What's Hot?!

October 2025

What to Know About Gen X, the New Big Spenders on the Block

In 2021, as the nation was coming to grips with the new realities of life post-lockdown and outside the EU, a sizeable change in the world economy went quietly under the radar. For that year was the first in three decades in which the Baby Boomers, a generation at once all powerful and yet much maligned, ceased to lead in global spending power.

Generation X, those born between 1965 and 1980, hold a buying power of $15.2 trillion, set to reach $23 trillion over the next decade, according to Nielsen IQ. But, like the Baby Boomers before them, this generation is still misunderstood and mischaracterised by sections of society. As brands find themselves increasingly reliant on this cohort, understanding the nuances within the group will be essential to unlocking their loyalty.

A generational shift, with caveats
While the balance of spending power may have shifted, Baby Boomers still command significant influence. Both the Prime Minister of the UK and the US President are Baby Boomers. According to Savills, over-60s, 90% of whom are Baby Boomers, hold 56% of the UK's total housing wealth. Indeed, while 74% of Baby Boomers own their home outright, this falls to just 34% of Gen X.

This leaves the roughly one-third of Gen Xers still paying off a mortgage more susceptible to financial strain. Sudden shocks in the housing market, such as those triggered by the inflation surge after 2022's ill-fated mini budget, exacerbate that vulnerability. According to Kantar TGI data, Gen Xers have a lower median household income than Millennials. While this is partially explained by higher retirement rates among the older cohort, it highlights the limits to Gen X's spending power.

What's more, as many hold caring responsibilities both for their own children and elder relatives, Gen X has been dubbed the 'caregiver generation'. This creates ramifications beyond their cohort: according to Nielsen, Gen X women influence 70-80% of all household purchasing decisions.

Myths and motivations
Far from being tech-averse, Gen Xers increasingly embrace new technologies for everyday convenience. According to TGI, this cohort is the most likely of all generations to own both a wearable smart device (32%) and a smart speaker (38%). Additionally, 49% agree that apps have made their daily routines easier.

Gen Xers embrace both digital ad linear channels as part of a balanced media diet, being the heaviest consumers of online news content and second only to Baby Boomers in their preference for live radio. This, coupled with rising usage of social media, offers brands the potential for diverse strategies to reach these influential consumers. And while there was previously a sizeable generation gap in adoption of generative AI, recent findings from the7stars' qualitative research community, The Street, found Gen Xers open to using AI for everything from Christmas gift ideas to travel itineraries.

Gen X may often receive less fanfare than Gen Z, Millennials, or Baby Boomers before them, but their spending power is substantial and only set to grow. Brands should ensure their strategies are tailored to this diverse and influential group. However, while the purchase power of Gen X offers an enticing prospect for brands, succeeding with this or any other age cohort will require more than a purely demographic approach to targeting. As always, brands should develop an audience strategy that considers the psychographics and behaviours – both in and out of category – of the consumers they wish to reach.

Why the Google Antitrust Ruling is Significant for Brands

Following a landmark antitrust lawsuit, Google emerged not quite triumphant but far from bruised. Following a previous 2024 ruling which stated that ‘Google had built and maintained an illegal monopoly over the internet search business’, US Federal Judge Amit Mehta ruled that Google could hold onto many of its biggest assets, including Android and Chrome.

However, the judge also ruled that Google can no longer enter exclusive distribution agreements for its search engine. This means that Google can no longer be the sole distributor of a product in the search space and must also share any data from its search results with competitors, a move which should help to level the playing field.

Also, in what was a turbulent week, Google was fined nearly €3bn by European Union regulators for ‘self-preferencing practices’ as part of a separate case that considered its dominant position in the ad tech space.

Google has been through similar trials before, but the most recent has had larger ramifications for the search industry. In 2017 and 2018, Google was handed fines. However, the 2025 outcome suggests we are seeing the shoots of deeper structural reforms of the advertising infrastructure – although we must await the outcome of Google’s appeal of the recent antitrust decision.

