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Governance-in-Practice

The Branded Content Governance Project

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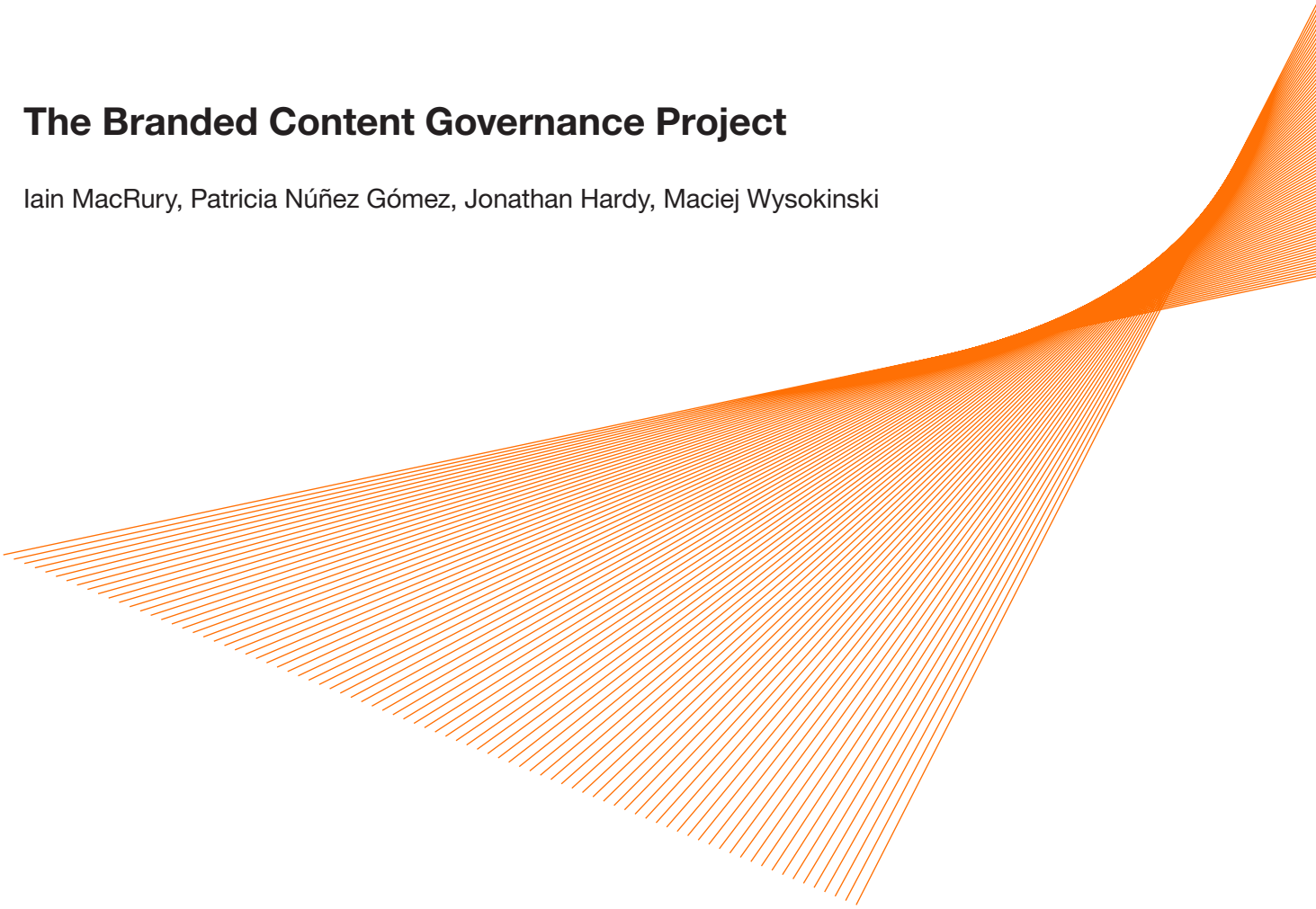

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1. Introduction

1.1 The Branded Content Governance Project

As media and marketing merge and new forms of marketing communications proliferate, are regulations, guidance, and best practice keeping pace? That is the focus of the Branded Content Governance Project (BCGP) 2022–2025, aiming to understand governance better in this domain. This report on the 'Governance-in-practice' portion of our research work makes one contribution to that aim by looking closely, and by listening, with attention and interest, to the accounts of practitioners working in an array of professional and creative media communications domains, those contributing to the development, production and circulation of branded content.

Governance-in-practice research does so as part of the wider project, one that investigates how branded content is treated in regulation and across all forms of governance, including how issues are reported, discussed and acted on. Our BCGP combines analysis with action. We seek to develop recommendations for governance out of our collaborative research and do so in a way that is context sensitive. What kinds of 'problems' arise in branded content practices and in the ways these are addressed in current governance? What kinds of actions, 'mitigations', can be identified that could guide effective responses in different media systems and contexts?

The BCGP is led by the University of the Arts London (Branded Content Research Hub), University of Stirling, and Complutense University of Madrid, supported by a 90+ international academic network, and industry, legal, policy and civil society partners. Our reports include *Branded Content Governance: 32-country comparative analysis* (Hardy et al 2025a) which accompanies our *32 individual country reports on the laws* and regulation affecting branded content across North America, the UK, all EU countries and Australia. Other publications include *Mapping the Media-Marketing Ecology*, with an interim version published in 2024 and the final version to be published as an open access book by Routledge in 2026.

The project also examines practices, policy networks and trade/general media discussions in more detail in the UK and Spain, with research publications on these topics. These include *Governance-in-Practice* which draws on interviews with practitioners and our *Media Analysis* report that examines how issues relating to branded content governance feature in reporting and discussion across professional ('trade') and public media (news publications).

We have also published a *Media-Marketing and Branded Content Policy Analysis: UK and Spain*, which examines and compares the law and regulations affecting branded content in the UK and Spain and examines relevant policy processes and actors including through interviews, roundtables and other research activities. Other published reports examine advertising policy and regulation in the UK (Hardy et al 2023; Hardy 2024a) as well as submissions to consultations, event presentations and the BCGP newsletter. All publications can be accessed at https://figshare.arts.ac.UK/BCGPProject.

1.2 Acknowledgements

This report has been written by the lead researchers for the Branded Content Governance Project with support from the project team researchers. The Branded Content Governance (BCGP) project is led by academics at three Universities. Prof Jonathan Hardy, University of the Arts London is Principal Investigator, working with two Co- Investigators, Prof. Iain MacRury, University of Stirling, and Prof. Patricia Núñez Gómez, Complutense University of Madrid. Our project research team comprises Dr. Celia Rangel, Complutense University, Dr Beatriz Carmen Martínez Isidoro, Complutense University, Dr. Maria Establés, University of Castilla-La Mancha, Dr. Lucia Gloria Vázquez Rodrígeuz, University College London and the work of postdoctoral research fellows Dr Hanna Kubicka, University of the Arts London, and Dr Maciej Wysokinski, Complutense University.

We wish to thank all those who have contributed to the BCGP. In particular, in this context, we want to thank the 60+ respondents to our interviews and roundtables. More broadly, we wish to thank all those who have acted as advisers for our 32 country reports (see our report, Branded Content Governance: 32-country comparative analysis). The BCGP is jointly funded by two research councils within UK Research and Innovation, the Economic and Social Research Council (ESRC) and the Arts and Humanities Research Council (AHRC), (ES/W007991/1). We gratefully acknowledge their support without which this project, and all the wider collaboration achieved, would not have been possible. We also wish to give a special thanks to our project partners who have supported this project from its initial planning to completion. They are the Branded Content Marketing Association, the Content Marketing Association and the law firm Lewis Silkin.

1.3 Introduction: Governance-in-Practice

Our governance-in-practice work interconnects across the wider suite of Branded Content Governance Project [BCGP] research activities. The BCGP by design, is wide-scoped, multi-layered, and multinational. It allows examination of branded content governance from a variety of perspectives, highlighting interconnected levels of activity. We deliberately built into our research design a recognition of the importance of identifying interlinked macro-, meso-, and micro-level organisation in the governance of branded content. Governance needs to take account of high-level policy systems, including legislation and government action. So BCGP extends a major focus into detailed and legal policy formulations and law. Industry wide institutions, including regulators, SROs (Self-Regulatory Organisations) and professional, trade and industry practitioner organisations play a further influential role in governance.

However, governance, manifold as it is, does not reside, only, in instituted forms. Nor in policy statements. It is a field of action as much as of documentation: a practice as much as an intent. So, the branded content field is populated by ‘actors’ (in the sociological sense), practitioners equipped (or not), willing (or not) but required, nevertheless, to interpret, to

follow, oversee and to learn about regulations. To check and put into their practice the rules, norms, and tasks associated with and in alignment with macro-governance in the round. Practitioners and practices play a role in constituting governance, as well as being its object.

So, we have made a concerted effort to consult with, learn from and to research with these practitioners. Practitioners who create and deliver the work of branded content also 'govern' it in this sense – 'overseeing' themselves and each other. So, our research includes considering media communications and brand organisations, but for interviews we have sought out individuals who participate in the wider field to form 'branded content' as a loose community of practice.

Media Ecologies and Governance-in-Practice

Elsewhere in our research, we look at 'media ecologies', another important and closely linked strand of analysis of governance-in-practice. Our perspectives are published in our report on *Mapping the media marketing ecology* (Hardy et al 2024, and Hardy, MacRury and Nunez Gomez (2026). This connects to a kind of meso-macro-level of our work. There we look at the ways branded content sits in the network of organisations doing media, marketing, regulation, and including platforms, publishers and broadcasters. We outline this broader critical governance analysis in the BCGP's 32-Country Comparative Analysis (Hardy et al 2025a).

In a field of practice, such as branded content or 'brand funded entertainment', some organisations are very small, sometimes individual solopreneurs or freelancers operate. There are consultants and influencer-creators in particular domains. We find diverse institutional forms. Notable here, one-person businesses, 'traders', work and compete alongside and in contractual relations with much larger commercial entities (brands, agencies and platforms). Indeed, there are governance questions associated with such 'elephant and flea' ecosystems [1](Handy 2002) When 'Big players' contract with e.g. individual influencers and small studios or agencies, and where there is a 'project logic' (Bernuth and Bathelt 2007) running alongside and within institutional logics, we see a fluid and volatile field. There are power relations and blurred lines.
As one respondent put it:

> I also think something... It's a bit incestuous because everyone's moving around. Everybody knows everybody. And interesting with freelancers, a lot of them, it's almost like there's a conveyor belt P012_Aisha

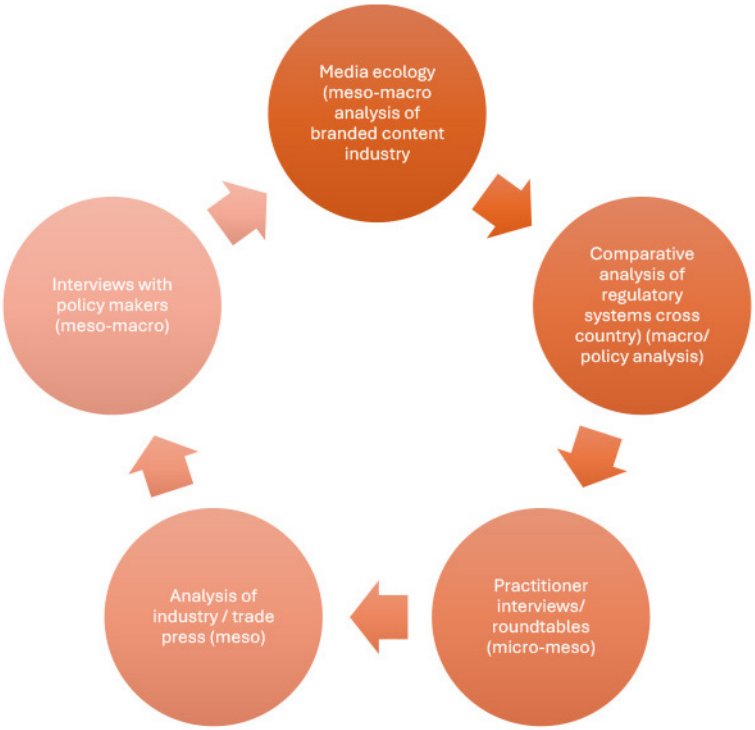
1 Handy (2002) suggests small, agile organisations, studios, or e.g. influencers, i.e., the 'fleas', bring speed, invention, and responsiveness. Large firms, the 'elephants', bring scale, reach, and resources. In branded content small producers innovate etc. Large brands control budget and risk. It is sometimes complicated to know where governance sits here – there are power relations. Handy (2002)

Media Ecologies and Governance-in-practice analyses sit enveloped in a larger-scale 'macro-' comparative analysis of inter- and trans-national regulatory systems. This framing developed, partly, as informed by high-level media systems and policy analytical approaches. But it also surveys in close detail, some specific institutional arrangements around regulation, legislation, and governance - as linked to the branded content domain. That more detailed document-led work includes, for example, different configurations of self-regulation within industries across 32 countries (Hardy et al 2025b).

Policy analysis extends, too, into a set of interviews specified as seeking input and perspective from policymakers and policy actors, i.e., those working in direct relation to relevant policy areas connected to branded content. These are discussed the BCGP's Policy Analysis (Hardy 2025c). These policy actor interviews capture a primarily a meso- and macro-level understanding of the *policy* environment. The interviews have been kept distinct and were approached somewhat differently to the ways in which we have spoken to practitioners. Inevitably there is some overlap, especially, notably at the level of trade bodies. Here practitioners and policy makers often connect and collide. In the project, our roundtables reflected a methodological design planned to bring these discrete actors, and areas of action and reflection, into some dialogue. Naturally, policy makers have views on practices, and practitioners typically form views on policy. These also meet in the trade press.

We have also included an analysis in a further strand of work looking at the industry more directly through the way it talks to itself about itself. The BCGP's *Media Analysis* report (Hardy et al 2025b) presents our research on professional ('trade') and public media (newsbrands) reporting and commentary on regulatory issues relating to branded content in UK and Spanish media. In the industry trade press literature dialogue abounds. We take note of Edwards and Piecza 2013; Wilkinson and Merle 2013; McMillan and Childers 2017; Corrigan 2018; Hardy 2024b). Each identify a place for analytical reading of industry discourses in related domains (Hardy 2025c). To underline: As Fig 1 indicates the interviews work in this report is part of a wider research context.

Figure 1: The Governance-in-Practice aligns with and should be read alongside the other BGGP project strands



1.4 Governance-in-Practice: Interview-led Working in Context

In the strand of work reported here, the BCPG has focused on a distinctive research approach. Interview-led, we seek to give voice to, and to better understand, the perspectives, practices (MacRury, 2013), and, in some cases, the 'live' analysis coming from practitioners working within the branded content field, broadly defined. Interviews (and roundtable discussions) allow for a further and closer look at micro- and meso-level elements of the system. Talk and dialogue complement document-based and policy analysis. They move us into more practical areas where governance happens or, on the other hand, where, perhaps sometimes, governance-in-practice breaks down, becomes inhibited, uncertain, disrupted or neglected.

We should add, however, that the BCGP was designed to be delimited and not to conduct our own primary research involving *audiences* (Hill and Lunt 2024; Lawlor, Dunne and Rowley, 2016). So, we have not, here, or directly researched the citizens, the consumers, the publics who receive and bear witness to branded content communications. However, our practitioner interviews, as well as policy-linked work, have been helpful in giving us some understanding of the sense of the 'audience' as operationalised within the work of practitioners as well as policy makers.

Practitioners' work will include the task of communicating with audiences. One insight is to confirm that, in many instances, practitioner-respondents do think about, and 'imagine' (Ang 1991; Litt, 2012) audiences and, indeed,

the wider publics in this domain. Our interview respondents did so in a variety of ways, casting their imagined audiences as variously 'highly media literate', 'vulnerable', 'inattentive' and 'media savvy', 'untrusting' and so on. We were also interested to hear when audiences thought about the specific dynamics of branded content in children's cultures. Governance is linked to considerations (constructions and misconstructions) of audiences and publics. These 'audience-linked' considerations remain central to our preoccupation, even while they are not directly in scope for our direct empirical work.[2]

For our interviews, we have approached practitioners in the broad spirit of ethnographic inquiry. We sought insight from multiple approaches to media practice research in this domain (Lotz and Tinic 2009; Marinos 2025; Coleman 2010; Herzog and Ali 2015; Grainge and Johnson 2015; Maguire and Matthews 2010; Carvajal and Barinagarrementeria 2023; Aitaki et al 2020; Benito 2023). Sometimes we worked to meet respondents *in situ,* where we have been invited to visit and understand different workplaces, and to talk informally in those settings. Equally, though, in many ways reflecting some of the working practices of the industries that we explore, not to mention the transnational geographic structure of the project, we have conducted many of our interviews in online settings. To balance this online quasi-telephonic interview approach, we have been able to do several face-to-face meetings, in offices or in neutral settings, which have been additionally helpful by adding an in-person quality to the interviews. All our work was conducted in accordance with arrangements and protocols granted research ethics approval from each of the lead researchers' institutions: University of the Arts London, University of Stirling and Complutense University of Madrid.

1.5 What do We Mean by Governance-in-Practice?

Our shorthand working definition of governance-in-practice describes the interfaces of 'external' and 'intrinsic' rulemaking/rule-shaping behaviour, and of 'regulation' and 'ethics' as realised within the practices and reflections on practice of socially organised and networked practitioners. Across our analyses and reporting governance-in-practice refers to the ways individuals, teams and networked practitioners reflect and act in accordance with these rulemaking/rule-shaping and in practical-internalised norms. *Governance-in-practice* encompasses the processes by which governance is managed and negotiated, within and across enterprises, supply chains and networks, by those producing content and services.

'Governance' has two common areas of usage. The most familiar sits in the common collocation 'corporate governance'. That situates governance as a privatised set of responsibilities, for instance via a corporate board, private, albeit managing its legal-public accountabilities and complying with

2 Strong work in this domain includes e.g. Amazeen 2020; 2025; Lawlor and Rowley 2016; See Hardy 2022, 2023b.

regulation. Governance is, however, more than a synonym for 'regulation' and has a public frame, too (Ginosar, 2013; Corduwener, 2024). Puppis (2009: 137) cites a helpful broader based sense of governance as a system for:

> …sustaining co-ordination and coherence among a wide variety of actors with different purposes and objectives such as political actors and institutions, corporate interests, civil society, and transnational organizations' (Pierre 2000:3-4 cited Puppis 2009:37).

Our focus extends into this wider usage (Hardy 2021c, 2022). It situates governance in respect of organisations, yes, but also, within a wider set of accountabilities captured in ideas such as 'civil society'[3], 'the public sphere' and, even, 'media cultures', including in respect of legal and policy-driven forms of public-institutional government.

On the ground, 'governance', (even if not acknowledged or named as such) becomes realised in encounters between practitioners and 'external' rules, systems, and with more tacit assumptions and norms. Layering personal, institutional (Scott 2001), professional (Kuhlmann, Agartan and Knorring, 2016) and cultural norms[4] (Bicchieri et al 2023; Cruft et al 2023), governance encompasses practical conduct and know how. Governance, then is held by persons and organisations, and in place, (Scott 2001) as a kind of regulator 'in mind' (see Armstrong 2018; Armstrong and Obholzer 2005).

Puppis (2009:143), drawing on Scott's organisational-institutional approach (2001) puts it in more conscious terms, describing a 'cultural-cognitive pillar' in organisational governance:

> The cultural-cognitive pillar of institutions refers to the way taken-for-granted assumptions and collectively shared understandings influence media organizations because alternatives are simply inconceivable. This governance ethos can be linked to persons, places and processes of work, as well as being set against wider cultural, policy and regulatory horizons.

Governance is managed. It is negotiated and re-negotiated within and across enterprises, supply chains and networks. While it can sometimes

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3 For instance, 'governance' is examined across industries and culture; MacRury and Poynter explore governance in urban regeneration in MacRury I and Poynter G (2009) 'Olympic cities and social change', in G. Poynter and I. MacRury (eds) *Olympic Cities: 2012 and the Remaking of London*. Farnham: Ashgate, 303–327

4 See Cruft at al. (2023) …' Social norms, like many other social phenomena, are the unplanned result of individuals' interaction. It has been argued that social norms ought to be understood as a kind of grammar of social interactions. Like a grammar, a system of norms specifies what is acceptable and what is not in a society or group' (see Bicchieri, Cristina, Ryan Muldoon, and Alessandro Sontuoso, 'Social Norms', The Stanford Encyclopaedia of Philosophy (Winter 2023 Edition), Edward N. Zalta & Uri Nodelman (eds.),

be enunciated in words and principles[5], and e.g. via specified regulations, governance-in-practice can, also, be tacit, assumed, even forgotten, or bypassed - in shortcuts and confusions. This is certainly the case in respect of branded content.

'Governance', we find, is present in discourse, in the breach as much as in the observance. Notably practical governance issues surface in practitioner discussion on matters such as labelling and disclosure in influencer marketing that we examine in this report. This also gets picked up in wider analysis and commentary (Edwards, 2025; O'Neill, 2025; Duffek et al., 2025). and with disclosure (Taylor, Aade, and Goanta, 2024; Ershov, He, and Seiler, 2025).

In this research we look at, and listen to, those producing (branded) content and adjacent promotional media work. General media and its attendant discourses and principles can also inform how industry practitioners identify and assess rules, and norms, and we look at that in our BCGP research on trade media. These discourses, for instance as articulated in trade and professional discussions, play a role in presenting, and ordering the perspectives of a broader range of policy stakeholders. It is helpful to name governance-in-practice and see how it is embedded in processes; to invite reflection. Our practice interviews have helped us to reflect more broadly on policy level governance (Herzog and Ali, 2015).

1.6 The Map is not the Territory: Practices in Context

One of the background methodological conversations structuring our work has led us to foreground high-level structures and systems of regulation and governance. Mapping structures and policies is a precursor to this analysis. We work within an understanding of the importance of grasping macro structures across the industry and mapping institutional constituent members. Concurrently we hold in mind broad ideas of audiences/publics, media platforms[6],and the culture-wide scope and scale of the media marketing ecology (Ruotsalainen and Heinonen, 2015; Hardy et al 2024; Hardy, MacRury and Núñez Gómez 2026). Each these elements (and the perspectives that allow us to see them better) are fundamental in good governance. So, we have actively sought to map these (Hardy et al 2025a; Hardy et al 2025b). Structures, systems and political economic dynamics are foundational in the work of media, cultural and communications studies of governance (Puppis, Mansell and Bulck, 2024) and in the workings of the media industries.

5 For instance, widely held principles set out by self-regulatory authorities, trade bodies and, even, global bodies regarding promotional communications such as The ICC Advertising and Marketing Communications Code' 2024, (Ikonen, Luomaaho and Bowen, 2017) and see our 32 country reports which reference national level regulatory codes.

6 Especially via the notion practices associated with platform governance (Gorwa, 2019)

At the same time, we recognise that it is important to grasp and relay something of the reality of branded content governance from 'on the ground/ from below' (Corduwener, 2024). We captured this feeling about the value of being in touch with practice *in situ* with reference to the neat aphorism from Alfred Korzybski, and his notion that 'the map is not the territory' (Korzybski 1958:750). So, we complement the aim elsewhere in our research to map, describe and critique 'macro' system features, e.g. in our orientations to 'media systems' (Hallin and Mancini 2012; Hardy 2021; Hardy et al 2025a) by also looking at the *territory*. Here we mean seeking to grasp the field from within practitioners' contexts, understandings, their working theories and experiences. This sensibility, amplified by Herzog and Ali (2015:41) suggests that it can be valuable to deploy mixed or complementary methods. These offer a 'broader picture of the voices, arguments, actors, arenas and controversies that dominate contemporary media policymaking'. With our governance-in-practice work we thus seek to balance the focus on more macro and meso domains in other parts of our BCGP work, countering the 'proclivity' amongst some media research towards 'privileging macro- and meso-level sources' (Herzog and Ali 2015: 41). Since[7] the early 2000s, in any case, there has been, indeed, a good deal of strong critical work that has been assertively attentive to the micro- into- meso- levels of (promotional) media industries, including in respect of branded content creators (Salamon, 2025; Marinos, 2025; Carvajal and Barinagarrementeria, 2023). So, we are encouraged in the relevance of this orientation to 'the territory' alongside the wider 'mapping' research.

Giving Voice to Practical Governance

Ethnographic interviews suited the task of getting inside governance (Seidman, 2019), closing some of the gaps between governance-as-theory (as abstract principle, as intent and 'system' or 'map'), and governance-in-practice, crystallised as a more tangible-pragmatic object of reflection and day-by-day action. Those whose daily work presses up against regulation and policy, even when they don't name it 'governance' as such have much to share. Practitioners represent a significant voice in wider deliberations about branded content. Conceptually, they stand alongside audiences and 'publics' as amongst major destinations, beneficiaries and vectors for functional implementation and enhancement of good governance. Here, we have in mind Freedman's (2014) recognition that:

> …it is vital not to insulate questions of policy from those of content and creative practice and from the spaces of media institutions and flows.

7 This has been a 'live' and creative debate in the research design (see, also Gandy and Garnham 2009; Aitaki, Papadimitriou and Tzioumakis, 2020). In our research design we resolved not to overdo one approach at the expense of others. Instead, we have consciously tried to recognise and respect the distinct value in our project's multiple and complementary methods and approaches - So, here, we emphasise the micro- and the meso- as well as holding the macro level analysis 'in mind'.

> The artificial separation between policy and media production and consumption weakens our understanding of media industries.

Freedman goes on to add that

> The aesthetic strategies, creative endeavours, and forms of resistance that may or may not be present in popular, everyday communication are critically related to the wider structural contexts of media environments (Freedman, 2014)

In outlining a critical governance analysis approach, applied and developed for the BCGP, Hardy (2022: 146, 143–168) argues:

> Conceptually, governance is helpful in addressing the interacting range of formal and informal regulatory mechanisms, the proliferation and liquidity of actors, the significance of automation and AI, and modes and sites of contestation. Governance offers a means to integrate political economic, policy, and cultural analysis, by addressing connections across macro-meso-micro levels, including: state–capital–market relations; industrial organisation and arrangements; regulatory institutions and processes; socio-cultural practices; norms and attitudes across producers, users, and other actors; communicative action; and discursive interaction across all relevant stakeholders and media. Governance is analytically encompassing and can connect studies of policy and regulation with studies of the organisation and performance of media industry practices. We might approach this with a holistic awareness of the influence of all these elements in the dynamic ordering of multiple forms of power, even if we choose to focus on specific areas of interaction for more manageable research design.

Governance, policy and regulation manifest in interrelated and integrated ways within the spaces/flows of media institutions and amongst the people who work in them. Interviewing in those spaces, and listening to those people seemed, then, like a useful way to deploy our research resources in the context of our wider research.

Linking Map and Territory

Within the heuristic distinction made here, ‘map’ and ‘territory’ remain closely linked. With an eye on change dynamics, shifts in one frame can readily and reciprocally disturb the other in the name of positive (or negative) changes in policy, governance and practices. In times of flux, however, they can diverge. So, these interviews have been conducted in part to contribute in a minor way to closing the gap between the ‘map’ and the ‘territory’ and to contextualise in practice some of the concepts and processes in governance that we have also sought to explore in other components of the project.

Overall, we argue that systems also matter. They en-frame practice. But we also suggest that governance resides in (practical) action, working constraints and shifting contexts. It does not just live in documentary guidance, policy and instituted principle. Efforts to develop and enhance evolved governance require an integrative understanding of both perspectives. We think, too, that this 'governance-in-practice' work stands up by itself as a small but focused instance of the tradition of close-up quasi-ethnographic engagement with practitioners in media and communications industries - looking distinctly at 'branded content. Respondents have led us to see the links, and we attempt to do justice to their contributions and to report some key findings and reflections here.

1.7 Methods: Researching Governance-in-Practice

Our methods support capturing insights and practitioner voices from what we discovered to be a complex and distributed producer/intermediary subsystem (González-Tosat and Sádaba-Chalezquer, 2021) within the media marketing ecology. This field 'Branded Content' traverses and remodels a space that used to be occupied, primarily, by distinct interoperating entities: Marketers, Publisher-broadcasters and Ad agencies. Now it is more complex (Zuckerman et al. 2021; Hardy, 2022; Hardy, MacRury, Gomes 2026; MacRury and Manika 2025). This practitioner focused element of our wider project, then, takes the form of a depth-oriented engagement through ethnographic interviews. Our BCGP research also incorporated 'roundtable' discussions, most involving policy actors and stakeholders and industry practioners. We have included n=57 respondents, (see Table 2) mainly in the UK and Spain, but including some respondents from wider international contexts. There has been a wider community of informants in the project more broadly, but these n=57 participants are the focus for this report.

Respondents were based primarily in continental Europe, but BCGP work has also benefited from some very helpful insights from US respondents[8]. Several, (indeed, most) respondents have direct experience of working internationally, even where UK or Spain-based. This is not unexpected given the globalised and relatively 'borderless' (Crawford et al 2019; Dens and Poels, 2023) character of contemporary promotional media, advertising and branding work. Insights came from unstructured comparative anecdotes between, for example, UK, US and marketing in Asia or MENA.

We have not focused, here, however, on a detailed or systematic cross-national comparison. That remains a part of the macro-level analysis conducted in our mapping work. Instead, in our analysis of practitioners' discourse, we find a relatively strong alignment in terms of preoccupation and position-taking from interviewing within the larger cohort, and across

8 USA is a key domain we have also examined as one of the 32 countries in our transnational analysis

the two systems the BCGP examines in greater detail, the UK and Spain. At least within the terms that we have addressed around governance-in-practice, there seems to be a relatively shared set of preoccupations amongst the UK and Spanish practitioner respondents. This is the case even though there are significant differences in the formal governance arrangements in the UK and Spain as the BCGP's Policy Analysis (Hardy 2025c) and 32- Country Analysis (Hardy et al 2025*) examines in detail. The BCGP's decision to compare Spain and the United Kingdom in greater depth was grounded in them sharing socio-economic similarities, yet legal and cultural divergences, providing a valuable opportunity to better understand and compare the production and interaction of a broad range of governance processes, building on researchers' prior links across academia, industry, policy actors and civil society[9].

Table 1: Overview of Methods for Governance-in-Practice Phase of BCGP Work

Qualitative Interview Approach (UK/ Spain)	A 'listening' approach - "push/pull"- conversational interviews and discussions
	Focus on situated, embedded knowledge and tacit "governance"-in-practice/situ/workflows
Depth Individual Interview sessions & Semi structured interviews	Long/ intensive one-on-one interviews inviting reflection in and on 'role as a branded content practitioner'
	Insights from personal reflections, emotional/insider-experience and localised dynamics
	Analytic and 'view of the industry/ governance' observations/ opinions
Roundtable discussions (UK/Spain)	Methods for complexity/ systems/ "polycentric positions"
	Capturing diverse stakeholder perspectives (regulators, practitioners, academics) in interaction

9 The departure of the UK from the European Union in 2020 constitutes a key contextual factor and point of difference from Spain, although for branded content the UK has not deviated significantly from EU rules. Instead, the key differences are located in the respective national legal-regulatory systems. The UK joined the EU relatively 'early in 1973, although nearly two decades after founding members formed the EEC in 1957, and formally left the EU in January 2020, following the Brexit referendum in 2016. Spain joined the EU 'late' in 1986 following its history of civil war and, like its neighbour Portugal, extended authoritarian rule, before a shift to democratisation in the 1970s.

Translation: Working Across Languages

Translation was front of mind as we began the work. This was mainly in anticipation of the specificity and subtle meanings of some aspects of discourse, especially in relation to legislation. We have done some detailed work in terms of alignment and translation, especially in the policy and legislation area. We were conscious of challenges associated with assumed commonality of meaning in transnational research (Livingstone 2003) more broadly. We had the benefit of cross national/multi-lingual research teams working on interviews and data handling.

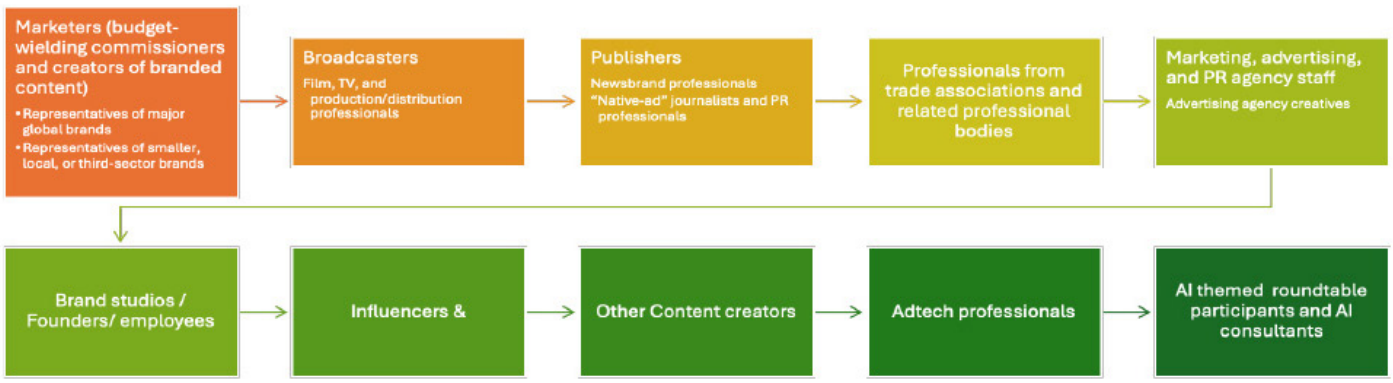
One early procedural finding in our governance and practice work, however, was that a good deal of professional-marketing language, language that we might want to call 'marketing jargon', namely the terminologies typically deployed across discussions of 'branded content' in UK and Spain, seem to reference a similar, not to say shared set of reference points (Carvajal and Barinagarrementeria 2023).

