



What's Hot?!

February 2026



Grow 2026: An Independent Voice Cutting Through a Noisy, Fragmented World

This January, the7stars' clients, colleagues and partners gathered for the second annual Grow conference, held at Odeon Luxe's Leicester Square Cinema. In the previous year, the average UK adult spent a staggering 2,999 hours (125 days) with commercial, ad-funded media. Attention hasn't disappeared; it has fractured. And in that fragmentation lies the defining challenge and opportunity of the year ahead.

This year's agenda addressed four themes defining the future of growth: navigating constant change, shifting strategy for an age of abundance, unlocking growth through modern communication codes, and transforming marketing by empowering people. Across each, the ambition of our guest speakers and the7stars' expertise was simple: cut through the noise and make sense of what's next.

Geopolitical tensions have reshaped the global order, moving us from easy globalisation towards competing spheres of influence. For brands, geopolitical complexity has become an unavoidable strategic variable. Decisions around sourcing, partnerships, prioritised markets and even comms now carry geopolitical weight.

The media ecosystem echoes this theme of abundance and complexity. Fragmentation isn't a weakness, but an opportunity, as audiences spend more time with media they actively choose. To benefit, brands must move away from isolated experiments and adopt integrated planning that turns insight into action at pace.

In just a year, AI has rewritten the rules of discovery. Consumers now treat AI recommendations as trusted filters that simplify overwhelming choice. Large language models now act as gatekeepers. In this new reality, AI is the most influential distribution channel we don't control. Brands must strengthen their clarity, credibility, community endorsement and the signals that AI uses to decide who surfaces and who vanishes.

Creativity must evolve alongside this transformation. While platforms push novelty, behavioural science remains consistent: people remember what is fluent, concrete and familiar. Creativity in 2026 is less about reinvention and more about adaptable systems of expression, flexible enough to work across platforms, consistent enough to reinforce an identity. Consistency isn't a constraint; it's a competitive multiplier.

Trust has become fragile, and audiences no longer reward brands for making noise, but for showing up with clear intent. Identity today is fluid, with communities forming around passions rather than demographics. Reach now matters less than relevance, so brands must focus on the audiences who actively choose them. But affinity with passion-led communities can't be bought, it has to be earned through listening, collaboration with creators, and respect for community norms.

Finally, none of this is possible without a fundamental rethinking of how teams work. Silent work patterns, fragmented processes and burnout impose hidden costs that slow organisations down precisely when speed matters most. Teams need shared AI practices, transparency, experimentation and the psychological safety to adapt. In a world defined by abundance and acceleration, empowered people remain one of the few true competitive advantages.

Grow 2026 emphasised a singular truth. The brands that will lead from here are those willing to match the pace of the world around them, acting with intent, learning faster than their competitors, embracing AI's new logic, and showing up in culture with authenticity. The event served as a reminder that independence of thought, strategic clarity and empowered teams are now the real levers of competitive advantage.



What Netflix's Entry Into the Podcast Game Means for Spotify and YouTube

The podcast industry is continuously growing, evolving from a niche medium into a mainstream channel available across a range of environments. In just a few years, podcasting has become a go-to space for storytelling, news and entertainment. New opportunities continue to emerge, such as the rise of vodcasts.

Joining this momentum, Netflix has announced plans to enter the podcast space with live shows featuring Bill Simmons and dozens of additional podcast titles. This move challenges Spotify's dominance in audio-first podcasting and YouTube's leadership in video podcasts, signalling potential shifts in how podcast advertising is bought and planned.

Netflix has a track record for trialling new ideas, from reshaping TV consumption to experimenting with gaming and new formats. Its six- and seven-figure talent deals suggest a strategic push into video-first podcasting, using algorithmic promotion to test audience response before scaling investment.

Netflix's entry puts pressure on Spotify by weakening the appeal of its exclusive content model. Compared with Netflix's vast built-in audience and major network partnerships, Spotify's approach feels narrower, potentially pushing creators toward platforms with broader reach. As demand for visual content grows, Netflix's video podcast format aligns with audience preferences, while Spotify remains primarily audio-focused, urging a rethink of its strategy.

