paid content from a brand that is published in the same format as full editorial on a publisher's site, generally in conjunction with the publisher's content teams themselves". Such content requires disclosure that it is paid for, and "should be considered as a native ad type" (IAB 2019:7). This substantive content (the text, images and graphic elements that make up an article, "story" or other item of branded content) is distinct from two other categories of "native advertising", which are both vehicles for the promotion of the branded content. These are in-feed and content recommendation ads. In-feed is a form of native advertising that appears in publishers' content feed, with the advertising unit usually surrounded by the publisher's editorial content. The native ad link takes users to a third-party website, but may link to a section of the publisher's own site carrying brand sponsored content. By contrast, content recommendation ads usually appear *below* articles, carried in a designated section with other content recommendation ads, and "does not mimic the appearance of the editorial content feed" (IAB 2019: 19). Content recommendation ads also always link to pages outside the publisher's site.

Returning to what has been referred to as branded content, the substantive content, there are important sets of distinctions which will help to clarify but not resolve the use of another key term: sponsored. First, branded content/native advertising are forms of "paid media" that are distinct from the "earned media" achieved through traditional public relations. Of course, that division has been tested, crossed and blurred in practices that predate native advertising, including editorial secured alongside advertising spending or publishers' use of "colour separation charges" to create a market for paid editorial coverage. However, the distinction between advertising and non-advertising content continues to structure regulations and governance. For instance, the UK self-regulatory organisation (SRO) the Advertising Standards Authority (ASA), under arrangements established in the 1960s, regulates marketing communications but not editorial, public relations or sponsorship.

The other key distinction is control over the communication content - editorial control - which may lie with the marketer, publisher or jointly (IAB UK 2018). Where marketers control paid communications, that content is generally recognised as advertising. When there is payment but editorial control lies with the publisher, a traditional description is sponsorship. Much branded content is a mixture of marketer and publisher control, so that the forms, practices, discourses, identifications, governance arrangements and user expectations are in flux. Paid advertising is associated with full control, as in display advertising where artwork is supplied by the marketer; by contrast, sponsorship is associated with payment without control. These distinctions can be illustrated by UK governance. As an EU member state until January 2021, the UK was subject to the Unfair Commercial Practices Directive (European Parliament and Council 2005/29/EC) which prohibits "[u]sing editorial content in the media to promote a product where a trader has paid for the promotion without making that clear in the content or by images or sounds clearly identifiable by the consumer (advertorial)" (Annex 1, Item 11). The Directive is incorporated into UK law in the Consumer Protection from Unfair Trading Regulations 2008, enforced by the Competition and Markets Authority. However, the ASA enforces codes on marketing communications written by the marketing and media industries, the Committee of Advertising Practice (CAP), and applies a dual test of whether the brand pays for *and* exercises control over content. As CAP (2019) explains "The broad principles of this exemption [for sponsorship] have also been applied to editorial content where there has been payment by a marketer (in money or

"in kind") but they have no editorial control…Such content is, however, still likely to fall within the scope of The Consumer Protection from Unfair Trading Regulations 2008…".

In the United States, a key structuring component in the legal-regulatory system is persuasive content. Advertising refers to paid persuasive communications, "where the communication features or advocates for a sponsor's products or services", "whereas the term "sponsorship" typically refers to communications that are not persuasive in nature" (Campbell and Grimm 2019: 117). However, increasing "use of the terms "sponsored content," "sponsored post," and "sponsored" "in conjunction with native advertising has likely eroded the traditional distinction between the meanings of "advertising" and "sponsorship"" in both industry and regulatory discourse (Campbell and Grimm 2019: 115). Likewise, in academic discourse, sponsored content has been defined as "the integration of brands or branded persuasive messages in editorial media content in exchange for compensation by a sponsor" (Eisend, van Reijmersdal, Boerman and Tarrahi 2020: 344; van Reijmersdal, Neijens, and Smit 2009). Yet, this conflates differences in sponsor control. There would be benefit in greater rigour and consistency in delineating between varieties of payment and control, yet their complex comingling in practices undermines definitional separation. It seems preferable, therefore, to remain attendant to all relevant terms and delineations across practices and legal-regulatory discourses while retaining broader terms. Serazio (2021) has suggested using brand journalism, as this incorporates the two key interacting elements of brand and journalism. Yet, that term is originally associated with the production and self-publishing of journalism on brands' own media (Bull 2013; Arrese & Perez-Latre 2017) and there is value in the breadth of "sponsored editorial content" as encompassing: addressing content beyond journalism, and sponsorship beyond brands.