This was explained to us in the following terms. The language of marketing communications has been somewhat globalised for several decades. Translations between the two are stable and reliable; cognate and coherent. Terms typically reflect direct use or ready translation from an Anglo-American tradition, one which is dominant and influential in practice. Although 'Branded Content' has been hard to define in the abstract, for instance, it has fairly common currency between the UK and Spain amongst marketing practitioners (Garcia Estevez and Cartes-Barroso 2022; Benito 2023). Respondents from both national cohorts commented on the relative instability of branded content as a defined term, although there was a general sense of what it meant.

In sum: we feel that this report supports one of the BCGPs core research purposes: gaining and presenting insight into elements of 'governance-in-practice' in branded content. We hope it will be useful in respect of developing further analysis and insight. We underline the importance of reading this report alongside the other outputs from the project. I.e. BCGP work and outputs on mapping the media ecology, analysis of regulation and legislation, trade press and media analysis, and a more policy focused set of interviews with policy actors.

We consider below our sample, scope and how we interviewed respondents before introducing some analytic approaches and insights.

Figure 2: Outline of the subsections of the field where we have sought respondents for interviews



1.8 Reaching a Complex Field of Practice: Practitioners and Domains

We use 'branded content practitioner' to denote professionals working across, for instance, brand studios, marketing communications and public relations agencies, publisher labs and creator networks, some journalists (Dowling, 2025) and film makers (Peplow, 2015) and brand marketers. All these have experience of creating, commissioning or being commissioned to produce promotional content for brands. Some have affiliations with professional ('trade') organisations but, as a whole, they can be considered as members of a loose community of practice. Indeed, one of our key findings, not to say methodological challenges, lay in the complexity of professional identities and identifications (MacRury 2017; 2018a, Hardy et al 2023b) for the respondent-practitioners in this 'branded content' domain (see Figure 2 and Figure 3 and Table 2).

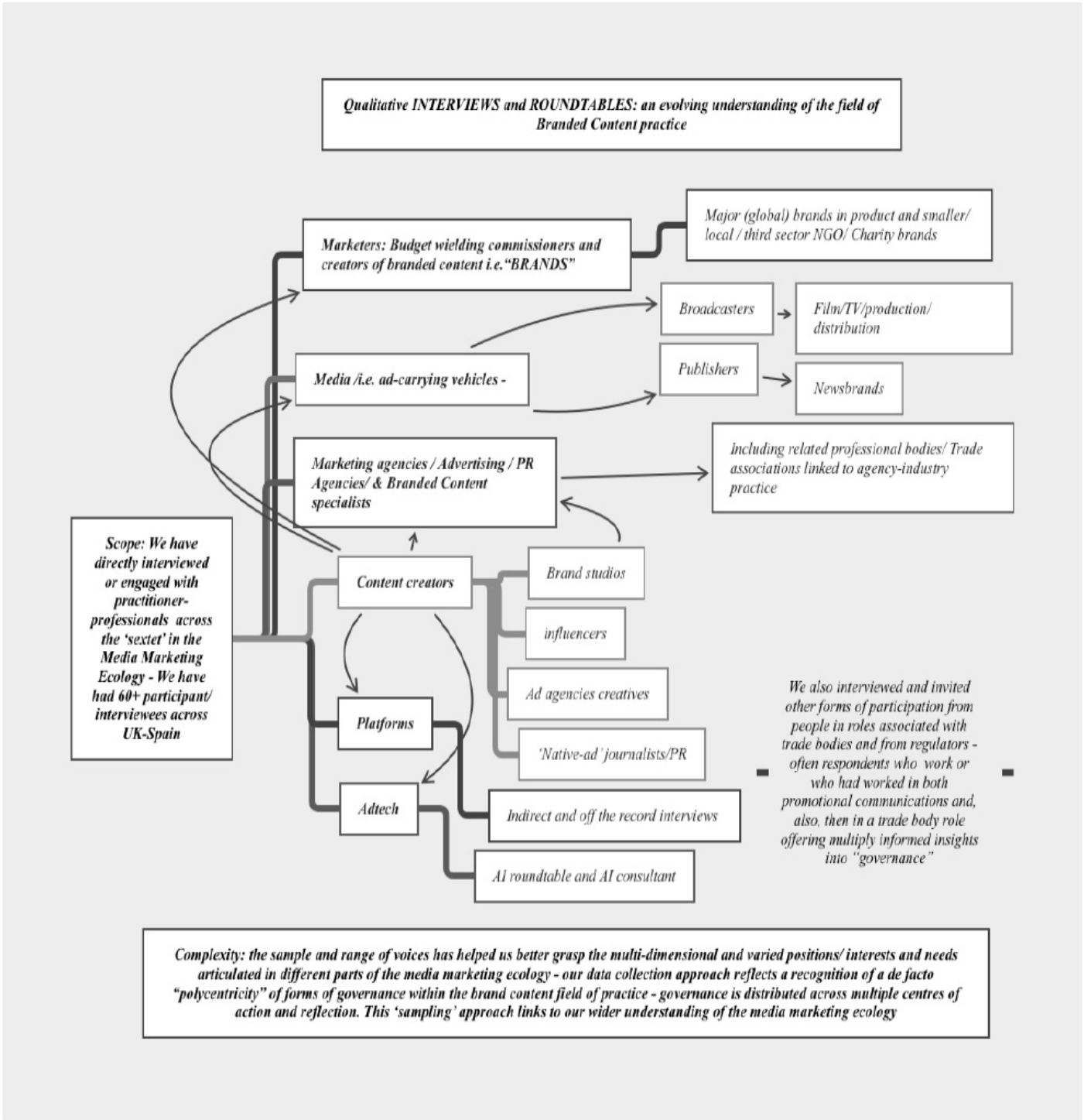
Our sample included people at very senior levels, from different layers of organisations. We also spoke to people who had moved between, had had multiple careers across different parts of the promotional industry system. In some ways we were involved in 'elite interviewing' (Herzog and Ali, 2015), which is to say that several of our respondents were at the top of their field and could justly be said to be pioneering in terms of the career trajectories; they could point to the campaigns they had worked on, and the organisations, or 'studios' they had, in some cases, founded. But we also gained insights from lower and middle tier content creators. Junior practitioners, often younger, were included, in part, because they had a detailed understanding of some of the very practical and labour-intensive compliance work that governance sometimes involved, but also because in our concurrent role as educators, we wanted to understand the place of governance in early-stage career paths. We were able to share some of our early finding with Edcom[10] at a UAL-based event in 2024.

10 European Institute for Commercial Communications Education (Edcom), an organisation that promotes excellence in commercial communications education and research in Europe.

Mapping the Field of Practice

We have organised our respondents into a set of sub-classifications that partly reflect our sense of the contributing components in the media marketing ecology. Further clusters of interviewees reflect membership (self-reported or derived from job title) of various media groupings, e.g. publishers, broadcasters, streamers. (see Figure 2 and Figure 3 and Table 2). Some respondents are involved in organisations that variously host and circulate branded content (direct brand funded output) often as a part of a broader remit, one which also includes e.g. news, journalism, cultural, and entertainment material. So, they still, also, work in a model funded by traditional advertising revenues, subscription, or as part of public licensed broadcasting.

Figure 3: Interviewing in a complex media marketing ecology: a sense of the multiple perspectives within the broad field of branded content as expanded to include a variety of different respondent types and categories'



A small handful of respondents have consultative or ancillary roles in respect of branding content production, for example coming from NGOs or legal domains, but nevertheless, reflecting a daily working relationship with matters arising in respect of branded content. We discuss the elaboration and specification of roles in more detail below. Figures 2 and 3 give a diagrammatic overview. The mind map gives further detail and indicates some of the wider complexity the branded content practitioner system as linked to sample and method.

Table 2: Respondent list – Anonymised names and indicative general titles

P001	David	Experienced brand marketer and trade body affiliate
P002	Lauren	Junior, mid-level account manager (advertising)
P003	Charles	NGO brand manager
P004	Caitlin	Mid-level brand manager (global brand)
P005	Jake	Senior broadcast exec
P006	Christine	Digital media specialist (freelance consultant)
P007	Enzo	Independent brand studio
P008	Sharon	Influencer marketing specialist/advocate
P009	Olivia	Influencer talent manger and brand creative
P010	Marcus	Influencer marketer & trade body affiliate
P011	Aisha	News brand account director
P012	Arjun	Media-first agency (global)
P013	Ruby	Media law and regulation specialist
P014	Declan	Independent brand studio
P015	Natalie	Journalist
P016	Owen	Governance/ media law specialist
P017	Avery	Production studio lead/ TV (Europe)
P018	Ashley	Influencer marketing specialist/advocate
P019	Mark	Senior advertising exec, large (independent) UK agency
P020	Jim	Senior Journalist and PR/ political communications specialist, UK
P021	Donald	Branded content commentator
P022	Nikki	Media law and regulation specialist
P023	Karla	Brand storytelling
P024	Piotr	Advertising tech/legal consultant
P025	Aaron	AI Tech / regulation consultant

P026	Paul	Ex-journalist
P027	Matthew	Senior International brand manager
SP01	Nuria	Market research consultancy
SP02	Iker	Child media advocacy association
SP03	Clara	Advertising agency
SP04	Xavier	Independent creative strategy
SP05	Diego	Creative studio
SP06	Héctor	Freelance marketing consultant
SP07	Javier	Branded content agency
SP08	Marta	Advertising agency
SP09	Sergio	Content agency
SP10	Elena	Advertising network
SP11	Rubén	Fintech platform, creative agency
SP12	Sofía	Digital agency
SP13	Valeria	Educational publisher/ responsible for advertising campaign
SP14	Ramón	Cultural media, marketing
SP15	Unai	Branded content agency
SP16	Noa	Digital innovation agency
SP17	Ignacio	Media planning consultancy
SP18	Álvaro	Neuromarketing lab
SP19	Luis	Advertising agency
SP20	Lola	Post-production studio
SP21	Alberto	Marketing and content agency
SP22	Felipe	University branding programme
SP23	María	Marketing agency
SP24	Raúl	Radio broadcaster
SP25	Celia	Media agency, creative agency
SP26	Carlos	Advertisers' association
SP27	Laia	Children's industry consultant
SP28	Eva	Academic association, university
SP29	Miguel	Consumer communications association
SP30	Andrés	Legal association, press freedom NGO

‘Creators’, ‘Marketers’, ‘Ad creatives’, ‘Influencers’, ‘Journalists’, ‘PR’, ‘Brands’, ‘Platforms’, ‘Streamers’: Navigating a Complex Media-Marketing Mix

Professional marketing and strategic communications disciplines run alongside, or in some cases provide more primary and familiar identification points for respondents than ‘branded content’, an ‘umbrella’ (P009_Olivia). Our sample represents a wide-ranging and rather complex ‘community of practice’,[11] one that our research has brought together under the banner of ‘branded content’. But as interviewees tended themselves to underline, there are (concurrently) more specific, established-orthodox, professional and practical identifications. Notably, for instance, publishing, marketing, advertising, PR, media production, journalism, and consulting. These readily describe respondents’ professional ‘disciplines’, even while ‘branded content’ creation and practices may well describe a major part of their daily practice and preoccupation. Sometimes identities came from formative periods in their careers.

These respondents’ historical reflections were valuable to capture because respondents’ narratives, their personal ‘heritage’, in the industry, their professional formation often subtly impacts orientations to governance and regulation. A sociological idiom might point to a ‘habitus’ (Bourdieu 1984; Hesmondhalgh, 2006), here, the tacit residues of a formative period in, in these cases, e.g. advertising, journalism, broadcasting, PR etc. and one that partly shapes subsequent dispositions, including toward governance, regulation and working ‘norms’ (Bicchieri, Muldoon and Sontuoso, 2023).

We often invited participants to reflect on those formative points during the interviews. Sometimes retrospection formed part of spontaneous contextualising, or analysis of what branded content was for them. This was often in the manner of outlining branded content’s distinction from other forms of communications (‘traditional’ advertising, old advertorials, festival films, corporate videos) that they had worked with in prior phases of their professional development, learning the ropes.

We were alert to the genre-blurring that defines branded content. But this work underlined that role mobilities and hybrid identities underpin a disrupted and disorganised field (MacRury, 2017; Townley, Beech and McKinlay, 2009).

Unclear Identification/ Uncertain Governance

As Ikonen et al (2016) observe ‘Sponsored content is hybrid by its nature’ adding that its complexities can require more ‘cooperation between the

11 We might even think of this community as a distributed and ‘still-forming’ community, in that its norms, including governance norms, are evolving from prior incarnation in the broadcast-advertising model.

media organisation and brand than older forms of traditional advertising or marketing' (Ikonen et al 2016:166). This adds complexity to identifications within the branded content supply chain. The 'liminal' identities of branded content professionals has been a focus for researchers (MacRury, 2018). So, in our sample 'Branded Content', insofar as it has traction as a widely understood marketing or marketing communications term, is nevertheless not typically a core orientation for direct professional identifications. Labels like 'advertising', 'PR', 'journalism' and more lately, marketing 'influencers' and 'creators' circulate (see Figure 2 and Figure 3 and Table 2).

In some ways this is in keeping with the more common sense and everyday understandings of 'advertising' in the broadest sense, where words like advertising, branding and marketing are used interchangeably in popular discourses (Hackley 2018). Several were post-advertising, post-journalism or ex-film production, for example. In essence, then, 'Branded Content'presents a media and marketing communications *genre*. It sits as a domain of practice rather than affording a formal-professional identification. We say this even while recognising the important and field-orienting work done by the BCMA, i.e. the Branded Content Marketing Association[12], the Content Marketing Association (CMA) and others. The BCMA membership group does a great deal to focus, identify, and provide a point of reference for arrays of organisations and practitioners in branded content, and as many trade bodies are able to do, it provides a focal point for professionalisation.

Several of our respondents were members of the BCMA, and we approached some through that organisation. We were able to therefore actively engage with practitioners for whom the term 'branded content' was a highly salient point of reference in the interviews. However, it is also the case that respondents also came via approaches to other professional areas (and not via BCMA) but worked for organisations formally tagged as, for instance 'ad agencies' or 'PR agencies'. They were well aware of the meaning and use of the 'Branded Content' term and its prominence in the industry, but did not identify with it, as such. It did normally transpire that nevertheless they were actively involved in content production which would be best classified as branded content and not 'spot-advertising' for example.

12 https://www.thebcma.info/

2. Branded Content Practitioners: Types and Identifications

Branded content practice often emerges in terms of a culmination of subtle transformations of a longer standing relationship to entertainment, news and lifestyle-consumer journalism, one linked to co-ordinating media relations and drafting press releases but also extending into events. There is a long-standing description of such agencies (advertising, Marcoms and PR) as intermediaries/ cultural intermediaries (Hennion and Meadel 1989, MacRury 2009; Featherstone 1990; González-Tosat and Sádaba-Chalezquer, 2021). To stabilise this recognition of roles within the field of 'branded content practice' we set out some of the dimensions of our sample seeking to capture the evolving organisation of practice-as-intermediation, remediation or, even, disintermediation of marketing and media communications.

Brands

Brands are central to branded content. We sought interviews with people working for major brands who have a role in distributing budgets, commissioning, and sometimes creating content - or managing in-house facilities for various forms of media production on behalf of the brand. Our sampling includes people who were working for global brands, big retailers, manufacturers, and we had input from entertainment brands, charity brands, all represented amongst the cohort of respondents. As one respondent set it out:

> Now, Diageo, a huge drinks company, have brands like Guinness and Johnny Walker and the like. They have taken pretty much all their content in-house (P001 David).

We noticed that product sector does have some bearing on how governance is talked about and understood - for instance, one respondent worked for an anti-tobacco charity and so understood regulation in that regard in some detail. Others talked about the challenges of working with alcohol brands. Here respondents showed how in relating to high-risk products daily regulation/compliance sat, in some regards, more 'front of mind'. So, we have spoken to marketers i.e. budget-wielding commissioners and creators of branded content who in several cases represent major global brands. However, we have also been able to speak to smaller local or third-sector brands who are also, in some ways, marketers, but who we wish to include because they have a distinct relation to the field of practice compared to, for example, major brand names such as Sainsbury's or brand owners such as Unilever.

There is awareness that branded content is no longer just the preserve of big brands and consumer-facing goods but that it is also deployed in CRM (cause related marketing).

> Editorially, whilst also allowing integrations in this branded content space, I can see increasingly, it's not just brands but causes are coming forward now trying to get their stories told (P005_Jake).

As well as charities and NGOs, branded content commissioners use its formats in B2B (business-to-business communication), see below.

Brand Studios

Brand studios, such as those set up by newsbrand-publishers, or marketer-brands, can also bypass or remediate the relationship between media and marketing that used to be more firmly held by traditional ad agencies (Hennion and Meadel 1989). A respondent's description gives a clear picture:

> I mean, that's, you know, that's where Walmart and Amazon are making most of their money. It's not selling products. It's, it's the retail media side. And so, for us, it's, it's a massive business, and that brings in not just those major brands, but all the brands that we sell. And you can be a small brand that's making, you know, charging cables or headphones or something, and everybody wants to invest in it. So, we have to create a variety of products that they that they want to buy. So it might be, it might be a content piece, for example, that is simply, technically how to use that product. You know, some text tech tips from one of our experts. Or it might be, you know, an unboxing video where you see what comes and these are the kinds of things we make at our studio what comes with the product, you know. So, you know, we need to create a wide portfolio as a retail media network and be able to make a lot of creative at scale(P027_Matthew).

Surprisingly, one traditional ad agency respondent reported partnering with a manufacturer (not a brand) to co-produce new brands. Ad agencies, PR and or the marcoms organisations tie up influencers within wider ad campaign planning, some brands bypass intermediaries and contract creators direct to make work in-house (Radar, 2023). There is a certain amount of 'musical chairs' in terms of branding, promotion and agency working. Branded content has become a format where a variety of 'professions' can and do claim expertise and play a part in a somewhat unsettled and improvised supply chain - not really a profession itself, it has some of the characteristics of a loose community of practice (Wenger-Trayner and Wenger-Trayner, 2014).

Within our broad domain of specialist branded content producers, there is in fact a further micro-ecology which identifies 'brand studios' (Radar, 2023) depending upon an orientation likely embedded in the professional profile of the founder or, in any case, the specific history of the formation of the studio as a provider of content services for brands (Maher 2024; Stamm 2021).

So, some respondents described their experience working for in-house studios, i.e., brand studios set up by a retailer or a manufacturer[13] (Monllos, 2025). This is a kind of disintermediation between marketing and media communications i.e. a more direct brand-to-consumer communication channel. Often 'owned media', and with no advertising agency involved is a key part of the set up, and 'retail media' is also central (McCoy, 2025).

But brand studio work also emerged with respondents recognising a specific connection to a founding news organisation, either broadcast or newspaper (Southern, 2017), including local media (Campbell and Lutostanski, 2019). Companies such as BBC StoryWorks and CNN Content Studio or Bloomberg. This is kind of dis-intermediation, in that 'advertising and media buying' are sidelined. One respondent highlighted that her practice led to connections to broadcast news brands in an international setting. The respondent, who works globally, highlighted a network where brand studios offered opportunities for content creation and led to past roles linked to several broadcast news brands. Others worked for national newspapers. This type of studio works because,

> We have a high quality in our journalism that is mirrored in our content. So, I think they lean in this idea of their newsworthiness, even though they are commercial. Then they hope to hold the halo effect, that when a brand [our global newsbrand], that shines, that radiates from the news organisation comes off onto them (P011_Aisha).

Film-led studios also bypass the advertising intermediary function (González-Tosat and Sádaba-Chalezquer, 2021). They have a stronger sense of the creative element of the task and can typically reference strong pedigree in terms of storytelling, but there may be a creative tussle with clients over questions of control and the prominence of the sponsoring brand. Once again, the shadow of traditional client–agency relationships from the advertising industry is present here (Wafa et al 2024; Earl, 1991), as creative content studios tussle with commissioning brand managers over the extent to which branded content can simply replicate the logics of display advertising and yet retain its distinctiveness as a pull medium, studio work demonstrating the subtlety and nuance which respondents wanted to advocate as creative hallmark of high-quality branded content.

Independent Producers

There were respondents from production-led studios which emerged from a history in filmmaking or video production, or as specialist subdivisions of television. Here is a characteristic pitch:

13 Some well noted in house branded content studios include Red Bull Media House, the LEGO Agency, but see also, e.g. Marriott Content Studio - which produces tourism focused content. See also, Sainsbury's (Hammonds, 2025).

> Every leading UK factual TV company uses us. We'll help you to find the right person for your premium production. Our clients work worldwide making broadcast and streamer tv, cinematic documentary, branded content and campaigning films. We work daily with production companies, brand marketing, insights and communications, content agencies, studios, networks and broadcasters. (Stern and Wild 2025)[14]

Respondents from the 'studio' subset have been extremely helpful and enlightening. We have spoken to founders and employees who work in these specialist organisations, and where branded content is more primary and central in their everyday work, i.e. branded content is the communications form for which their organisations were initiated rather than being, as with PR, advertising, and broadcasters, an area into which professional scope has either crept or where strategic development has been planned and targeted. So, for some independent creative brand studios part of their self-definition is precisely as a counterpoint to traditional advertising and PR. Respondents have reported doing a wide variety of important creative services or related tasks i.e. films, documentaries, podcasts (García-Estévez and Cartes-Barroso, 2022), or animation for brands. Indeed, one insight emerging from the work of identification/classification/self-descriptions from our respondents in relation to 'branded content' work and creative output, is that there is a good deal of *remediation* and *disintermediation* in terms of the organisational tasks and relations. They may have bypassed the intermediary space held by advertising agencies in the promotional content supply chain. Ad agencies traditionally would outsource 'production' and commission creative services from companies like these studios, but as sub-contractors to brand clients. One respondent characterised his position with clarity:

> …we work direct for brands, that's been a deliberate choice because I've worked inside bigger agencies and it's deeply frustrating as a program maker because you often get given, here's the thing that we want you to make. Whereas I've always believed that programme makers and filmmakers can do a bit of a better job than that. So, we deliberately work direct with brands. So, we circumnavigate the ad agency structure (P007_Enzo).

A recurrent point of reference was the idea of the studio. The connotation of 'studio', as a creator or maker space, and not an office, or even an agency is notable.

14 Our sample - we are not attributing to protect anonymity as per our research ethics agreements with respondents.

Broadcasters, Streaming Services and Partnerships

One respondent worked directly for a major streamer, although not in a senior role. However, several other interviewees and contributors made films or other content for streaming services, and there was a wide alertness in these respondents to the place and role of streaming in branded content (Herren, 2024). This emerged with reference to the topic of distribution. Independent producers commissioned by brands had useful insights into the dynamics of distribution of branded content via e.g. Netflix, Hulu, Disney or Amazon Prime. It became apparent that branded content creation has been front of mind for most people in the industry (Deery, 2012). However, distribution via streaming platforms is a notable additional factor that brings streaming services centre stage in practice and development of branded content formats (Mistlin, 2025).

Influencers/Creators

We have spoken to influencers, who are an important and much commented on subset within branded content communications. We have also spoken to influencer agencies and talent organisations who manage influencers into their various client partnerships and paid marketing work (Quinn Schwartz, 2023). The respondents across the board talked a lot about influencers, with the world of YouTube/TikTok series, podcasts (García-Estévez and Cartes-Barroso, 2022), 'lives,' and 'merch-linked content' high on the agenda for several interviewees. We became more aware of the institutionalisation of influencers. While they are seen as a high risk area (Edwards, 2025; MacRury, 2020; Taylor, Aade and Goanta, 2024; O'Neill, 2025; González-Díaz, Quiles-Soler and Quintas-Froufe, 2024; Tatum, 2024) in many discussions, they are, concurrently, acknowledged as a key part of the emergent-established media promotional ecosystem (Courea, 2025; Sumandiyar *et al.*, 2023). Echoing the original branded content juncture of Madison v Vine (Donaton 2004), Armstrong (2025) describes recent influencer-industry moves, 'Hollywood is merging with creators', he continues,

> pointing to the hiring of NBC unscripted chief Corie Henson as president of Beast Industry Studios. 'You've also got large production companies like Banijay using YouTube as a piloting platform,' he says. 'Every new format or franchise on sale this year has been tested on YouTube' (Armstrong, 2025).

As press commentary underlines the mainstreaming of influencers, and the further attenuation in the boundary demarcating Mainstream TV, and YouTube and TikTok styles and ethics, we were keen to sample from those close to practice. So, our sample includes several respondents working closely with influencers.

Advertising Agencies

We have also, and mainly, spoken to various intermediaries (Hennion and Meadel 1989; Maguire and Matthews 2010; González-Tosat & Sádaba-Chalezquer 2021), specialists involved in creating content and developing strategy and ideas for brands. This extends to different kinds of marketing-comms agencies, sometimes commissioned by brands, but also by advertising agencies. Many agencies have expanded beyond traditional roles making just (paid 'spot') traditional advertising. Respondents from these agencies reported including branded content within broader campaign briefs/ offers to advertiser clients.

We have spoken to advertising agency staff, again seeking a mix of senior and mid- or early-career practitioners, but identified as working distinctly not for a single brand (as a marketer or client), but as offering advertising services or other agency services in the branded content domain to those brands and marketers. A boundary between traditional advertising and branded content is one clear point of definition/demarcation at the conceptual level. However, in practice, as our respondents have told us, among the many transformations to and within advertising agency models and working practices, they are often also commissioned by, or engaged in, the production and distribution of branded content as part of their advertising relationship to their clients. In addition, as advertising practitioners, it is helpful to have their perspective on this distinct part of the promotional communications domain.

PR Agencies

An equally important legacy intermediary identity was PR (González-Tosat and Sádaba-Chalezquer, 2021). PR-type agencies also engage in various forms of branded content. Several respondents were doing or had done PR work. One respondent, a certified PR professional and who was currently contracted to an NGO, talked about the roles that formerly PR-only companies were playing in branded content, citing the crossovers (Sumandiyar *et al.*, 2023) and contributions made by PR-first organisations in the production of press content, events, reports and podcasts (García-Estévez and Cartes-Barroso, 2022).

Experiential Marketers

Experiential branded content is an important category in the BCGP's 32-country analysis of branded content regulation (Hardy et al 2024) and in emergent practices (Hardy 2021). Partly an extension of the PR domain, our sample did not include anybody who identified directly with experiential and live event agencies, however we were able to explore some of the particular challenges around classification of live events through discussions with respondents who worked in advertising and whose agencies included clients who had worked with them to do live events as part of brand building activities and in relation to launches and other

experiential forms of branded content. We were reminded that ad agencies diversified their portfolios of services over the past decades, so that experiential, sports, and other marketing content vehicles was often part of their roster (MacRury 2018c). We also had responses from respondents who worked for entertainment brands, and where the promotion of live events was a fundamental element in their work. However, like their ad agency counterparts, their identification was with media-based work more that live branded content formats, even though they worked in them.

Podcasting: A New Strand in Audio-Branded Content

It was helpful to be able to have a discussion with a podcast producer, and indeed podcasting, along with games, has emerged as an important additional area for thinking through branded content governance, given the increased prevalence (Garcí-a-Estévez and Cartes-Barroso, 2022; (Hiljding and Gárgoles, 2022) of both of these formats as integral components in cultural and entertainment media. This is because of the opportunities taken up by brands to integrate through various forms of collaboration, sponsorship, and payment for brand exposure in these media. Indeed, podcasting has been especially prominent in the UK, as reported through our analysis of documents and coverage in the trade press (Hardy et al 2025b), with particular attention paid to well-known influencer and podcaster Stephen Bartlett, who has come under scrutiny and sanction from the Advertising Standards Authority because of undisclosed marketing components in his podcast outputs (Hunt, 2025). The popularity of Spotify and the switch from broadcast radio towards various forms of podcasting is an important background dynamic in the circulation of new entertainment and opinion. Brands have been quick to recognize this as a new 'channel'. This domain is growing:

> here are some agencies who are really running with this. They're very excited about the potential, of particularly audio first podcasts, and also the use of influencers and video programming and other things (P00_5 Jake).

Podcasting offers, both intimacy and targeting:

> The same as with podcasts, it's particularly with sponsorship, is that you're looking at, locked into your target group so although you're you're paying more if you use the traditional metrics, you're paying much more for that commercial time it's far more effective than the scattergun (P017_Avery).

One extended reflection from a Spanish respondent on Podcasts reminds of the use of Branded Content by NGOs.

> …for an example the current um [Podcast] which I really enjoyed working on is the personal stories of people involved in frontline

> negotiations… part of the Red Cross. They said, we've got loads of stories about people who've been negotiating on the frontlines. We think they make a good podcast. And at first you think, oh, no, you're bonkers. And then it's actually, OK, why are you doing this? Well, because we want to, A, make a record of it, and B, they're useful for other people in the same sector to listen to, to learn from. So, in effect, they've been done as a training resource. And they're just good stories. And they can automatically tell me who they wanted to reach. So, the target audience is the humanitarian community, which is substantial. You add together the United Nations agencies, the Red Cross, Oxfam, all of the other, you've got a global audience in the millions, potentially (Respondent, Spain).

However, respondents reminded us that we should be alert to the challenges associated with podcasting in governance terms, as there is live uncertainty about labelling conventions and blurring of commercial and editorial voice.

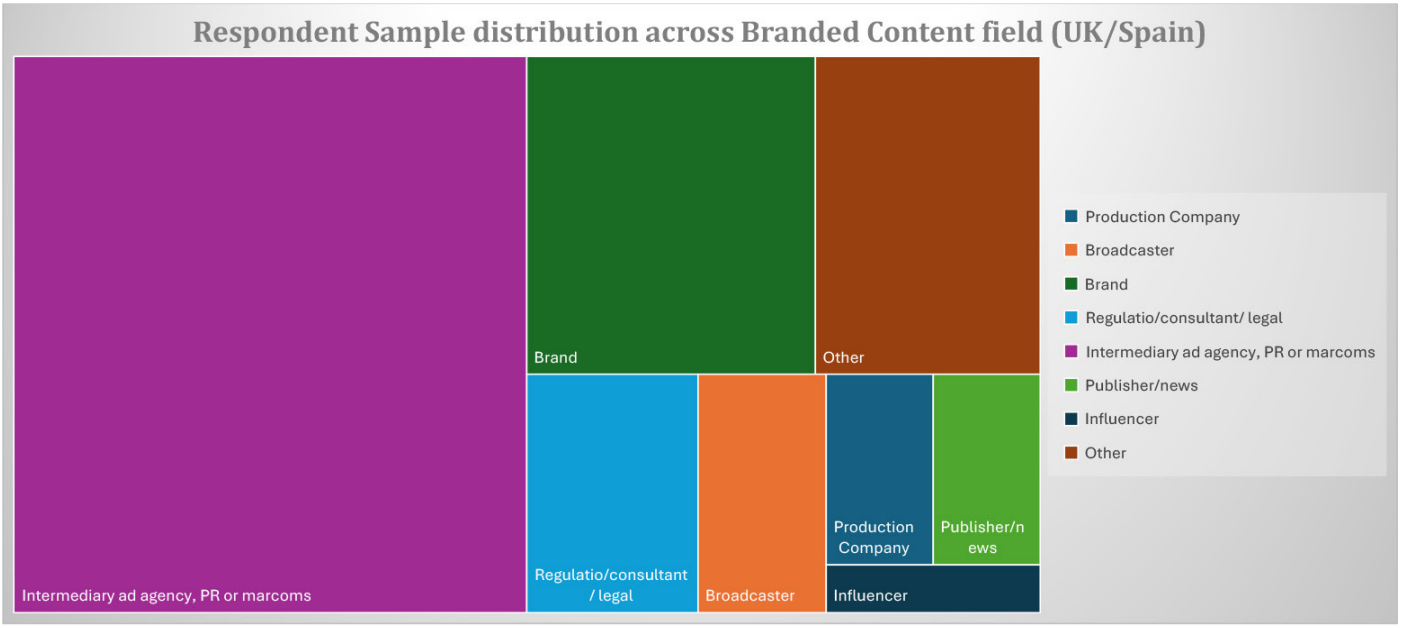
Business-to-Business

An area which had not been front of mind in the BCGP's original research design opened up in several conversations with respondents who have highlighted the importance of remembering that branded content formats extend into B2B (Business to business communication) i.e. a salient reminder that branded content and the adjacent regulations extend into practices which are not primarily framed in the language of consumers and markets but instead sit within important but less prominent frames of business to business communication. Podcasting was cited as a key B2b area, alongside video and some journalistic work (Hiljding and Gárgoles, 2022).

2.1 Coding an Analysis of Professional Background

Within our sample, we have included representatives across this variety of roles, recognising that there is a certain degree of fluidity and, as discussed, cross-identification, as well as movement within different parts of the broader sector, meaning that respondents could often refer to experience in different parts of the system, sometimes having worked and shifted, for example from client side to agency or from journalism to PR, or from and between practitioner and trade body roles.

Figure 4: Nvivo15 output - Hierarchy chart mapping respondents coded professional categorisation. Areas capture relative proportions of coded professional affiliation. N=57



Profession and Governance

From an analytic perspective, professionalisation and professional identity offer a further practical and conceptual underpinning in respect of practice, one linked, in respect of governance i.e. professional conduct is a component of practical governance (Pratt 2006; Coddington 2015; Deuze 2001). In someways a re-rehearsal of dynamics identified in respect of advertising, notably by ad historian Sean Nixon, who described mid-century efforts to professionalise advertising, a move which included stabilising 'good practice' regulation and professional bodies (Nixon, 2016).

Hybrid Identifications

We think it is important to recognise the fluidity and hybridity of roles as well as the multiple parts of the system since this perspective-taking touches on a fundamental governance issue. Governance has typically worked through professional bodies and in the naming and sharing of definitions of good and best practice. These are broadly bounded within a professional identity, PR, advertising, and journalism in particular (Haenens, Sousa and Trappel, 2018). For instance, a respondent, whose original background was in journalism, talked in detail about the long view transformation in his industry-of-origin and where he had served as an editor for a major national newspaper. His current work which includes continued contracts via national news brands has changed tack. So, while being able to refer to insights from a significant, senior career as a news journalist (and continuing with journalistic work for two newspapers) this respondent is also a senior consultant with a PR and public affairs organisation, and able to talk fluently

about marketing work, as well as having detailed expertise in specialist areas of political communication, and a period working as a regulator.