These structural reforms have twin beneficiaries. The first is Google’s direct search competitors. With access to Google’s wealth of search data, companies are free to offer advertisers an alternative platform without compromising on their predictor models. They also clearly benefit from the rescindment of Google’s right to exclusive distribution agreements as superior products will no longer be concentrated within Google’s domain. Without Google maintaining exclusive access, consumers may consider alternative platforms.

But while competitors may benefit from this ruling, it will also help put brands in the driving seat. Not only will they benefit from increased transparency to improve their ability to forecast costs and optimise campaigns, but they will also gain fairer access to alternative ad channels. This ruling may also grant brands greater planning freedom by diversifying search ad spend.

Google is likely to maintain its status as the main player in the search market. However, it is being increasingly challenged by competitors outside of the search engine category. LLMs such as ChatGPT now account for around 6% of desktop searches, a proportion that is set to grow.

While this isn’t the first legal threat Google has had to endure, it carries a significant impact for brands. Data from Google will now be more freely available and its search competitors are likely to become more competitive, which may allow brands to refine their approach.

Fresh or Foolish? Why Rebrands Keep Making Headlines

It is rare that a company rebranding makes international headlines, let alone a casual dining chain with locations scattered across small-town America, but that is exactly what Cracker Barrel recently achieved.

The decision to replace – and later hastily reinstate – the brand's 1970s-era 'old timer' logo drew hyperbolic reaction on both sides of the Atlantic. Social media users pondered whether the rebrand was an elaborate publicity stunt designed to generate renewed interest in the brand. Media commentators described the logo reversal as emblematic of the power of consumers to influence corporations, a narrative that particularly resonated, given the brand's popularity among rural and working-class audiences. Even President Trump, who has heavily courted such voters, weighed in.

Why brands rebrand – and why consumers take note
For those in marketing circles, the debate felt eerily similar to the hysteria that surrounded Jaguar's controversial rebrand late last year. In each case, commentators – many unlikely ever to dine in a Cracker Barrel or drive a Jag – quickly seized upon declining sales data as evidence that such rebrands had failed.

But while the long-term impacts of such efforts will take years to become clear, such design switches are almost never isolated decisions. Announcements may go viral in mere hours, but they are likely the conclusion of months of consumer research and careful planning, fuelled by a need for change.

In Jaguar's case, that change was declining sales and a need to pivot to electric vehicles, whilst Cracker Barrel was attempting to signal the arrival of a new menu and revamped interior design. On the British high street, WH Smith stores were suddenly replaced with a new, 'TG Jones' name, following the separation and sale of the company's retail arm.

The reaction to these changes – however positive or negative – shows the power of brand itself. As consumers we form relationships with brands over decades of exposure, such that any changes, if not effectively communicated, can feel like the loss of a family heirloom.

The power of nostalgia
Whilst some brands have adopted modern, minimalistic identities in recent years, others have embraced the past, such as IRN-BRU bringing back its iconic 'Made in Scotland from girders' tagline in its latest campaign. This tactic seems, counterintuitively, to resonate with younger audiences; a GWI report found that some 37% and 21% of Gen Z felt nostalgic for the 1990s and 1980s, respectively, despite none having living memory of such times.

Faced with turbulent political times, economic uncertainty and fears over excessive screen-time, the return to a bygone identity can offer comfort to consumers. But it also comes with risk, particularly if nostalgic branding evokes connotations best left to the past.

Iceland, in tweaking its tagline to 'That's why we go to Iceland' last year, offered a case study in retaining heritage without reinforcing outdated shopper stereotypes.

As with so much in marketing, behind every viral story lies a trail of consultants taking a calculated risk, and the recent Cracker Barrel controversy is no exception. But while sometimes a visual refresh is an unavoidable decision, it should always be taken in consultation with consumers.

Will Meta’s Paid Ad-Free Subscription Disrupt the Industry?

Facebook and Instagram owner, Meta, has announced it is introducing a new paid subscription model to remove ads for paying users. Users can expect to be notified in the coming weeks of the change, allowing them to choose whether to pay a monthly subscription to continue to use their chosen platforms ad-free.