The definition I advance is: *sponsored editorial content is material with similar qualities and format to content that is typically published on a platform or by a content provider, but which is paid for by a third party*. Sponsored editorial content encompasses both editorial-like material that is paid for and controlled by the marketer/source and brand "sponsored" but publisher-controlled editorial that falls outside those definitions. All such content involves payment or other economic consideration by a party other than the publisher. Control is not axiomatic, yet is precisely at issue in assessing the outcome of payment. Designated advertising, paid media, is controlled communication by marketers. Earned media is content

supplied without payment, with control over usage lying with the publisher. Such demarcations are blurred and hybridised by many factors beyond branded content, including the transactional relationships and interdependencies between sources and content publishers. There are multiple, intersecting spectrums across source interest, source influence, source disclosure; journalist/self-publisher/publisher self- and cross-promotion, interests, influence and disclosure. Yet while the economic beneficiaries of content, and the interrelationships of promotional exchanges, cover a wide expanse that must be incorporated in analysis and policy advocacy, this holism must not deflect from assessing the conjuncture of third-party payment with the presentation of content "*with similar qualities and format to content that is typically published*".

Definitions are integral to the exercising of regulatory authority, making formal legal-regulatory documentation arguably the most authoritative source, followed by the codes and statements of self-regulatory agencies, professional associations and trade bodies that are components of broader governance arrangements. Definitions are also a fascinating site of discursive struggles to persuade various stakeholder interests, and to shape and order the way practices are understood, valued and governed. For marketing professionals, the drive to establish positive associations with novel practices, disassociated from the old, discredited ones, is evident in the rearticulation of advertorial. Advertorial is a portmanteau term describing advertisements that appear as publisher's editorial content (Cameron and Ju-Pak 2000). In common use since the 1950s, the term is associated with advertising-as-article in magazines, and to a lesser extent, news publications. While contexts vary, the term is still used by publishers to label content, including to meet legal requirements to identify advertising material, yet has been superseded by the term native advertising within industry discourses, with the latter encompasses digital production and evolving formats. Yet, the term native advertising is used to enact a set of claims for a transition from old to new, that need to be interrogated by scholars, not merely endorsed. Sonderman and Tran (2013) state:

> Advertorials seek to present advertising as editorial content to convey claims and messages the reader wouldn't otherwise find credible. By contrast, sponsored content (done well) is properly labelled and clearly associates the brand with the content — the goal is to have the reader know and appreciate the brand's involvement, not to hide it.

Such differences are rhetorically constructed, but inaccurate and misleading as descriptions of either past or present practices. Fulgoni, Pettit and Lipsman (2017: 362) adopt a similar schema, describing advertorials as "interruptive to the print experience and [which] can be seen as misleading readers by offering funded content that masquerades as editorial". A more persuasive argument is that advertorials are associated with marketer supplied material rather than content produced by the publisher (Sirrah 2019; Apostol 2020). However, that demarcation is approximate, at best, and does not account for the continued use of "advertorial" by publishers to cover diverse kinds of publisher-hosted sponsored content, from advertiser-supplied to publisher co-created. As the research outlined below indicates, it is vital to recognise, and analyse, the discursive efforts to detoxify "branded content" across industry and academic discourses, including how definitional inexactitude serves processes of camouflage that make up the phenomena of "native" advertising itself (Serazio 2019).

Finally, we need clarity about the objects of analysis to enable cross-national comparability. We now have an emerging body of single country and comparative research, as discussed below. Yet, differences in the terms used, their meanings and values and how they map to practices across linguistic and geo-cultural divisions remains a surprisingly neglected component. Building a foundation for cross-national comparative research will require not only suitable standardisation but also greater reflexivity on the significance and implications of language-in-use across diverse and differentiated contexts.