A Less Structured Field of Professional Practices/Affiliations

As we have learnt from listening to our respondents, 'branded content' is typically organised across a much more flexible and diverse media system/ecology. Respondents report often also working across and in between different parts of the system for example between commissioning brands and broadcasters or between creative services studios and advertisers. We should say, however that we have not tried to be proportionate or to claim our sample 'represents' any snapshot or quantitively accurate survey of real distributions in the industry which would be the aim and achievement of a different type of study using different types of methods.

A final observation is that the confluence of roles (and role identifications) echoes a wider structural observation about the merging (Hardy 2022), convergence (Hardy, 2022) and 'liquidity' (MacRury 2024a) of ad media. The liminal (MacRury 2018a) identities of creative industries practitioners typically include some management of transitions between or within commercial and creative domains and, consequently, of tacit assumptions and internalised regulatory intuitions/institutions (i.e. 'what's ok and what's not for me to do/ignore here'?) across domains of practice. e.g. journalism and advertising or between creative production and brand marketing.

Professional and Governance: Intersections and Crossed Wires

So 'Branded content' as a field emphasises hybrid- and pre-professionalised, or emerging actor types - e.g. emerging from journalism, advertising or PR. More broadly, the intersection between professions and governance, including in a neoliberal settlement that seeks, paradoxically, to both deregulate, disrupt *and* performance manage work processes, has consequences in respect of professional identification. Our interest in professional identities is partly about better understanding a complex field. But 'profession' is also a matter of attention for us as 'professions [matter] in the context of governance and highlighting the bonding of professionalism and other forms of governing' (Dent et al 2016:5). This comes across, for example, most explicitly in relation to influencers. One respondent who runs an agency clarifies:

> Like social (media), for example, is also PR and influencer marketing. Influencer marketing is also PR. The umbrella of that is branded content and hence why I position as a strategic storytelling consultancy (P009_Olivia).

So, one appeal in the branded content 'umbrella' rests in part in the capacity to evoke a pro-am and counter-orthodox voice, one presented by this respondent as a contrast to traditional advertising/PR. This is not just in terms of influencer space. A producer sets it out:

> I've worked inside bigger agencies and it's deeply frustrating as a programme maker because you often get given, here's the thing that we want you to make (P007_Enzo).

Hence a move to an independent branded content firm. The counter- or liminal- or trans-professional identities of employees (MacRury 2018a) especially in independent production companies is important. These creators are now mobilising to work directly with clients and bypassing traditional-professional advertising agencies to make brand communications. They sometimes capitalise on or cultivate an outsider status. They pitch as different, a departure from more orthodox and legitimated forms of promotional communication - e.g. paid ad campaigns, traditional PR. However, as we found, clients used to commissioning ad agencies can have a difficult task in commissioning branded content production directly. There is a need to renegotiate what the literature describes as 'principal-agent theory' (Earl 1991; Wafa et al 2024:46-47) to articulate and reassess lines of accountability and responsibility in respect of creative control and, so, governance. As Ikonen et al (2016) suggests in respect of brand sponsored content, branded content, conceptually, but also practically, poses 'novel ethical concerns that no industry alone can answer' (Ikonen et al 2016: 165). In part, this is a matter of disrupted and therefore partly regulated organisational and professional identifications.

Influencer Professionalism

As our respondents were frequently keen to emphasise, the influencer marketer sector has been growing, and fast. And there are different types of signal which respondents deployed to connote professional status, often corroborated in the trade press and social commentary.

1. The preference, for some, of terms like 'creator' rather than influencer (Tatum, 2024)

2. The size and prestige of client partnerships i.e. working with big brands but also with governments (Courea, 2025)

3. The relative success of influencer marketing in commercial terms relative to other promotional communications formats (McCorquodale, 2020)

4. The existence and formation of professional bodies, such as the Influencer Marketing Trade Body (IMTB) and attention dedicated to influencer marketing or specialist subdivisions of trade bodies, e.g. Branded Content Marketing Association (BCMA) instituting and recognising the influencer marketing subsystem. The IMTB established the European Influencer Marketing Alliance in 2024, initially with national organisations in France and Germany but now also including Belgium, Italy, Spain, and Latvia. In Spain AUTOCONTROL, the main advertising

self-regulatory organisation (SRO) runs its national Code of Conduct on Influencers in Advertising.

5. However, several also note the continued scrutiny of influencers and evidence of uncertain governance (Cocker, Daunt and Mardon, 2021; O'Neill, 2025). P018_Ashely describes how, these days 'talent agencies will often look after, the influencers themselves so sometimes you're not even dealing, with the influencer, you're dealing with their manager in the same way that you would an artist'

Adjacent Professional Interests

Via our individual and group interview sessions and roundtables, we have been able to include specialists and consultants across wider-but adjacent domains, notably ad tech and artificial intelligence - where we came to see partly through our initial explorations in the field that there was a looming governance issue that we have and arguably it's already having implications in respect of branded content. We also sought out content creators and producers in newer formats, for instance, in relation to podcasting (Hiljding and Gárgoles, 2022) and AI. Emergent and novel forms such as these have struck us as relevant in gaining a multifaceted picture of this broad domain. Evolving and diversifying branded content communications formats confront a governance system that needs to be able to attend to and integrate novelty and new forms. The sample and range of voices have helped us better grasp the multi-dimensional and varied positions/ interests and needs articulated in different parts of the media marketing ecology, which we discuss in our adjacent BCGP reports (Hardy et al 2024; Hardy, MacRury and Gomez 2026).

2.2 Interview Formats

Conversational Interviews: A 'Pull' not 'Push' Approach

Our core aim has been to provide a rich picture of relevant discourse. We coded for (insider) descriptions, for insights and tensions around 'governance-in-practice'. We have benefited from responses, including very in-depth work derived from interviews, some that lasted over an hour, and each at least the scheduled 45 minutes. These engaged conversations, and the analysis they permit, indicate a well-informed and highly tuned-in practitioner community (across territories). Understanding and internalisation are important in the process of governance as we theorise it, and so the complementary method, the method that goes best with trying to examine or explore internalised values, sometimes unspoken and tacit values, is to allow these to emerge not in response to direct questions but indirectly as part of a wider narration from the practitioners themselves (Herzog and Ali, 2015; Seidman, 2019). Having said that, we did structure conversations towards specific research-agenda items for the Branded Content Governance Project (Brennen 2025:42).

Semi-structured interviews felt important because, unlike more direct questionnaires or even the sort of 'push' interview that sometimes might follow a very structured agenda of questions, we wanted to have a 'pull' structure to the interview, i.e., lead with listening and allow people to speak freely, sometimes in quite long narratives describing their world. In analysis we have sought to reconstruct and build a thematic picture across practitioners and across domains of the way in which 'governance' was framed, understood and practised emerging from within the testimony of the people whose work is to create via branded content communications practices. We have tried to carefully distinguish our interview approach as socio-cultural *academic research* and not for example to attempt to mimic the manner of auditors or investigative journalists.[15] This has had a contribution in the way that we reflected and framed our approach to interview. We didn't want to over-push respondents to compile an answer about 'governance', but instead invite them to describe their world, and for us to therefore discern the place of governance and regulation in their everyday practices. We punned on the push/pull terminology that our respondents use to characterise branded content as a mode that draws attention in - as opposed to broadcasting messages outward.

Mixed Format Interviews

The face-to-face interviews were helpful and insight rich as we sought to better grasp practice. For example, being in agency respondent interviews conducted in work environments added a flavour of ethnographic components in the research. We got to see people in situ. One respondent (P0019_Mark) identified the office they go to if they have regulatory questions and, pointed out, 'just over there,' where a regulations specialist had his desk. The face-to-face interviews generated a kind of closeness and feeling of candour from respondents. Some interviews took place outside the office - but face-to-face, where more junior staff, for example, worked in shared workspaces.

On the other hand, the online interviews were very helpful because of practicality. Notwithstanding time zones, it was very convenient to interview our handful of respondents in the United States, online. At the same time, we recognised that the industry that is being governed works in an increasingly online (Meyrowitz and Meyrowitz, 1987) and remote manner.[16]

Our sample was made up of a variety of different types of promotional industry practitioners. So, we included people working for the relevant

15 It should be noted that some good work has been done in those modes, and this occasionally surfaced in the work as points of discussion where respondent referred to reported infringements or emergent legislative efforts, more widely in different parts of the broad area of the branded content industry. (Walker, 2018; Tabassum 2023; (Ershov, He, and Seiler 2025; Easton, 2025)

16 We had to adapt our methodological process, which included e.g. signed ethics forms, and transform those into Microsoft Forms formats.

trade associations, where governance is part of their work, but where they also, typically, had either current or recent-historical association with particular promotional industries. As a key strand in our project, qualitative interviewing (Seidman, 2019; Brennen, 2025; Flick, 2018) helped get into the space of micro-practices and to capture, and, to a degree, provoke reflection on governance from professionals in their daily work (Carvajal and Barinagarrementeria 2023). To do so felt necessary in order to complement and contextualise some of the BCGP's 'big picture' work, namely our focus on cross-national policy, regulations systems and broad structures of governance.

We had the benefit of a multilingual interviewing team, and a specialist Spanish-US English consultant. When it came to analysis, they were able to provide details for translations and cross checks of pre-coded material for upload into our chosen analytic tool, Nvivo15. We were able to then subsequently recode these transcriptions/excerpts to align themes across the two data sets. So, we have included the translated Spanish interview data in thematic analysis. We have, however, less specificity regarding case identification/ grouping in respect of Spanish respondents, but the respondent list (Table 1) provides an anonymised descriptors of the broad sample and their roles.

2.3 Naming 'Governance'

A key rationale for including an interview component in the BCGP was to better understand how, and indeed if, governance and regulation were significant matters for practitioners in their (everyday) contexts, especially as considered alongside other and attendant pressures and preoccupations. All respondents were working in the knowledge economies and creative industries. Promotional communications enterprises making branded content stand as a significant constitutive part of these domains. Practitioners find themselves pulled in multiple directions. Their industries (news, entertainment, advertising, marketing, content creation, influencers etc.) are variously 'under pressure'. They have faced (and are facing) sustained periods of technological flux and disruptive transformation (Hickman, 2025; MacRury, 2024), including as a result of regulation. Regulation bears the authority typically of key public values e.g. in the UK, via GDPR (Wang, Jiang and Yang, 2024), the Online Safety Bill/Act(Hardy et al. 2023b), Digital Services Act, (Zuiderveen Borgesius and Wolters, 2025) or mooted clamp downs on HFSS food advertising (Conway, 2025) amongst several examples mentioned. Being in frontline dialogue with governance can be hard work even when the values enshrined in regulation are important.

Beyond headline controversies, from the point of view of our research, it is everyday *governance* in these contexts that has been front and centre in our orientation. But it was important to remember that governance-in-practice is often a secondary, tertiary or otherwise subsidiary component in the everyday working lives of promotional communications practitioners. This is not necessarily a matter of negligence, but it instead registers the

embedded and even tacit nature of governance. It is part of what individuals and organisations *do*[17], and not always part of what they say. It is part of the small print of practice.

Our sense of governance was quite specific and inflected by the BCGP interest in laws and regulations. The things which we would understand as, in a rather rigid language of compliance, governance, rule-following the CAP Code, etc. were not always described by respondents as 'governance'. Those rules and codes were often buried, in practice, within a whole number of different accountabilities and compliance tasks - many from clients, some from platforms, some linked to product or publisher rules.

Tacit 'Governance' in Practice

One practitioner (P004_Caitlin) who worked for an entertainment advertising brand and was responsible for producing promotional material, reels for soon-to-be-launched movies, told us that she found it important to check with the radio authority around the validity of journalistic quotes that were going to be used, and that she couldn't just say 'the Daily Mail had said it was this number one film'. She had to rigorously check that. Now, this checking was just seen as a routine component of the job verification, fact-checking and it was typically cleared with her immediate boss, but more explicitly it was embedded in her process. However, what such truth checking actually referred to was a specific CAP-related compliance issue. But the connection to any advertising authority or any fundamental governance principle was masked by the fact that this was *just what you did*. It was important to check everything, and it was quite hard work; it was quite 'irritating' (P004_Caitlin). Sometimes, she relayed, 'it is quite difficult to get answers back from journalists or newspapers' (P004_Caitlin) who had made a particular statement and to obtain permission to use the quote.

One of the key findings is that 'regulation' and 'governance' typically lie buried within the effort to comply with the more immediate level of client-led brand guidelines or mandatories. The client represents a key line of accountability. Regulators are less 'front of mind', for some practitioners, in terms of getting things right. This still leads to good practice, in the main, but is a helpful reminder of the importance of the client first ethos that some agencies/practitioners highlighted.

'Governance' in the Mix

It is the fashion in some agencies to put motivational slogans and posters on walls- 'Where intelligence meets creativity', for example. They sit alongside the awards given for creativity and effectiveness. It is rarer to see 'compliance', 'governance' or 'accuracy' promoted in these ways, although,

17 The corollary here is that this is also part of what they sometimes don't, can't or won't do.

as our research found, governance is present in place, and as part of the organisational fabric in some settings, part of the furniture.

Governance is not an 'easy' topic for practitioners. Some, including in interviews, felt under scrutiny, aware, directly or indirectly, of wider anxieties about socio-technical and cultural change, often expressed in direct public, academic and regulatory attentiveness towards the promotional communications (González-Díaz et al 2024). So, there is a case for a research approach that trusts participants to discuss their experiences and practices (Andersen and Gemzøe, 2025), and for us to 'design' or cultivate a listening ear and nudge towards respondents to name governance and to distinguish it from within a professional script more comfortable talking about creativity or client relations. In addition, while our study emerges from within a critical academic tradition (Hardy 2022), our critical perspectives are deployed in the service of enhancing discourse at the system level and not critiquing individuals in their practices. So, we do want to note our gratitude to respondents who, despite working in a difficult industry moment, nevertheless were willing to give up valuable time in that context, and who spoke openly and insightfully from well informed practice-led perspectives (Andersen and Gemzøe, 2025).

2.4 Roundtables: Surfacing 'Governance' Debates

The grant-funded Branded Content Governance Project has allowed us to host several events in the form of roundtables, some face-to-face, some, online and most, hybrid. These allow for live interaction and cross-institutional and organisational meeting of minds. These interactions have generated some key supplementary insights, for instance reflecting on employment in the industry, children and AI. We think this supplementary set of interactions is fundamental to holding in mind the multi-vocal and distributed nature of the branded content domain. Roundtable working was also, as we found, in keeping with our emergent and structuring conception of the essential 'polycentricity'[18] (Ostrom 2010; Gadinger and Scholte, 2023) of the governance processes across this loosely organised branded content domain (Cairney, Heikkila,and Wood 2019). Here discussions did include specific inquiries and provocations about governance and practices,

18 The BCGP examines branded content governance as a a case of/for practical 'polycentric governance' and sets out key recommendations for integrated policycentric governance, strengthening connections across the range of governance 'nodes' from self-regulation to statutory (Hardy et al 2025*). Branded content practices sit at the conjunction of several centres of authority. Statutory regulators set out competition, consumer protection and child protection rules (Hardy et al 2025a; Hardy 2025c). Co and self-regulatory bodies set advertising codes and pre-clearance norms, such as the ASA and AUTOCONTROL. Platforms and broadcasters impose commercial and editorial standards/ injunctions. Brands, studios, agencies, influencers and production companies develop (or don't) 'governance-in-practice' structured through contracts, pitch processes and internal processes or person-based 'moral/professional compass'. Civil society, NGO, journalism and media literacy actors/activists/academics also contest and interpret the rules in public. No single centre controls the field. Thus, the acceptability/ censure associated with advertising transparency and labelling of branded content emerges through the interaction of these several overlapping 'nodes' of regulation, and quotidian practices.

and invitations to reflect on the industry more widely. In our roundtable discussions respondents focused on some specific themes and debates, helping us to more broadly situate the in-depth interview material generated from individual respondents.

Highlighting Discourse, Debate and Insights: Governance-in-Practice

Although there are terminological alignments and some common understandings and preoccupations evident in the dataset across territories, there is no consensus or even typicality in respect of the perspectives gathered. There are multiple voices. This is partly a function of the variety and difference of underpinning professional roles and organisations from which we have sampled. One key finding has been a sharpening of focus around the differences between practitioners/practices united under the broad umbrella of 'branded content' but showing specific insights, preoccupations and points of practice on governance, sometimes reflecting their professional affiliation. These link this analysis to our meso-/macro- look at the *Media Marketing Ecology,* in our report (Hardy et al 2024) and forthcoming analysis (Hardy, MacRury, Núñez Gómez 2026), and across the BCGP research.

2.5 Making Sense of a Complex Field: Clusters of Preoccupation

Our interviews, closely analysed through an array of emergent codes and sub-codes, generated some broad thematic areas. We looked through the interview and roundtable discussion data, deploying the Nvivo15 software package, and following protocols and coding categories emergent from the data. We also cross referred to our working principles (i.e. practitioner-led, bottom up, 'territory-based') as set out at our early-stage project and methodological workshops. Some of these team-based methods reflections sessions included practitioners as well as academic researchers from our advisory board and underscored the multi-disciplinary and practice-aware orientation of the work. So, in this governance-in-practice analysis, we have followed the discipline of being respondent-led and interpretive in terms of emergent themes and analytical motifs. This has been helpful in rendering perspectives and concrete details which would have been less available to us in coding from just our own theoretical and conceptual perspectives.

Most notably, governance and regulation, even in compliance-oriented individuals and organisational cultures, are often mixed in with other 'externalities', most notably clients' requirements and demands. Although we are drawn away from making generalisations from the data, it would be reasonable to say that it is the commissioning client, (or platform) not the regulator directly, that sits front of mind in the management of communications production and development for several of our practitioners - even on matters that come from regulation such as disclosure. Clients are, in practice, often, the ersatz 'governors', even while the wider regulatory framing may be in creators' minds. Our respondents

were not typically ignorant or negligent in respect of regulation, but it is clear that regulation and governance are held concretely in compliance, day to day, rather than being a live 'hot topic' under consideration in campaign/ creative planning or in the workplace.

Overall, as shown in appendix 1, we have captured and coded a very wide area and detailed codes and sub codes, read these to grasp a fuller sense of the emergent themes. However, for intelligibility and to help report a less messy picture of the preoccupations within the field we have subsequently derived aggregated clusters of codes according to the following headings.

Figure 5: Top Level Collated Themes and Preoccupations

Top Level Collated Themes and Preoccupations

Our secondary analysis collated clusters of granular-low level codes (see Appendix 1 - where we have presented our full code book in detail). These helped to capture a set of higher-level themes. These secondary codes (Fig 5) provide a presentational structure for the data but also indicate how the respondents, their data and our analysis, have drawn the discourse into particular areas of preoccupation. So, we open up both detailed and broad topicality across this complex domain of branded content governance.

Actors and Institutions

Actors and institutions captures codes and reflections on roles, including the reflections of actors on their own roles within the broad domain of branded content work[19]. We began to note that many of our respondents identified with established professional-discipline labels, typically advertising, PR, journalism. Some emphasised being 'ex-' or 'post-' in respect of those professions - with branded content work influencing their repositioning. This theme also captures mentions of other parts of the field and includes mentions of for example regulators/trade bodies.

Creative Practice and Production

Creative practice and production, gathers up respondents' discussions of creative working and within the domains of what typically sits as creative industry tasks. We also have a high-level theme which captures the variety of discussions of different formats and media environments where branded content creation happens. As we discuss below in a People, Place, Process, Pressure framework, the intersection between (branded content) creativity and governance[20], in the form of regulation and disclosure, forms a notable and recurrent conjunction.

Formats and Media Environments

We also gathered up miscellaneous codes about formats and media environments. Where branded content 'lives' and how it looks e.g. TV, streaming, social, news-site native, podcasts, events, games (Kokholm, 2021; Micallef *et al.*, 2024) etc. Newer genres have significant governance implications not least because traditionally regulation (MacRury 2009:142; Offer 1996:213; Hardy 2025c), such as advertising oriented oversight, has operated within 'verticals' or supply chains that have been channel specific. For example, pre-clearance is often orchestrated at the level of for example radio or broadcast television from different organisations. A cross-

19 'Theme' here is partly deployed to identify domains of activity, but crucially is distinct from case classifications.

20 This conjunction is noted, too, in advertising institutional analysis in, for example, (Pratt, 2006; Scott 2001).

industry common cause has sought general principles (Offer 1996:213), but regulation tended to recognise specific types of advertising. Branded content disturbs this settlement.

Policy & Systems

We have gathered up discussions too of the sector, collating respondents' broader reflections on the *policy & system-level* issues facing practitioners as they see it within branded content. Key concerns/ challenges include working transnationally in a globalised marketplace, the impacts of disruption and disruptive innovation (González-Díaz, Quiles-Soler and Quintas-Froufe, 2024), AI (MacRury 2026; 2025b), and changes in adjacent technologies, including, e.g. programmatic/online display advertising (MacRury, 2025a), a key contrastive point of reference for some branded-content-creating respondents.

Governance and Regulation

A related set of references unsurprisingly, comes within those codes emerging from respondents' reflections on in part because interviewers placed this on the agenda at points, but also because it was a dedicated and more structured element of some of our activity, including the roundtables. Respondents talk about issues coded here as types of infringement, the (accuracy-based) diligence and due care needed within the creative and communications processes, their work with regulations and (more rarely) statutes. This allows for the various descriptions of elements of processes connected to governance and indeed to the idea of 'governance in processes', including accuracy, control and client negotiations.

Ethics, Risks and Principles

Ethics, risks and principles captures how participants navigate territory around branded content practices, focusing on the implicit values that (should) guide practice and governance. This includes concerns about trust, risk and harm linked to working principles, and more general reflections around key themes in the domain, including risk, freedom of expression, questions of journalism and news values, disclosure and diversity.

Audiences, Effects and Literacies

Finally, we have a code which is about audiences, effects and literacies, capturing the ways in which our respondents talk about or imagine an audience that they are seeking to reach through their branded content activities. This extends into references and reflections on intimacy with audiences but also issues such as consumer protection as considered in respect of audience experiences, children (Nunez Gómez, Mañas-Viniegra and Juan, 2020) and young audiences, and the broader question of attention (Wu, 2017) in the branded content communications domains (Núñez-Gómez, Rangel-Pérez and Rivero, 2024). We have a further code

where we capture observations made by respondents about the project and the research processes.

Figure 5 and table 3 help to identify the areas of preoccupation and to illustrate the wide-ranging underpinning topics that feed into building a multifaceted picture of governance-in-practice. It also serves as a guide along with the codebook to the granular interests and insights that we have sought to surface through the interview method. It is important to say, however that the insights impressions and observations gathered through the interview method must be read alongside and contextualised against more structured data collection in other parts of the BCGP research - where we look more directly at policy, and where we chart legal and institutional organisational configurations, including at national and indeed comparative international levels.

Table 3: Top level themes and areas of preoccupation NVIVO15 coded (See also appendix 1)

Code cluster / top-level theme	Captures codes where respondents reference…	Codes/points in these clusters, for instance...
Creative practice and production	Work and making. Briefs, pitching, ideation, scripting, budgeting, timelines, client approvals, crew roles, post-production, success markers.	Our respondents describing/ reflecting on how work gets done, who does what etc.
Formats and media environments	i.e. Where branded content 'lives' and how it looks. TV, streaming, social, news-site native, podcasts, games, events, placements, publisher lab/native etc. Platform norms and affordances. etc.	When respondents discuss format, placement, platform fit, discovery, or e.g. distribution
Policy and system	Larger perspectives, e.g. Industry structure and system-level change. Cross-border work, market shifts, platform power, AdTech, programmatic etc.	Points where respondents step back to the wider system and take a view of how their works sits within a wider network of relations/ policy environment
Governance and accountabilities	Rules, oversight, and process. Law, self-regulation, disclosure, surreptitious risk, infringements, enforcement, guidance, compliance workflow.	Respondents talking about rules, compliance, due diligence, esp. in practice/ unclarity re regulation/ anxiety about/ confusion or over regulation. Or regulation in different parts of the industry.
Actors and institutions	When respondents talk about/ describe/ roles. Brands, agencies, publishers, platforms, creators, regulators, trade bodies, NGOs, budgets, relations, accountabilities in a media marketing ecology.	The focus is roles, remit/responsibilities, what 'we' do in our organisation who decides, or how organisations relate.
Ethics, risks and principles	Norms and values. Trust, risk, harm, freedom of expression, journalism standards, disclosure as a value, diversity and inclusion.	What ought to happen, why it matters, or weighs harms and benefits, sometimes comparing or contrasting practice and principle.
Audiences, effects and literacies	How participants imagine and talk about audiences. Attention, intimacy, communities, minors and protections, recognition of ads, literacy, outcomes.	The talk/ transcript mentions notes/ 'imagines' audiences on e.g. who watches, how they read the content, what they learn, or the effects on them.
The BCGPP project	Meta-comments about the study. Fieldwork notes, method choices, coding reflections, project logistics.	Some respondents comment on the research process or the project itself.

3. Governance-in-Practice: Introducing Findings

From such a wide array of thematically coded interviews, there is a significant number of areas of interest. However, for the purposes of reporting here we have restricted our analysis to themes that have emerged at that point of intersection between practice and governance.

Insights and Observations on Practice: Perspectives on/from a Complex Field

In many ways the role of our research in this aspect is to suspend judgement, if not criticality as such. Our discipline is to instead listen and present an analysis emerging from the multiplicity of responses given in good faith and with a good degree of candour and thoughtfulness. We want to better understand where respondents are coming from.

Our practitioner, respondents do not all think or do the same things. And we do not want to too readily draw conclusions or construct or impose a consensus from within such a diverse and multi-vocal community of practice(s)/ practitioners. Instead, analysis delineates some themes, themes that in turn indicate, to us, certain dynamics which we hope will deepen our understanding of this domain. Our interest, however, veers towards ways these insights inform or enrich wider research on governance framed by and within adjacent institutions and practices linked to regulation, policy, law and across the media marketing ecology.

3.1 Analytical Approaches

For our analysis, we have explored some of these codes and themes, pulling out work salient to our understanding of governance in practice. Respondents spent a good deal of time reflecting on definition, and we came to see that definition was a significant issue not only for practitioners' roles, but also for their understanding of what was included in the category of branded content relative to other forms of media production and communications-cultural outputs.

We propose our observation that *definition is the beginning of governance.* We set out some analysis of practitioners' approaches to regulation and offer some thoughts that draw out the different orientations towards regulation. We quickly found that respondents vary in respect of where compliance and regulation sit in their wider 'cosmology', i.e. the wider framings underpinning their practice. Respondents' reflections include some considerations about the interlinking of professional commitments to creativity, craft and storytelling, alongside client and media relations, but understood mainly in the context of trying to deepen an understanding of the link between professional practice in these areas and professional commitments, obligations and approaches in respect of governance.

Analysis Structure: Surfacing Governance

- Becoming a branded content practitioner: We map practitioners' reflections on the emergence of the field, and discern a link between history, definition and emergence and governance.

- We propose and explore an observation: *definition is the beginning of governance.*

- *Regulation:* Our focus on regulation extends also to an area where governance was closer to the surface of respondents' deliberations, notably around particular types of infringement or lapse.

- *Consumer protection:* We also focus on particular thoughts around that part of governance recognised under the heading of consumer protection.

- *A 4Ps model:* To situate governance in practice, we coded/analysed interviews to think about how governance is ordered in terms of some basic categories which have their origins in both creativity theory and, with some variation, in Scott's (2001) account of institutions and organisation, i.e. the axes of governance through people, places, and processes

- *Infringements:* We include in this the discussion of various pressures towards compliance and infringement.

- *Storytelling:* We also drew from our interviews some analysis and reflection around storytelling, which was a recurrent theme with some (initially) unexpected connections to issues of governance.

- *Disclosure:* We also discuss the key governance issue of disclosure and connect this to governance-in-practice issues around labelling.

- *'NIMBY' Governance*: We consider some wider reflections from respondents in relation to the field as a whole, which includes an analysis of what we call NIMBY governance.

- *Audiences*: Respondents surfaced some wider issues around audiences and trust, and the connections drawn between debates around branded content and the formative influence of public service broadcasting in this context.

- *Training:* We collate observations and some reflections on training and some overall recommendations

- *Conclusions/ recommendations from governance in-practice*: Conclusions are to be read and considered alongside, and integrated with, broader conclusions, recommendations, and findings from the Branded Content Governance project.

Emergence and Reflection: Branded Content v Traditional Forms

Several of our respondents had direct or adjunct experience of the best-known and in some ways defining exemplar, the BMW films campaign of 2011 (Donaton 2004; Benson et al 2007). Branded content practitioners often frame their practice as a counterpoint to traditional advertising, and, of course, the demise of traditional broadcast and publisher-centred advertising is a well-established, perennially predicted feature of academic and other industry analyses (MacRury 2009:1-4; 2025a). The BCGP's principal Investigator provides a book-length study of branded content (Hardy 2022). Amongst the industry-facing books are Scott Donaton's (2004) *Madison and Vine* and Ries and Ries (2004 *The Fall of Advertising*, subtitled *The Rise of PR*. Neither of the latter books name brand integration, and Ries and Ries (2004) advocate for an expansion and deepening of PR practice. But both situate the emergence of various forms of brand entertainment and PR content with the emergence of the Internet and the increasing exhaustion and depletion of traditional advertising forms and formats, mainly in terms of credibility, audience attentiveness, and clients' willingness to pay. The point: definitions of branded content often emerge for some as a counterpoint 'solution' to a problem in traditional media advertising. It is not a genre, but a refusal of one, born, sometimes from questions of efficacy (do spot ads work?) or principle (we want to be different) and from a critique of established marketing interventions. Such critique, typically, does not extend, in practice, into a critique of markets and consumption as such.

Respondents' Formation: Some Histories in Practice

History brings some useful insights (Dens and Poels, 2023; MacRury, 2013), partly linked to the practical everyday functionality of branded content within the media, marketing, communications mix. Accounts of the formation of the organisations for which the practitioners have worked, and in some cases where they have played foundational roles, adds perspective to define branded content and understanding governance. Many of the respondents had interesting accounts of their emergence / apprenticeships in 'the industry'. Often, they talked about the demise of traditional forms of advertising.

> There were ad blockers, there were, you know, there was the fast-forward button, there was all sorts of ways, and so what we determined early on in our thesis was, consumers hate...they hate advertising. They love brands. And so, it became, how do you give consumers what they need? they want which is an emotional connection which is added value of being entertained added value of education or information sharing (P014_Declan).

Of course, it may well be that 'love' is not exactly the appropriate word here (MacRury 2009:158) but certainly several branded content advocates discuss the various forms of dislike of traditional advertising, especially

its interruptive tendency. Another respondent (P0027_Matthew) who had worked in pioneering big budget branded content, captured a fundamental point. In planning this, for him pivotal campaign, in the early 2000s, his ad agency (at the time) switched the normative balance of investment *away from paying for expensive bought media spac*e, often up to around 80% of the campaign budget, with the remaining 20% going to creative execution etc. But instead,

> our proposal was to take the usual 80 20, media to production ratio and flip it on its ear, 80% production, 20% media (P027_Matthew).

The emphasis by an advertiser (and its agency) away from media expenditure and into 'content' was important - and satisfying for the 'creative' ambitions of marketers in an era where media targeting (in its numerous guises) was taking centre stage.

Another respondent referred to formative experiences working with pioneer retailer Anita Roddick of Body Shop fame (Spence 2024). Their work, he said, set out on a less splashy but equally innovative promotional track that eschewed paid-for advertising channels and thereby, at the time, built a belief in the Body Shop through a prototypical branded content approach emerging from creative documentary style corporate videos. This planted seeds for non-or anti-advertising brand strategies and an 'in house' confidence that has mushroomed in the creation of brand studios.

A more recent take, amplifying the analysis of budgetary shifts, focuses on the impact of social media and platforms on advertising in the past decade, suggesting that:

> [the] ad agency world is kind of dying on its arse at the moment. You know, they're just being cut out by the likes of Meta and X and so on' (P007_Enzo).

From the publishing angle, the long demise of traditional newspapers and indeed of news brands including digital news brands comes under scrutiny 'young people are…less about… traditional news brands' (P011 Aisha). One respondent gave a fuller analysis, noting that subscription models are unlikely to work in every part of the traditional sector.

> …the popular press is now living on borrowed time... *The Sun* tried a paid-for model and it didn't work… the popular (ad-funded) press has now got a serious issue because it existed in mass circulation on cheap cover price and fun and entertainment and there are entertainments everywhere., P020_Jim

Tabloid culture is ubiquitous and free. Respondents often referenced TikTok. Why pay for it? Why buy ad space on a bewildering news site? This reflected the feeling of one of several respondents. Not always by choice, they had transformed their roles in journalism to incorporate writing

material for brands. There was some ethical and professional ambivalence about this. A respondent who had lately left the profession had a detailed understanding of some of the complexities and challenges facing journalists being asked to produce content which was 'egregious'.[21]

At the same time, several the journalism-origins respondents talked about ways in which branded content had become normalised as part of journalistic practice. This was considered in their terms as a necessary adaptation in the context of a collapsed/ collapsing business model. It included some positive views of the capacity for branded content in journalism to nevertheless operate to good standards.

Meanwhile, reflecting on influencer marketing, the demise of some traditional formats including magazines, but also the advertising model that partly funded them, is up against stiff competition, for example:

> makeup tutorials, particularly on YouTube, you can have them hooked there for nearly an hour at a time. Well, I mean, in terms of getting people's attention for that amount of time, I mean, brands would love that. In many instances, they'd be lucky if they've got a few seconds. So, not only are you. watching…the person [influencer] that you like. they're then [mimics makeup tutorial] oh and this what I do to moisturise is this product I found works really, really well (P018_Ashley).

