



# ***What's Hot?!***

**December 2025**



## What the Proposed Sky Acquisition of ITV Would Mean for Brands

Few announcements have rocked the media world in recent times quite like this one. Comcast, parent company of Sky, [is in talks](#) to acquire the media and entertainment arm of ITV.

They say 70 is the new 50, and that certainly rings true for this proposed merger. ITV [celebrated](#) its 70<sup>th</sup> anniversary this September and, with it, the 70<sup>th</sup> anniversary of the first TV advert to hit UK screens. The Sky-ITV merger, if it comes to fruition, would represent one of the biggest commercial broadcasting shake-ups in the seven decades since. The proposed £1.6bn deal still faces major regulatory challenges but, if it clears those hurdles, would lead to 70% of UK TV ad revenues being controlled by a single entity.

Still, those hurdles are numerous, and passage is far from certain. For one, the combined entity would command a near-monopolistic position in the broadcast ad market, where ITV and Sky are currently the primary and secondary forces. This will likely trigger intense scrutiny from both the media regulator, Ofcom, and the UK's Competition and Markets Authority (CMA).

Indeed, previous merger attempts involving both companies have been blocked on similar grounds. In 2018, Fox's proposed takeover of Sky [was blocked](#) on the grounds it would give the Murdoch family too much control over UK news providers. Earlier still, BSkyB – as it was then known, prior to its acquisition by Comcast – [was ordered](#) to reduce its stake in ITV on monopoly grounds.

Furthermore, an acquisition by the US-based Comcast may be challenged due to ITV's status as a public service broadcaster, particularly given that its 40% stake in news provider ITN [is included](#) as part of its media and entertainment arm.

Should the proposed deal succeed, its impact on advertisers would be mixed. Ian Daly, Head of AV Investment at the7stars, highlights a benefit. 'Combining Sky's addressable advertising technology with ITV's mass reach to create a single, data-driven proposition [helps keep] UK TV ad budgets within the domestic ecosystem, rather than losing them to Google and Meta.'

However, the deal is also fraught with risks. The dominant market position of a combined Sky-ITV entity could, Daly projects, lead Comcast to 'use its new market power to push up prices for advertisers'.

Though ITV's broadcasting arm remains profitable, its CEO Carolyn McCall has forecast that, just as they did in Q4 2024, its ad revenues [will decline](#) by high single digits in the final quarter of this year. That Sky has come back for another bite at the ITV cherry suggests that it believes the threat to broadcasting revenues is significant enough to warrant a combined business.

As the7stars Founder, Jenny Biggam, [recently told](#) Campaign, 'a single point of sale could finally make planning and buying across platforms more streamlined, with more joined-up targeting and measurement'. Such a development could help to safeguard broadcast ad revenues for years to come.

However, like the proposed mega media mergers that came before it, the only certainty in the Sky-ITV deal is that much uncertainty remains. As Biggam concludes: 'The real test will be whether this move genuinely modernises TV trading, something many of us think is well overdue.'



## The Trust Factor: Why Direct Mail Works for Brands

Trust is foundational to business success, and direct mail outperforms other channels in driving consumer choice, according to new research published by Marketreach. The report, *The Trust Factor*, has been endorsed by the Advertising Association and includes a foreword from noted journalist Emily Maitlis.

‘Without trust, no relationships are possible, either personally or in the commercial world,’ the report begins, noting that trust directly drives 13% of consumer consideration of brands and is a major influence on brand usage and loyalty. The report then outlines the eight pillars of trust in order of importance as 1) Reliability (2) Reciprocity (3) Aligned Interests (4) Stake (5) Familiarity (6) Fame (7) Frequency of Communication and (8) Tenure.

The research was conducted through a rigorous, multi-stage methodology, including literature review, expert interviews, an ethnographic study of 20 consumers and a nationally representative study of 4,000 UK adults measuring 125 potential trust attributes.