Research review

Up to the mid-2010s, researchers commented on the paucity of studies of branded content in news publishing. Ferrer-Conill (2016: 905) found "very few studies focus on the actual introduction of native advertising in journalistic contexts". Since then, published research output has increased significantly, notably on topics such as the effects of disclosure of sponsored content (Eisend, van Reijmersdal, Boerman and Tarrahi 2020), but remains underdeveloped in some core areas for digital journalism research.

My research has identified 150 academic journal articles on sponsored content in journalism up to the end of 2019. Nine journal articles deal with advertorials and hybrid journalism advertising formats and were published before 2000. Twenty were published between 2000-

2009, with the remaining 121 published between 2010-2019. A journal article search (updated June 2021) was conducted using Ebsco for the search terms branded content (N=162) and sponsored content (n=87). A second search strategy included searching academic publisher databases for related journal outputs. A third strategy was to examine the reference lists of the articles identified through the database searches. The literature review also includes the results of searches of publications and reference lists to include books, book chapters and other academic outputs. The criteria for selection were substantive discussion of brand sponsored content (and all variant terms) in relation to the production and publication of print-based journalism.

Table 1 presents journal outputs only per year from 2000. This indicates the patterns of growth and topic selection in research. it is not a robust quantitative measure as search methods, inclusion criteria and English language publication bias make selection imprecise. Yet, it does show a pattern of increased scholarly attention and provides the basis for the qualitative mapping of research work and approaches discussed below.

Table 1: English language Academic Journal articles

Year	No. of Publications	Year	No. of publications
2000	1	2010	0
2001	1	2011	0
2002	0	2012	3
2003	3	2013	4
2004	2	2014	6
2005	4	2015	15
2006	3	2016	21
2007	2	2017	16
2008	1	2018	22
2009	3	2019	34

There have been at least 21 journal articles published in 2020. Here I draw on this literature for a short review of key topics, approaches and selected findings.

Criticality

The research literature can be mapped on an axis of criticality, from affirmative scholarship guided by industry concerns for marketing effectiveness, business opportunities or revenue growth, through to research informed by, or explicating, critical perspectives. The practices of "embedding commercial messages into traditionally non-commercial content" (Boerman and van Reijmersdal 2016: 116) are subject to critiques that branded content camouflages marketing communications, risks "confusing and alienating some readers" (Marshall and Alpert 2016) and blurs the boundaries between advertising and editorial in ways that undermine independent journalism. The inclusion of paid content designed to be "native" to its editorial environment has generated most concerns, ranging from deception and reader awareness (Wojdynski and Evans 2016) to the impact on editorial integrity, credibility and trust in publishing (Levi 2015; Piety 2016; Einstein 2016).

Hardy (2017b, 2018, 2021) identifies three main problem areas: consumer welfare, media integrity, and marketers' power. Policy-oriented discussion, and a significant share of scholarship, has focused on consumer welfare and addressed the labelling of native advertising, identification challenges for users (Amazeen and Wojdynski, 2020; Li and Wang 2019), and their implications for governance. Critically oriented researchers evaluate industry practices as deceptive and as instrumental efforts to overcome users' knowledge and capabilities. The implications of branded content for the quality, integrity and purposes of journalism is the focus of work by legal, political science, marketing and media scholars. The creation of content on behalf of marketers that looks very similar to editorial content has the potential to undermine the editorial integrity of the publication, critics argue (Levi, 2015; Serazio 2019b). This highlights concerns to safeguard qualities of the communication channel, not just protect consumers from deception (Goodman, 2006). One version argues that native advertising is parasitic, destroying what it feeds on; advertisers wants to harness reader trust but in doing so undermine it. For Piety (2016: 101), "native advertising threatens to spread advertising's low credibility to all content, thereby destroying the reason advertisers wanted to mimic editorial content in the first place". This is extended in critiques that argue that branded content undermines the capacity to provide the trusted information and commercially disinterested opinion needed for democratic governance: "although native advertising serves as a temporary (and partial) solution to the crisis in the news industry, it

might also – paradoxically – disrupt the core functions of journalism in order to ensure the news industry's survival" (Lynch 2018: 5).