His point is to say that this is a more engaging and potentially successful marketing mechanism than traditional advertising.

> whereas on an advert you've only got a few seconds and it's all lifestyle, it's all it's all been over curated, to influence you but in it doesn't never feel the same way as somebody that it's real (P018_Ashley)

He thus frames the conundrum that lower production values and lower cost make it easy to circulate content. This can trump expensive creative work, even in the domain of authenticity. This practical hypothesis has been tested by many brands and seems to be one which evidence (at times) supports.

Governing Disruption

A more sceptical tone was struck from one Spanish respondent who argues that amongst the proposed advantages of branded content formats is that they allow for less strict governance oversight:

21 P016_Paul was speaking in response to an example of a local newspaper headline which highlighted a bargain in a local shop chain - presented a retail brand selling a blouse at discount cost in an undisclosed 'native' format. Not 'news' as such and no label.

> I think those loopholes are what make branded content what it is. Because otherwise it would revert to traditional paid advertising (Respondent, Spain).

This of course opens up governance questions. The perception that branded content is a a solution to the challenges of reaching audiences includes among its appeals (and in practitioner pitches) a hint that avoidance of regulation is a plus point. This poses a *significant problem from a governance point of view*. Respondents capture, variously, what we sum up as a structural shift from costly, interruptive bought media toward immersive, influencer-led branded content. Promises of attention (Wu, 2017), intimacy (McStay, 2018) and 'authenticity' (Gilmore and Pine, 2007), and insistent platform logics offer cheaper, 'low-fi' creativity (Dempster, 2015; Taylor, Aade and Goanta, 2024). This is sometime dismissed as cheap and cheerful. Other responses are despairing even from inside the industry.

Several branded content respondents speak in similar vein to define branded content as a counterpoint, not a thing-in-itself. It is paid brand communication/entertainment/news that avoids 'advertising', the latter being associated with:

- Creative deficits
- Interruption
- Irrelevance/distraction
- Unsophistication
- Cliché
- Cost (sometimes)

In a subtle way the branded content creators present a self-identifying narrative reminiscent of earlier era creative revolution advertising agencies who (Frank 1998; Goldman, 2005) at various junctures have 'disrupted' advertising-as-genre. This disrupter tag includes an unconscious rejection of traditional instituted forms, stabilities, and, perhaps, an inadvertent 'escape' or turning a blind eye (Stein 2007) from the 'advertising label' and concomitant governance habits. With a more critical eye, and one not emerging from particular self-reporting from respondents here, there is the sense of a strategic pitch designed to escape regulations. One respondent acknowledged the role for branded content in the face of incoming restrictions on traditional product ads for HFSS, (High Fat Salt and Sugar) foods[22]. where owned media channels can continue to promote HFSS products (Conway, 2025).

22 Ad restrictions have these terms: 'Paid for advertising The government has considered feedback from a range of stakeholders and has concluded that the online restrictions should be limited to paid-for advertising. Paid-for space online is any space where a third party has had to pay the owner to display content and is outlined in more detail in Annex 3. Owned media The restriction will not, therefore, apply to 'owned media'. This is to ensure that brands can continue to talk about their products in the spaces they own. Owned media is any online property owned and controlled, usually by a brand. For owned media the brand exerts full editorial control and ownership over content, such as a blog, website or social media channels.

Reconfigured Boundaries of Practice (and Governance)

Several of our correspondents, felt that branded content represented, for them, a more sustainable and at times more creative form of marketing communications than some traditional advertising formats, practices and innovations (e.g. programmatic, MacRury 2024a; Balocco and Li 2019). These, they suggest, are failing both clients and consumers. One respondent described client relations as 'like poking and like helping people move through the change curve' (P009_Olivia). For respondents, branded content represented a particular and further 'solution', a further integration, a practice (Godin, 2020), within these wider and fragile efforts at holding the media-marketing 'advertising function' together in an era of disruption and displacement.

> But what's happened is, is that more and more brands have been taking more and more control of their own content and cutting Adland out of the picture (P007_Enzo).

Instead of integration coming via heightened strategic alignment (and monitoring) of media channels (e.g. via IMC)[23], or via big Data, machine learning and emergent automated forms (i.e. Programmatic ads reinventing media planning (MacRury 2025b), branded content, including influencer marketing, represents a more literal integration at the level of creative *content.* In some ways, for its most ardent respondent-practitioners, branded content, then, is a 'solution' to several of the problems associated with traditional media 'dying on their arse' (P007_Enzo), broadcast, publisher, advertising agency-centred models.

For some practitioners, in the 'new' ground of revised branded content practices, regulatory 'loopholes', real or imagined, are in mind. They are a risk. From a governance perspective this risks normalising, for instance, opaque, under-identified advertising. Some influencer forms, in the name of authentic spontaneity, e.g. via 'live' scripted reels, can undermine existing media and journalistic and ad creative/ broadcast standards - there is no 'clearance' (MacRury 2020) and no accuracy checking, because no script.

Many practitioners are alert to the risk of poorly supervised commercial influence. As good and capable practitioners, most (but not all) support a case for more coherent, cross-channel rules, clearer disclosure duties and stronger, enforceable oversight. As we shall see the breaking out from the traditional instituted forms of advertising has in some cases been seen as a liberation from wider accountabilities. However, several practitioner respondents want to help to close regulatory loopholes, e.g. aligning influencers, platforms, and publishers under common obligations. This, however, is not a consensus.

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23 IMC: integrated marketing communication strategies.

The BBC in Practice: Public Service Values, Influences and Professional Standards

Other respondents and contributors to the project were able to offer direct observations around the BBC, which is notable because, of course, as a public service media organisation, it plays a crucial role in setting standards around non-commercial contracting. In the UK it is *not* a natural fit for branded content. The BBC's UK public services carry no advertising or brand sponsorship and are subject to very detailed editorial standards. However, the BBC's global operations include commercial services that are subject to different operating obligations and standards in respect of branded content and commercial partnerships(Hardy and MacRury 2024c). The governance-legacy of public service media was a recurrent theme for respondents. This was partly unexpected given that we are talking about content produced or funded by marketers, principally brands.. However, we found the BBC was a notable and recurrent theme in the data.

Amongst our respondents, there were notable allusions to the BBC, the UK's major public service broadcaster. This was partly in its role as an important formative institution in their cultural experiences and in their professional formation, several having worked directly or freelance for the BBC. Of course, the boundaries are shifting here too. The BBC Global's commercial content studio, StoryWorks directly references the BBC brand's pedigree and its trustworthiness. One respondent was careful to acknowledge that the BBC operates differently inside the UK than it does outside the UK, in a funding arrangement that permit such international commercial productions, but which are *not* funded by the licence fee. They are therefore unavailable inside the UK.

The influence of the BBC's public services as advertiser-free, guides personal and sometimes organisational-level positioning around the question of honouring that demarcation between commercial speech and 'public service' speech.
Here is a sample of comments:

- I got a job at, an entry-level position, in the factual side of the BBC, in the learning zone, just doing basic production office stuff there (P007_ Enzo)

- I love storytelling and I got exposed to being on BBC and like radio etc from young talking about [some of my experiences] (P009_Olivia).

- I for years was a slave to the BBCs producers' guidelines which are actually very good (P0015_Natalie).

She continues describing work internationally where she would surreptitiously share these guidelines as a secondary piece of professional mentoring.

- They look at the BBC [regulations] when they go, like, oh my god this is the bible (P015_Natalie).

An ex-Journalist, talking about local news, recognises the distinctive contribution made by the BBC in the context of local content, a comment emerging from the analysis of the consequences of branded content in local media ecosystems and a link to news deserts:

> You know, the BBC in recent years has been involved in initiatives to try and ramp up coverage of local courts again and local councils partly because of the massive hollowing out of [local] newsrooms in the press (P0026_Paul).

One indicative point made about access hits home about accessing content in public service versus branded settings:

> If you think about the BBC, you're thinking you know about people who are maybe using things with screen readers and all of this. It's often brands' issues around different kinds of... Because, you know, if they think about something's going to look, I think there needs to be more regulation around ability (P011_Aisha).

The point being that public orientated communication informed by public service values will have a tendency towards inclusivity in terms not only of accessibility for disabled readers but also in terms of diversity and inclusion. This is not to say that contemporary branding is not alert to such issues, but it is perhaps not such an intrinsic value for commercial forms of communications.

3.2 Defining Branded Content in Practice

> I think the industry is still trying to find words or categories to sum everything up or make sense that a lot of the work is fluid or feeds into other departments (P009_Olivia).

Across all elements of our study questions of definition became important for a variety of reasons (Mission, 2018). It is fundamental to our analysis of formal regulation of branded content across the 32 countries. It is a highly significant aspect in policy formation and is often discussed in the media. We were also very interested in understanding how the term branded content was used in and inflected practices ‘on the ground’. The first issue that, despite important and influential efforts, (Asmussen et al 2016) and continuing ‘takes’, (Carlson, 2015; McCoy, 2025; Vollans, 2024) there continues to be uncertainty about *defining* branded content. The BCGP examines definitional debates in Hardy et al 2024 building on prior work including Hardy (2022).

The term branded content is used to describe quite a wide variety of practices, including, for example, cinematic feature films sponsored by brands, games inserts paid for by brands (Kokholm, 2021), creator-influencers,

and including also various forms of native advertising, particularly of the kind embedded in the press via publishers' dedicated units, for example Guardian Labs in the UK (Ponsford, 2014), or El Pais in Spain[24], and the New York Times. (Lynch, 2018; Amazeen, 2020; Costello and Adebayo, 2024). Lately, attention has also turned to audio media in respect of podcasting (Hiljding and Gárgoles, 2022) as a format where payment and brand prominence have caused concern.

From the point of view of governance, this question has a further element. Sometimes also definition is a matter of provenance - who made art, a brand, a creator, a famed director. Sometimes in practice this seems to be just as important as textual or genre features. Less frequent are considerations around how the communication 'lands'. One component of some definitions of branded content includes a recognition of being partly dependent on how it is recognised by audiences, often in a 'pull' logic (Asmusssen 2016: 34; Shrum, 2012). Indeed, this question of recognition can become an important, if tacit part of governance questions e.g. around labelling and product or brand prominence within the communication.

Definition is the Beginning of Governance

Definitions of branded content take their place, not just within the work of the naming of parts in a complex media marketing ecology, nor just a focus for professional identifications. Pushed further we see that *definition is always already a governance question* since the nature of the communication, i.e. 'Is it branded content?', 'Is it an advertisement?' 'Is it another form of marketing communications, for example packaging or retail display?', or is it 'pure' news, entertainment or editorially aligned lifestyle piece, such definitions and demarcations in communications have a bearing on governance. This has bearing, too, on the consequential and practical decision-making about rules and the applicability of rules in situ and 'live' for creators/ communicators, influencers, and eventually sometimes also for regulators (Hardy, 2022).

Straightforwardly, knowing (with confidence) as a producer, as a consumer, and as a regulator that a communication *is* a piece of branded content has a bearing on how it is assessed from the point of view of governance. Indeed, in terms of authority within the communications ecology, *definitions matter.* As one respondent put it:

> If the sector itself does not have clear guidelines, how can we expect a legislator to be able to legislate (NGO, Spain).

Establishing coherent definitions of branded content, then, becomes the

24 Carvajal and Barinagarrementeria (2023) examine the creation of branded content teams in Spanish news media such El Mundo, El Confidencial, El Español (and regional press groups such as Henneo, Godó, Vocento and Prensa Ibérica) , including the branded content team for El País, (Prisa Content) created in 2014.

key part also in debates about advertising transparency, labelling and disclosure,and about the role of branded content communication in the media marketing and culture mix. So, we have worked with the idea that *definition is the beginning of governance*, and focusing definition (and attendant uncertainties) becomes an important contribution from listening to practitioners.

The BCGP adopts as a starting point a definition of branded content as content that is funded or produced by marketers (Hardy et al 2024; Hardy 2022). We also draw on definitions such as from Asmussen et al. 2016, 'branded content is any output fully/partly funded or at least endorsed by the legal owner of the brand' a definition which has rightful authority on the grounds of its basis in research and its connection to an important branded content organisation, the BCMA[25].

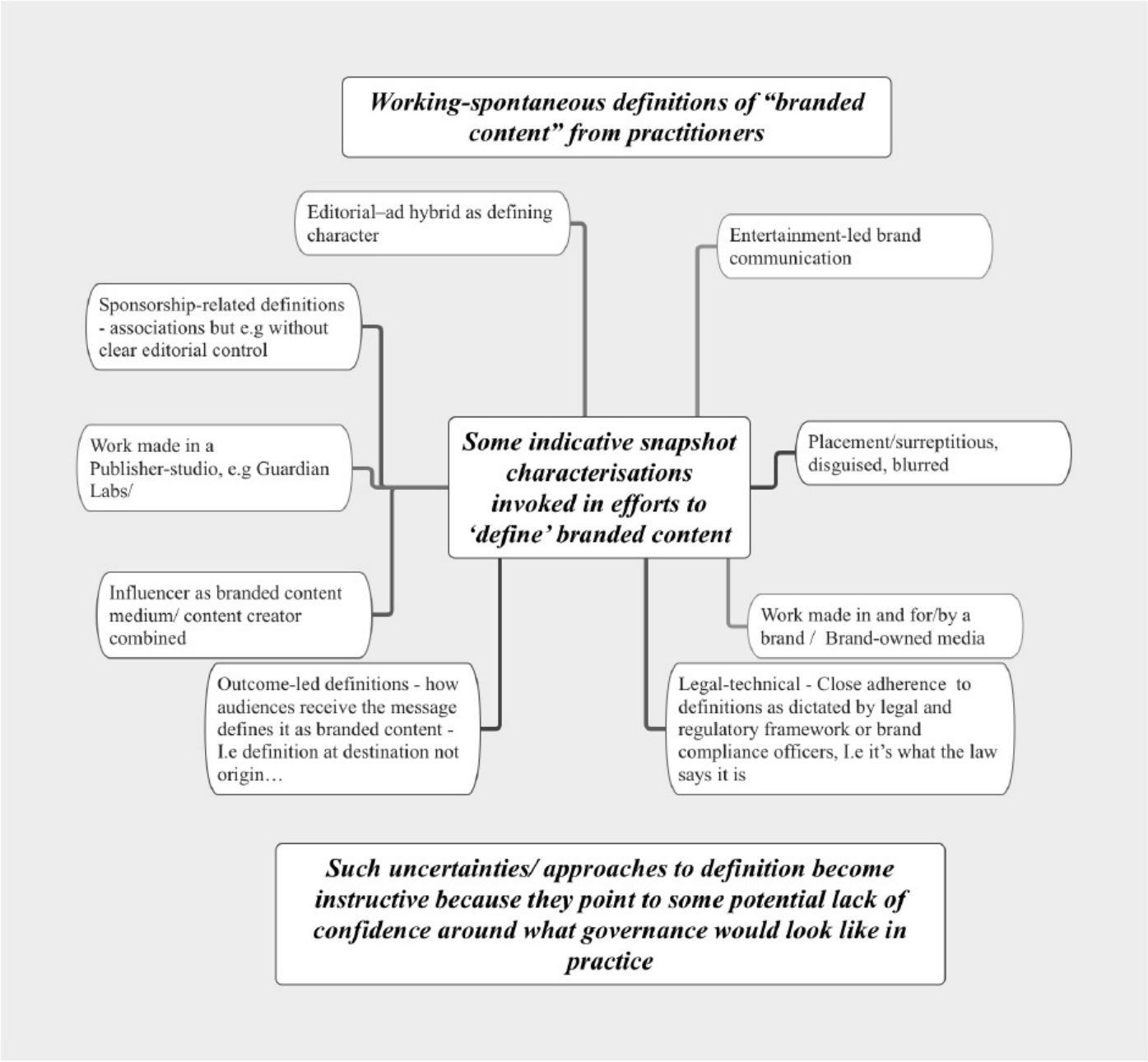
Soliciting Definitions-in-and-of-Practice

In keeping with our aim to better understand governance-in-practice, we invited practitioner research participants to offer their own definitions of 'branded content'. On the surface this was straightforward. As noted, many practitioners self-identify as working in the branded content field, specifically. Many others, however, understood branded content as a sub-form of practice, and governed within their extended practice (as product placement, advertorial, or incentivised lifestyle piece), rather than as a 'new' and specifying point of professional identification. This occurred amongst some practitioners who had longer-term or more established professional identities coming from public relations, from advertising, from journalism or from filmmaking, Aligning new practices/formats and old professions forms a core governance issue here. In practice it is signalled as a kind of cognitive dissonance, one that is typically resolved pragmatically rather than conceptually. So, the blurriness and uncertainty that is already part of creative working is amplified in this specific domain as a governance and definition issue.

25 Asmussen et al 2016 offer this as a useful reference point. Our study continues to capture the multiple approaches that practitioners actually take to defining branded content. However, we do think this is a valuable definition: "From a managerial perspective, branded content is any output fully/partly funded or at least endorsed by the legal owner of the brand which promotes the owner's brand values, and makes audiences choose to engage with the brand based on a pull logic due to its entertainment, information and/or education value" (2016:34) Asmussen, B., Wider, S., Williams, R., Stevenson, N., Whitehead, E. & Canter, A.: Defining branded content for the digital age. The industry experts' views on branded content as a new marketing communications concept. A collaborative research project commissioned by the BCMA and conducted by Oxford Brookes University and Ipsos MORI. Published in June 2016.

Fixing Definitions

Figure 6: Some in-practice/in-circulation definitions



In interviews we asked for respondents to help us think about these working definitions in more detail - distilled some headline and components of definitions which reflect the piecemeal and anti-systematic understanding that occurs in practice (Figure 6) For academic and for regulatory and indeed wider institutional purposes, the definition of branded content is key to try to fix and establish its nature.

Respondents' Reflections on Defining Branded Content

One challenge we noted in interviews is that branded content is understood in the field as being somewhat unstable in terms of its clarity and use in practice. As one respondent observed, terms are being coined to capture subtle differences of emphasis. One Spanish Practitioner observes:

> Content marketing is one thing and branded content is another. And that is why we use the term brand entertainment, because it takes us to a very different semantic sphere where brands and agents have the capacity to collaborate with the entertainment industry to create products that are truly relevant for an audience. Notice the difference which, for me, is fundamental (Practitioner, Spain).

In another exchange, somewhat eschewing labels, but also highlighting the practical imprecision that marks discourse in the field:

> …our industry as well. Many things mean many things…. is branded content a word? I think I do hear it, but it's mostly from the brand side, that brand may call their strategic social media or like email marketing, they may call that branded content…they may call like billboards for example branded content, where brands don't collaborate with others to create that (P009_Olivia).

She adds a more confident definition, but one that relies on some ways on the instability of other formative frames, and introduces the idea of storytelling which afforded a strong and somewhat defining and transdisciplinary connective point of reference for many respondents:

> And it goes back to storytelling. I think, I think branded content sits at the conjunction between like advertising and PR (P009_Olivia).

A very senior and experienced big brand manager who had been involved in some of the earliest and most seminal branded content campaigns describes a recent piece of work, a sports-based simulation device/game that could be used at home:

> So, we used, we used the influencer, to do a video just explaining how, how that, how that works. You know, for viewers, because once you, if you watch a match, you get it, but if you're kind of curious about it, he kind of explains how it all works. And that was just a really great way, I think, to show, you know, to get people more interested in it. And truly is branded content (P027_Matthew).

As it is often the case with practice the best types of definition are through example and exemplars rather than a specific conceptual framing. Not all definitions were positive, however. This is a competitive field of practice and some forms of practice are eschewed/ denigrated. There is caution and criticality from other parts of the field:

> When you talk about branded content you always talk about two things: surreptitious advertising and product placement (Practitioner, Spain).

And of course, it is these types of concern that mean that regulators come into the debate in quite an important way, including in the minds of practitioners. A regulator underlines the definition issue; branded content, for them is:

> a figure that moves in a regulatory grey area, since it does not have an autonomous legal definition or a specific regime, even though its presence in the advertising ecosystem is increasingly relevant. Its regulation is constructed in a fragmentary and indirect way, on the basis of general rules on advertising, unfair competition, audiovisual services, consumer protection and advertising self-regulation (Regulator, Spain).

Problem/Solution Definitions

From amongst the sometimes loosely defined 'branded content practitioner community' some working/spontaneous definitions emerge. These often take the form of an explanation of what types of problem in the media marketing practice the said 'branded content' has sought to manage and resolve for marketers, creators and (imagined) audiences. For instance, 'branded content' is sometimes billed a solution to the problem of not wanting to use traditional advertising agencies. At others, it's the name for a solution to the problem of no longer believing that younger audiences will use traditional media channels. Sometimes it is a response to anxieties about audiences turning away from advertising interruptions and scarcities in the attention economy, which is to say that some of the definition is by way of counterpoint and contrast with traditional left behind practices.

Definitions: Elements in a Basic Consensus

In general, there was an understanding, too, which extended also into influencer marketing, that branded content typically includes some kind of financial reward, typically payment for a piece of communication advocating and, to a degree, briefed by a brand. There was a working understanding that branded content is, however, different from traditional paid-for advertising in dedicated and demarcated media advertising space; a billboard, an ad break, or a pop-up ad online and that instead, and sometimes to a high degree, the branded content material was integrated with and within the flows and formats of the medium through which it was communicating, i.e. native. Practitioners, however, did not use terms like 'disguise' or 'surreptitious' in respect of their own practice, although occasionally they would attribute these less noble motives to other sub areas - e.g. to AI or influencers.

4. Regulation in Practice

Governance and regulation were recurrent themes coded from our interview transcripts with Spanish, UK, and international contributors. When prompted to reflect, various aspects of regulation were discussed, although the language and institutions of regulation was not necessarily prevalent in accounts of practice except when we asked respondents directly about them. For most practitioner interviewees their preoccupations tend to be creativity, client relations, their sense of the audience they reach, and the response their work garners. Discussions of the relationship between governance and creative practice was sometimes confusing, and almost always complicated. It is seen by many respondents as important and valuable, but also identified as a considerable and frustrating transaction cost in terms of time. Of course, in some cases producers, publishers, and writers are working in highly time-sensitive settings and scenarios. However, when respondents were asked about governance and regulation, they broadly described the relationship as either

- conflictual in relation to their creative efforts
- complementary,
- or compartmentalised.

Some Shared Concerns About Regulation

At the most speculative level there is a general anxiety about the state of the communications environment. Of course, there has never been a time in the history of advertising when this has not been expressed in some shape or form (MacRury 2009: 131; Nevet 1981). For some of our practitioners, including those who make and commission it, branded content is, in its various forms, a particular challenge for an overstretched regulatory system and for the governance principles that underpin it. Put bluntly:

> almost certainly [there] are millions of ads live right now in the UK that will be seen by consumers today. So how is it regulated? Do we understand even what ads are out there? How do we stay on top of what's compliant, what, you know, what's not compliant and things like that? (P025_Aaron)

In similar vein, looking at influencers:

> ..there's probably you know a couple [of] tens of thousands of billboards in London; for example there's about a hundred magazines that are credible maybe even less, there are 50 million influencers worldwide probably more and hence why I mentioned I think it's quite uncontrollable to do it [regulate] ..to nitpick or do one fix all (P009_ Olivia).

Taking a more global stance and one respondent shared his view:

> There are regulations there but not being used. They're not being applied. For example, the most basic is hashtag ad. Let the consumer

> know or your follower know that you are promoting a product or service. At the most basic level, that is not being done (P012_Arjun).

In Spain, similar concerns are set out by a practitioner.

> The agents who operate in the online environment do not feel addressed by the regulations. It is true that on our televisions both free-to-air and pay TV, or on-demand service providers (not those who have catalogues of programmes) - they are indeed totally 'addressed' by the regulations and are perfectly clear that they have to identify advertising and what kind of advertising they can broadcast or not. And the agents who intervene in the online environment do not feel addressed, and they are entering the self-regulation agreement with difficulty (Practitioner, Spain).

It is worth looking in more detail at the different ways in which practitioners talk about and reflect on managing relationships to regulation. As Puppis (2010) argues 'regulation is not a synonym for governance. Indeed, governance includes the relationship to regulation, but it exceeds regulation in its scope'.

Conflicted About Regulation

One Spanish respondent is concerned around 'deception'. He feels a lot of practice can conflict with regulation:

> the issue of deception, or the mention of third-party brands or the mention of third-party names. That is, when, in a commercial communication, there is indeed the improper use of a person, of their product, or of their… And that is where more emphasis should be placed (Respondent, Spain).

A respondent who advocates for good practice, nevertheless, finds herself conflicted. Some regulations are too 'blanket' and there are calls for a recognition of some of the specific risks and harms in product sectors:

> that's just overkill, but it just seems like maybe it's going to a place of overkill, and there's not much visibility of the rationale of why, etc. ….like for example I think I think there's also space for case by case… so there's a reason why we don't advertise like cigarettes for example because that's just very obviously bad, and no kind of bad or weight loss pills, things like that. But I think there perhaps could be more categorical focus than general focus because sometimes it just doesn't make sense…like, you know, lipstick is harmless but if there's influencers around finance or health that can actually have real massive implications. You can't just blanket-regulate (P009_Olivia).

Some conflict emerges from feeling that regulators are unclear. P006_ Christine claims

…and actually, it does help to address some of those issues where regulators might give conflicting perspectives on something and trying to make sure that it's absolutely clear (P006_Christine).

A Spanish practitioner puts the conflictual position bluntly:

> We have doubts, since there is no specific legislation on branded content, as to whether it would be advisable to have it or not. I am one of those who think probably not, because the legislator usually does not open windows, but closes doors (Creative Practitioner, Spain).

In a wider frame, analysis of regulation in respect of influencers there was a concern about diversity and recognition of the demographics and backgrounds of the very large and often young influencer population. Thinking about the make-up and imagined profile of regulators, some respondents noted the prevalence of traditional establishment profiles:

> There's that, and perhaps just more representation in those spaces, I'm pretty sure the board members are probably, I'm just imagining, I'm just imagining the decision makers for example, I don't think they're probably people that have worked in the influencer digital space, are probably traditional or and again just a generalisation.

4.1 Compartmentalisation

A subsection of compliant approaches to regulation and governance includes various forms of engagement with regulation based on the recognition that following rules is a requirement. However, this is done as a matter of risk management and efficiency, as it typically does not imply belief that regulatory compliance is fundamental to the task of creative content production. It might for instance, be done grudgingly.

> It doesn't mean I agree with all the regulations, I actually don't, but [I tell them] just for their safety and just best practice and I mean, you have to [disclose] (P009_Olivia).

The same respondent said that she sometimes found it hard to defend a 'lack of common sense', but she would set aside her personal views in order to comply with the required labelling:

> 'Oh, you need to add on that' [disclosure], or sometimes when a post is where brands only paid for the post and the influencer is like, 'oh, I love it so much, I want to use it going forward', there is a grey area. I am sort of like, well, you were initially paid, let us say a month ago, and now you do love it, it still came from a paid opportunity (P009_Olivia).

This compartmentalisation can take many forms. The underpinning formation can be observed in a routine decoupling of 'creativity' from 'compliance' entirely. In practice this means that compliance issues

(following rules, labelling, adhering to sector norms) become the responsibility of individuals or teams who are not directly associated with the creative media production. P002_Lauren, an account manager described her role as less to do with creativity and more to do with accuracy checking and compliance. In an entertainment brand agency, she felt that she was not part of the creative process but an adjunct to it or even a manager in relation to it - but not a creator. This means that responsibility for compliance is delegated. It might be delegated up, to managers, or, even back to the client. For instance,

> like the old days of QVC TV selling. You've got that now in the influencer space. So, brands are aware of regulations, but they do, I believe, ignore it. And it's our job as the agency to convince them and influence them in our own way to actually follow the guidelines. But that is one of the biggest challenges we face as a business within the industry (P018_ Ashley).

On the other hand, it can be delegated to an account manager or a legal team. A very senior marketing manager was able to discuss collaboration and a proactive approach to regulation in relation to AI, which was also a live concern for many of our respondents. He talks in detail about currently being very cautious about artificial intelligence and making sure that they are pre-empting any potential future challenges and problems emerging from, for example, intellectual property issues in respect of content created using artificial intelligence:

> coming off of what we just talked about in terms of compliance, we're being very cautious about AI, and we are working. We want to make sure that we are not using certain tools that pull from too wide of a world where you could be stealing. And so, we're working, actually very closely with partners like Adobe, who's able to create our own kind of, what I'd call ecosystem, where we're not we're not risking pulling imagery and ideas and from others without authorization (P027_ Matthew).

A further manifestation of this dynamic, delegates, or we might say ‘splits off’ the responsibility for, for instance, disclosure, in a different way: *to the audience*. This is to say that it is left to the audience to know and understand, for example, whether or not it is a commercially funded and controlled message or whether it is a piece of organic content. This delegation of responsibility outside the creative process becomes higher risk in less structured organisations or in organisations which work on a freelance or distributed basis - as there is nobody to look over the creative’s shoulder.

This dynamic of compartmentalised approaches to regulation and governance is important because it typically recognises the principles of good practice (disclosure, labelling, accurate content) while sometimes allowing those principles not to be realised in practice because of confusion or complexity, or pressure (speed/urgency).

4.2 Collaboration with Regulators

Sometimes relations with regulators (real or imagined) are challenging. Several respondents discussed the idea of the burden of regulation. But a common and practical and functional orientation included active collaboration:

> …so I'm not asking for more law, more legislation, more specificity, what I'm asking for actually is for the regulators to have a slightly more liberal interpretation of the laws that we already have and maybe to be a bit more pragmatic and work with people a little bit more and for them to be open and receptive to the research around consumer understanding. There is sometimes a sense from some regulators that they think they apply the average consumer test and it's really based on their sort of gut feel not on extensive consumer research (Creator-practitioner, Respondent, Spain).

Practitioners tend to have some understanding of the place of regulation in their practice and to seek to work within the guidance. So, alongside the typical characterisation of regulators as nit picking or 'anti-creative' bodies who 'don't understand' practice, there is also a notable strand that recognises regulatory collaboration:

> From our point of view as advertisers, so to speak, the most difficult thing is trying to create content that complies with that legislation. That is, making content that is interesting but shows that it is sponsored in a way that still maintains engagement. That's what is most important for us (Respondent, creative, Spain).

Included here are comments or reflections which emphasise some of the work that practitioners do to ensure that they are in alignment with regulations. For instance, as regulations are often a matter of interpretation working with regulators can be an important element in the task of preparing work. This tends to happen most in more planned, and often traditional client-agency relationships, where the agency producing the promotional material takes responsibility for different kinds of compliance.

Within a more traditional broadcast workflow, one advertising agency executive describes working with a pre-clearance service. A key element in governance workflows that dissipates in some digital formats. Discussing work with a new and challenging client in a product area where he was less familiar, and linked to transport, but where there were some challenging claims,

> [beyond just] sending it to Clearcast which we would typically do I'll send it all off to the ASA so that's going through them or um or CAP really at the same time and getting their viewpoint on the work at that point and now that's probably something we wouldn't have done, some time ago right yeah right so the very nature of the fact that we have that relationship, with them is that opens our eyes to what they deliver and what they can offer us but also makes, On the other hand, make sure

> that we are sharing the work that we deliver at a quite embryonic stage sometimes (P019_Mark).

Speaking of a client, in a sector where there is dense legislation, for good clear reasons:

> We were struggling with an ad for a gambling client…. So eventually we got, actually, a guy from Clearcast, who knows gambling inside out, and he came and did a talk to us about where you can go. It's just so everybody's on the same page, you need to certainly sometimes bring that to … [the creative process] (P0019 Mark).

In our 32-country report (Hardy et al 2025a) we identify variability in the extent to which different national self-regulatory authorities would offer this kind of hands-on pre-clearance support. In this UK-based case, what is interesting is the interviewee's further observation that he has noted a more collaborative and facilitative relationship emerging with the regulators in recent years. In his experience, there is a more problem–solution-oriented set of relationships coming from the regulator, collaborative in both directions, rather than something that seems like a more policing relationship.

> But I definitely feel it used to be a question of once upon a time it was 'NO'. And now it's more, 'probably not', but 'if you looked at it this way', so it's much more problem-solution orientated, if you looked at it this way that might help you navigate that particular area (P019_Mark).

Speaking at a more general industry level in respect of influencers, there is also a feeling from another respondent, who describes his relationship with the influencer community as one where his role is to support a more collaborative approach to regulators and follow guidelines, that collaboration is increasingly central:

> And it's our job as the agency to convince them and influence them in our own way to actually follow the guidelines. But that is one of the biggest challenges we face as a business within the industry (P018_ Ashley).

4.3 In-Practice-Enforcement

When we talk about enforcement and governance, we are normally thinking about formal public or semi-public complaints procedures and even prosecution for infringements. However, within the frame of governance-in-practice, enforcement is often about the micro-dynamics within and across teams, particularly in the client agency relationship.

A nuance within the relationship to regulators and regulations appears in a response from a mid-career account manager, who talks about working within a creative agency. She personally found it easier to communicate changes to the creative team—for example, to a script or to a particular shot or claim—and, while occasionally some creative negotiations would happen

between client and agency, she preferred relaying changes that were explicable in terms of regulations. They are easier to communicate. Even while creatives may not like such changes, they typically were not able to argue with them. Asked what kind of changes she was happiest relaying to creative teams she says:

> No, [I prefer to pass on] a regulatory decision. which is very easy to communicate through, because you can't argue with it, not really, anyway (P002_Lauren).

There are multiple orientations in governance between practitioners and the various regulatory and statutory bodies to whom they are accountable and where their professional practice needs to demonstrate responsible action. An influencer advocate notes that now there are 'shame lists' for infringing influencers, part of a wider set of practice-led actions to do with professionalisation and regulation.