In her foreword, Maitlis quotes the US commentator Thomas Friedman in describing trust as ‘the only legal performance-enhancing drug’. But as the research notes, brand trust is also a two-way street; 60% of consumers will stop using brands that break their trust. Says Maitlis: ‘If the Uber lets you down, if the eBay package doesn’t arrive, if the seatbelt jams or the restaurant gives you food poisoning, then our trust is shaken, broken – sometimes destroyed.’

That is why it is essential for brands to communicate with consumers in the most effective way. For advertising and other communications to be effective, the channel choice and the figurehead delivering it must both align with brand and audience. The research finds that the success of a campaign depends on trust being delivered by the messenger (52%) and the medium it is delivered in (40%). With those in place, the final 8% of impact is down to the power of communications to deliver an advertising message that stands out, confirming what we have always known, advertising alone cannot fix and untrusted brand.

Using conjoint analysis to understand consumer preferences, the report finds that direct mail has more than twice the impact on trust of the next closest channel. In the research, 54% of respondents say that they ‘completely’ or ‘somewhat’ trust the channel – followed by TV adverts (51%), app notifications (51%), emails (49%) and press adverts (48%), with social media lagging behind (35%). This shows the enduring ability of physical media to cut through in a world of AI-driven noise, as recently [highlighted](#) by Foresight Factory.

Cameron Russell, Head of Marketing at Marketreach, says: ‘Trust drives brand choice — and Marketreach’s latest report proves it. It reveals that when consumers trust a brand, 92% take action and 74% spend more. With direct mail emerging as the most trusted channel, this report offers brands a strategic framework – including the eight pillars of trust – to build trust and unlock commercial growth.’

The full report, including details of Marketreach’s new Trust Explorer tool, which helps brands to pinpoint the trust factors and channels they should focus on most, can be downloaded [here](#).





## The Creatives of Christmas Past vs. The Creatives of Christmas Yet to Come

That time is upon us again. Bublé and Mariah are on the airwaves and so are this year's portfolio of Christmas ads. With so much anticipation of what brands' new festive releases will bring, it seems many received a similar memo – to not show us anything *new* at all.

IRN-BRU has long been a frontrunner of this approach, with its 'The Snowman' creative, first seen in 2006, [returning](#) this year. The repetition of this creative in its many iterations has helped anchor the brand at the start of the festive season, particularly in Scotland, where it has achieved the status of an iconic ad. Similarly, Coca-Cola has brought back its distinctive 'Holidays are Coming' ad with a new creative execution, having been a staple of the season for the last 30 years.

This year, other brands have recognised the reward in revival, with brands like Amazon leaning on their creatives of Christmas Past. Indeed, in Amazon's case this entails not an annual tradition but rather a regifting of its 'Joy Ride' creative [from 2023](#), with the world's biggest advertiser placing its faith in an old favourite, potentially a bellwether of the importance of nostalgia to many consumers.