The separation norm, of which church and state is an American institutionalized formulation, is linked to a broader norm, whereby "maintaining a certain degree of independence from those who are covered in the press… is in place to give citizens a sense of autonomy while establishing the legitimacy of journalism's democratic professional values" (Ferrer-Conill 2016: 906). Criticism focuses on the potential impact on editorial decision-making and output arising from pressures from, or dependency on, brand sponsorship (Atal, 2018; Ferrer-Conill, 2016). As an Advertising Age article puts it, "[w]hen you are a publisher that peddles native advertising, you're more vulnerable to advertising pressure" (Goefron, 2015). Native advertising violates principles of editorial independence, or artistic integrity, because it creates the risk that "non-advertising" content will be shaped in accordance with advertisers' wishes. Radical political economic critiques go further in their concern about the system-wide consequences for communication provision of privileging marketers' voices (Hardy, 2017b, 2021). The extension of brand voice into non-commercial spaces increases inequality in communication power. Such critique of branded content connects with those of market-driven journalism (McManus 1994) and hypercommercialism (McChesney 2013) and more recent ones concerning commercial personalisation, clickbait, adtech, dataveillance, digital platforms and capitalism (Couldry and Mejias 2020).

Affirmative-tending research is characterised by its alignment with goals of improving marketing effectiveness for sponsored content and profitability for dominant commercial media and marketers (Wang and Huang 2017; Campbell and Evans 2018; Wang, Xiong, and Yang 2019). Becker-Olsen (2003) found sponsored content improved consumer purchase intentions and disposition towards brands compared to banner ads. Fulgoni et al (2017) discuss industry research showing higher reader engagement with sponsored stories over display ads and call for time-spent metrics to be included in evaluating branded-content impressions. Another strand of media economics and business research assesses branded content as a necessary response to challenges for news publishers. Some of this literature acknowledges disbenefits but argue for the economic necessity of sponsored content to fund directly, or cross-subsidise, journalistic purposes, and to aid news publishers in challenging market conditions including their relationship with platforms (Watson et al., 2018; Nielsen

and Ganter, 2018). A third strand draws variously on organisational sociology, management and culturalist scholarship to align with managerially-defined discourses of innovation against traditional resistance. Here, separation norms are recast as defensive moves by incumbent, professional elites and the embrace of marketing as unavoidable, innovative and responsive to market demand and users (Deuze 2005; see Hardy 2017a). Scholarly alignment with the perspective of selected actors or stakeholder interests may be perfectly justifiable, but should reflexively acknowledged, with research seeking to explicate not merely replicate the framings advanced by selected participants. Such reflexivity necessarily involves and requires greater dialogue and engagement across critical and affirmative research.

Approaches

We can apply a division in the literature at the point that studies begin to address native advertising in journalism and to a lesser extent branded content, content recommendation and other terms used from the 2000s. Before that there is a longer history of relevant research into media, advertising and public relations interrelationships in journalism. That includes research on advertorials discussed in a literature review by Kim, Pasadeos and Barban (2001). Drawing on that mapping Bachmann, Hunziker and Rüedy (2019) distinguish three main strands of empirical work concerning the blurring of editorial and advertising in a journalistic context: a) content analysis of practices b) interviews and surveys with practitioners ("media managers or advertisers") c) experimental studies to examine persuasion and perception of recipients. While illuminating, their mapping conflates topics and methods and is selective. In this special issue Ferrer-Conill et al (2020) identify three main foci for native advertising in journalisms: normative implications, practices, and effects on readers. This is apposite but normativity issues, for journalisms, users and societies, arguably run through each topic and interconnect. So, I propose instead this mapping of four topic areas:

a) Industry practices - including political economy, institutional arrangements, production processes and practices, professional identities and attitudes