> You know, influencers if you've got this black mark or if you're on the ASA shame list etc. Yeah so, I mean like there are there are some organisations that do that, and they've got a strict code of conduct linked to it and everything else (P018_Ashley).

It is important to reflect a complex picture in which there are a variety of orientations towards regulation and governance within practice. Certain kinds of responsibility and accountability, e.g. providing paper trails and audit systems in respect of accuracy of claim are considered to be (at times) irksome. In practice, some governance tasks are an overhead cost in a squeezed system. It is clear from our interviews with the sample of respondents that we were able to reach, that there is a strong understanding, nevertheless, of the place of regulation within their wider workflow. Several are able to point to active and collaborative relations with regulators as a working component within current business practice. In many ways, where there are difficulties or conflicts with regulation, these are to do with uncertainty and unclarity.

Practitioners, especially those working in new areas or a new configuration of relations with clients (e.g. influencers and independent brand studios) recognise that they have an important interpretive role in finding an appropriate balance between promotional communicative intention and regulatory requirement. They often have to 'manage up' (P009_Olivia). Sometimes this collaborative approach is something that respondents will acknowledge in their own practice (P019_Mark) while recognising that it is not necessarily an industry wide norm. One of the burdens of compliance is the feeling that their efforts to observe requirements are not matched by competitors, or, by other sub sectors in other media channels. It felt that this type of collaborative compliance was easier to notice in sectors with an established, instituted regulation-orientated workflow i.e. for example one that includes pre-clearance. However, pre-clearance exists in a largely

traditional broadcast advertising model for paid media and is far less clear in respect of other forms of branded content communication.

> But you know, we are, we are so careful to be ethical for everything to be, you know, if we're talking about a benefit, it is, you know that are a feature, it's, it's a real feature, and representing it correctly. So, for example, when we show AI accomplishing a task in a social video or on TV, we don't recreate it, even though that'd be a lot easier, we actually have to capture it actually happening. So, when you're playing by the rules, you kind of want everyone to play, otherwise, it's not a level playing field (P0027_Matthew).

4.4 Governance on the Ground: Accuracy

One of the things that the interviews with practitioners underline is that a very great deal of practical marketing communications work is to do with accuracy and checking. Governance and regulation related checks are often merged, or, even, submerged in production tasks. Such checking constitutes a good deal of the processing of 'getting the message out there'. One respondent practitioner from the Spanish interviews outlines the commitment to the notion of accuracy across different domains.

> …so, if you as a marketer make false claims you'll be found out when there is no doubt in that he claims something and it doesn't work or it doesn't do what it says it's going to do you will be found out so what's the point of doing that…(Creative, Spain).

In (best) practice there is recognition that accuracy is a primary professional responsibility. However, there are sometimes grey areas, suggesting a distinction; that opinion based and fact-based claims are somewhat different in terms of their regulatory status.

> you know it's okay maybe opinion okay but yeah opinion and accuracy are two different things again if in the opinion, it helps if the opinion can be backed up by evidence. You're going deep, but you would not want to do anything that was inaccurate or misleading in any way (Creative, Spain).

There's a view that sometimes this may go awry:

> Most of the advertising industry follows those rules anyway. Although they will be a bit selective, shall we say, they won't make false claims. And right through your journalism career, that's the one thing that is important, not to be inaccurate (Creative, Spain).

We are reminded for instance that communications must be checked, for instance to ensure brand claims can be substantiated. An independent creative producer explains some of the in-process dilemmas clearly:

> There might be a product involved, but let's say it's these shoes. We'd be making some content about where the rubber comes from and how it's sustainably sourced and things like that. That's the sort of stuff we might make for somebody, for example. But we're reliant on those brands to prove to us that what they're saying about that (P007_Enzo).

While this of course appears to be simply a matter of getting the facts right and therefore straightforward communication is common sense, it touches on fundamentals in governance and indeed, in this case, specifically to regulations about 'green' claims. Respondents did not name specific rules or principles, but showed awareness of the need to manage accuracy, as set out in, for example national advertising codes (EASA 2025) [26]emerging from the International Chamber of Commerce's Advertising and Marketing Communications Code (ICC Code). In addition to the ICC Code requirements for advertising transparency that the BCGP examines in depth (Hardy et al 2025a; Hardy 2025c), the ICC Code (2024) includes articles on truthfulness and substantiation (requiring that any claim made in marketing communications is supported by scientific, and verifiable evidence, available upon demand). So, compliance includes the very detailed,'hidden' work that must be done to substantiate claims and maintain such records.

Reflecting on confusion between responsibilities for questions of accuracy and product representation while working as a creative content production studio directly with a brand - and crucially without the traditional advertising agency link to UK pre-vetting service Clearcast - one respondent reflected on uncertainty about where responsibility for avoiding breaches associated with misleading claims might sit:

> …we can do our own kind of fact checking to a certain extent, and we always do. We kind of feel a sense of responsibility for that. But nobody's telling us to do that. There's no guidance on how we do that. And the only option we're left with is to go back to the brand and either say, we don't believe you, prove it, and if you can't prove it, then I'm sorry, we're not going to work with you on this (P025_Aaron).

He adds, underlining the pressure of a regulatory attentiveness to accuracy (legal, decent, honest and truthful):

> But there will always be another production company who will gladly work with them. So, I'm a great believer in actually something potentially from the bottom, from a governance point of view (P025_Aaron)

26 EASA elaborate: 'Misleading advertising is consistently the most complained about issue for European consumers, as shown in our annual statistics of complaints handled by national ad self-regulatory organisations (SROs). Every year for the past 5 years, at least 58% of complaints lodged almost exclusively by consumers for free with SROs have taken issue with purportedly misleading advertising' (EASA 2025).

Reflecting on the commitment to getting things right and checking things before 'pressing send' is captured in the form of the potential cost and reputational damage of getting something wrong in a very public domain. One respondent reflecting on agency work for Out-of-home(OOH) Bus ads explained:

> The side of a bus is not easy. The side of a bus is really expensive as well. Signing off bus sites is very stressful (P002_Lauren).

One point prompted by this observation about 'high cost/ high risk/ high visibility' communications is that practitioners convey some sense of not wanting to make a regulatory error on the 'big stage'. This might be distinguished against for example, fast produced, low profile, rapidly sent and forgotten digital content, e.g. made for platforms, where the need and the incentive to get things right may feel less pressing in amongst the work of maintaining high intensity production workflows, or on the other hand, where on off posting and production is less systematised.

P004_Catlin talked about entertainment brands and the difficulties associated with verifying and building an audit trail for claims that journalists from national newspapers had indeed identified a soon-to-be-released film as 'must-see' or 'exciting' or 'family-friendly'. Another respondent talked about the difficulty of negotiating at short notice, in relation to another entertainment brand, whether or not the fight scenes shown for a blockbuster movie could be included in a trailer for distribution where it would reach children (P002_Lauren), on the basis that it may be considered to be too violent for the audience and the time slots in which it might be broadcast.

Another respondent who works to try to professionalise aspects of influencer compliance talked about the challenges of accuracy. She works to explain to her influencer teams, telling them:

> like how people say something and the claims they make because they'll be bound to those claims. And as a mouthpiece for that brand, you're also selling not just the product, but you're also selling the transformation or selling the result. That's what it is, yeah. There are guidelines around, especially with scientific and beauty brands… you just have to be really sensitive. So, there's scripts sometimes or scripts that are approved…i.e. check they didn't say 70% or whatever it is (P009_Olivia).

In taking up her role as mentor to and as a kind of governance advisor to these influencers the respondent says the following: 'you've got to have your brand hat on' (P009_Olivia*). H*ere, the talent manager intermediary locates responsibility and accountability with the brand, and not for instance, the idea of a regulator.

A further and looming governance issue is connected to the potential risk associated with a further and unique form of delegation of governance responsibility:

> So if you say, give me an ad for my, you know, my, I don't know my dog food, whatever, and it (an AI ad generator) produces one that says you know, all the ingredients of free range meat or something like that, for example, if that's not true about your product, then then obviously, that's misleading because the AI sort of invented those claims for you. And that's the kind of stuff that we think we need to keep an eye on (P015 Natalie).

These types of questions around misinformation (Hardy, 2021b) and accuracy are becoming quite important. Again, within the frames of reference guiding practitioners within the broader field, the point of reference is not 'the regulator', as such, but the 'C-Suite':

> But certainly, when it comes to governance and making misleading claims and fake reviews and lack of transparency around these sorts of issues, that is something that now agencies and brands are taking much more seriously, particularly brands, whereas consumer claims, including using influencers to make consumer claims, that would have been quite low on the agenda. It wouldn't have been a C-suite issue. (P016 Owen)

The underlying issue suggested here is that the pathway through which cultures of compliance and attentiveness to regulation in the branded content domain must pass in typical organisational set ups includes the need for proactive buy-in from corporate leaders, not just stringent legislation from statute and regulatory authorities. In a wide frame, this recognition of the fundamental importance of accuracy is set against the threat of misinformation and indeed disinformation in the marketplace. So, while we would agree that this commitment to accuracy is important - and indeed that it is reassuring to see organisations taking the matter seriously - this is not just a 'C-suite' issue. It is a fundamental issue of social and cultural value. The integrity of and within the media marketing ecology depends on the trustworthiness of communications within it. Governance is fundamentally interested in that - as in its widest interpretation, it holds and institutes cultural values around for instance, trust. Indeed, trust was a key term for many respondents.

4.5 Trust

> [W]hy do most people, most of the time, trust in practices and social mechanisms about which their own technical knowledge is slight or non-existent? (Giddens 1990:88).

At a fundamental level governance is connected to trust. As Sociologist Anthony Giddens, amongst several others has argued, trust becomes jeopardised in the disembodying and abstraction of systems, including

systems of communication (Jeacle and Carter, 2011). Trust formed a potent term for our practitioners. While the explicit language of regulation and governance was not mobilised quite as frequently by practitioners as the BCGP research team had become used to within our own discussion of what governance involved, there was a broader and more recurrent (if abstract) ethical commitment to the idea of trust. This is widely noted.

Duffek, in a US study (2024:21), cites an advocate for influencer agencies (Schwarz 2020):

> Unfortunately, many brands today think they can shortcut trust. They pay personalities to promote products they don't actually use or believe in. The result is influencer marketing that feels fake and inauthentic, breeding distrust (and anger) among consumers.

Our study echoes this and found anxieties about 'trust' emerging in the reflections and thoughts of several practitioners. As noted, this sometimes took the form of pro influencer advocates or creator practitioners-agencies articulating a kind commitment to professional self-governance ('we will do better'). Respondent practitioners did acknowledge that there was a real problem/risk to link with governance, and that from their point of view the key issue was the erosion of *trust:*

> There are regulations there but they're not being used. They're not being applied. For example, the most basic is hashtag ad. Let the consumer know or your follower know that you are promoting a product or service. At the most basic level, that is not being done. And then you've got fake content or paid content, which is actually driving disbelief, distrust. And then you've got so many problems with the little, tiny influencers who are working with multiple brands (P012_Arjun).

Speaking from a wider perspective and referencing the role of trade bodies in the industry, another respondent recognises that trust was not to be taken for granted:

> … trust is not owned, and we must we must guard it jealously. So that that that is sort of keep your own heels to the fire to make sure that we are upholding the best practices so that we have a future for our industry (P010_Marcus).

A mid-level brand manager recognised a further risk, in the extent the audience is lose faith in communication systems:

> It will all just kind of become 'white noise' (P004_Caitlin).

She fears that people are just going to stop being able to trust, understand tune into or communicate in media spaces. Another practitioner, who specialised in advising on digital for brands, took a wider perspective:

> …interesting question about trust in advertising and I think, given where we are at with since the pandemic and the escalation of fraud and scams online and the escalation of misinformation and disinformation and the sort of, theorising political situation that we're sitting in, we are well, yeah and deep fakes and all the rest of it, this this you know this is there's that movement of um people not trusting mainstream and traditional sources of media and information there's a sense of what do we do when we really can't tell if something is genuine or not and how that extends into advertising (P006_Christine).

We can put this in context of a disruptive and fast changing media ecology. Intermediation has been, as it remains, a fundamental part of promotional industries (Hennion and Meadel; MacRury 2024; MacRury 2009). As part of a wider disquisition on trust, Onora O'Neill (2020) discusses the proliferation and automation of intermediary mediation functions in the wider media and communication system. Branded content is a big part of the intermediary industry and represents amongst the several and many transformations of promotional mediation that have been underway for decade - with each phase of digitalisation and remediation of the marketing system bringing new formats and governance risks. This has implications for trust. As O'Neill puts it:

> It is this proliferation of intermediaries, rather than the differences between various communications media that shapes and modifies communicated content, and that can support or disrupt processes for checking or challenging, corroborating or undermining, mediated claims and commitments, and so also affect capacities to make judgments that bear on the placing or refusal to trust. Where intermediaries not merely transmit communicated content, but can edit or alter, suppress or embellish, insert or omit, interpolate or distort content, both the intelligibility and the assess-ability of claims and commitments, and capacities to judge trustworthiness and untrustworthiness, truth and falsity, may be affected and may falter or fail (O'Neill 2020: 25).

Influencers sit in the spotlight here. They are at once a new form of marketing intermediation and seen as more 'relatable' and hence trustworthy. But equally, they disturb more established roots of accountability and governance and so introduce new risks - as Hardy suggests, mis- and dis-information (Hardy, 2021*).

This ambivalence resonates with our interview work in that it reveals the proliferation of roles and new alignments between different actors within the media marketing ecology. It points, too, to the continued necessity of attentiveness to questions of governance, both in practice and in the wider frame i.e. attending to intentionally stabilising an increasingly complex and intermediated public sphere - including via legislation. The already present prospects of AI add yet further concerns, with individual marketers, brands, creators, organisations, clients, platforms and media in desperate need of clarity and alignment, and where consumers need a degree of predictability

and certainty to help stabilise their navigation across an increasingly complex media marketing ecology.

4.6 Infringements

Characteristically, our respondents were not forthcoming in terms of breaches from within their own practice. The most sensible interpretation of this is that, relatively, and as assessed in terms of formal and upheld complaints, breaches are quite rare, even while across the many thousands, not to say millions, of messages there are the many potential breaches[27]. But perhaps more important in the context of this research, our sample reflected thoughtful and good practice-oriented respondents. Moreover, our primary interest was in understanding the tensions and dynamics in the governance associated with this field of practice not in auditing or interrogating practitioners regarding their, or their organisational conduct. However, in passing, several respondents were conscious of the reasons why regulations exist and indeed had a detailed understanding of some of the potential breaches and some of the breaches that they witnessed in respect of the broader field of practice. As one respondent put it:

> So, at the moment, I would say the governance around the content that we're producing for brands is pretty non-existent in practice, in that it's almost self-policed in a way (P007_Enzo).

In this case, however, it is self-policed, in that the respondent draws on past experience and instinct to align with his working understanding of governance and strong commitment to clarity and regulation. Typically, practitioners were likely to locate infringements in their past or in other sectors of the industry i.e. geographical or different media. A former journalist, looking back to a period when regulation was less alert to questions of branded content, P016_Paul,describes work which he often did, as he describes it in downtime from his real journalism:

> as expected, as part of my job, a small part of my job, to, to write, articles that, that ostensibly were journalistic feature articles or news stories or whatever, but mainly feature articles, but were actually semi-disguised advertising, really, and they, they were, they weren't terribly well-disguised quite often (P026_Paul).

However, as discussed, there was also some awareness, sometimes prompted by direct questioning from the interviewer, of the existence of various types of infringement breaches. These, respondents said, were acknowledged, but were often located in other sub-sections of the wider branded content field, notably, often, and as discussed before, in relation to influencer marketing. As a group of respondents, and as coded under ‘infringements’ in our data, we can point to awareness of several areas. As summarised in Table 4.

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27 In an appendix to our overview of our 32 Country report we include data on the numbers of complaints in different EU jurisdictions.

Table 4: Collating infringements – the need for governance-in-practice

Area	Respondents note risk of/ incidents including...
Misleading or hidden advertising	Failing to identify paid, gifted or incentivised content. In different ways, both journalist-linked and influencer manager respondents noted this was a problem that needed attention.
Incorrect, ambiguous. 'Half-hearted' or unclear labelling	Using vague tags, e.g. '#collab' placing labels where users miss them. Influencer managers and other respondents noted the challenge of poor labelling.
Challenges in the payment-and-control domain	Posting paid-for content without assessing whether it meets e.g. CAP guidance on payment and e.g. script direction. No respondent was willing to say they did this. However, they note 'grey' areas and challenges in client-agency relationships.
Affiliate marketing disclosure failures	Not identifying affiliate links as advertising. One ex-journalist noted examples of this in national and local press
Unsubstantiated claims (n.b. manyrelayed how working to substantiate claims was frustrating)	Making claims about performance, health, or product qualities without evidence/audit trail
Problematic targeting/ uncontrolled audience	Sharing commercial messages likely to reach children or vulnerable groups. Several respondents felt that 'age gating' on social media was inadequate/ unreliable.
Use of restricted categories	Promoting products with special rules but failing to acknowledge/ check these. On ad manager noted a recent gambling campaign where they were checking, but where in the past others might not have.
Misleading comparisons or endorsements	Presenting brand-related opinions as independent when a commercial relationship exists. Influencer managers seek to redress this poor practice.
Passing off brand-owned content as editorial or personal opinion	Integrating brand messaging into 'authentic' storytelling without transparency e.g. in journalism - referenced as past but 'standard practice'
Cross-border compliance failures	Posting content that reaches jurisdictions with stricter rules. Again, this type of infringement was acknowledged, though being 'international' and making edits for different places was seen as a professional norm in a digital world.

So, respondents across the board were able to acknowledge that these different forms of infringement were recurrent and observable in practice. They would often mention working to manage this better or to clarify how they worked in meeting their responsibilities in respect of different types of infringement. However, partly reflecting the profile of the sample, which was mainly engaged and reflective practitioners, conscious of wider responsibilities to the industry and indeed media culture, there was a tendency to be quite positive and proactive in respect of different types of infringement and mitigations.

Most often, however, breaches were discussed in terms of uncertainty, either about particular grey areas, such as in relation to payment and control, or in terms of seeking to understand accountabilities and lines of responsibility in contexts where newer relationships between content creators and commissioning brands, for example, were being worked out and worked through - e.g. in relation to accuracy and fact checking of claims. Indeed, the most common form of compliance issue that came spontaneously to mind amongst respondents was linked to unsubstantiated claims, and from across the field there was a strong sense that practitioners understood, even if through gritted teeth, that unsubstantiated claims were a risk and a problem, and that they had often personally been involved in having to redress or manage the work of making accurate claims, checking them, and keeping paper trails.

There were also concerns about various forms of problematic targeting, for example age-gating in relation to children or other vulnerable groups, linked to anything from high fat, salt, and sugar to cosmetic and aesthetic content. Several had worked for alcohol, gambling, and medicine-related brands and recognised the challenges and responsibilities in those domains. Softer and more recurrent issues emerged around, for example, skincare content, where one influencer manager talked about the problem of balancing influencers' enthusiasm for a product with not over-claiming. None of our respondents mentioned directly working with affiliate marketing, but they did mention it in relation to uncertainty, and uncertainty about affiliate links amongst influencers.

In some of the BCGP roundtables, there was helpful discussion about the vagueness and uncertainty of certain types of labelling, for example the use of vague tags such as 'collab', or at points when they were likely to be missed by audiences. This, of course, included the failure, typically identified with influencers, around paid, gifted, or other types of incentivised content, although journalists also discussed longer-term historical practices in the form of describing long and sometimes expensive travel-based work with tourism or nation-branded projects.

Respondents outline a variety of ways of thinking and talking about these infringements, including actively seeking to collaborate with and take advice from advertising practice bodies, e.g. via pre-clearance bodies. In one instance, the agency which had just taken on a new gambling ad invited

the Advertising Standards Authority in to brief the agency and creative team on gambling-related advertising responsibilities. Branded content infringements include platforms, but, as noted, we were unable to get direct access to interview senior practitioners linked to platforms, as well as to some of the bigger brands. During the period of data collection, we were aware, for instance, of investigations into TikTok and problems at the macro level regarding disclosure. The BCGP reports on platform policies on advertising transparency and disclosure in Hardy et al (2025a). Secondary analysis also highlights a key investigation. Citing 'an EU Technology lead investigator, who reiterates that 'Transparency in online advertising – who pays and how audiences are targeted – is essential to safeguarding the public interest,' (Easton 2025), there is a concern that TikTok does not have a searchable archive allowing proper disclosure. One key issue is that:

> …TikTok has failed to provide necessary information about advertisement content, targeted users, and who paid for the publicity. If the preliminary conclusions are confirmed, TikTok could face a fine of up to 6 per cent of its global annual turnover (Easton 2025).

This is relevant in the context of the Cambridge Analytica scandal, an event which is at the heart of a good deal of attentiveness to governance and social media, and where one form of redress imposed on Meta/Facebook was the institution of an 'ad library'[28] (Walker 2018).

There was also a feeling of helplessness. Governance can be slow and Platforms powerful, A Spanish respondent sets it out well:

> Imagine there is an ad on YouTube, and I think it infringes the Spanish General Advertising Act. And the courts… suing YouTube is not advisable. Neither cheap, nor fast. So, well, to take action and set all this in motion, we will see whether the platforms have taken note and are going to apply the DSA and are going to do it with the means. In the end it is always that, right? shifting the costs—not to the platforms—but everything is going to be on platforms (Respondent, Spain).

28 Meta Ad Library supports a duty in respect of transparency into ads including information on advertisers. Often relevant re. social issues, elections, or politics These are stored for seven years. TikTok doesn't seem to have one. This makes disclosure weaker.

5. Governance and Creativity in the Branded Content and Creator Economy

We have recognised that, because our respondents are embedded, each in their own ways, in the 'creative industries', that 'creativity' is a significant underpinning point of reference and identification for them (MacRury, 2018b; Godin, 2020). Our practitioner-respondents, have in common, despite their differences, that they work, more specifically, in domains best classified as *professional* creativity (Kaufman and Beghetto, 2009) and with the commercial-marketing aspect of this creativity an important, not to say defining qualifier.

It is the economic driver and rationale behind their work. Typically, budgets to 'create' come via commercial marketing lines - the brands in branded content. This link is rarely out of mind for respondents, some of whom talk about the precariousness of their work and indeed of their creator organisations. However, commercial economics aside, the component of professional identity and the forms of work in which they are involved, and upon which they are drawn to reflect, retain for most of our respondents a particular relation to the broad field of *creativity*. This should be no surprise. Some, as advertising creatives, past or current, have or have had the word 'creative' as a nominal designation (Roston, 2019) in their professional identity. Indeed, it is a feature of advertising and adjacent industries that 'creative' is not just an adjective, but also a noun. Several identify with the nomination 'creator', as opposed to influencer. This is true, especially, where their work includes commissioning or 'matching' online influencers to brand clients for contracted marketing work. Respondents refer to creativity, often in the context of other aspects of their work or as part of negotiations and justification of the particularity of their practice.

> The biggest driver of trust is the quality of the content, the quality of the creative (P010_Marcus).

One could refer to some significant creative collaborations, buoyed by working with 'brave' clients:

> So, it was just a very unconventional approach, but we had very brave clients who were really willing to give it, give it a shot. And as once, we kind of sold this idea, we then started talking to we were very fearless at [former agency], like we work with the best, or we go home. So, we started reaching out to [top, headline] directors in Hollywood (P027_ Matthew).

As one Spanish creator put it:

> Well, it is advertising, beyond whether one wants to think of a content or a message that is more artistic, more creative than traditional advertising (Respondent, Spain).

As another respondent, from an independent brand studio put it, in the form of questions he asks himself and clients:

> Are you getting the returns for your clients that they need? But are you also creatively, succeeding? Are you winning the highest awards? Are you permeating pop culture? So those are the sort of benchmarks that we set for ourselves at our current company (P014_Declan).

Creativity and governance

Our focus here is primarily on governance, and we are not, in this report, going to get too heavily drawn into the perennial question of the extent to which branded promotional or branded content creativity are philosophically deserving of the epithet 'creative'. But we do see creativity identified as emerging within the constraints and conditions, not to say the instrumentalities, associated with paid-for creative production. Such production, whatever its scope and scale, small or large, ambitious or modest, must bear a trace of its instrumental commercial purpose, normally some element from marketing.[29]

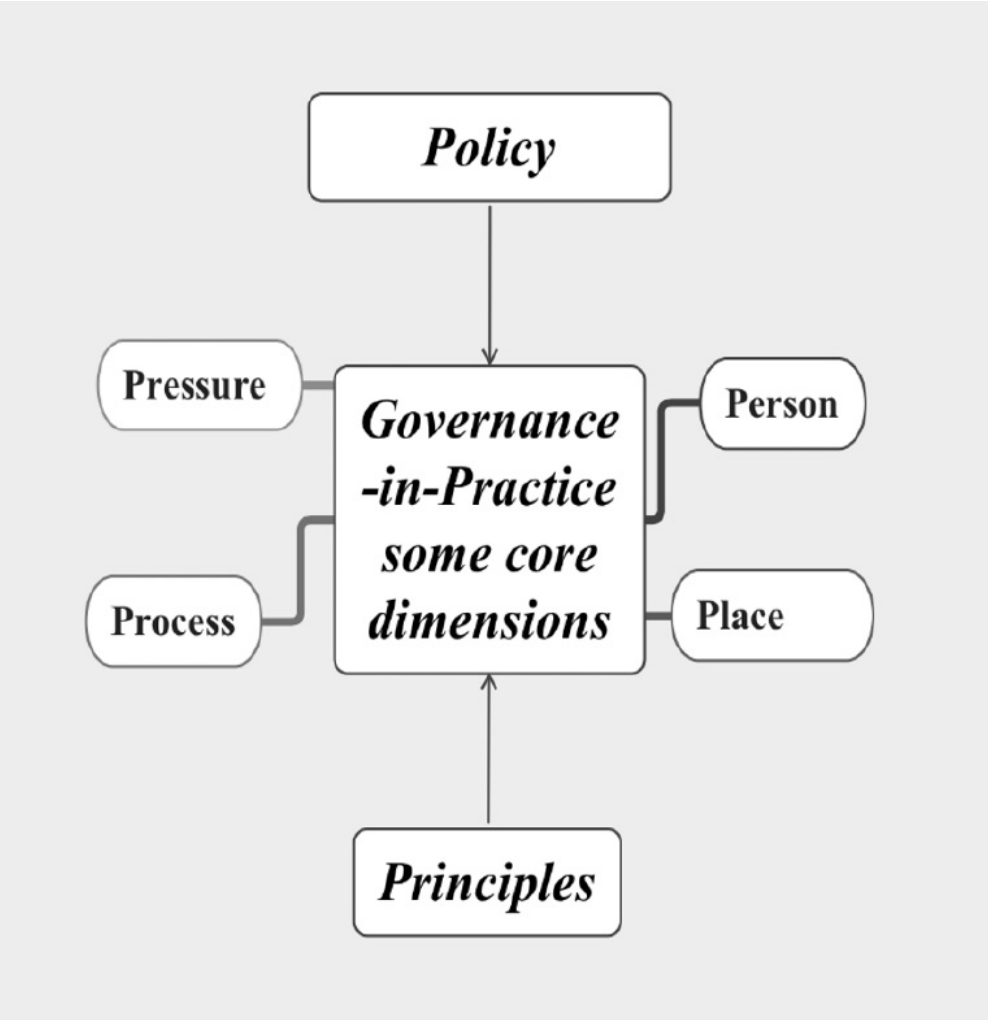
Within the industry, however, creativity is sometimes associated with keeping the market (and thus the marketing) function of the communication 'in its place'. But our respondents did nothing to pretend otherwise than that they were actively engaged in various forms of commercialised marketing communication. The demand for and the supply of creatively generated communications content is the stock interest of our group of respondents. The governance of creativity, especially when identified within the boundaries of professional, paid-for, creative work, is, of course, not forgotten; but governance, regulation, and adjacent responsibilities are, as we have found, typically managed as secondary tasks, split off from the core-integral work of the creator or the creative organisation. An important part of our exploration of governance has been to see how the connection between creativity and governance is managed or achieved, and we have found that there are several ways in which this is done.

5.1 4Ps of Governance-in-Practice

To make fuller sense of this (complex) relationship between creative working especially, in the particular domains that can readily be characterised as the production of branded content, we have sought to frame our analysis by linking an account of governance to a recognised way of talking about creativity.

29 For purists, such connections disbar promotional miscellaneous creativities, e.g. long-form journalistic storytelling (Dowling 2025), paid influencer content (Yesiloglu and Costello 2021), and indeed most forms of branded content, from being considered 'creative' in the senses deployed in more romanticism-inspired paradigms or 'the arts' (Runco & Jaegar 2012).

Figure 7: 4Ps of governance-in-practice (Policy and Practice as contexts)



This connection emerges from the experience of speaking to practitioners in the field, where the fluency and passion with which they talk about creativity, and advocate for the sometimes potential of branded content to be creative alongside its other aims and goals, was typically front of mind.

Creativity is what the practitioners felt that they are doing. Most often, there was no similar clarity of vision or unanimity about the role of governance. While happy and interested to talk about and to reflect, sometimes deeply, on governance and regulation issues, there was an overall sense that governance was a secondary or tertiary compartment in their overall organisation and understanding of the core task. But we think that the connection to creativity might help activate an understanding of the distribution of governance, too. There are some not dissimilar (Institute of Directors, 2025; Scott 2001) approaches to governance. But we did want to emphasise the parallel to the creativity model.

To help, then, in analysis and in the aggregation of certain codes around creativity and governance practice, we reference the four Ps of creativity (Rhodes 1961). Since the 1960s this 'model' has provided a key pointer for thinking about creative practice and which has often been applied in respect of advertising (Sasser and Koslow 2019). Our understanding of governance-in-practice can usefully be cross-referred with this established model to show two things. The first is that there is an intrinsic connection, we might say a homology, between the primary tasks of branded content, 'creative communication', however basic, and the vital but secondary organisation of *governance-in-practice* within and alongside that task. It is helpful to think about how they interconnect in the people, places, and processes of creative communication.

Table 5: 4Ps of Governance-in-Practice

Code/Concept	Underpinning Theme	Discussion Points
Governance-in-practice - & analytic subcodes	Everyday enactment and interpretation of rules. What people actually do, attentiveness, improvisations, informal shortcuts, interpretation of grey areas.	How do practitioners perform/live governance? What micro-decisions or negotiations make it real/practicable?
Governance in Place	The embedded structures and organisational ethos that embody governance: policy frameworks, workflows, compliance teams, approval - who do I ask? -, or an institutional 'culture of responsibility.'	How is governance built into the way an organisation works/think? What internal systems, routines, or norms create stability 'in the building? / this is how we do things here. Etc.
Governance in Process	How are governance and regulation embedded., or missed out, in workflows and compliance routines.	When/ how in the creative/ process workflow does governance & regulation 'come in'. How?
Governance in People	The personal and relational dimension: trust, ethics, discretion, mentorship, emotional labour. Governance as a moral or identity practice.	Who 'carries' governance? What values, feelings, or characteristics sustain it? Personal ethos etc.
Governance under Pressure	Points of strain or breakdown: deadlines, crises, commercial tension, precarity, confusion, conflicting rules, technological disruption.	How far can individuals carry good principals into their practice. The ways that sometimes it's difficult to negotiate these.

4Ps: Governance and Creativity: a Homology

Those familiar with creativity and the creative industries will recognise the shorthand designation of the four P's: person, place, process, and pressure in respect of creativity (Rhodes 1961)[30]. This helps articulate a recognition that the working theories and assumptions, and indeed the organisation of practice, typically accent one or more of these capacities in the description of, and efforts to support and optimise, creative working.

The connective point is this: we think there are homologous elements of creativity in practice, that can hopefully be framed in respect of governance-in-practice in similar terms, i.e., considering the contributory framing of person, place, process and pressure. We think these apply in respect of the complementary governance requirement, albeit as secondary tasks which nevertheless must, in an ideal, i.e. well governed world of integrated good practices, adumbrate creative working, especially in areas such as brand communications.

People

One common-sense assumption is that creativity is the property of persons: there are creative people, just as there are people who are uncreative or less creative. This ethos of creativity has its roots in a variety of traditions. From a humanities perspective, it is typical to reference Romanticism and the idea of the 'creative genius'. Some industry discourse and common understandings identify tacitly with the notion of the charismatic creative (Hesmondalgh 2006:211) who is able to make something out of nothing, extending that artistic-philosophical ethos of disruption and innovation into the domains of professional commercial creativity into brand communications and advertising.

Articulating this ethos matters as it situates branded content creation within a long-standing tradition for whom 'rules' are a hinderance. As one Spanish respondent set it out:

> the most difficult thing is trying to create content that complies with that legislation. That is, making content that is interesting but shows that it is sponsored in a way that still maintains engagement. That's what is most important for us (Respondent SP).

Where unruliness is a tacit virtue in the broad culture of promotional communications governance can readily cast as a negative counterpoint, as 'boring, or 'off task'. Person/personality-based notions of creativity also extend into psychology with, for instance, the idea of creativity being a function of psychological individual difference; a set of ideas sometimes in

30 This neat acronym footnote: not to be confused with the four Ps of marketing. Place / Product/Promotion/ Price

the background of arguments about diversity, neurodiversity and creative aptitude and often referencing dominant-orthodox neuroscience-inflected accounts of creativity.

One hyper-personal observation went this far:

> So, at the moment, I would say the governance around the content that we're producing for brands is pretty non-existent in practice, in that it's almost self-policed in a way...(P007_Enzo).

He adds,

> I'm personally interested, though, as a production company, though, in our responsibility to do that as well. We talked about this earlier about, you know, what's our responsibility to kind of govern the stuff that we're making.…The idea of governance, I think, is really fascinating, because it's almost just based on people being good people (P007_Enzo).