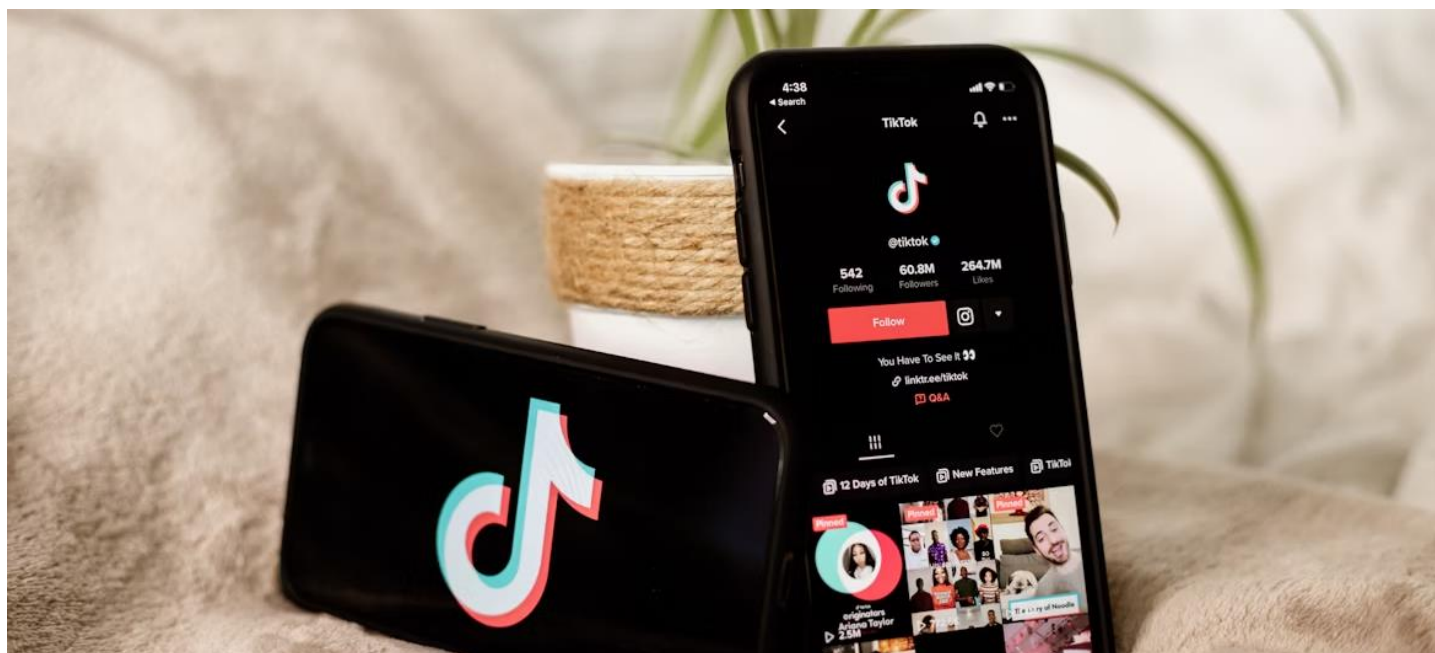
As more and more brands get in on the nostalgia act, many questions remain: is it risky to bring back something people have seen before, especially when a brand's Christmas ad is highly anticipated? Have brands become lazy? Have they all simply run out of ideas? Or, is a well-loved creative just the gift that keeps on giving? Is the real risk that you release a new ad that lacks the emotional connection of the ones that came before?

The results speak for themselves in System1's [Christmas Ad Rankings](#), with Amazon's 'Joy Ride' taking the early top spot. The ad struck the most emotional response from consumers and demonstrated that this was a powerful and effective move from Amazon for long-term brand building.

It's also interesting to note that Aldi and Sainsbury's place fifth and ninth respectively on this list. Although they have created new spots for this year, they too are playing into the power of festive nostalgia.

We must also consider the general mood of the average consumer and how this impacts their receptiveness to Christmas ads. According to quarterly tracking from the7stars, consumers are feeling significantly less happy than they did this time last year (the QT, November 2025), with almost a third of Brits reporting that they now feel less comfortable with their income than before. This is reflected in some of the biggest Christmas ads of the year, with many [tapping into](#) themes of affordability and toxic masculinity as they seek to reflect back the mood of the nation.

With the Christmas spirit perhaps feeling a little low this year, maybe it was the perfect time to be reunited with old, well-loved characters of the Christmases that have come before. Perhaps in unpredictable times, there's comfort and hope in the nostalgic, predictable familiarity.



## The Power of Influencer Marketing – and Why We Need to Measure It

2025 is drawing to a close, and what a year it has been in Media. Even as murmurs of mergers and anticipation for AI dominated the headlines, one subject that has permeated throughout the industry this year is influencer marketing. From marketing giants like Unilever committing [huge swathes](#) of their budgets to the field, through to some of this year's [most awarded](#) campaigns being influencer-first, this is certainly an exciting time for the relationship between influencers and the media plan.

As an emerging channel growing at unprecedented scale, the bank of evidence on the effectiveness of influencer campaigns is finally starting to catch up with investment. A landmark paper from Felipe Thomaz of the Saïd Business School, [How Humans Decide](#) has outlined the propensity for different media to influence at different stages of the purchase journey, with paid media most effective during the priming stage before owned, shared and earned touchpoints become most impactful once a consumer is actively in the market.