At the same time, Netflix's move into video podcasts directly challenges YouTube's polished, studio-level creator ecosystem. However, YouTube still holds a major advantage through its strong ad-revenue model, which offers creators higher earning potential than Netflix is likely to match. The platforms also operate on fundamentally different models: YouTube is open and built for discovery, while Netflix is closed and subscription-based, which may slow the scale of its competitive impact.

As new platforms enter the market, competition for top creators and premium inventory is intensifying. However, after years of heavy investment from Spotify, the market is beginning to stabilise. Meanwhile, hybrid video podcast formats are reshaping how podcasts are produced and consumed.

Netflix's move into podcasting will also have implications for how media agencies plan and buy podcast inventory. With Netflix entering the space with a video-first model, agencies may need to rethink traditional audio buying strategies and consider how podcast placements fit within broader video plans. The introduction of premium, studio-quality video-podcasts on a subscription platform could create new high-impact environments that sit closer to TV and OLV than to conventional podcast buys. Increased competition among platforms is likely to create a more diverse range of inventory, giving agencies more choice, but adding complexity around measurement, cross-platform frequency and audience duplication. As hybrid formats grow and more players enter the market, agencies will adopt more flexible, platform-agnostic approaches, evaluating podcasts not just as audio channels but as part of a wider content buy.

Overall, the podcast ecosystem is shifting into a competitive and fast-moving phase, driven by new formats, new players and evolving audience expectations. Netflix's arrival accelerates this momentum, pushing the industry towards more visual and innovative content models. While Spotify, YouTube and other established platforms still hold strong positions, they can no longer rely solely on the strategies that built their early success. As video podcasts grow and monetisation models mature, the platforms that thrive will be those able to adapt quickly and continue meeting audiences' appetite for flexible and engaging content.



What Media Can Learn from the Push Towards Creative Authenticity

AI content is here, both crude and credible, and the creative world is being shaken by the repercussions of anyone being able to make anything, at any time, using just the device in their pocket. This rapid evolution, naturally, has met with [pushback](#), fuelling a countermovement towards more rough-and-ready, authentically human content and creative expression.

While many in our industry are toeing the line of engaging with AI while still trying to make clear their value as a human creator, [concern is growing](#) and the creative world is rumbling with efforts to show real people, with real stories, who [made real things](#).

With this same mentality, there are a number of ways in which media, too, can drive authentic, human connection and brand awareness.

Moving into the real world

It [has been argued](#) that AI exists within the so-called uncanny valley, where the inability to decipher what we are seeing on screen breeds discomfort and distrust. From deepfake content creators to [fictitious events](#), rarely does a week go by without news of AI-generated content having duped consumers.

This creates an opportunity for experiential activations that exist firmly in the real world. From pop-up events to immersive inventory, such as London's Outernet, brands can become not only front-of-mind but literally right in front of the consumer.

Flyposting and street art

Take a walk around central London and you will see a wave of graffiti on paving stones, in chalk, with motivational or emotional phrases on them. One, near the7stars' office reads, 'It took a lot of sadness to be this soft'.

This is reminiscent of the resurgence of flyposting, one of the oldest forms of physical media. Whether tactically flyering near a competitor's activation, or partnering with street artists to create [community-led murals](#), brands have a multitude of ways to reach new audiences while promoting authentic art.

Sometimes, such experiences can happen by accident. Last December, a [new Banksy mural](#) emerged next to a H&M activation at Tottenham Court Road, driving new audiences and fresh eyeballs onto the site.

Showing up in cultural moments

The comments section of a viral post can be a valuable tool. Hopping on trends and selecting cultural moments in which to participate demonstrates a human awareness AI cannot replicate. When brands engage in a human way, where readers can imagine a person on the other end writing it, they are more likely to engage. It humanises a brand to ensure more people observing feel they share values and identity markers with the people behind the media.

While AI will eventually form – and for many, already is – an essential part of the media and creative toolkit, there will always exist a space for raw, human-led content. In a world of volume without value, increasingly proliferated by AI babble and uncanny valley content, brands that show up in real and experiential ways will drive cut-through with consumers.



Are We Entering the Era of Conversational Commerce?