In this framing, the homologous component, i.e. governance at the level of person is the sense of responsibility and conscientiousness that exists in the everyday minding and practices of individual practitioners. Shorthand for this may be 'values', and that may come from individual sensibility. It may, equally reflect for example, as we discovered, the important influence of assumptions and dispositions about governance inherited from earlier phases of careers and personal formation. For instance, somebody with a strong set of experiences linked to public service journalism carries forward some of those instincts into various kinds of self-governance in creative promotional communications practice. As Fig 7 reminds us, however, policy and practice are contexts for good governance.

Process

A second category of creativity theories points to *process.* Creativity, here, is not a function of spontaneous personal improvisation, but the aggregated and cumulative outcome of multiple phases in respect of a communications problem or challenge. Less personal and more collective, process theories (Omidi, 2025) of creativity highlight organisational aptitude and various stage-based models of working, including problem definition, ideation, and various processes for synthesis and integration of ideas that are both novel and appropriate to the task at hand (MacRury 2018b; 2026).

The homologous aspect of governance in process is equally evident, and this is the point where ideas about governance and creativity most readily converge and where our respondents have shown us and explained to us some important disjuncture. Creative communications, including journalism and various forms of TV production when carried out in what we now refer to as traditional institutional formations, had various process-based activities and methods which allowed governance and regulation to be bolted onto creative processes. In advertising, for instance, and

of course this still exists. There is a key element in the creative process which includes checking and sometimes more detailed cross-referencing, both with clients and with regulatory bodies (for example, Clearcast and radio services, as some respondents discussed). This means that there is an institutional mechanism for the integration of the governance component of the communication as well as its creative and marketing elements. The process is instituted, recognised, and governed in practice:

> In our [Big retail brand], of course, we have all kinds of resources for legal resource, everything, everything is completely checked out. We're incredibly cautious and thorough (P019_Mark).

However, in new and disruptive areas processes can break down:

> You've got that now in the influencer space. So, brands are aware of regulations, but they do, I believe, ignore it. And it's our job…(P012 Arjun).

The intensification of workflow processes and its intersection with governance will certainly be a continued problem in AI-linked areas as one of our roundtable respondents observed:

> Because if you are using the systems to make something really quickly, in a silo, say in a week's time, what do you do when in real life scenarios you maybe have 10 things that are due that week? So, I think they realised, you know, if we broadcast this, we're going to have higher demands on, you know, make 20 videos a week, write 20 scripts a week, and so they pulled back from publicising the content, and they're still evaluating how they integrate it into their systems. And what I felt was we probably needed different production workflows for the writers and strategists, how they're using chat GPT you know, how to qualify interviewees that don't exist, and then thinking about a lot more in terms of granular compliance (P023_Karla).

Large corporate brands tend to be quite process-oriented and so the alignment of creative processes and governance seems to be more integrated:

> I think when your client side, especially if you're working on a brand, you're constantly thinking about whether or not something is on-brand or appropriate. So, particularly working for a brand like [my client] there's not going to be very many times where you think that you are going to struggle to get something through the advertising standards (P002_Lauren).

Processes, she continues, in these larger more corporate organisations were ‘really baked in yeah because I think it's just it to be honest regulation / compliance is] a part of the process but it's not one that occupies a lot of headspace but I mean potentially it could if something if something goes

wrong'. Attentiveness to process was not really a matter of investment in larger ethical thinking but, as was candidly put, 'just to cover my own arse, really' (P002_Lauren).

Perhaps connected to the fact that the product sector was somewhat more risky than mainstream fast-moving goods or entertainment products, one Spanish practitioner was able to give a firm account of governance in process:

> And if we have any doubts or some kind of problem arises…. We have our own legal staff who deal with this, but it also typically goes through the legal department of whichever company it concerns. For example, right now we are doing a lot of work with pharmaceutical companies, so their legal regulations are much stricter than those in other sectors, so everything has to go through that legal framework (Spanish, Marcoms, Practitioner)

For one branded content production agency, which was now approaching brands directly rather than through the intermediary function of an advertising agency, the question of governance was very much in mind and connected to the keen embrace of process:

> we do still need all the propriety, and we need, you know, we have to sign away our life in blood, and we have to still do all that governance stuff of risk and cyber stuff, and IP and you know whatever yeah, it'd be really interesting to see, if in our next round of contract stuff that we get, whether it's like the CAP Code or some element of that responsibility starts to fall with us (P007_Enzo).

Again, the key thing is the relationship between the client and the creator, in this case, this is intermediated because of a structural wish, common and emergent in the branded content field, for producers to work directly with brands rather than through agency intermediaries (González-Tosat and Sádaba-Chalezquer, 2021). In practice, this means that studios and producers are now coming up against, for example, big brands who have an 'in-house creative procurement function' (P007_Enzo). As this particular creator put it, 'yeah it'd be interesting to see what they put in front of us'.

In terms of compliance, one respondent who had worked in several different types of brand Studios, including some connected to journalistic outfits and some connected to big brands, noted subtle but important distinctions in their approach to governance processes:

> I knew someone who, freelanced at [Newsbrand], [they had a] maybe five level check-ins before a piece was published, whereas obviously the slightly lesser than at a brand studio [large global FMCG marketer,] ... it would be less than five (P011Aisha).

An underlying narrative then is to notice that alongside the changes that our BCGP research has noted in the macro policy environments, these are gradually having knock on changes in terms of how organisations process and manage their workflow. One retrospective observation from a PR practitioner, with extensive and senior newspaper experience, captures it neatly:

> um now the advertising standards um, regulations are pretty clear, the need to differentiate between the two [editorial and advertising], but there is no question that lines can get blurred as to what is in a publication as a result of a deal as opposed to something which is there because an editor has chosen it to be so. Now, there's a lot more of it now than there used to be, there's no question about that (P020_Jim).

Place

Another set of accounts of creativity and governance rest on the idea of place.This includes the ethos, for example, of a famous fashion house or advertising agency or a great publisher, whose values/ ethos is somehow enshrined in the bricks and mortar or the aluminium and glass of the agency offices. Indeed, an important part of our interview process included the deliberate investment in visits to respondents in situ, in part because how 'place' plays its role in the formation of practice is always a useful element, lending an ethnographic component to some aspects of our data collection.

More prosaically, creativity is sometimes talked about in the context of, for example, the arrangements of desks and offices in a building. For example, was the account manager who is sometimes the bearer of internal regulatory compliance on behalf of the client and in liaison with a creative team somebody who was accessible and visible and sitting at a nearby desk or were they remote and separated off in a different office or on an upper management floor?

Of course, influencers are a case in point where they are online first and typically cannot learn regulation within the terms of what we might call an apprenticeship of place. Our respondents talk in some detail about working from and creating various new places. This spans a variety of narratives and takes the form, in part, of a simple recognition of what institutional analysts have called the 'vanishing organisation' (Cooper and Dartington, 2004), which extends to recognising the dispersal of promotional communications creators into new hybrid organisations, into brand studios, and into quasi-amateur, one-person, work-from-home, distributed setups.

The point is that there is not a single reference point in place; there is not the convenience of walking across to a senior expert in a corner office against whom to check questions of governance and compliance as part of everyday working tasks. The governance compass is disoriented:

> I think that the creation of these in-house studios has created quite a unique environment within brands where the creation of content is starting to get dislocated from the traditional sort of policing structure' (P007_Enzo).

We might say that there is evidence of distributed agency. Agency here, of course, has a potential double meaning. It connects to the industry language of important institutional units of action: advertising agencies, marketing agencies and brand agencies, for instance. But at the same time, it echoes the sociological notion of agency as a kind of motive force, a puissance and a capacity to plan, act and think deployed within a field of practice, sometimes resting within an individual, but more often in an organised group, an institution or project.

However, when the marketing task and indeed high proportions of marketing budget become routinely redistributed across multiple agencies, the risk to be acknowledged and, if acknowledged, to be managed, is that in the aftermath of that redistribution there is a disconnection. One thing that can get 'split off' is a part of the institutionalised agency function, one that touches governance, it includes capacities such as knowing and negotiating rules, or coming to judgements associated with reflective compliance in the context of a creative piece. This 'compliance' can take several forms, but in the disruptive and distributed systems supporting branded content production there is a risk it can 'fall between stools'. In the shuffle of redistribution, the connection between accountable agency in respect of regulation and creative agency in respect of activity and prospecting can become attenuated or even broken.

A wider perspective on governance and place comes from taking on a geographical sense and a recognition that there are feelings about differential governance approaches in different territories and domains sometimes linked to contrasting international cultures:

> And coming back to governance globally, I'm fortunate that we have the exposure here in the West and in the East with our offices there. And we see the Wild East. …. And then you've got fake content or paid content, which is actually driving disbelief, distrust. And then you've got so many problems with the little, tiny influencers who are working with multiple brands (P012_Arjun).

5.2 Governance-Under-Pressure

Finally, there is the role of *pressure*, which is typically an ambivalent and sometimes absent consideration in the context of creativity theory (MacRury, 2026), but which tends to be a key reference point in practice. Pressure can sometimes serve creativity merely by keeping up the pace and incorporating the idea of urgency and completion into the creative workflow; while at the same time, pressure can forestall and interrupt the emergence of various creative flows, serving not as propulsion but as interruption and interference in the unfolding of the creative process.

Regulation is often experienced and internalised as a form of pressure. We have discussed this in some detail in relation to accuracy and fact checking for instance.

Media producers, influencers, traditional advertising agency staff, and PR professionals or journalists producing branded content still have deadlines and demands to meet. These various pressures can sometimes spur creativity - the push to get things shipped, executed, done (Godin, 2020). Equally, however, as much creativity theory points out, more often pressure reveals itself as a form of impingement that destroys the authentic creative process. There was a similar argument around governance. Pressure from clients can produce shortcuts or missed responsibilities:

> Rules are a hot topic around like the release of a movie when you would be making claims like, for example, 'number one movie'. That's something that you can't just say. But also, if you want to really pound that message and get that message out there, you need to do it the Monday after the release has happened. So, you probably need to make that advert before it's happened. Because also by the time you find out if the movie is number one, you have to brief the creative agency, get the internal approvals for the creative done, submit it to the radio regulating people…probably you get on air is probably the following Friday. So, if you lost a whole week and really you want it on air on Monday. So, in an ideal world, you would do all of that [fact checking] the week before (P004_Caitlin).

This means that the pressure to comply is connected to the pressure to deliver to a very market specific deadline. Indeed, a common finding was that the pressure to create and produce, and the sheer velocity of the process, means that the various even light-touch forms of checking and assurance in respect of governance may be squeezed out in the accelerated processes between clients and the creative communicators whom they hire to communicate their brands. The space for practical deliberative governance - I.e. should we check this? Do we need to change that - in the hurly burly of deadlines can be a challenge.

But sometimes there are problems, including with the governance process, including a threat which comes in the form of a potential race to the bottom. One respondent, who tended to convey and communicate a highly thoughtful and considered approach to governance and attendant responsibilities, talked about his agency's approach to fact checking:

> Now, we can do our own kind of fact checking to a certain extent…, and we always do. We kind of feel a sense of responsibility for that. But nobody's telling us to do that. There's no guidance on how we do that. And the only option we're left with is to go back to the brand and either say, we don't believe you, prove it, and if you can't prove it, then I'm sorry, we're not going to work with you on this. But there will always be another production company who will gladly work with them (P007, Enzo).

Pressure takes a variety of forms. One important form is reputation (Picci, 2011). As networks become looser and as the promotional communications industries become more disorganised, the reputational risk associated with infringements may seem less - it is harder to point to a close or closed community of practitioners. The pressure to comply is asserted sometimes by regulators in the form of 'Shame Lists':

> You know, influencers if you've got this black mark or if you're on the ASA shame list etc. Yeah so, I mean like there are there are some organisations that do that, and they've got a strict code of conduct linked to it and everything else (P018_Ashley).

However, the sense of who is the responsible owner of infringements for example, individual influencers, the brands that commission them, the agencies that introduce them, etc. means that that pressure can negatively lessen somewhat in terms of compliance and reputation. There are also industry-level pressures. Speaking about pressure to take in branded work, in journalism, a very experienced respondent points out:

> Now there is a lot more of it now than there used to be, there is no question about that. The reason there is an awful lot more of it than there used to be is because publishers have had to be much, much more creative in the offer to advertisers to maintain their relevance in, for them, a vastly shrunken advertising market (P020_Jim).

The pressure to take on different forms of branded content for journalism (Cornia, Sehl and Nielsen, 2020; Costa-e-Silva and Figueira, 2025), including local journalism, has a notable impact on professional-personal governance in the field. Journalists are less free to assess if this is a 'real' story or a journalism-flavoured promotional task.

Overall, across forms of practice, the speed-and-pressure issue, in pursuit of lower costs, there is the risk of false economies emerging from cutting out what appears like red tape and administration, but which is actually the micro-processes of governance in action e.g. checking key features of a text, a film, or a piece of brand content. Governance is an intrinsic but, in practice, an inadvertently secondary task in the minds of many of the practitioners we interviewed, in respect of creative promotional communications production. We suggest, too, that governance-in-practice is understood in the context of extant frameworks for understanding creative processes, creative people, and creative places, and the pressures that they work under. There are correlative aspects of the governance-in-practice work that must be done, but in the disorganised workflows born of remediation and/or disintermediation of the promotional practices' creative workflows, these can become deprioritised. We notice that the governance system (in the day-by-day framing of practitioners) depends on a sometimes fragile/precarious combination of governance in person, governance in places, governance in process, and governance under pressure.

5.3 Storytelling and Governance

Across our data we noted a key term: storytelling. 'Storytelling' captures respondents in the variety of creative strategies denoted in their regular appeal to *storytelling*, often as part of definitions of, and explanations of, branded content (Alonso 2024.; Dowling 2019; Fog et al. 2010). As we found, storytelling is sometimes linked to anxieties or inhibitions around disclosure. We think this conjunction helps understand some governance issues, e.g. inhibitions regarding labels.

Many branded content practitioners claim their niche value is in the provision of novel and engaging methods for telling a good story about, and on belief of, the brands they work with (Proctor and Gamble 2025). Several respondents sought to characterise the main task of their branded content work within this frame of 'storytelling', distinguishing long-form (MacRury 2023) narration against 'spot or display' ads. Essentially story becomes a defining sub-component in their broader but equally firm identification with 'creativity' and creator identities. This was a widespread response, but which had some subtle patterning. 'Creativity' was typically, cited by those who worked in agency roles. Thus, one Spanish creator put his definition like this:

> Well, it is advertising, beyond whether one wants to think of a content or a message that is more artistic, more creative than traditional advertising.

'Storytelling' appears more within the practitioner argot discerned across newer sections of the ecology, i.e. studios, creators, influencers, and talent managers. Storytelling, here, emerges as amongst the key distinctive offers/attractions of branded content practice whenever these practitioners reflect on their work.

A subset of respondents highlighted a further cross cutting link, 'story' has an older function in journalism, one linked to news values (Harcup and O'Neill 2016; Galtung and Ruge 1965). We see it, now, re-mobilised in relation to journalistic branded content to converge with 'Storytelling' as meant by promotional creators. 'Storytelling', then, forms a watchword no matter what 'channel' or format; from films to journalism, from influencing to podcasts, and even games (Kokholm, 2021; Vollans, 2024), albeit in usages that elide some differences of emphasis.

For instance, P&G Studios, nodding to their 'soap opera roots' to describe their recent (2025) production *Beyond the Gates*:

> …a new soap opera co-produced by P&G Studios, CBS Studios and NAACP Ventures — features an inclusive cast in front of the camera and crew behind the scenes. Just like the classic soap operas, Beyond the Gates is brought to the screen by the everyday P&G brands people know and love, such as Febreze and Tide. These brands are authentically woven into the plots, showcasing the performance of our

> products where they matter, such as doing laundry or using Febreze to help set the stage for one of the Dupree's iconic parties. (P&G 2025)

None of our respondents was directly involved in that production but have worked on similar high profile branded content series (Weiss, 2014) projects. Typically, they advocate against too much brand product prominence.

Brands and Stories

Client brands, our respondents suggest, have a good understanding of their products. They know what the brand (should) represent, an insight often packaged as 'values' and enacted via templated guidelines. Much of this is aesthetic/cosmetic. But some brand guidance reaches into the domain of ethics and compliance. For instance, more than one respondent had worked for or with Disney[31] and noted some brand-led strictness in guidance around taste, decency and violence - based on a longstanding family-younger child-centred orientation, but one now complicated by brand extensions into its channel and adolescent-adult franchises such as *Star Wars*[32]. In interviews, those who cast themselves as branded content specialists repeatedly identified the capability in 'storytelling' as part of the distinctive offer that they brought to the communications marketplace. Brands commission them because they can tell stories, with a hope, therefore, that the piece can activate a different and engaging form of communication, one that is valuable for marketing purposes.

One Spanish respondent places this very much at the heart of his understanding of what branded content is:

> …branded content is a form of advertising. It is content created by a brand and it is content that seeks to generate fame; the brand does not necessarily have to appear in it in the end. It is a narrative, what we call 'storytelling' (Respondent, Spain).

A UK respondent who works in international markets draws a distinction clearly:

> …digital ads which are very promotional driven rather than brand storytelling. With influencer marketing…., we break it down to different levels of influence and marketing where it's very promotional and sales driven, versus brand storytelling. So that's one of the biggest challenges we're facing (P012_Arjun).

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31 It should be said that Disney was not one of the brands that creators felt needed help with storytelling as such, but that because it was very child focused, there were other regulatory challenges, e.g. how fight scenes could be used in trailers.

32 Specifically, this was an issue linked to trailers including violent fight scenes.

In the influencer settings, it is also very clear that storytelling plays a part. Another respondent from Spain, highlighting influencers, e.g. referencing formats on Instagram or TikTok:

> One of the best-known formats is 'stories', which are quick pieces of content that offer users different perspectives of a person's or company's lifestyle and that disappear in 24 hours (Respondent, Spain).

In social media marketing one UK respondent describes how she tries to explain the distinctive contribution that her agency can make to clients:

> But I realise when you talk to someone about 'social', they're like, okay, social media, they're just rigid on that one thing and they're not realising it's storytelling. Okay, how does your [media] tell a story about you? … it's not just a post, it's how you, maybe you're showing your brand values, maybe you're talking about your product (P009_Olivia).

But the point she wants to emphasise is that good content is 'story first'. This commitment is not just a function of influencers. Indeed, the story element seem to be even stronger where branded content producers frame their practice with the values of broadcasting or filmmaking. A respondent with a strong background in film-based branded content talked about challenges, highlighting creativity failures in branded content:

> I remember I once saw a branded entertainment comedy series…, that a shampoo brand put out. And the first scene in the movie is a shower scene. There's a series. The first scene is a shower scene, and you're holding on the shampoo bottle for what felt like an eternity. And I just, I was gone. I mean, even though I was looking at it, I immediately knew I was not in the hands of a storyteller. And, you know, as a consumer, as an audience member, that is a tragic misstep (P014_Declan).

As noted, journalist-origin respondents put this issue into a distinctive context. Again, the idea of story has a powerful meaning in either validating or, on the other hand, invalidating different types of branded communication. Discussing his recent press work a respondent describes a piece:

> But it's clearly branded, you know, sponsored content. There is no passing it off as something else. But the good stuff will be written like a proper story, and that's what I do…because I'm a journalist, yeah. So, I'll approach it with a standard means of drawing a reader in and making it entertaining and informative and all that sort of thing, without it being a drudgery (P020_Jim).

This reference to 'storytelling' reveals the extent to which 'story' is a key marker of quality. Some respondents noted that an important part of governance links to the idea of the piece has some proximity, albeit often tenuous, to 'news values' (Schudson, 1981). One way to reflect on this in

respect of different pieces of work was to ask the question, is there a *story* here? Referencing past practices, one former journalist makes clear that quite often various pieces of branded content did not pass the test:

> There wasn't really much of a story there either, you know, that's the other issue, you know, there, there was no real newsworthiness other than the fact that the, the organisation we were doing this for had paid money at that time to the newspaper for advertising, and as part of the overall package it was allowed some editorial. So anyone reading it and seeing it presented on what ostensibly was a feature page of the newspaper would probably detect quite quickly that it was, other than its form, it was rather unlike most of the other features that were around that had proper interviews with them and had some underlying stories of them and some newsworthiness, you know (P026_Paul).

He adds that some degree of professional sensibility drew his journalistic practice away from wanting to produce this kind of branded content:

> there's [an] expression in journalism…. when you're writing something, [when] you know that actually there is a story here because it's a proper story you're trying to write rather than something like that [branded content], that it's too 'thin', it feels 'too thin' (P026_Paul).

So, the absence of 'story' for a journalist, and indeed for a filmmaking practitioner, or, even an influencer, taken from a practice perspective, presents is a noted deficit, the difference between value and failure in branded content - at least in terms of craft. Hackley contextualises in a wide-angle insight. Branded content seeks to address a transmedia (Dowling, 2019) ecology:

> Today, the influence of transmedia storytelling (Jenkins et al., 2013) dictates that advertising should engage consumers with narrative craft, sentiment or visual spectacle to build brand resonance and. 2018 defend market share. (Hackley 2018:63)

He continues, in a point that helps us draw the link between the 'storytelling' aspects of branded content and our interest in governance:

> The brand that paid for the content is often hard to discern for the casual viewer caught up in the storyline (Hackley 2018: 63-4).

We come to see the marketing intent is nevertheless fundamental. Citing influential marketer Byron Sharp (2010) Hackley (2018: 63-64) sums up:

> The strategic purpose is to promote engagement and sharing, with brand salience improved as a consequence. The heightened relevance and presence of the brand in the lives, and in the mediated experience, of consumers, in turn, translates, over time, to market share.

He continues:

> Advertising genres are still subject to detailed classification by enthusiasts, but for consumers, advertising, sponsorship, entertainment, news and information, video, digital print and radio seem to blur into a vague, brand-saturated experience of media when they are all accessed via a screen during the consumption of entertainment and information searching (Hackley 2018: 64).

This context is also important in respect of governance,. In respect of practitioners, the emphasis on storytelling becomes linked, sometimes, to an inhibition or a reticence around disclosure - and labelling in particular. This failure to disclose has been documented and discussed extensively in studies of branded content (Hardy 2022) and in the BCGP publications (Hardy et al 2023b, 2025a) Because the product prominence and marketing intention of content can disturb the story flow, there is an instinct drawing some practitioners to want to minimise or relegate labelling. It is anti-story and, so, for some risks being anti-craft, uncreative work. Branded content creators mobilising the 'storytelling' frame face a dilemma. On the one hand, a belief in storytelling craft, on the other a genre-defining eschewing of 'interruption'. Given the commitment to bypassing the interruptive nature of traditional spot advertising there is sometimes a problem for this instinctive inhibition about reintroducing 'interruption', e.g. as over prominent product/brand prominent, but also, including in the form of overly prominent labelling.

> And from the regulatory point of view, well, it means that it is not an invasive type of advertising; what it tries to do is connect a bit more emotionally with the public (Respondent, Spain)

For some analysts, such as Hackley (2018) the origins of media-advertising content can become a 'blur' in everyday experience, so that attentiveness (already stretched) is at risk of lapsing into a kind of unconscious negligence in respect of those aspects of media literacy alert to commercial intentions. For other scholars such as Amazeen (2020, 2025), Hardy (2022) and for the BCGP, these findings inform recommendations for advertising transparency, labelling, disclosure, and discussion of the suitable application of rules on 'separation' of advertising and non-advertising content (Hardy et al 2025a, 2025b).

5.4 Distribution and Governance

Another key finding was the prominence in the thinking of practitioners in relation to the question of distribution. As one brand creator put it:

> Because, you know, my definition of branded content is something that people seek out, that they want to see it, instead of you forcing it on them (P027_Matthew).

The creative and editorial bar for some branded content is quite high: people might need to choose to watch or share this work. Film-led studios distinguish themselves against internal brand-owned studios:

> …and so these brand studios, you know, also what often happens with them is they aren't really exposed to best practices because they're only producing one or two films if they're lucky a year. And they're very internal facing. They're not necessarily out in the market. So, like without exposure to an agency who's exposed to all kinds of things, their monthly, their quarterly quotas or their yearly sales goals. So that's, that is the challenge of these internal brand studios is they're not always aligned perfectly with the way, you know, businesses actually work (P014_Declan).

Indeed many manufacturer brand studios or retail brand studios, are creating primarily for owned media or various kinds of retail media where engagement is more likely because of the added factors of either interested consumers searching for, for example, videos of product demonstrations on a retailer website, or because there is an implicit interest based on the fact that the branded content is on display in a retail setting. One respondent adds, talking of big brands:

> there's politics and budgets and all sorts of things preventing them from doing great work (P014_Declan)

In this set of interactions with streaming platforms, branded content has a particular challenge. Because clients commissioning branded content, sometimes with rather big budgets, have an expectation of getting good 'circulation', an expectation born of the market puissance that budget wielding has accustomed them to in the Paid media (spot advertising) marketplace, it takes specialist branded content producers some efforts to explain that you are not paying for audience attention but for content creation. The dynamics and difficulties of negotiation into a space such as Hulu or Amazon Prime, i.e. for content to be treated like broadcaster commissioned work, depends to a degree on matters of quality and interest. Brand funded entertainment needs to stand up against the competition in these settings. This is sometimes hidden in a debate about quality and interest, production values and the balance of brand prominence and creative ambition, but it includes a basic categorical decision about brand funding.

Some respondents who worked for studios which were more independent of commissioning brands noticed issues such as many brands still thinking as if they are working within a media-buying logic, and when commissioning branded content, they are thinking within a paradigm that pays for reach, with the presumption that attention will come with spend. An independent producer put it succinctly:

> That's the danger when you [have] advertising people running these internal studios who don't really understand that you're not going to be able to do a paid media buy for an hour and a half film um you know unless you have a…, you know budget that's way outsized (P014_ Declan).

Some kinds of work have to compete with culture, news, and entertainment sources which may be more intrinsically interesting or enlivening or engaging for audiences, and where the content created in the name of the brand has to earn attention and engagement as much as pay for it whilst, of course, some graded content placement is indeed paid for and this helps. Once they paid for a media project, commissioning a short film for example, they considered their work done and assumed it would be seen. However, not all branded content appears in paid media space. So, for instance, while native advertising is paid, some branded content producers/commissioners must still think about strategies for getting the work shipped and seen.

Getting a short film made and then circulated via film festivals or placed on a platform such as Hulu or Netflix is a different proposition from making a piece of video and circulating it on YouTube. Brands whose mindset is deeply rooted in older paid models were, he noted, sometimes slower to see that content distribution now depends on partnership and alignment with platforms, not just on budgets for buying attention/audience. Content created and merely 'uploaded to YouTube' is not necessarily going to function well for the brand, since the presumption that this material will be spontaneously shared for free in such a cluttered media environment is mistaken. For studio-based respondents, good work included balancing creativity and distribution as fundamental components of branded content, which once again signalled a commitment to a creativity-first definition of value in the field.

Regarding governance, some respondents noted an anxiety that labelling branded content can negatively impact its categorisation in both platform catalogues, where it may be set in a subcategory, and in organic sharing - where the paid label may negatively impact organic shareability. Some influencers share this anxiety, leading to infringements.

5.5 Disclosure

In some ways 'disclosure' is a perennial issue in promotional communications (Yoon 2025). One of our Spanish respondents, in providing a definition of branded content, opens up a discussion about disclosure, a principle and a preoccupation which is fundamental across all strands of the BCGP's research:

> Branded Content advertising is different from banner advertising or a leaflet on the street, without a doubt. And I respect that. I also understand that it is another type of message, more elaborate, more artistic, more complex, no doubt. But, in the end, behind it, -be it

> a leaflet or Branded Content, there is a company. A company with objectives and a purpose when it undertakes that action (Respondent, Spain).

The implication for this respondent is that it is important for audiences, however interested or uninterested they may be in the communication of 'content', to know, or be able to readily and reliably attribute, who and on what basis that person (and here we in fact mean 'brand') it is that is addressing them to invite attention[33].(Pedersen, Albris and Seaver, 2021; Wu, 2017).

Clearly signalling who is paying for the message, underlining that it represents, therefore, paid *for attention* and 'space' is important. These factors are material to the meaning and use of the communication, whatever else the 'content' may convey (pleasure, play, entertainment, enlightenment, information, joy or introspection). The governance argument is that communications conditions should be disclosed.

The creativity or elaborateness of the content should *not* be a justification for lack of transparency about underpinning marketing influence. However, and again from a Spanish respondent, here is a passage that articulates one of the core challenges very clearly:

> …many branded content items are not clearly identified as such, which makes it difficult for the consumer to distinguish between objective information and sponsored content. This problem is especially serious in the online sphere, where formats are more versatile, editorial boundaries are less clear, and the broadcasters, such as influencers or native digital media, are not always governed by the same standards as traditional media (Respondent, Spain).

In several ways, with these responses we reprise a long established and well-known set of debates (Hardy 2022). But their currency is clearly evident in the discourse around the industry, with the debate re-emerging in the context of the variety of new formats under the 'branded content' umbrella. One of our UK respondents comments that, drawing on detailed legal experience he is:

> …still seeing lots of ASA investigations into the very basic issues around transparency that we've been seeing for several years' (P0016_ Owen).

Practitioners and advocates for better governance within the industry, including, for example, voices coming from trade bodies point to the importance of disclosure.

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33 Attention in the context of marketing becomes linked to an implicit 'grammar', I.e. that captured under the acronym AIDA, a mechanical but influential stage-based model Attention, Interest, Desire, Action.

A level playing field?

Some want a level playing field. The BCGP has examined and assessed anomalies in governance, we describe as indicators of 'deconvergence' (Hardy et al 2025a; Hardy 2025c). Alluding to a failing that there were different standards of disclosure between requirements for influencers to disclose partnerships and the sometimes-hidden practices of advertising and organic content going into traditional magazines, P009_Olivia comments:

> it's very clear and I think because we're used to the codes of conventions of magazine advertising however it's different if Marks & Spencer's said, [to]a journalist' hi I'm giving you 50 grand, can you write this article but massively promote us but do it in an article organic format .'.[But]then we do some ads so...I think it's how it shows up and I think it's about um transparency (P009_Olivia)

Another respondent refers to influencer marketing, which is one of the branded content formats and channels into which most attention around this issue has been directed. They argue for,' …enlightened self-interest in promoting responsible marketing, responsible influencer marketing':

> We've talked about disclosure and how important that is. The biggest driver of distrust for the consumer... Influence of marketing works because it over-indexes in terms of trust in the consumers, particularly the younger consumer. The biggest driver of distrust is consumers thinking that it's a piece of organic or editorial content when it's paid for, i.e. influencer is not disclosing. That's the biggest driver of distrust. Lose trust, we lose the industry. The biggest driver of trust is the quality of the content, the quality of the creative (P0010_Marcus).

Referencing the conception of 'enlightened self-interest' articulates an important practitioner motivation for compliance in respect of governance regulation, especially around disclosure and labelling. An extended, but worthwhile and instructive reflection comes from another branded content creator but speaking from a domain informed by the creative values of another format and branded content subset, i.e. film and television. Work here does not have a direct association with influencers. Indeed, as we have discussed elsewhere in the report, this practitioner wants to distinguish influencer branded content from his home discipline, i.e. elaborate formats such as filmic or tv serial-based long-form branded content. He articulated his feeling on the basis of arguments about disclosure:

> It [Influencer marketing] is a different animal you know I think that there is certainly a level. Look, I look at influencers and creators similar to the way I look at journalism, and there consumers have a level of sophistication, they know when they are in an environment of, you know, truth and trust and in a separate environment of being entertained and you know, and so when it comes to influencers and

> creators, essentially what their value proposition is they're selling themselves…and that is a very different, um, construct in my opinion, because, um, there is a, a, anybody who is being followed as an influencer, you know, there is a level of trust and intimacy that is created between the, uh, talent and the, and the audience. And that trust eventually can be, um, you know, it, it can be, what's the word I'm looking for? Um, not undermined, but, um, exploited is the word I'm looking for. So that trust can be exploited. And in those scenarios, like I can understand why there is required governance around letting people know that the opinion that someone is now sharing may not be their own (P0014_Declan).

In some regards, his point about the need to disclose that the communication is paid for by the brand is the same as those seeking more transparency across the board, namely the problems and risks associated with 'trust'. However, he sets out a perspective whereby different branded content formats have different requirements and status in terms of the communications relationship and, so, therefore different labelling needs.

> I think that, like, if I look at all of the very clear entertainment series we've created, if we had a [caption] or something that came up that said, you know, paid advertisement or, you know, branded entertainment. [It would] be an absolute, I mean I could not effectively do what we do if that was um a solution that you know a governance solution, it just, it not only would it not work... [it would] undermine the entire industry (P0014_Declan).

He adds: 'it would be disingenuous to the fact that almost every piece of entertainment has an agenda' P014_Declan. This respondent is not a lone voice in the practitioner field:

> I sincerely think that everything that has changed my opinion, where before I favoured legislating and now, I see it as more difficult, is because I think the consumer knows that everything is, in quotation marks, commercial communication, right? From everyone: politicians, the media, and so it does not worry them much.

There is an assumption that labels aren't always needed since it's obvious that content is funded. This respondent, from an influencer background, sets out a position thus: that in some areas should not be overstated.

> So, it's like, I do feel like consumers are sophisticated enough in many ways to know... That they are watching something that might have a brand associated with it. I don't think it's necessarily incumbent on us to be, you know, to get to the point where we need to make an announcement before or during the series that, you know, what you're watching is brand funded (P009_Olivia).

There is genuine ambivalence about how disclosure should be handled amongst the practitioners because sometimes interviews would vary in their position for example supporting the idea of disclosure in principle but arguing about the mechanisms for labelling in practice. An advertising executive felt that studios of the type run by P014_Declan were typically strict in compliance on disclosure. In a conversation about non-advertising agency branded content producers (studios) he parried the view that non-ad specialists might be lax on disclosure:

> No, not at all, I think the studios are very strong on (disclosure) rules – they are used to Ofcom rules, and they can be pretty forceful (P019_ Mark).