Among the most intriguing findings of the research is the variation in consumer behaviour: across the population, receptivity to media sits on a spectrum, but clusters at the extremes, with 23% being 'unreceptive' to nearly all media and, at the other end, 10% of consumers susceptible to a wide array of messages. This shows that, while large databanks like that used by the Oxford scholars can offer clues to marketing success at an aggregated level, brands should always pay close attention to their category and its consumers. Tools like the7stars' Gravity Planning framework offer an effective way to understand the distribution of category shoppers across the active, primed, dismissive and inert stages of purchase.

Despite these developments, the ability to accurately measure whether an influencer campaign has been successful is still in its infancy. While traditional media has long been measured, and the tools to do so honed and perfected, many still rely on a disjointed array of metrics such as engagement and comments to determine the success of a content-creator-led ad. This creates a world in which many advertisers are stepping into the unknown; as Kantar's Jane Ostler aptly [describes](#), '50% spend on influencers [means] 50% spend over which you don't have complete control'.

To tackle this challenge, the7stars has developed the Influencer Affinity Score framework. Working in collaboration with our in-house creative agency, Supernova, the7stars conducted proprietary research to understand what makes an influencer campaign successful. The findings revealed that the best content creator partnerships are those which are both culturally relevant and feature influencers who are aligned with the brands they promote. Such influencers are those which are seen as authentic, credible within the category, and relatable to the audience.

While not a catch-all measurement solution, Influencer Affinity Score goes beyond platform engagement metrics to provide a clearer picture of how a campaign resonated with audiences and its impact on the brand health funnel. This, combined with sales uplift analysis and marketing-mix modelling, can help bolster the marketing toolkit and offer indicators for future adjustments.

Like any channel, measuring success in influencer marketing is complex, but with the amount of money being invested in content creators rising steeply, it is paramount that brands continue to invest in understanding whether their advertising budgets are being spent wisely.





## The Enduring Appeal of Appointment TV: The Ultimate Celebrity Traitors Twist

Round table ready? Grab your shield – appointment-to-view TV continues to draw mass audiences. Much like a room full of celebrities sweating over side-eyes and murdering in plain sight, the *Celebrity Traitors* final had many Brits saying, ‘I’m 100% Faithful... to watching live.’

Broadcast TV has been in steady decline over the past decade, particularly with younger viewers, as many [flock](#) to SVOD and digital platforms such as YouTube, TikTok and Instagram. Ofcom’s latest *Media Nations* report showed that that time spent with broadcast channels was down 4% in 2024, with weekly reach among all adults down by 1.7%pts.

However, the rate of decline was notably slower this year. Perhaps consumers are settling into a new equilibrium where digital platforms compete for the lion’s share of our time, but traditional, broadcast moments reign supreme in the battle for the cultural psyche.

Nothing better illustrates this than the finale of *Celebrity Traitors*, which drew [over 11 million](#) live viewers and an 81% overnight share, numbers comparable only to the final stages of major sporting events in recent years.

**The Event TV Phenomenon:** While this doesn’t mean we will all suddenly return to the turrets of classic telly, when it comes to real-time drama and viral gold, linear TV is still king. In the age of multi-screening, fear of missing out – or the threat of seeing a spoiler – trumps the convenience of on-demand viewing. Alliances are made, feuds are born, and, let’s face it, watching a live backstab is much juicier than a catch-up in your pyjamas.

Properties like *Celebrity Traitors* succeed because they translate television viewing into a true national event, reminiscent of the days when families would gather around the TV for shared experiences. The BBC series demonstrated the power of communal viewing and water-cooler conversation.

Key to the show’s success, it drew viewers from all generations, including Gen Z, typically least interested in scheduled TV. However, A-list celebrities, high production values, and interactive online buzz, particularly through TikTok and Instagram, played a crucial part in boosting its popularity.