This is not totally new, however. EU users of its platforms can already pay a fee starting from €5.99 a month to see no ads, following a contentious battle between Meta and EU regulators over data privacy. Despite this, the EU subscription has received little enthusiasm and has already been reduced from an initial €9.99 a month – with packages for UK users set to start at a lower £2.99 monthly fee.

This model comes after the UK's data watchdog, the Information Commissioner's Office (ICO), published guidance for firms about ad-free subscriptions earlier this year.

In its announcement, Meta said the subscription model would give users ‘choice about whether their data is used for personalised advertising’. Outside of consumers, this is likely to have significant ramifications for brands.

While initial uptake is expected to be modest, the exclusion of subscribers from targeting and measurement pools will gradually reduce the reach available to advertisers. Meta’s competitors will also be watching closely for signs of the subscription’s success, potentially leading to similar models becoming available to users in the future.

To stay ahead of the curve, brands should monitor changes in audience composition, particularly among privacy-conscious and higher-income users, and should anticipate marginal increases in CPMs and CPAs in tightly contested segments.

To mitigate the impact of audience fragmentation, advertisers should maintain broad targeting structures and continue using Meta’s automated tools such as Advantage+ Shopping. Frequency caps should be applied judiciously as opt-outs grow. At the same time, investment in robust measurement infrastructure, including CAPI, offline conversions, and incrementality testing, will be essential. These tools will help to preserve performance visibility as the pool of trackable users diminishes.

Finally, the shift towards subscriptions appears to coincide with Meta’s broader push to invigorate its creator ecosystem. Brands should take this opportunity to lean into creator partnerships, which offer a durable route to attention, even when ads are switched off. Creator content remains visible to subscribers, helping to maintain brand presence and cultural relevance in a landscape where traditional reach is no longer guaranteed.

AI Influencers are here. What does this mean for brands?

Influencers are undoubtedly a hot topic in advertising. In last month's edition, we covered why influencers should be considered a worthwhile marketing channel within a balanced media plan. However, this strategy applies directly to human influencers, overlooking the emerging cohort of AI influencers now being leveraged for marketing purposes.

AI influencers are not human influencers within the field of AI, but rather AI generated 'content creators' who do not exist in real life. Until recently a niche concept, this group has become increasingly relevant to the advertising industry over the last few years.

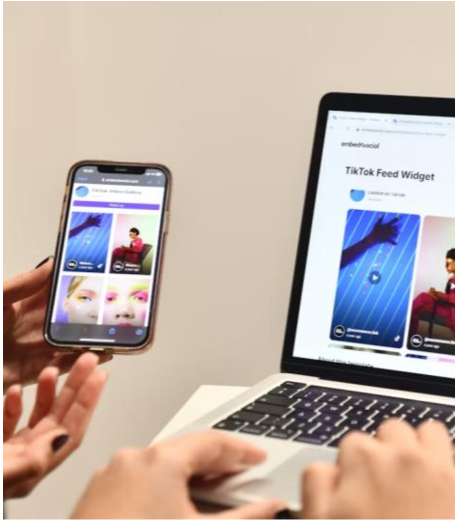
We are still early in the life cycle of AI influencers, yet some have already amassed millions of followers on social media and command eye-watering fees for sponsorships. One of the most prominent influencers within this virtual cohort, Lil Miquela, has partnered with brands as well-known as BMW and Calvin Klein, and brands who wish to join this list can expect to fork out as much as $73,920 per post. For context, that figure stood at $10,000 in 2023. The AI Influencer market is burgeoning, and it proves lucrative when executed well, benefitting both the team behind the profile and the partnering brand.

There is no template for a successful AI influencer partnership, however. As with any emerging forum, brands are experimenting. Some partner with existing AI influencers, while others create their own. Others still utilise AI influencers without fully disclosing their methods. Lil Miquela's unique selling point is the fact that 'she' owns being fake, while other AI influencers such as Mia Zelu and a recent German Vodafone influencer skirt the margins of reality. In both instances, many consumers are led to believe that the figures on their screens are real people, as evidenced by the replies to such posts.

This poses an ethical risk for brands. When Vodafone, in response to a comment, admitted the character was fake, some consumers reacted negatively to the lack of transparency shown.