So, while it's true, the different sub-sectors compete, they also support each other on the commitment to disclosure.

5.6 Labelling and Brand Prominence

This is where the governance-in-practice issue perspective adds insight. Attention-stretched consumers are at risk of succumbing to the 'blur' in a multi-screen media ecology. Meanwhile, practitioners seek to manage a dilemma. That ethical and compliance led commitment to good practice (i.e. clear, unambiguous labelling) can sometimes find itself in conflict with a craft based and aesthetic commitment to non-interruptive flow and unobtrusive disclosure i.e. the craft of story-led the communication:

> So, you're then seeing more pressure to have more exposure or a brand, where it's something going on to a stream all of these things are important, essentially about internal governance. The right people making the right decisions between the editorial team and actually the senior brand owners at the bottom of the product, because you'll see marketing teams who will say no, no, we want to get as much exposure as possible. Actually, more exposure is not necessarily a good thing because it then starts to work against itself and defeats you. So, looking at the no visibility within a programme. Yeah. You want it to be subliminal actually, the creative teams… can be very good at helping to deliver that (P007_Enzo).

For some practitioners this risk to craft and the authenticity of storytelling felt like an interruptive problem and labelling was something that they sought to minimise, often deploying a rationale around for example media literacy as a defence against subterfuge. P014_Declan argues that there is a long history that justifies the difference between various forms of longform and shortform content against spot advertising and he wants differentiation to be honoured:

> this is where they have a problem because, you know they are applying, uh, the rules of spot advertising no matter what the medium is you have to have a stop sign; you make it clear. It is very clear. These are commercials. Sponsorship has always been treated in the broadcast

> market differently, right from the Oval-Teenies. And they're trying to say, well, actually, it might not be clear. Well, everything I've heard to date is clear. And it's just going on the lines of insulting the intelligence of the audience...(P014_Declan).

This question then about labelling and disclosure does indeed have some interesting dimensions. One (US) respondent who works in cinematic and high-level TV production expressed his reservations around the manner in which disclosure is enacted through labelling:

> This is, however, not just an aesthetic or 'interruptive' problem from this respondent's point of view, i.e., it is not just a matter of 'audience' response and experience, or evaluation.

He argued such labelling has a potentially negative effect within the emerging algorithmic architecture of most streaming services, which use a variety of variables in constructing and indeed targeting or even personalising available shows and categories of shows. He expressed apprehension about, as he would see it, intrusive or disruptive labelling (beyond, say, initial acknowledgement of sponsor, and end roll credits)

Labelling: Between Governance in Principle and Governance in Practice

If the strategic, ethical and indeed political-cultural accent falls on the need for disclosure, a norm that, it appears is widely accepted *in principle*, then in exploration of governance-in-practice it is useful to get practitioner voices to deepen understanding of the operationalisation of such principles. How do practitioners enact this disclosure principle within the variety of different tasks associated with the production of creative promotional branded content? Our research direction here is not so much in monitoring or auditing infringements, but in collecting reflections on the question of practical disclosure, using labelling. This includes understanding the potential gaps and inhibitions around labelling, including in journalism.

> It wasn't really a news story with sort of two, three hundred words in it, but we tended to each allocate in some kind of feature article. Normally, yeah, it wasn't really a news story (P026_Paul).

He continues, somewhat ruefully:

> The organisation we were doing this for had paid money at that time to the newspaper for advertising, and as part of the overall package it was allowed some editorial. So, anyone reading it and seeing it presented on what ostensibly was a feature page of the newspaper would probably detect quite quickly that it was paid for… (P026_Paul).

He goes onto elaborate that by saying that the feature articles were 'not well disguised' he means, though, that it would have been 'obvious to anybody'

in terms of the content that this was paid for. However, these types of features were *not* consistently marked off as 'sponsored', or 'advertorial' content, and in terms of a glimpse at 'process governance', the work was signed off by sub editors and through the editorial desk i.e. not by the advertising department of the paper.

Some respondents expressed resistance from marketers towards labelling, including semi-defunct terms such as 'advertorial'or 'advertisement feature' in publishing:

> The problem, of course, with that is that advertisers hate it. 'I'm paying for all this space and all these words. I don't want 'advertising feature' across all of it'. I want the readers to believe it's objective content. So, the sophistication has moved on to try and find ways in which you can, write an objective story, but actually it's there because an advertiser has wanted it to be there, and clearly that content won't include criticism of the advertiser and the client. But it's still advertorial, really (P020_Jim).

It is possible to see the convoluted logic and the challenging situation that newspapers and journalists face in the context of labelling-in-practice. Branded content and various native formats and labelled (e.g. via developments such as Guardian Labs) have evolved to try and contain these tensions between news values and brand values. But they persist across the branded content domains. One experienced practitioner notes labelling is the extension of the question of disclosure:

> like in any industry there's good and bad and unfortunately that's the reason why the ASA have been quite dominant in making sure that there are proper disclosures around hashtag ad (P018_Ashley).

Indeed, some respondents observations about labelling concern 'esteem'. A branded content practitioner, who has significant experience in journalism, too, set out an important strand:

> …just as we say that like in any industry there's good and bad and unfortunately that's the reason why the ASA have been quite dominant in making sure that there are proper disclosures around hashtag (P018_ Ashley)

Taking a perspective inflected by both active work as an influencer agent alongside a role within an important trade association this respondent continues…

> I just think that it's important we as a discipline are transparent with things now, unfortunately there are loads of influencers that do campaigns, that aren't compliant in other words they are not showing those things and um, and I think and I'll tell you why because some of the times it affects their engagement and of course they don't want to do that they want to see good performing stuff but what they can do

> because the ASA have got a like a shame list now where they've got a traffic light signal and they will send out sort of warning letters to say that we've noticed this (P0018_Ashley).

There is a connection here to ideas of literacy and intelligibility in terms of labelling and the idea of durable and sustainable labelling that does not become invisible to audiences. One position seeks to:

> find a system that is a bit more nuanced, that consumers can understand, then I think you're onto something in terms of enhancing transparency, but there is a disconnect, because even now I think the ASA has limited information about how many people actually understand, if you write 'advertisement' on social media posts (P016_ Owen).

Some other respondents were sceptical of the efficacy of labelling positing the challenge for audiences reading and noticing labels.

> I suppose there will be some element of risk there because I think it's a lot easier to miss a flag that says 'this is branded content' online than it was on a page, just because there's lots of stuff going on (P020_Jim).

As one Spanish regulator set out, in straightforward terms:

> The information obligations should include graphic signals, such as labels ('sponsored content', 'advertising', 'paid partnership', etc.), that allow the audience to immediately identify the commercial nature of the content, without ambiguities. (Spanish respondent, regulator).

The BCGP research identifies that there is a live debate around labelling and how to activate this important function and the principle of disclosure into a practicable set of protocols across media and channels. Issues of labelling and disclosure are certainly important with respect to consumer protection and market issues - and the practitioners seemed to understand this in respect of particular product areas and in relation to competition issues.

There is a further, deeper logic to calls for such disclosures and various forms of transparency and accountability in respect of such disclosure, which is to do not with consumer protection as such, but with citizen protection, i.e. some degree of honouring, in action and use, the philosophical and political principle of the public sphere. The BCGP analysis identifies four key problem areas in branded content practices: first, consumer identification of advertising (advertising transparency and disclosure); second, the impact of integrated advertising on media quality and integrity (editorial and aesthetic independence); third, limits on marketers' power to dominate communications, and fourth, the capacity of creative workers to act ethically (Hardy et al 2025). In this context, the responses from journalism-based practitioners were poignant. In

some respondents' discourse we hear vestiges of a public service ethos and an understanding and valuation of the distinction between public and commercial speech. The somewhat trivial-seeming or 'nit picking' (P009_Olivia) matter of labelling in this domain stands as a wider concern, i.e. its relevance includes containing a deeper anxiety about the continued recession of stabilising public institutions. Typically, that sense of publicness in media is becoming displaced and replaced by heavily platform-centric media organisation, and the somewhat atomising and dispersive audience dynamics emerging from the amplification of market logics and the marginalisation of public ones (Doctorow, 2025; Hardy, 2022)

There seemed to be a developing and more shared view that AI is another area where disclosure will be a key point for governance (at all levels):

> we're not heading towards a disclosure that says this post incorporates AI or this piece of content incorporates AI, because that's relatively pointless. It doesn't really tell consumers anything that moves the dial. But if AI is being used in a way that is misrepresenting what they're seeing in the sense that the actual product shown is not actually real, or the person shown is not real, and you don't even know who's behind it, because it might be a sort of AI-generated influencer, you'd need to know who is funding that sort of model. So, there are nuances around different types of content (P025_Aaron).

Our respondents tended to form a nearer-consensus around labelling *AI* content because, in some ways, they do not see it as creative (MacRury, 2026) in the way that they see their own work in creative, storytelling, 'pull' media.

5.7 Overview and Reflection: DIsclosure and Labelling

From within the group of respondents who talked about disclosure and labelling there was an array of positions which we might summarise as follows. All the respondents understood and acknowledge the importance of the principle of disclosure. Many had worked with and against clients and with other colleagues to underline the relevance and importance of the principle - and to put it into practice in their work. The practice of disclosure using specific or extra labels was notably more contentious. This was handled in several ways. Some respondents wanted very understated labels, especially relation creative content that took the form of film storytelling, or television output (serials, shorts and so on). Their advocacy for labelling was typically focused on other media or content types such as influencer market marketing, described in the reort as NIMBY governance.

Those advocating for less obtrusive or attention-grabbing interruptive labels did not articulate a wish to disguise or deceive the audience in any direct way. Instead, at least ostensibly, the wish for a lack of over-obtrusive or interruptive communication within the flow of branded content, especially when conceived as 'storytelling', was expressed as an extension of their commitment to a professional set of craft values (less is more, story first,

non-interruptive engagement etc). Obtrusive labelling was viewed, by them, as diminishing the value and status of the (creative) work that they produced and audiences' experiences of it. Such practitioners are seeking to be recognised as creative cultural communicators *first* and as *marketers* second; for some practitioners, the labelling of promotional content disturbed those identifications.

Content Identification and Professional Identities in Branded Content Domains

So, practitioner concerns around labelling were articulated around the suitability of specific labelling practices, rather than as any outright repudiation of the importance of advertising transparency and signalling provenance in terms of paid media elements in branded content communications.

Critical academic studies tend to want to reverse the order of importance in terms of their classification of this work. So, branded content is fundamentally *marketing* communications adapted into 'creative', 'informative', 'entertaining', 'playful', 'authentic-relatable' forms and genres suited to the dynamic and evolving, not to say fragmenting and abstractive digital media ecology (Hardy 2023a).

One governance question emerging from this: To what extent is the marketing component of practitioners' work understood and recognised as it's *defining* feature? Many respondent-practitioners in our study, embrace a *hybrid* but primarily cultural-creative-journalist-creator identity, one that still acknowledges also (secondarily) a marketer identity - selling stuff. These hybrid practitioner formations have emerged from the transformation of prior media disciplines - stretching from journalism to advertising, from hawking to direct sales to games design, from public relations to media sales. The semi-tacit dilemma in the field however, is that, at the governance level of system and principle, brands' payment for creative communication services becomes a/the core pre-defining term constitutive of what branded content practice is. i.e. *They are doing advertising/marketing*. At the level of practice, however, uncertainty, ambiguity and nuance continue to be part of the discourse, in part because individuals and organisations are managing these tensions in their work. They have (in mind and in practice) shifted somewhat away from exactly those formats practices and organisations where advertising is/was the core and defining task. This explains some of the tension and uncertainty in the system. Practitioners live with conflicting identifications; 'labelling' touches this raw spot.

Holding Tension: Meso-Institutions and Micro-Dilemmas

One of the several reasons that significant and important voices in the debate come from trade bodies and, up another level, self-regulatory institutions e.g. via the ASA, is to do with the belief within the wider set of professional communities of practice that such bodies represent and 'hold' a meso-level

line to help contain the conflicting motives and identities of professional promotional creators. They publicly manage the accountabilities and ethical framing required for good professional practice and public responsibility.

A further view is less complex. Practitioners feel it tends to be best left to the professional community to understand the nuances and particularities of emphasis that function in daily practice, even while working within and at the boundaries of more explicit and direct injunctions activating from high-level principles and legal frameworks. It does seem clear from our work with practitioners that there is some acknowledgement that established regulatory frameworks tend to run a little behind the curve in terms of finding means to capture and deal with governance issues emerging from new formats (AI, Podcasts, 'live' TikTok's) i.e. some of those that come under the heading of 'branded content'. This remains the case even when self-regulatory bodies do indeed acknowledge, understand and support longer standing enduring principles, including those long affirmed around advertising identification and transparency (ICC, 2024).

Practitioners Within a Wider System

Across our different strands of research in the project we have examined in more detail the varieties of inter-operation between self-regulatory authorities, trade bodies and various high-level ministerial and governmental, including EU, laws (Hardy et al 2025*). In many ways at the structural levels, we see a high-level and distilled understanding of practice. It takes its forms in finding and (re-)negotiating a balance of definition, intervention, enforcement in the face of the assertion of core principles, e.g. disclosure, harms and risks, consumer protection, disinformation, and market fairness. We think that these policy level considerations are helpful informed by acknowledging insights from within the spaces of professional and organisational practices that they seek to oversee. However, as the BCGP policy recommendations and proposal for integrated polycentric makes clear, acknowledging the importance of these practitioner voices is not to recommend leaving governance to themselves. It is of course important to say that regarding complex objects such as branded content that the aspiration to functional and well-informed styles of self-regulation may be necessary to but not sufficient for good governance. Sometimes the law does indeed need to intervene directly, and practitioners have sometimes agreed that clarity and disambiguation are helpful contributions in respect of areas of uncertainty, e.g. around labelling.

5.8 Governance in Sub-Areas of Branded Content Practice: a Competitive Field

From the perspective of the practitioners who contributed to our study, their support for governance, regulation and best practice across the industry reflected their own ethical and organisational stances, and what one contributor characterised as 'enlightened self-interest' (P010_Marcus) on the part of promotional, advertising and marketing communicators around protecting the extensive integrity of the communications field. But it also, sometimes, included a more civic minded wish for a 'good' (or better) media

environment, albeit one where there is a plurality and spectrum of positions regarding what 'good' looks like. However, it was also acknowledged that attention to governance was important, and even where regulation and compliance are considered, sometimes, as 'frustrating' or time costly. A recurrent question, as framed by some practitioners, for us was: 'who owns the regulatory burden?' (P020_Donald, RT) and a feeling that there might not be a level playing between different channels.

As several respondents underlined, they are working in a business environment. Sometimes squeezed, and disrupted, important part of the broad industry-wide discourse around governance takes place in a context of competitiveness between different parts of an industry, and where different agencies, individual actors and whole industry sub-sectors take up positions or assumptions relative to other 'players'. Sub-sectors in promotional communications, such as advertising, branded content marketing, PR and influencer marketing, are competing for a relative slice of the (shrinking) budgets flowing into the diversifying forms, channels and formats for promotional communications. As such, they are often ambivalent about the performance, value and governance of other competing promotional forms. For instance, creators of branded content films were often somewhat sceptical about the value of programmatic display advertising. Marketing influencers, or those who employ them through influencer talent agencies, advocate for their value; the intimacy, approachability, relevance and affordability of this sub-sector of the creative economy: Influencers as the new 'creative' and effective solution.

Meanwhile, independent branded content producers were somewhat sceptical of the capacity for in-house brand studios to produce truly engaging or creative, and indeed brand-building, promotional material. Conversely, those responsible for big brand in-house communications production through studios defend their particular capacity to be efficient and on-message within a concerted integrated marketing communications strategy, with their content standing up and playing its role.

Journalists producing long-form copy, sometimes embedded as native advertising in significant news brands, or where they contributed to the writing or presenting of documentary work for well-recognised broadcasters, similarly distinguished the engagement, interest and quality of their output relative to programmatic advertising churning in the scroll space of online news. Equally, they mention the value of branded content journalism relative to some of the click-focused journalism which arises as a symptom of the behavioural and programmatic advertising model. The abiding question: is this really news, is there a *story* here, the journalist's version of the wider practitioner identification with 'storytelling' as the uniting element in creative craft.

NIMBY Governance

It was not the purpose of this governance-in-practice report to settle these long-standing and important internal industry debates, but to connect them to a particular feature that our data reveals about the discourse of governance amongst its practitioners. For our practitioners, sometimes, *the necessity and importance of governance was sometimes projected into the parts of the system which did not include them*. One Spanish respondent sought to distinguish the regulatory responsibilities between sub sectors:

> It is not the same, the misleading advertising generated by a 20-second or 30-second television spot as [compared with] a piece of branded content that lasts half an hour, and where the advertising claims would be arguable (Respondent, TV production)

We might propose that the expressions of support for increased, enhanced, improved governance in principle, appeared to be connected, in the minds of respondents, to the evidence of risk and infringement *elsewhere* in the broad promotional media and branded content system.
By contrast, their own practice in their 'patch', their channels, formats and domains were reported as well governed and responsible. In many cases, ther was some evidence-based justification for such differentiation.. One traditional advertising agency respondent had received only one complaint (not upheld) in 20 years of practice. However, occasionally there was a sense of what we might call NIMBY governance, stealing from a popular piece of British acronym slang, and this NIMBY governance tended to direct any additional and needed oversight away from their promotional backyard and towards other 'bad apple' actors in the broader domain:

> Yeah so, I mean like there are there are some organisations that do that, and they've got a strict code of conduct linked to it and everything else but, but I still don't believe the influencer marketing industry is anywhere where it should be (P018_Ashley)

It was seen as a general attentional threat in the field:

> the influencer marketing space is so huge that you've got millions of people believing that they are truly an influencer and then you've got the top tier, the tier one influencers who are truly experts in their field and what we face is that the ad clutter in other words the content clutter is how to break through and one of the problems we face with our clients is capturing the attention in nanoseconds, because when creators are creating content we need to make sure that it's captured while people are scrolling (P012_Arjun).

The distinction between influencer, marketing and other forms of branded content is articulated by P014_Declan, an independent branded content producer who locates governance issues in that influencer marketing channel/format:

> I think there's a societal danger that someone [an influencer] might be promoting a product they know very little about or have very little experience with or may have, you know, and I think consumers should be aware of that. So that, like, I think is a little different. When you're watching a four-part comedy series that is funded by a brand, I don't think there's, you know, really much risk in consumers not being aware that the environment they're consuming, is very different, and a very different level of trust and influence (P014_Declan).

In a traditional ad agency setting respondents spoke about one conflicted relationship around compliance, understanding the importance of accuracy as a principle but wanting to relieve the pressure, and indeed the 'burden', of compliance associated with verifying particular types of claims. One respondent mentioned in conversation that it took a colleague over 'five days of detailed form-filling' to allow sign-off on a claim in a piece of content mentioning a soup brand as one of consumers' five a day' (P019_Mark). The point being made was, however, not that checking this health claim was not needed, but that such observance of the rules was, hyper diligent when contrasted with some influencer marketers' food content, which seemed more spontaneous and organic (in the media sense). Typically, such concerns, then, landed on influencers who, in terms of the density of preoccupation, and as captured in our data, and within the wider discourse about branded content governance, became a focus partly as a reflection of this 'projective' dynamic. The acknowledged ills of the industry are partly managed by projecting them into a relative newcomer subgroup, and away from the locus of more established and legitimated branded content forms and organisations/practices.

One specialist who deployed influencer talent in some of her work,P009 Olivia, reflected on the challenges:

> ….there's a lot there, so I think I think fundamentally they're not advertisers [Influencers] they're just individuals that I've signed up to be content creators and build community with people and the commercial element of that I mean I guess that fundamentally makes you an advertiser then but by default but that's not that's not your sole thing. Not like a billboard is, that their sole purpose, is an advertising space, that is the function. So, it is…it is challenging to define (P09_Olivia).

However, there was some pushback from influencer advocates arguing that some of the anxiety about influencer governance was a function of this competitiveness. So, influencer marketing sometimes defend itself as a kind of anti-establishment format at risk of being persecuted by mainstream media and orthodox assumptions:

> But I think the mainstream media were anti-influencer marketing, possibly partly because they didn't understand it, partly because there was a financial disincentive to eulogise about influencer marketing because ultimately going for the same ad spend. So, you know, it wasn't in their interests. So, it was all right to be a bit sniffy (P010_ Marcus).

Influencers were not the only object of this. Amongst branded content practitioners, programmatic advertising carried the most recurrent negative commentary, often in throwaway comments. In broader terms, sometimes respondents just recognise the complexity and confusion between and amongst channels and formats in terms of regulation and especially where there was a potentially higher risk product involved.

> I am also thinking, for example, of Estrella Damm's shorts, which it always makes in summer, 'mediterráneamente', or for example Campofrío's Christmas ad, which everyone looks forward to. That is, and they are like little shorts. And for us this is interesting because I see the double leg. The leg of this is advertising, but at the same time this is advertising cinema. And for me it has to, for me it is equivalent at that moment if you produce a series or a short, because in reality they are like shorts, but paid for by a brand. So, well, that is the issue. When you distribute or broadcast the 'mediterráneamente' ad on your free-to-air television channel, well, you will have to see what the impact is. Whether you have it identified whether it is alcohol advertising of more than 30 degrees, of less than 30 degrees, whether you broadcast it in the specific time slot, to what audience you are addressing (Respondent, Spain)

In more recent interviews, AI has sometime served a similar role as another source of threat, sometimes expressed in governance terms. In marketing jargon'low funnel' activity seemed to be seen as 'risky' in governance terms. Indeed, the long defunct distinction between above-the-line and below-the-line in the traditional advertising industry (MacRury 2009: 76-80) resonates in the contemporary discourse of promotional communications prestige, with 'low funnel', direct to consumer communications (more marketing logic) distinguished negatively against 'high funnel' brand building (more 'cultural-creative' logics) formats such as brand commissioned films or native (quality) journalism.

In some ways, this was an instance of a long-standing sociological dynamic, the assertion of distinction within a field of practice in pursuit of recognition of 'value'. This is not only instrumental, not just a form of active/ direct economic competitiveness coming into play, but rather a strategy of 'distinction' (Bourdieu, 1984) asserted in the service of some recognition of the rewards associated with acknowledging the craft, commitment, value and integrity of this or that domain of professional practice.

5.9 Training, Education, Induction: Belonging to a Community of Practice in Governance

Branded content creators illustrate these challenges (MacRury 2018a). A journalist may be commissioned to write promotional content. A marketing-trained production assistant may source goods for a brand-funded entertainment show. Brand studios, or 'labs', work at their best when they also operate as learning environments. Our findings suggest growing appetite, and growing need, for distributed forms of CPD across this fluid space (Wenger-Trayner and Wenger-Trayner, 2014; see Figure 3 above). As one respondent put it:

> I also think something... It's a bit incestuous because everyone's moving around. Everybody knows everybody. And interesting with freelancers, a lot of them, it's almost like there's a conveyor belt (P012_Aisha).

As we have seen, new 'professional/ post-professional' alignments are reshaping everyday work in branded content. Links between computer science, automations, and creative advertising, or between journalism and promotional content production, unsettle long-held assumptions about roles, norms and good governance. Our Interviewees spoke about this shift often. Many were part of, or worked alongside, a growing group of 'disorganised' (Wenger-Trayner and Wenger-Trayner, 2014), freelance and project-based workers (von Bernuth and Bathelt, 2007). Their training is often piecemeal and offers only a partial view of what they now face. They move between sectors, tasks and jurisdictions, but without the place-based reassurance of the expert in the corner office who can provide spontaneous advice and organic induction into governance-in-practice. So, there is evidence of uncertainty in the details of regulatory needs and in the consensus- organisation-based judgement needed to act with care in new, hybrid roles across the media ecosystem.

A journalist paid to write promotional material, or marketing-trained production assistant sourcing goods for a brand-funded entertainment format, sometimes work with blurred boundaries. Brand studios and 'labs' amplify these pressures as they sit at the edge of established ad industry structures. But they are positive and seem ready to build on / build up shared practice. Respondents wanted clearer guidance, steadier support, and space to build the skills needed for 'creative compliance'. So, one key recommendation outlined across the Branded Content Governance Project propses appropriate and distributed CPD for those outside the established professional media-marketing structures of PR, advertising, broadcasting and so on, training that fits the real conditions of cross-sector work, mixed responsibilities and fast-moving governance demands – a reframed apprenticeship for a disrupted governance space.

5.10 Governance-in-Practice in Context

Across the BCGP study, we see that flexibility, adaptability, responsiveness, legitimacy and support are essential to good governance. From governance-in-practice, through to guidance issued by industry bodies, self-regulatory organisations, statutory agencies and courts, branded content shows the need for multiple centres and modes of governance. We tag this multi-layered process, 'integrated polycentric governance' (Hardy et al. 2025*).

So, we have set out an approach that recognises governance agency across the spectrum, from statutory regulation to self-regulation and governance-in-practice. This forms the basis of our proposal for integrated polycentric governance. 'Problems' in branded content practices reduce the ability of professionals and creators across the media-marketing ecology to act in informed, ethically reflexive and autonomous ways - person, process and place-based good practices. There are inhibitions and bad actors in the system. These problems, as we have seen, may stem from precarity, lack of agency, pressures, low confidence, and gaps in training and support. As well as risks at the level of individual product sectors, there are also risks associated with the erosion of trust as well as fragmentation from public forms of culture and communication. Such conditions shape practice. They affect the organisations that have been held responsibilities for governing branded content and adjacent formats in promotional communication. Influencers sit at the edge of the older assumptions that guide established communications professions (MacRury 2020; Silver et al. 2023), but pressures extend in journalism, and studio-created works too.

One of the main areas where more support is needed is accessible professional development and training. The governance environment will continue to change at speed. Practitioners want and need space to learn. People also carry practical governance across organisations and supply chains, through their own expertise and judgement. Practitioners often learn 'horizontally' from peers and colleagues, in office spaces and 'by doing/watching'. Where place/space has been shifting or vanishing (this informal learning resource (we might say informal 'apprenticeships in governance') recedes.

So, a key focus is capacity-building across the media-marketing ecology. This involves how best practice and compliance are communicated and supported through institutions, networks, AdTech systems, supply chains, and individual learning. Rapid change in promotional communication institutions (MacRury 2017), driven by technology (MacRury 2025a), hybrid working, and new professional alignments, can remove opportunities for organic learning. New alignments, for example, between computer science and creative advertising (MacRury 2025b), or between journalism and promotional media unsettle norms expectations and habits (Cornia, Sehl and Nielsen, 2020). At the same time, a growing group of 'disorganised', freelance and project-based workers (MacRury 2018a; Salomon 2025) enter creative labour with limited training, and only partial understanding of the wider overview needed to work with creative compliance.

Governance-in-Practice: Some Observations from Talking to Practioners

In the context of these observations, speaking with and listening to practitioners has underlined to us the importance of governance- in-practice. Adaptability, responsiveness, legitimacy and support are vital for regulation to work and for practitioners to engage and comply. Trade bodies play a useful role in making governance intelligible and relevant. Governance is complex to navigate. From embedding in 'governance-in-practice', in persons, places and processes, through to guidance from industry regulatory organisations, self-regulatory organisations, statutory agencies and courts, the governance of branded content illustrates the presence for multiple centres of authority. There are multiple modes and types of governance, alongside an integrating 'holding' set of regulations and connections. Principles, norms and, at base, statutes, that can help practitioners and audiences manage their interactions in what some describe as an increasingly 'mediatized' environment (Lunt and Livingstone, 2016).

Echoing the language of systems analysis and attendant psychodynamics (Krantz 2001; Cooper and Dartington, 2004), our respondents, often working freelance and project to project, speak of a system where there is fragmented authority and, consequently, a somewhat diffuse sense of accountability. As such role holders can feel pulled by several priorities at once. A sense of ambivalence about 'more regulations' reflects, in part, respondents' experience of working in organisations stretched across markets, professions and governance regimes. We are seeking more clarity and integration in this space. That is one reason why we advocate in our *Problems and Mitigations* report (Hardy et al 2025b), for an approach that recognises the value of governance agency across the spectrum from statutory to self-regulation and governance-in-practice. This is developed in our proposals for integrated 'polycentric' governance.

Our practitioner work supports the broader project conclusions, i.e. to propose continued attention to the relationship between marketing intents, media-communications and other forms of cultural communication, news and entertainment. Such vigilance is in the service of a media ecology still capable of supporting public media and the values enshrined in the idea of good, thriving and open public communication. Where business models supporting a healthy-functional media marketing ecology are threatened by diminished trust in, or fragmentation across that 'ecology', then it is time to reflect at all levels of the system. As several of our journalist and filmmaking respondents made clear, professional credibility is important in good content, so disclosure and transparency stand as 'must haves' in any model of sustainable news or creative media production.

There's likely to be a cyclical quality in the process, new rounds of policy formation (upstream) and governance, may be initiated in response to emergent problems 'downstream'. Engagement with respondents underlines that change is very fast so that a cyclical-recurrent 'always in beta' quality to the policy/governance environment seems likely. Governance must grapple with and contain multiple, rapid changes. So, we might say 'agile' polycentric systems are likely best suited to contain and encompass the speed, scope and scale of change.

6. Recommendations

Concluding Reflections on Governance Practice

Branded content sits across a complex mix of statutory, self-regulatory and co-regulatory systems. These systems meet the lived practices of practitioners and professionals across the media–marketing ecology. Our interviews and roundtable conversations, captured, coded and analysed in some depth, show that overall, there is some need for clearer support to meet governance expectations with practical confidence and as embedded norms in the face of a period of flux. The fast pace of industrial and technological change has reduced opportunities for informal learning and weakened some of the institutional structures and professional norms and compass points that once held governance knowledge. Some recommendations aim to address these gaps, and these should be read alongside and as complementary to the BCGP summary of problems and recommendations for mitigation as set out in our other reports (Hardy et al 2025b).

Strengthen Governance Capacity Across the Media-Marketing Ecology

Offer accessible training that helps workers understand obligations and take informed decisions. This supports staff in agencies, brand studios, production roles, journalism–commercial hybrids, influencer management and creator work.

Support Integrated Polycentric Governance

Strengthen coordination across statutory regulators, self-regulatory bodies, platforms, agencies and internal compliance teams. This helps reduce confusion and supports consistent judgement in production settings. Ensure practitioners have a fuller sense of the interdependencies and responsibilities to the wider aims of the media marketing ecology and to the necessary ingredients - including good governance - needed for sustaining good practices and public credibility.

Recognise and Expand Governance Agency at All Levels

Treat governance-in-practice as a core element in creator tasks and roles. Provide tools, examples and structured guidance that help practitioners understand how everyday decisions carry regulatory and ethical implications.

Address Structural Conditions/Anxieties that Limit or Inhibit Good Practice

Reduce uncertainty for practitioners by clarifying role expectations, decision rights and routes to authorisation. Acknowledge that ‘flexibility’, precarity and role ambiguity limit a practitioner’s ability to act with and inherit ethical confidence. Address anxieties around the intersection of creativity storytelling and labelling.

Improve Communication of Rules, Definitions and Classifications

Ensure that guidance from regulators, platforms and clients is clear and easy to use. Offer practical examples, short checklists and decision aids that can be passed across supply chains. Create regular opportunities for learning and reflection where hybrid working, automation and new role alignments have weakened informal knowledge transfer.

Expand Professional Development Routes for Creators

Support influencer creators and other independent freelancers/practitioners who sit outside established professional networks. Provide structured learning and support pathways to reduce risk and improve compliance.

Attend to and Translate/Update Institutional Principles to Fit Branded Content Settings

Explain and demonstrate how long-standing regulatory and professional traditions e.g. ICC principles can shape current expectations. This helps practitioners understand the origins of rules and their practical implications to support building governance-literacy/intelligibility in disrupted and hybrid work settings (Cooper and Dartington, 2004).

Improve Coordination Between Regulatory Types

Help statutory, self-regulatory and co-regulatory systems align expectations in respect of the 'polycentric' nature of the ecology. Shared resources and joint initiatives can support clarity and reduce duplication. This links with the BCGP's wider proposal for integrated polycentric governance.

Reassess Institutional/Educator Governance Roles

Invite agencies, broadcasters, publishers, trade bodies and educational institutions to review how they support media communications and creative industries governance today. Many of these institutions now face disrupted structures and altered responsibilities.