b) content

c) users – consumption and use, awareness, attitudes

d) governance

[a] Industry practices

Analysis ranges from macro-level studies of the changing political economy of journalism to studies of the organisation of practices at sectoral and organisational levels, with many also addressing attitudes and self-reflections of practitioners. Studies identify a range of configurations for branded content production and para-journalistic labour. Sonderman and Tran (2013) identify four main business models in US media: an underwriting model (brand sponsors publisher-controlled editorial), an agency model (publisher employs workers to create custom content in partnership with brands); a platform model (publisher provides space for publisher-owned content, e.g., Forbes' BrandVoice) and an aggregated/repurposed model where a publisher allows its content to be repurposed for brand communications. They identify the agency model as the most commonly adopted arrangement comprising "a separate stable of writers/editors", removed from the newsroom although "newsroom people may have some say in final approval" (Sonderman and Tran 2013). Subsequent studies identify greater hybridisation of news and branded content production. Chadha (2016) found that journalists at hyperlocal news start-ups composited their business and editorial duties. Boyles (2016) examines "intrapreneurial" units whereby legacy publishers adopted innovative features from digital natives. In this issue De Lima Santos, González-Tosat, Sádaba and Salaverría (2021) trace the evolution of multi-revenue stream business models at Buzzfeed, Vox and Vice and their dependence on branded content. Boundaries between journalism and commercial interests are relatively more fluid at digital natives than legacy news organisations and more differentiated across sectors, such as lifestyle and business-to - business. Common findings are overlapping roles for staff (Drew and Thomas 2018: 199; Porlezza and Splendore 2016). Researchers draw variously on organisational sociology, social psychology cultural anthropology and transdisciplinary media industries studies. Analysis of branded content as a liminal space between editorial and advertising sales connects to wider analysis of practices, cultures and identities of those engaged in and around journalisms, with many drawing Bourdieu's field theory and boundary object analysis.

Research on the perspectives of news organisation staff includes Artemas, Vos, and Duffy 2018; Coddington 2015, Drew and Thomas 2018. Interviews with various actor types involved in production include Harms, Bijmolt & Hoekstra, 2017; Poutanen, Luoma-Aho & Suhanko, 2016; Schauster et al., 2016; Atal 2018. Serazio (2019a, 2019b) conducted 28 in-

depth interviews with brand journalism professionals who operate in the United States. Drew and Thomas (2018) interview individuals in editorial and business departments. The general findings are that pre-existing church-state walls have become progressively porous (Artemas, Vos, and Duffy 2018; Carlson 2015; Coddington 2015; Ferrer-Conill 2016). Church and State has served as an influential "boundary marker" differentiating journalistic values from market-driven influences (Ferrer-Conill 2016), yet has been progressively eroded, critics argue, with the wall become variously a "curtain", permeated, collapsing (Coddington 2015), and, for some publishers at least, an archaeological curiosity (Hardy 2018). The adoption of sponsored content has been accompanied by the creation of "hybrid" editors (Poutanen, Luoma-Aho & Suhanko, 2016). Drew and Thomas (2018: 197) examine how "once-sedimented institutional and organizational logics are being negotiated and, potentially, reshaped". They cite the New York Times's Innovation Report (Mashable 2014) which advocated a shift in attitudes and practices at the news organisation and stated that "[t]he very first step should be a deliberate push to abandon our current metaphors of choice— 'The Wall' and 'Church and State'—which project an enduring need for division" (Drew and Thomas 2018: 196-7). Almar Latour (2015), executive editor of *The Wall Street Journal*, proposed replacing the metaphor of walls with canals, "purpose-built and with a clear narrow focus" whereby "news organizations that align with business colleagues on relevant issues will be better positioned to respond to competitive threats". Artemas, Vos, and Duffy (2018) identify a shift away from "building" metaphors to "ecological" metaphors that endorse closer business and editorial collaboration and which serve to frame more integrated practices "in natural, and hence amoral, terms", rendering them beyond "the realm of normative consideration" (Artemas et al., 2018: 1015). Whereas for Artemas et al these are framing strategies, Cornia, Sehl and Nielsen (2020: 186, 182) suggest that a new norm of integration has emerged, based on concepts of "collaboration, adaptability and business thinking", that "supplement the traditional value of editorial autonomy and norms of accuracy, fact-based discourse and a commitment to the practice of reporting, but seek to ensure it through integration rather than separation". Processes of normalisation are identified by Ferrer-Conill (2016: 912) whereby "the long-standing divide between editorial and commercial content has started to be questioned by powerful actors within the industry". Carlson (2015: 861) advances the concept of norm entrepreneurship, identifying a new normative accommodation with sponsored content: a "curational norm of providing a coherent mix of both editorial and

advertising content" based around "an imperative of providing content that audiences would find attractive".