Google [has announced](#) a new feature as part of its ongoing efforts to streamline the conversion journey for users through AI. The change will allow users to purchase without ever having to leave the Google ecosystem, through AI mode and Gemini AI agents.

This follows ChatGPT's Instant Checkout and Microsoft Copilot Checkout features. While adverts have yet to hit UK AI models, advertisers are already gearing up for the day in which sponsored, brand-led content can play a role in these new purchase journeys.

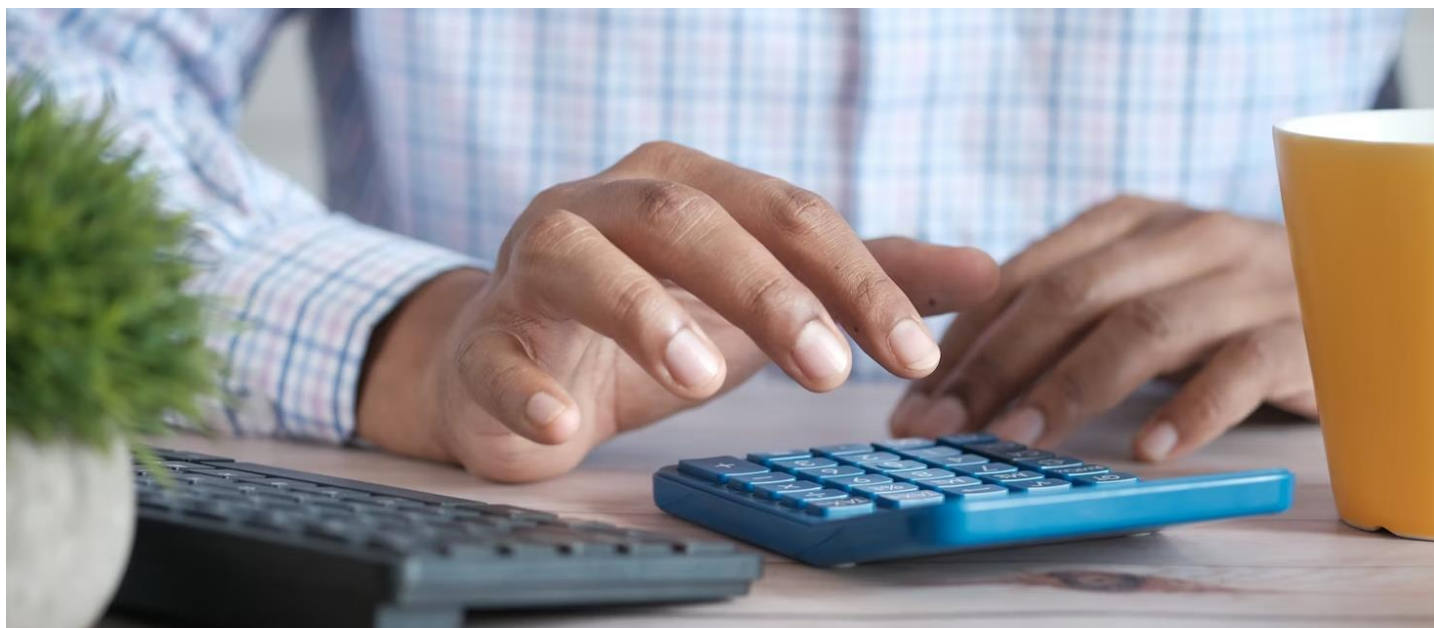
Google's move towards 'zero-click' searches [has become](#) more and more evident with the mainstream use and push of AI, through AIOs (AI Overviews) and Gemini. These features are already cutting out a lot of the research phase for consumers. They may be driving higher intent clicks to websites, but they do so at the cost of first-party data for businesses. This can limit marketing effectiveness across channels, and is set to become a wider issue as businesses start to see zero-click conversions. How data will be reported in Google Ads, Google Analytics, and Merchant Center remains unclear at this time.

This new feature is being powered by Universal Checkout (UCP), Google's new commerce system. The merchant will still be the source of the sale, with Google's AI going into the back end of the seller's website to complete the purchase. The idea is this will remove multiple steps for the user, streamlining the path to purchase.