### **How Advertisers Can Join the Round Table:**

It will not be lost on many brands that, for all the viewers flocking to *Celebrity Traitors*, the event occurred on public licence-fee funded TV. However, this does not mean brands are banished from the conversation.

A golden opportunity for reactive brands lay in joining the nation’s enthusiastic conversation on social media: from a fashion brand sharing how to ‘steal Claudia’s look’ through to an FMCG brand debuting new flavours and asking the public which should be banished.

Moreover, as publishers flock to create click-driving stories discussing new episodes, brands can ensure their content appears alongside the hottest news. A [recent analysis](#) showed that almost two-thirds of articles related to *Celebrity Traitors* were flagged as unsafe due to their use of terms such as ‘murder’. This ‘fear of missing out’ can be avoided by ensuring all quality newsbrands are marked as brand safe, a strategy [championed](#) by Bountiful Cow.

*Celebrity Traitors* has proven that with the right mix of format, suspense, and star power, linear TV can still unite a nation and dominate cultural conversation in the age of streaming. With a new *Traitors* series just weeks away, advertisers should consider how their brands can gain a seat at the coveted round table.



## Diminishing Concerns Over Online Safety Act for Digital Advertisers

New Ofcom data has revealed that the percentage of Brits using Virtual Private Networks (VPNs) to access the internet has declined by a third since July, alleviating fears that the Online Safety Act could cause adverse effects for digital publishers.

The introduction of the legislation in July caused a spike in VPN downloads, with the number of daily active users in the UK spiking to 1.5m. But this had dropped to 1m daily users by late September, according to Ofcom's tracking, only marginally above the numbers before the Act came into effect.

Mass adoption of privacy tools like VPNs would seriously threaten the industry, preventing the ability to track and geo-target users, with many also including ad-blocking technology. When the legislation came into effect, there was also concern that the Act could speed up the spread of dark traffic, a critical issue for digital advertising.

However, five months later, and it appears as though predictions of mass VPN adoption and a surge of dark traffic were too pessimistic. This will allow digital publishers to breathe a sigh of relief.



## Music Streaming Growth Stalls as Subscription Prices Rise

The growth rate of online music streaming has been eclipsed by the growth rate of vinyl sales in the UK for the first time, according to industry data. The year-on-year growth rate of streaming-equivalent albums – the metric used to determine chart performance – was 4.9% in Q3 2025, down from 11.4% growth the year before, [according to](#) Music Week.

Conversely, vinyl sales were up 7.4% so far in 2025, compared to 5.9% YTD growth in online streaming. Streaming still accounts for a far greater share of the market, but even small shifts back towards physical media can have major implications for record labels, with one vinyl album sale equivalent to 150,000 streaming-equivalent albums in the UK Official Charts.

As the market has grown mature, streamers including Spotify have shifted away from their previous model of holding prices low to attract listeners. The costs of a Spotify individual and family plan [rose by](#) £1 and £2 respectively in October. Still, most consumers seem prepared to accept the move; the proportion of Brits saying they had increased spend on entertainment subscriptions rose by 2%pts in November (the7stars QT).



## 'Classic' OOH Growth Outpaces DOOH in Q3

The UK Outdoor advertising market grew by 4.4% in Q3 2025, with traditional, paper-and-paste style OOH growth (6.5%) notably outpacing Digital OOH (3.3%), [according to](#) industry trade body Outsmart. However, DOOH continues to account for two-thirds of overall OOH revenues.

This comes as the Advertising Association & Warc [increased](#) the forecast growth for OOH in 2025 in their latest Expenditure report to 3.1% year-on-year, compared to 6.8% for the wider UK ad market.

The growth of classic OOH formats is partly influenced by the new HFSS restrictions, which have been widely and voluntarily adopted by brands ahead of official rollout in Q1 2026. With HFSS brands forbidden from advertising on paid online and TV pre-watershed, many have pivoted to OOH as a means of reaching mass audiences. Thus, traditional OOH is seen as a safe channel for continuing to target consumers at scale.