The boundaries between editorial and advertising are established and negotiated in normativities and practices worldwide, but take context-specific forms, values and meanings of vital importance for analysis, as the contributions to this special issue attest and advance. This special issue confirms and enriches analyses of normalisation by examining specific configurations of news publishing, notably in Spanish media. Carvajal and Barinagarrementeri (2020) identify three organizational models (integrated, autonomous and emerging), each involving hybrid professionals, linking commercial, editorial and design practices. Carvajal and Barinagarrementeri (2020) find that "those in more senior roles seek to normalize advertising–editorial hybrid forms through a set of arguments regarding the editorial quality, ethical standards and sustainability of their news organizations". Palau-Sampio (2021) examines newsroom journalists involvement in branded content production in Spain, while Wang and Guo (2021) examine hybridisation in Chinese state news media, through their study of TeKan, governmental, paid content occurring in the context of "a business model imposed by the central government to enforce the political directive of media convergence".

b) content

Content research ranges across studies examining sponsors, authors, article types, how articles are written, analysis of text content, visual, layout and positioning, and studies assessing user engagement with selected content. The main sponsors of paid-for editorial have been commercial brand owners, but overtly political actors have also adopted sponsored content. Ferrer-Conill (2016: 911) describes how El País and El Periódico published articles sponsored by Area Metropolitana de Barcelona (AMB) "in a contract worth over half a million euros that was disclosed in the governmental official journal, but not on the newspaper's website". The Irish government strategic communications unit arranged for sponsored content to appear in local, regional and national newspapers, including the *Irish Independent* and *The Irish Times* in 2014. The unit was disbanded following a review and majority vote in the Irish Parliament, the Dáil, (Hennessy 2018). The UK government was criticised by the advertising self-regulator, the ASA, for advertorials carried in Metro

regional papers, Metro online and Mail Online, on welfare benefit that were deemed to have "the potential to create some ambiguity as to whether or not they were ads or editorial" (ASA 2019) and where all the complaints made against article claims were upheld, a damning verdict on a government "information" campaign. Scholars have examined the phenomena of corporations taking out sponsored content in publications that have carried critical editorial, providing opportunities for confusion over information or editorial stance, or as a platform for rebuttal. Supran and Oreskes (2017) found that Exxon provided misleading information on climate change over a 40-year period, including in advertisements and advertorials in the *New York Times*. The phenomena includes state actors paying for presence in publications that carried critical journalism, as the Thai government did with sponsored content carried by Reuters (Carroll 2019). In this issue, Balint (2021) examines the Israeli government's use of sponsored content within multimedia campaigns. Wang and Guo (2021) examine the relations of journalists at state news media with Chinese state paid content. As these studies indicate researchers need to integrate studies of information management, strategic communications and commercial speech to track their deployment by sources across journalisms.

The majority of systematic content studies have examined formats, positioning, labelling and other identification markers. There has been an emphasis on textual over other visual objects, but that is being redressed, including by studies in this special issue. Mañas-Viniegra, Núñez-Gómez and Zamith (2021) use neuromarketing analysis of eye tracking to assess how users read combinations of headline, text and image. Ferrer-Conill et al (2020) compare the visual features by which native advertising is distinguished from news items. This innovative study examines the contradictions between "coinciding" visual objects which help to mimic news articles such as "lead paragraph, text size, text font, text colour, background colour, authorship bylines, banners", and "disclosing" objects that identify and distinguish native advertising "use of borders, number and explanation of disclosures, stating the advertiser and their logos". In a five-nation comparative study, the authors find that "both national and organizational characteristics matter when shaping the visual boundaries of journalism"; disclosure and transparency levels tend to be lower in commercial publications than legacy and up-market outlets, while "online-only and mass-market publications tend to employ visual objects that facilitate mimicking content".