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8. Appendices

Appendix 1: Codes and 'nodes' – working NVIVO15 codebook for governance-in-practice analysis BCGP

	CODE/ 'node' and themes	Coding protocol/ descriptor
Codes	ACTORS AND INSTITUTIONS\ actor type in MM ecology	Typologies of organisational actors involved in branded content—brands, agencies, publishers, platforms, creators—and how their roles shape governance responsibilities.
Codes	ACTORS AND INSTITUTIONS\ actor type in MM ecology\3RD SECTOR CHARITY	Comms professionals from Charitable or non-profit actors commissioning or partnering on content; heightened expectations around transparency, safeguarding, and alignment with mission and public benefit – n.b. CAP code charity still important.
Codes	ACTORS AND INSTITUTIONS\ actor type in MM ecology\ad agency	Many respondents either worked in or for, had worked in traditional advertising agencies and the traditional advertising agency relationship to regulation was sometimes seen as an important precursor to and template for ideal or otherwise evaluated regulatory regimes. Add agencies retain an important role in the brand content media mix and some participate in the production and commissioning of forms of branded content
Codes	ACTORS AND INSTITUTIONS\ actor type in MM ecology\ advertising traditional	
Codes	ACTORS AND INSTITUTIONS\ actor type in MM ecology\BIG BRAND	Large advertisers with multi-market operations and often layered approvals; strong brand safety/ risk management expectations, formal risk controls, and complex compliance-measurement integrations across partners. Power dynamics with creators, sometimes of interest.
Codes	ACTORS AND INSTITUTIONS\ actor type in MM ecology\ brand studio	In-house or partner creative units producing content for brands or publishers, combining editorial craft and marketing objectives within hybrid accountability frameworks. Owned media or retail media sometimes afeature.
Codes	ACTORS AND INSTITUTIONS\ actor type in MM ecology\ broadcaster	TV/radio organisations/ commissioning or hosting brand-funded content, navigating editorial standards, sponsorship rules, and commercial pressures within public or commercial remits.
Codes	ACTORS AND INSTITUTIONS\ actor type in MM ecology\ consultant	Some of our interviewees were consultants in the industry, moving in a space between policy and trade bodies, and often having or having had longer- term careers in various kinds of marketing or marketing agency roles. Often 'freelance'
Codes	ACTORS AND INSTITUTIONS\ actor type in MM ecology\ freelancer or independent	Independent producers navigating multi-party expectations and approvals, often bridging editorial craft with brand objectives and compliance requirements. Sometimes ancestry in traditional creative services and in multiple forms of relation with branded content creation

Codes	ACTORS AND INSTITUTIONS\ actor type in MM ecology\ influencer	Many respondents referred to Creators/ influencers - pro-am and via agency / talent etc. with audience trust for branded narratives, where disclosure, suitability, and contractual control can intersect with platform rules and self-regulatory guidance.
Codes	ACTORS AND INSTITUTIONS\ actor type in MM ecology\ platforms	Massive tech-led Digital intermediaries (e.g., YouTube, Instagram, TikTok) shaping distribution, labelling, targeting, and monetisation through policies, algorithms, and commerce features. Often referred to in connection to the idea of platform governance
Codes	ACTORS AND INSTITUTIONS\ actor type in MM ecology\PR	Reflections and mentions of PR. Sometimes these are media communications agencies, but there is common reference around the relationship to traditional or developing PR style agencies and activities
Codes	ACTORS AND INSTITUTIONS\ actor type in MM ecology\ publisher	News and magazine organisations/ news and magazine brands - some offering studio services and inventory for branded content, balancing revenue with editorial integrity and audience trust.
Codes	ACTORS AND INSTITUTIONS\ actor type in MM ecology\ regulator	There are a number of regulators that are directly mentioned, as well as the more general invocation of regulators as a catch-all term. So, this code captures mentions and references to regulators, specifically and in general.
Codes	ACTORS AND INSTITUTIONS\ actor type in MM ecology\ regulator\ASA direct	
Codes	ACTORS AND INSTITUTIONS\ actor type in MM ecology\trade body	There are several relevant trade bodies, including the Branded Content Marketing Association and the Content Marketing Association, and respondents sometimes reference the role and function of these trade bodies, or indeed had affiliations with them directly themselves.
Codes	ACTORS AND INSTITUTIONS\ allusions to the feeling of being displaced (professionally)	Discussion of role shifts and changes, including displaced expertise or organisational displacement because of disruption in the industry
Codes	ACTORS AND INSTITUTIONS\ ASA	The Advertising Standards Authority is frequently mentioned, as is Autocontrol, the Spanish equivalent, although there are some differences between the role, function and constitution of the two regulators. The code Collaboration with Regulators is deployed in instances where respondents talk about actively engaging with regulators to solve regulatory and governance problems, or following advice, or, for example, setting up training and bespoke relationships with the regulators.
Codes	ACTORS AND INSTITUTIONS\ BBC	Many respondents either through their career heritage or because of a sense of continuing influence make reference to BBC policies, (real or imagined) guidelines, or experiences with brand-funded content or partnerships, and how public service obligations condition permissible formats and disclosures. An emerging finding was the shadow influence of public service broadcasting as a temper to the broad practice field
Codes	ACTORS AND INSTITUTIONS\ client agency relations	Used when respondents discussed dynamics trust tensions or dependencies between brand clients and their agencies.

Codes	ACTORS AND INSTITUTIONS\ client caution	Used for mentions of risk aversion or hesitant by clients in improving creative or regulatory sensitive work
Codes	ACTORS AND INSTITUTIONS\ Client roles and responsibilities	Used when respondents define or reflect on the responsibilities, decision powers or expectations of client organisations sometimes referencing for example principal agent theory but also the principle of control/payment and control
Codes	ACTORS AND INSTITUTIONS\ Commissioning	Commissioning. This code captures references to processes and entities involved in the initiation and payment for branded content productions.
Codes	ACTORS AND INSTITUTIONS\ decline of traditional advertising	Capturing various reflections on the weakening of legacy advertising models and alongside this traditional linear media or the dominance of broadcast in terms of budgets and also formats.
Codes	ACTORS AND INSTITUTIONS\ Differential media comparisons and contrasts	This code is deployed in order to identify instances where respondents compare and contrast differential branded content formats and media in terms of treatment and recognition in regulation.
Codes	ACTORS AND INSTITUTIONS\ Educating advising clients (e.g. on regulations)	Respondents often talked about their role in educating clients & normally commissioning clients, sometimes in relation to creative choices but sometimes connected for example to big brands marketing assumptions & and helping them to understand better /different aspects of the branded content process, including aspects related to regulation, governance and compliance.
Codes	ACTORS AND INSTITUTIONS\ history origins	History and origins captures respondents' own discussions about their personal histories within the industry, but also their reflections on the broader history and transformation that they have borne witness to in their careers. Some of our respondents have seen extended periods of change; others have arrived in an industry which is in a state of flux.
Codes	ACTORS AND INSTITUTIONS\ influencer agencies	Influencer agencies captures discussion and reference to the role of influencer agencies in the intermediation between big clients and influencer marketers, which sometimes includes a governance role i.e. for example, in ensuring labelling and compliance as a component of agreed contractual terms.
Codes	ACTORS AND INSTITUTIONS\ initial role	Initial role is another code to capture the personal trajectory and beginning story of our respondents, which we think is important in understanding their orientation to and induction into the governance regimes of the industries into which they have landed.
Codes	ACTORS AND INSTITUTIONS\ IPA	The IPA is one instance of a trade body: the Institute of Practitioners in Advertising.
Codes	ACTORS AND INSTITUTIONS\ Ofcom	Specific mentions of Ofcom
Codes	ACTORS AND INSTITUTIONS\ Place	Illusions and references to the idea of place as a component in the governance system
Codes	ACTORS AND INSTITUTIONS\ place organisation building	Respondent referencing particular elements in the organisation of place as a component in the work of governance

Codes	ACTORS AND INSTITUTIONS\ polycentricity	This is an aggregate analytical code in relation to the idea of POLYCENTRICITY - Polycentricity is an aggregate analytical code capturing various forms of collaborative, cross-organisational, cross- institutional, and cross-functional cooperation in the service of institutionally distributed modes of polycentric governance.
Codes	ACTORS AND INSTITUTIONS\ talent agency	Talent agency is a code to capture allusions to the designation of influencer and creative marketing activity as a particular talent asset that needs management through particular types of organisations, sometimes dubbed "talent agencies," to highlight the role of practitioner personality and personhood as opposed to, for example, the reduction of influencer marketing to being seen as merely a channel.
Codes	ACTORS AND INSTITUTIONS\ trade body mentions	Capture specific mentions of trade bodies in context
Codes	ACTORS AND INSTITUTIONS\ traditional advertising industry or 'model'	Traditional advertising is a code to capture allusions to descriptions of, and stories about, traditional advertising, often in its role distinguished from branded content by practitioners who consider themselves as either escapees from traditional advertising, rivals to traditional advertising, or, on occasion, advertising agency staff who talk about their capacity to extend traditional advertising to deploy branded content within a wider media marketing mix.
Codes	ACTORS AND INSTITUTIONS\ training	Training is a code to capture references to processes of induction into regulation and understanding of rules. This includes a subcode of non/no training where practitioners reflect on the absence of formal training in relation specifically to regulations and principles around branded content and specific requirements.
Codes	ACTORS AND INSTITUTIONS\ training (none)	
Codes	AUDIENCES, EFFECTS AND LITERACIES	
Codes	AUDIENCES, EFFECTS AND LITERACIES\attention (audience)	The fundamental structuring concept of attention is an important component of understanding the micro dynamics of practice in the context of the media marketing ecology. We have coded for discussions or mentions of attention
Codes	AUDIENCES, EFFECTS AND LITERACIES\children and young audiences	Safeguards and obligations when content may reach children or young people, including age-gating, harmful product prohibitions, and enhanced disclosure and literacy/ induction into media meanings etc... Anxieties, concerns and vulnerabilities. Some practical challenges.
Codes	AUDIENCES, EFFECTS AND LITERACIES\consumer autonomy sovereignty	Coded to capture assertions from respondents that audiences or individuals assert a certain degree of judgement and even power in terms of their interpretive capacity and in their ability to recognise and respond and make choices in respect of the promotional environment. Practical echoes of active audience theory.

Codes	AUDIENCES, EFFECTS AND LITERACIES\consumer protection	This code captures discussions of regulation which foreground and explicitly identify with the consumer protection element of regulation in the media marketing ecology. Sometimes connected with dangerous product sectors specific policy in legislation or identified vulnerabilities.
Codes	AUDIENCES, EFFECTS AND LITERACIES\high risk products	High-risk products allows us to capture references made to different forms of governance which are mobilised in respect of consumer protection, especially for products such as tobacco, alcohol and, more lately, high fat, salt and sugar, medicines etc. but also gambling and financial services products, etc. Most governance systems will designate a particular number of product sectors as especially significant in respect of consumer protection, although even mainstream products such as beauty products.
Codes	AUDIENCES, EFFECTS AND LITERACIES\intimacy engagement	Intimacy engagement is a reference to facets of branded content which are seen respondents point branded content & the promotional communications ambition of affording moments of intimacy and engagement between consumers and the brand, so for instance, via an aesthetically pleasing message, a cognitively interesting piece of consumer information, or via a parasocial relationship with an influencer.
Codes	AUDIENCES, EFFECTS AND LITERACIES\Media literacy	Media literacy is an important code which discusses the general principle of media literacy as a component in governance, and also the role that media literacy can, should and is imagined to play in the imagined audience of branded content, or which is discussed as part of wider debates about the broad governance system of branded content where some role and some enhancement of media literacy is often proposed or discussed & sometimes also extended into particular consideration around children.
Codes	CREATIVE PRACTICE AND PRODUCTION	
Codes	CREATIVE PRACTICE AND PRODUCTION\AI	A key theme that has emerged in the project is AI. We began to ask respondents about AI tools in ideation, production, targeting, or measurement, raising issues of disclosure, bias, IP, deepfakes, and evolving regulatory guidance - and to consider the emerging governance issues connected here.
Codes	CREATIVE PRACTICE AND PRODUCTION\Brand prominence	This is an important craft issue sometimes and a point of creative discussion, but which overspills into governance- How clearly and frequently the brand appears within content e.g. visuals, mentions, integrations & balancing Ad-ness with editorial value and transparency expectations. Also sometimes connected to adjacent conversations about labelling
Codes	CREATIVE PRACTICE AND PRODUCTION\Branded content aims and offers to clients	What branded content promises the audience and the brand - often relayed as part of accounts of the usefulness of branded content or its potency or in some terms as its appeal in respect of and in distinction from other forms of promotional communication and sometimes elicited through questions about discussions with clients and client agency relations

Codes	CREATIVE PRACTICE AND PRODUCTION\comedy	Comedy refers to instances where respondents talk about the use of comedy and humour as a particular sub-genre of the many entertainment forms deployed in branded content.
Codes	CREATIVE PRACTICE AND PRODUCTION\Communication strategy	Communications strategy captures discussions and observations from respondents talking about the connection and integration of branded content within wider communications approaches.
Codes	CREATIVE PRACTICE AND PRODUCTION\Context and context rich media	Sometimes deployed to capture the rich guarding of contextual storytelling authenticity of presentation or depth of setting associated with different types of branded content and linked to the idea of branded content as hyper contextuality - in opposition, for example to hyper targeting.
Codes	CREATIVE PRACTICE AND PRODUCTION\Context and context rich media\contextual promotion	Placement strategies aligning content with situational or topical relevance rather than personal data, Ie without behavioural tracking. A key feature of pre-programmatic advertising and therefore of publisher and broadcaster strategy
Codes	CREATIVE PRACTICE AND PRODUCTION\creativity	How craft, concept development / ideation and “storytelling” promise audience “value” and client aims/ creator aspirations etc. Sometimes linked to discussions about governance constraints, and thoughts about cultural/ editorial authenticity and branding objectives/ requirements
Codes	CREATIVE PRACTICE AND PRODUCTION\distribution	This captures observations from participants alert to issues around dissemination placement on platforms and various kinds of audience reach strategies sometimes connected to the underpinning idea of distinctions between paid and earned and shared media PESO. Sometimes references the specific nation of distribution as used within television and film industries.
Codes	CREATIVE PRACTICE AND PRODUCTION\informal knowledge	Informal knowledge refers to the important function in governance exerted by shared knowledge within work and professional settings, which supports practitioners in compliance and understanding of regulations relevant to their work, but without necessary formal reference to published regulations or codes of practice. Informal knowledge refers, in a sense, to the possession and transmission of “an understanding of what we do here”, sometimes basic “norms” within the promotional communications setting
Codes	CREATIVE PRACTICE AND PRODUCTION\Money, finance and charging	Money, finance and charging is a subcode in relation to the general category of payment and captures references to and allusions to the way in which content creators and branding communications agencies are paid. Payment, of course, is a key governance issue, as payment is typically fundamental in defining and determining the nature of a communication as branded content or not.
Codes	CREATIVE PRACTICE AND PRODUCTION\Storytelling	Storytelling captures the variety of creative strategies and the regular appeal to storytelling as part of definitions of, and explanations of, branded content. Storytelling is sometimes linked to anxieties around disclosure.
Codes	ETHICS, RISKS AND PRINCIPLES	

Codes	ETHICS, RISKS AND PRINCIPLES\brand safety	Often emerging in discussions of programmatic advertising and the issues of online ads - keeping brands away from harmful contexts, but also creators, or topics, - balancing reach with risk.
Codes	ETHICS, RISKS AND PRINCIPLES\disclosure	This code is used when there is a direct discussion of questions of disclosure in the context of branded content. Open linked to labelling, but which is a subtly different code, on the grounds that labelling points to specific conversations about forms and formats of labelling or other debates
Codes	ETHICS, RISKS AND PRINCIPLES\disinformation & misinformation	Recognition of disinformation as a policy issue and mentions of issues such as fake news or blurred truth and extending into the idea of branded content and for example influencer media
Codes	ETHICS, RISKS AND PRINCIPLES\diversity	Used to capture mentions and conversations regarding representation inclusion or workforce diversity in the context of the branded content industry and any consequences for regulation and governance
Codes	ETHICS, RISKS AND PRINCIPLES\freedom of expression	Free expression captures references to various debates sometimes connected to branded content, around the complexity for governance in relation to recognising rights and values associated with free expression/ speech
Codes	ETHICS, RISKS AND PRINCIPLES\journalism & news values	Journalism and news values is a broad code to capture the various rich discussions about the relationship between branded content and the specific sets of rules around—or the specific set of principles around journalism and news values. Respondents talk about the integration, but also the abrupt challenge that branded content can appear, sometimes, to have in respect of traditional interpretations of journalism, news values and what is frequently referred to as objective journalism.
Codes	ETHICS, RISKS AND PRINCIPLES\person-coded governance	Personal governance refers to the reflections from respondents on the role of themselves or individuals in ensuring compliance, governance and reflection in their work, sometimes expressed in terms of mobilising self-governance in the absence of clear or well understood, or in the face of emerging, governance and regulation protocols.
Codes	ETHICS, RISKS AND PRINCIPLES\principles	Principles is a top-level code trying to capture practitioners' references to more general, principle-based norms and values in the broad areas covered under governance and regulation, for example, the classic principles of regulators around truth, honesty, and decency, but also principles around separation and disclosure from the International Chamber of Commerce.
Codes	ETHICS, RISKS AND PRINCIPLES\privacy	Privacy captures references to issues around privacy, typically expressed in relation to data issues.
Codes	ETHICS, RISKS AND PRINCIPLES\reputation	Reputation is a code to capture the important idea of reputation, either of the brand, the practitioner, the organisation, or other parties, in respect of, for instance, breaches of governance or the action of enforcement. Some regulators, for example, use "name and shame" lists. So, reputation is a code to capture the important role of seeking to avoid shame within governance processes.

Codes	ETHICS, RISKS AND PRINCIPLES\risks and mitigation	Risk and mitigation captures practitioners' discussion of the way that regulation and compliance are managed, sometimes through strategies of risk and mitigation, often in concert with clients, or where questions of holding risk and indemnifying practice against, for example, compliance-related damage to brand reputation, are cited.
Codes	ETHICS, RISKS AND PRINCIPLES\trust	Trust is a code to capture allusions to the idea of trust and its importance in both client–agency relationships and as a value within the wider media marketing ecology. It also captures the importance of trust in relation to arguments about governance, which has amongst its functions the capacity to protect the media environment from consumers' distrust in promotional communications messages.
Codes	FORMATS ND MEDIA ENVIRONMENTS	
Codes	FORMATS ND MEDIA ENVIRONMENTS\affiliate	Affiliate marketing is a specific element in many branded content communications. Often taking the form of direct links to retailers for instance Amazon, or lately via the TikTok Shop etc. these marketing links often appear at the end of short videos or news stories and of course constitute an area for consideration in respect of governance.
Codes	FORMATS ND MEDIA ENVIRONMENTS\B2B	The emerging recognition of the use of various forms of branded content in Business-to-business contexts where branded content addresses professional audiences,
Codes	FORMATS ND MEDIA ENVIRONMENTS\Cinema	Some observations are made about specific media, including cinema
Codes	FORMATS ND MEDIA ENVIRONMENTS\Earned media	A component of the PESO model, the notion of various kinds of organic amplification and audience engagement linked to the quality interest value or usefulness of a piece of branded content. Often contrasted with paid media. And also, in an important distinction from owned media.
Codes	FORMATS ND MEDIA ENVIRONMENTS\Interruption	Interruption captures references to the particular facet mainly of paid advertising which is to interrupt attention, and which is often referenced as a counterpoint to branded content, whose definition includes the idea of integrated communications. Sometimes interruption is explained as one of the disadvantages of traditional advertising and one of the advantages of different forms of branded content. Sometimes interruption is referred to in connection with ideas of labelling and disclosure.
Codes	FORMATS ND MEDIA ENVIRONMENTS\Labelling	Labelling captures responses from answers which talk about the specific processes of labelling branded content, and this can sometimes extend into discussing how labelling works in non- visual media such as podcasts, and which, in any case, is a long-standing and fundamental component in the conversation around what governance in practice looks like and entails.

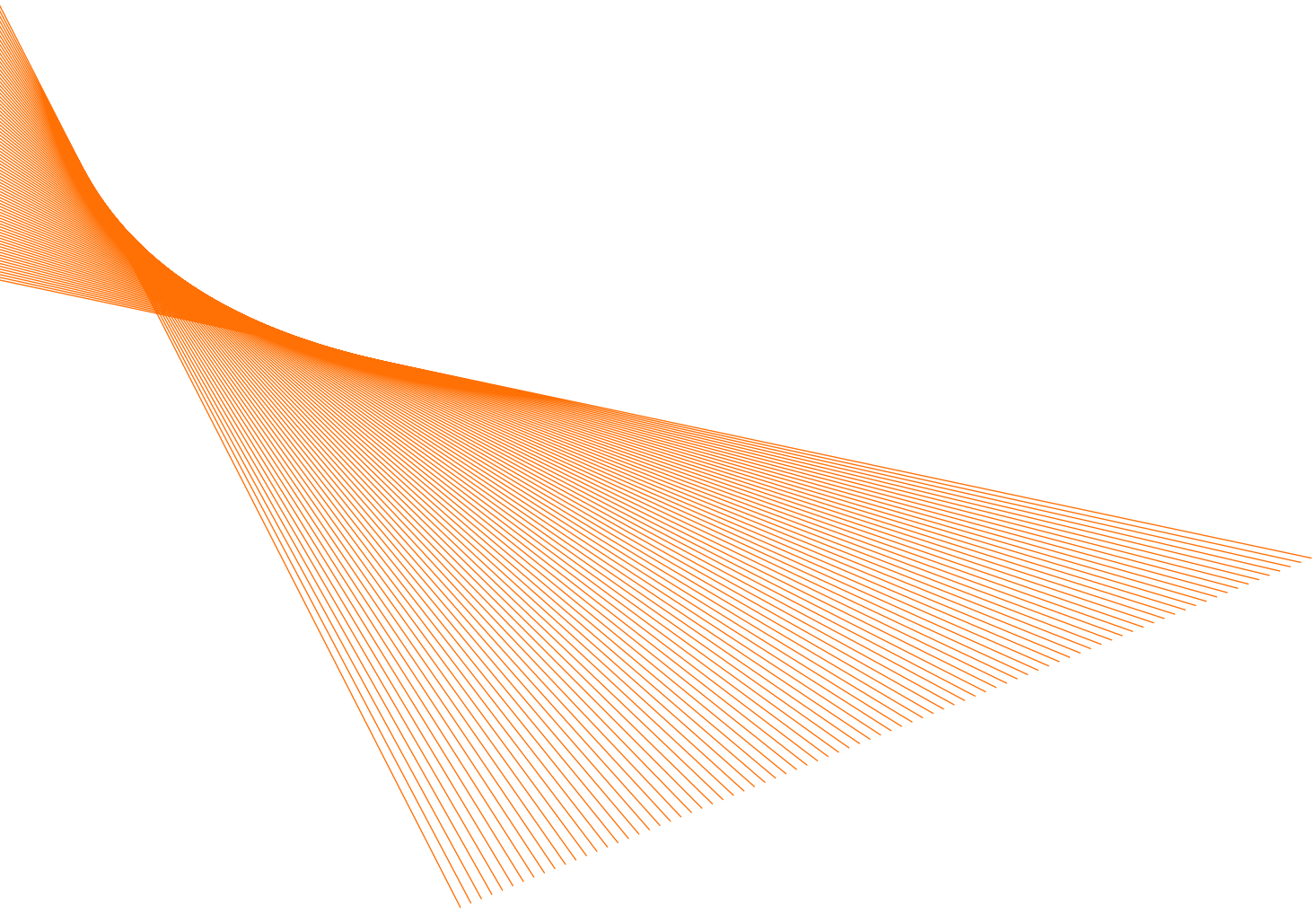
Codes	FORMATS ND MEDIA ENVIRONMENTS\live stream influencers	Livestream influencers captures references to a particular subspecies of influencers who operate in livestream environments, and which pose a particular challenge in terms of governance and oversight since the form includes a good deal of spontaneity and unscripted material, which is hard to label and difficult to anticipate for the purposes of governance, regulation and compliance.
Codes	FORMATS ND MEDIA ENVIRONMENTS\Nation branding	Nation branding reminds us that while branded content is normally spontaneously defined in relation to everyday consumer items and brands, in fact a good proportion of branded content production is involved in a variety of different types of client projects, including commissioning coming either through tourism or other agencies, from governments seeking to brand places and territories under the broad heading familiar from international relations and tourism studies of nation branding.
Codes	FORMATS ND MEDIA ENVIRONMENTS\OOH out of home advertising	OOH is an abbreviation for out of home, and refers to references to out-of-home advertising and brand communications— i.e. brand communications that don't happen through television screens, etc. Out of home is a challenging category these days because of the prevalence of mobile media, although it is still a viable and highly visible category in everyday life, and with retail media and the prevalence of addressable out-of-home poster sites posing a further dimension for thinking about branded content
Codes	FORMATS ND MEDIA ENVIRONMENTS\Owned media	Owned media is one important component of the well-known PESO model, and this code captures references to owned media often meaning media owned by big brands and which is deployed in branded content communications by big brands, especially those who have invested in brand studios to produce dynamic content supporting their branding activities through screens, television and internet distribution.
Codes	FORMATS ND MEDIA ENVIRONMENTS\Paid media	Paid media refers to media that has been paid for in terms of space or time, and this code captures references to paid media. Its traditional forms as advertising are often referred to as a counterpoint to branded content, although branded content, of course, is also paid media in many instances.
Codes	FORMATS ND MEDIA ENVIRONMENTS\Paid media\ payment	Payment is a further code to capture the processes and reflections on the place of payment within the branded content process, especially in relation to its implications concerning governance.
Codes	FORMATS ND MEDIA ENVIRONMENTS\Podcasts and podcasting	Podcast is a code to capture allusions to podcasting as a relatively new format, one which has attracted various forms of regulatory attention, as well as offering a new mode of creative branded content in audio formats and in line with some popular media trends.

Codes	FORMATS ND MEDIA ENVIRONMENTS\Public relations uses of branded content	PR, uses of branded content, is a code to capture the crossovers and extensions between branded content and the more classic, orthodox, and established discipline of public relations, with some branded content practices emerging out of older PR forms, such as corporate video-making.
Codes	FORMATS ND MEDIA ENVIRONMENTS\radio	Radio captures specific references to radio channels.
Codes	FORMATS ND MEDIA ENVIRONMENTS\retail media	Retail media is a code to capture references to various kinds of retail media. This might include the growing fashion for dynamic in-store media on walls and shelves, but also media channels owned by large retailers, including online retailers such as Amazon and TikTok Shop. There is a subcode for Retail Online TikTok Shop to capture specific references to that domain, which has a strong link to specific influencer- related forms of branded content.
Codes	FORMATS ND MEDIA ENVIRONMENTS\Sports	Sports captures the increasing and important role of sports in branding and its specific connection to different forms of branded content and the use of sports, and in sports, of branded content mechanisms.
Codes	FORMATS ND MEDIA ENVIRONMENTS\Targeting	Targeting is a code to capture practitioners' mention and interest in the place of targeting in branded content and in relation to its role in governance for example, targeting towards or away from children.
Codes	FORMATS ND MEDIA ENVIRONMENTS\Television	Respondent sometimes mention specific media, including television.
Codes	GOVERNANCE AND REGULATION	
Codes	GOVERNANCE AND REGULATION\ ACCOUNTABILITY	Where responsibilities sit for decisions and outcomes across brands, agencies, publishers, and platforms, including escalation routes, audit trails, and consequences when governance fails.
Codes	GOVERNANCE AND REGULATION\anti regulation	Attitudes and arguments resisting statutory or self-regulatory constraints, invoking creativity, free expression, market innovation, or perceived burdens on production/ the work of getting things done. Negative observations of frustration and difficulty/ intrusion
Codes	GOVERNANCE AND REGULATION\collaboration with regulators	
Codes	GOVERNANCE AND REGULATION\complaints	Complaints. This code captures references to complaints, to complaint systems, and to the role of complaints, which has significant prominence in some parts of the system in relation to registering infringements and operating governance in practice.
Codes	GOVERNANCE AND REGULATION\COMPLIANCE	Compliance describes and captures instances where respondents discuss various forms of compliance. We have distinguished between compliance which is proactive and compliance which is procedural or naturalised.

Codes	GOVERNANCE AND REGULATION\compliance and regulation proactive	Coded at instances where respondents talk about their active efforts to comply or to orchestrate compliance in re. to regulation. Either working within their team or sometimes proactively supporting clients.
Codes	GOVERNANCE AND REGULATION\confusion about regulation	Coded when there are various confusions or the general nation that regulation is in a confused or confusing state for practitioners and others in the field sometimes illustrated by reference to specific confusions or identification of frustrating contradictions in the mind of the respondent
Codes	GOVERNANCE AND REGULATION\DATA	References to various forms of data in the branded content process, including those linked to personalisation and also effectiveness.
Codes	GOVERNANCE AND REGULATION\definition of branded content	This code helps us to capture the variety of insights where brand content is defined in terms of their understanding and practice and sometimes more conceptually in respect of seeking to stabilise meanings sometimes done by contrasting branded content against other formats and also identifying subdivisions and types of branded content for example branded entertainment and different forms of marketing related content creation from influencers
Codes	GOVERNANCE AND REGULATION\Diligence and due care	Practitioner care and thoroughness across planning, production, and review, ensuring lawful, ethical, and culturally sensitive outputs that anticipate risks and correct errors swiftly.
Codes	GOVERNANCE AND REGULATION\Governmental statute governance	Our code for governmental statute captures instances where respondents refer directly to the general idea of governance by statute and by law, but more particularly when they refer to specific pieces of legislation or rules and law as they understand them.
Codes	GOVERNANCE AND REGULATION\identified codes of practice, named laws etc.	Connected to our broad code about law, we have a code to capture explicit references to particular codes of practice or named laws, or particular rules as understood by the respondents.
Codes	GOVERNANCE AND REGULATION\infringement types	Infringement types refers to instances where respondents talk about different types of infringement that they have witnessed or understood as important in the domain of branded content.
Codes	GOVERNANCE AND REGULATION\Law	Law is a general code to capture references to specific legal issues and the role of the law within the governance process as understood by practitioners.
Codes	GOVERNANCE AND REGULATION\LEGISLATOR V INTERPRETER	Legislator/interpreter, highlights the role played, sometimes, by regulatory bodies and by participants in seeking to explain, understand or interpret legislation and (the code refers obliquely to the sociologist Zygmunt Bauman's conjunction of these two adjacent but different roles in relation to the governance process)
Codes	GOVERNANCE AND REGULATION\PRESSURE	Pressure captures governance questions emerging around the variety of pressures facing practitioners in the context of commercial competition, time and task delivery, financial pressure, as well as pressure from clients and regulators, towards either compliance or non- compliance. The point is: there are pro- and anti-compliance pressures.

Codes	GOVERNANCE AND REGULATION\PROCESS (GOVERNANCE-IN)	This is an analytic top-level code around governance processes
Codes	GOVERNANCE AND REGULATION\PROCESS (GOVERNANCE-IN) \ ACCURACY BACK UP CLAIMS ETC. DILIGENCE	How claims in ads/ branded content are substantiated with credible evidence or sources, incl. third-party verification, trials, or data, to meet regulatory standards and audience trust.
Codes	GOVERNANCE AND REGULATION\PROCESS (GOVERNANCE-IN) \control	A subcode in client agency relationships but actually connected to a very specific technical legal notion of payment and control defining sponsorship/ branded content. Conversations about how where and when control is distributed in the content creator versus commissioning client relation
Codes	GOVERNANCE AND REGULATION\PROCESS (GOVERNANCE-IN) \Process	Process captures the extent to which governance is enacted and overseen through the application of specific processes and workflows. This is aggregated into the next code, which is governance in process, where governance is discussed and referenced in respect of such processes in action.
Codes	GOVERNANCE AND REGULATION\PROFESSIONAL GOVERNANCE	Professional governance captures depictions of governance in relation to professional identity and the important functional notions of professional standards, professional reputation, and so on, as well as the role of professionalisation, or indeed de- professionalisation, in the context of governance-related issues.
Codes	GOVERNANCE AND REGULATION\PROPAGANDA	Propaganda is a code devised to capture references to propaganda-like uses of branded content which sometimes steal into the spaces of political communication and governmental mobilisation of branded content formats.
Codes	GOVERNANCE AND REGULATION\Regulation collaboration	Regulation collaboration captures references from practitioners who discuss instances and modes of collaboration with regulators in the creation or verification of approaches for marketing communications.
Codes	GOVERNANCE AND REGULATION\regulation	Regulation is a meta code that captures the general discussions of regulation, including the variety of subcodes referencing regulations.
Codes	GOVERNANCE AND REGULATION\Regulation Compartmentalised	Regulation compartmentalised talks about engagements with regulation where it is seen as split off from, or otherwise distinct from, the main and major processes and preoccupations of the organisation or practitioner.
Codes	GOVERNANCE AND REGULATION\regulation CONFLICT relation	Regulation conflict relation talks about and captures instances where practitioners report various conflicts or disagreements around different forms of regulation.
Codes	GOVERNANCE AND REGULATION\regulation enforcement	Regulation enforcement talks about and captures respondents' references to, and consideration of, the question of enforcement in respect of regulations, policies, rules, and compliance requirements.

Codes	GOVERNANCE AND REGULATION\self-regulation	Self-regulation captures references to self- regulation and practitioners' discussion of its use as a component in governance, often in opposition to the lack of regulation at the industry level or various forms of governmental and statutory regulation through more formal legal and state political processes.
Codes	GOVERNANCE AND REGULATION\self-regulation mentions	Basic mentions of self-regulation
Codes	GOVERNANCE AND REGULATION\Statutory	Statutory is a subcode for the variety of references to law and legal instruments in relation to formal regulation, alluded to by many respondents.
Codes	POLICY & SYSTEM	Top level code linked to policy. Policy is a top-level code capturing points where practitioners actively discuss specific policies or the policy process, especially the extent to which it connects with their working practices.
Codes	POLICY & SYSTEM\Disruption & disruptive innovation	Various and different discussions connected to comments around technological creative or market disruption and consequential changing practice, especially where connected to governance and regulation
Codes	POLICY & SYSTEM\ globalisation	Globalisation captures the variety of comments about transnational and international communications, with a particular focus on navigating differential global approaches to branded content, which also links to our own interests via the 32 country reports on the variances and differences between judicial territories and regulatory frameworks at national levels.
Codes	POLICY & SYSTEM\Place based governance region	References to the particularities of place considered from a geographical perspective in the organisation of governance e.g. the difference between governance in different countries
Codes	POLICY & SYSTEM\ Programmatic advertising	Programmatic advertising captures references to this now dominant form of advertising distribution through digital online channels, often discussed in relation to its distinction from branded content formats, the notion of interruption, and also linked to a broader set of thoughts
Codes	POLICY & SYSTEM\Technology	Technology captures the regular references from practitioners around the intervention of, and through, technology in the branded content process.
Codes	POLICY & SYSTEM\ transnational	Transnational is an extension of place- based codes around the specific issues of governance and regulation across borders.
Codes	POLICY & SYSTEM\wild west	Wild West captures allusions to feelings and anxieties about unruly, unregulated, and ungoverned, or ungovernable, sectors of the promotional communication environment.
Codes	The BCG project	Our study is a code designed to capture references within debates about the function of our work and its relevance and connection to practitioners' understanding of their own practice.



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