While online buzz around AI influencers has grown by 50% year-on-year, a significant proportion of this is negative press. This poses a challenge for brands wishing to collaborate. The boundaries of acceptable behaviour for AI influencers are far less clear than for their human counterparts. An influencer being shown in both New York and London on the same day may be permissible, but the same influencer being shown as a cancer patient as part of a charity partnership may cross a line for some consumers.

In the current risk-averse media landscape, where the cost of dull has never been more detrimental for brands, it is commendable for brands to experiment with such new technologies. However, the risk of reputational damage, likelihood of divided consumer sentiment and the high costs of partnering with the few AI influencers to have cut through so far mean brands should exercise caution. As always, look to add to your marketing toolkit, but first consider the power of human influencers for your brand.

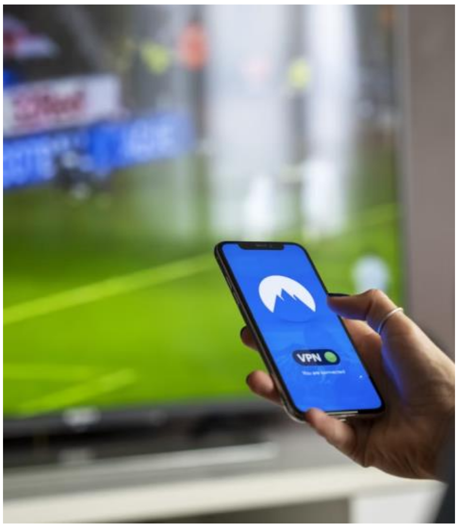


Gen Z Using Facebook more than TikTok

According to new YouGov research, 75% of Millennials and 59% of Gen Zers who are active on social media continue to use Facebook. However, among Millennial social media users, only 33% say they're on TikTok, alongside only 56% of Gen Z users.

Despite many believing that Gen Z is abandoning legacy social platforms like Facebook in favour of reactive, fast-paced apps like TikTok, the data suggests this group remains engaged across both platforms.

The research also concluded that after Facebook, YouTube is the second most popular social media platform in the UK, reaching 65% of British social media users of all ages.



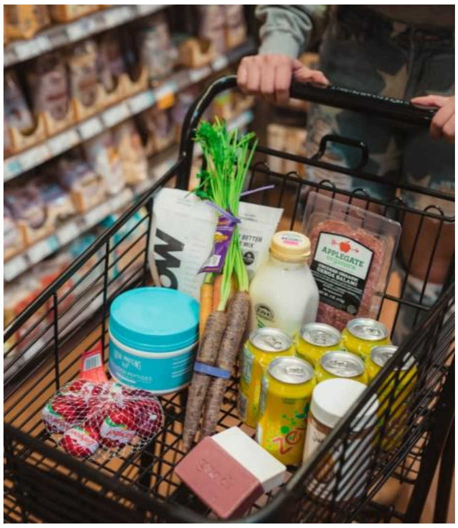
Global Sports Piracy Site Streameast Shut Down

The Alliance for Creativity and Entertainment (ACE) joined forces with the Egyptian police to close popular piracy site Streameast, which drew more than 1.6 billion visits over the past year.

Millions used it to access streams of sports such as Premier League football matches, Formula One races and Major League Baseball games.

According to the BBC, ACE chairman Charles Rivkin said it was a 'resounding victory in its fight to detect, deter, and dismantle criminal perpetrators of digital piracy'.

'With this landmark action, we have put more points on the board for sports leagues, entertainment companies, and fans worldwide,' he said.



Waitrose Trialling AI Trolley Tech to Track Purchases

Waitrose is testing an AI computer system that will recognise products as customers place them in their trollies, starting on a small scale with their Bracknell store.

The devices, supplied by Israeli software firm Shopic, enable retailers to 'understand everything that happens on your retail floor'.

Waitrose will also be able to use location data on the devices to track how long customers spend in each aisle, their route across the shop, and their 'shelf interactions' to better understand consumer journeys.

This comes as Amazon announces all of its 19 Amazon Fresh grocery stores in the UK will close.