In this issue Palau-Sampio (2021) examines the range of brand sponsors found across Spanish publications. Such systematic content analysis of sponsors or stories remains rare, by contrast there are numerous studies of labelling and disclosure. Wojdynski and Evans (2014) examine disclosure practices in 28 US publications and find significant variation in the language used and positioning of disclosures, with some form of the work "sponsored" the most commonly used. Studies show variation in practices that may be attributed to different regulatory obligations, regulatory adherence and customary practices in media systems (Ferrer-Conill 2016).

c) users – consumption and use, awareness, attitudes

Labelling can be the sole means by which users can distinguish paid content from editorial, and so is a key determinant of awareness of advertising content (Wojdynski 2016; Boerman, van Reijmersdal, & Neijens, 2012). This is the principal focus of user research, dominated by experimental research methods, that examine attention, comprehension and recall and assess or infer influence and persuasion. Boerman and van Reijmersdal (2016) review 21 studies and conclude that the literature is inconclusive about several effects of disclosures of sponsored content, including whether disclosures encourage readers to ignore sponsored content or activate critical processing. Apostol (2020) examines thirty-seven research articles examining attitudinal responses to native advertising in editorial, published between 2003 and early 2020. The majority used experimental methods, some with qualitative research components, including interviews with survey respondents (Becker-Olsen 2003) usability testing and semi-structured interviews (Krouwer, Poels, & Paulussen, 2019). Eisend, van Reijmersdal, Boerman and Tarrahi's (2020) metadata review of 61 papers that examine the effects of disclosure of sponsored content, across journalism and other media, finds that readers often fail to identify native advertising content and fail to recognise or comprehend disclose labelling (Amazeen & Muddiman, 2018; Amazeen & Wojdynski, 2020; Boerman & Van Reijmersdal, 2016; Hyman, Franklyn, Yee, & Rahmati 2017). Across experimental research, Howe and Teufel (2014) find that user recognition of native advertising had no effect on their estimation of a news website's credibility. However, Amazeen and Wojdynski (2020) find that readers who recognise an online article as native advertising have less favourable opinions of the host news publisher, while Amazeen and Muddiman (2018) argue that both legacy and online news publishers damage their brand reputation through native

advertising. For marketers and media "disclosure increases the likelihood of criticism of the brand, message, and source" (Eisand et al 2020: 364), . Yet, if there are incentives to disguise NA, the findings provide a contrary pressure on regulators to strengthen the disclosure of NA in ways that go beyond the more discretionary approaches some regulators have so far adopted.

d) governance

The interface between branded content and national regulation has been examined (Campbell and Grimm 2019) and specific rules and practices, such as labelling, have been reviewed in cross-national contexts, with recommendations from many scholars for better labelling and disclosure (Iversen and Knudsen 2019). Governance analysis can integrate examination of all forms of rule-making with studies of media production, political economy, social action and discourse (Hardy 2021). Ferrer-Conill (2016: 912-13) advocates the development of "analytical tools for studying native advertising in journalistic context" and longitudinal approaches that study the evolution of implementation of native advertising. Such longitudinal and comparative research is required across the study of sponsored content practices and governance . In the special issue Ferrer-Conill, Knudsen, Lauerer and Barnoy (2020) examine native advertisements in 21 news brands published across five countries: Germany, Norway, Sweden, Spain, and Israel. While governance is not the main focus, each of the special issue papers engages with governance and contributes to this developing research agenda. Several papers examine Spain showing how this mature market for sponsored content also illustrates complexities across rule-formation and adherence. Formal rules lack specificity in addressing native advertising, industry codes are developing but are not embedded across institutional practices contributing to inconsistencies, idiosyncrasies and confusion across those involved in content production, as well as for users (see also Hardy 2018, 2021).

Summary: special issue contributions and future research

The papers in this special issue make a significant contribution to research, developing new frameworks, making theoretical and empirical advances and providing fresh perspectives on

established topics. The main methods for research to date have been content analysis, interviews and experimental audience research. The special issue includes ethnographic field work (Wang and Guo); surveys, interviews, archival study, quantitative content analysis incorporating visual analysis (Ferrer-Conill, Knudsen, Lauerer and Barnoy). The authors engage a wider range of theories including social identity (Wang and Guo), material object (Ferrer-Conill et al) and Habermas' theory of strategic and communicative action (Balint).

In commentaries, Joseph Turow (2021) assesses the implications of the frontiers of the voice intelligence industry for digital journalism, including serving personalised sponsored content based on combining voice profiling with other information collected on an individual. Lisa Lynch (2021) updates her review of possible trajectories for native advertising (Lynch 2018) to consider the faltering of some prestige publishers' branded content studio strategies amid advertising market contraction and competition from the Google-Facebook duopoly and other opportunities for advertisers. Both articles indicate that news publishers' routes to advertising revenue growth, whether through podcasting or voice profiling, are likely to involve further accommodation with brand sponsored content.

The wide-ranging research of the last 15 years has occurred in a period of claims, hype, hope and experimentation. There are ever-attendant risks that the findings of excellent research into specific configurations of practices in time and space may be cited as if it was sufficient to describe general and enduring features. Instead, the ephemeral qualities of sponsored content must be incorporated reflexively. Sponsored content has grown significantly but been an unreliable resource for media and marketers. Several of the digital natives who relied on sponsored content have stumbled, contracted or closed (Lynch 2021). Key issues for marketers including scale and measurement. For media, sponsored content has involved costs, including paid promotion of client-sponsored content, generating low profit margins. Revenue from all forms of advertising was in steep decline for many legacy publishers before the 2020 Covid pandemic, but then collapsed as the virus outbreak led to worldwide restrictions on public life. In the UK, the *Telegraph* cut the branded content activities of its agency Spark in 2020, although Chief Executive Nick Hugh promised to continue "editorially integrated partnerships tied to our reader-first approach" (cited in Spanier 2020). Sponsored content is also ephemeral in challenging ways for researchers. Publishers' branded content,

like other advertising material, is ignored, or inconsistently captured in news databases and publishers' digital archives, and is especially ephemeral online, with problems including inconsistent tagging, the removal or alteration of labelling, and, in some instances, the removal of sponsor identification after paid promotions, so that the presence of brand sponsored content is entirely erased, at least without web archive recovery tools.

As well as mapping evolution in branded content practices, there are still large research gaps across the intersection of journalism and branded content. More research is needed on the liminal "spaces", institutional and ideational, of branded content production. How do workplace organisational arrangements and social relations differ? What are the labour practices and divisions between staff journalists/content studio creatives, freelancers and subcontracted labour? How do younger or early career journalists assess and navigate tensions between normativities and exigencies? There are tendencies in research to conflate branded content producers and (all) journalists, whereas we need more careful assessment of stratification and demarcations in workplaces, more attention to tensions, accommodations, and antimonies. As Carvajal et al (2020) ask in this special issue "why is the lack of consensus about the use of native advertising in the newsrooms important, and what does this debate reveal about how scholars and industry stakeholders perceive branded content and native advertising?". Above all, we need to examine the factors that influence differential, and changing, responses to branded content across journalistic networks and across positions and identities within specific institutional configurations.

Within digital journalism studies, the research addressing sponsored content has tended to replicate general biases. The majority of studies have examined news journalism over other journalisms, and print-based/online text-based publishers over primarily audio or audiovisual journalisms. There is an extensive literature on branded content audiovisual but the interface of journalism and brands across all converging media forms is underexamined, although studies of online and mobile native advertising are increasing. The neglect of other journalisms is also being addressed, for instance, Hanusch et al (2019) examine lifestyle journalisms' particular susceptibility to commercial pressures. However, studies of sponsored content are needed across a range of publishing sectors including the Black press, social enterprise, radical and alternative media (Medeiros 2019). Historic studies of *Ms* show how

the tensions of serving advertisers within feminist publishing were negotiated (Steinem 1990) yet many more contemporary studies are needed.

Some sponsored content phenomena may indeed be short-lived. Formats and arrangements will change, yet the shifts from media and advertising separation to integration are far-reaching. Sponsored content illustrates a deepening convergence between marketing communications and journalism, between those with the resources for pay for presence in third party communication and those involved in the production of communications activities that carry the weight of expectations, assumptions and responsibilities of journalism. A profound reorganisation of digital journalism is underway affecting financing, resourcing and content decisions, across circuits of production and consumption. Digital journalism studies must contribute to analysis of the social as well as industrial implications, as marketers voice extends further into channels where multivocality and disinterested speech are so vital for political democracy and for our decision-making as consumers and citizens.

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