Whether customers will trust these AI agents with payment information and to complete a purchase without error will be very interesting to see. For businesses and advertisers, this appears to be the direction of travel and commerce sites will soon need to have their sites set up to maximise the change, rather than risk being left behind. So far, big names like [Shopify](#) and PayPal have already made changes to prepare for agentic storefronts, along with brands like Monos and Gymshark aiming to secure first-adopter advantage.

Success with these changes will revolve around optimised feeds in the Merchant Center and updated technical SEO best practices being followed on the site to make it as machine-readable as possible. Google has already taken steps recently in making it easier for AI to pull information from the Merchant Center, and additional attributes are being added to feeds. Taking advantage of this feature is another priority for advertisers and businesses looking to be as effective as possible in UCP.

Google and other AI agent providers are leaning into this type of agentic sale journey, with Google calling it the 'conversational commerce era'. However, as mentioned, success will likely fall back to businesses putting investment into SEO and their back end feeds, a requirement in line with Google's usual strategy. Opting out won't be a simple switch either, so how people adapt to these changes will be key over the coming months.



What the IPA Bellwether Report Tells us About Marketers' Confidence

As any researcher will tell you, the contrast between claimed data (what a respondent tells you they *think* they will do) and actuals (what they *actually* did) offers a fascinating insight into the human mind. When times are tough, survey after survey, including our own the7stars QT, will typically suggest that consumers are tightening their purse-strings across as many categories as possible. Actualised data sources, such as open banking data, often reveal a murkier picture: we may think we're saving money, but our bank balance says otherwise.

None of this is to say claimed data isn't important. In fact, it makes it even more critical: a consumer's spend intentions provide an excellent summation of how they are feeling about the economy. If a consumer feels positive, they may be more likely to reward themselves with extra luxuries, and their favourite brands will profit. Negative feelings, on the other hand, suggest they are more conservatively spreading their cash. They may be spending the same, but they don't feel their money is going as far.

The same mentality, it seems, is true of marketers. This is what makes the IPA's quarterly [Bellwether Report](#), published jointly with S&P Global Marketing Intelligence, so critical. In Q4 2025, marketers said their budgets had flatlined, after growth in the two preceding quarters and in stark contrast to the usual rises in the final quarter. This was despite another respected source, the Advertising Association/Warc Expenditure Report, [forecasting](#) 7.3% growth for the UK ad sector for 2025's golden quarter. Much like consumers' spend intentions, both of these sources can be true in their own ways.

While the headline stat from the IPA report was of 0.0% growth in marketing spend, other areas saw significant movements. PR and Events spend was expected to grow, by 3.5% and 1.4% respectively, while Market Research (-4.0%) and Direct Marketing (-4.2%) declined.

On a channel-by-channel basis, only 'Other Online' was stated for growth (+13.2%). Marketers expected to pull back spend on both video and audio, though this was less pronounced than in the previous quarter. Out of Home saw the biggest drop, to -17.7%, as demand created by new Less Healthy Foods (LHF) restrictions will stretch competition within the Outdoor market.

As summarised by its authors, the forecast for 2026 is 'one of the weakest preliminary outlooks in Bellwether survey history'. This reflects both global geopolitical tensions – with the presidency of Donald Trump continuing to lead to volatile markets – and the fears expressed by UK businesses over policy decisions in recent Budget announcements.

In a challenging economic climate, it is not just consumers who are anxiously checking their bank balances. Marketers, too, see worrying signs ahead, and most are pushing for their pennies to go ever further. This reinforces the need for targeted, data-driven media planning. In turbulent times, brands who continue to invest are often those who prosper later – even if the temptation is to pull the plug entirely. We're all human, after all.



Trust in Quality News Content Remains Strong

Newsworks [released](#) its annual *State of the Nation 2026*, highlighting a UK audience navigating uncertainty, stress and information overload, while actively seeking trusted guidance. Over a third expect finances to be their main source of stress, and 75% say journalism helps them make sense of the volume of information online. Trust in quality news remains strong: 90% say journalism is important, 80% believe it strengthens democracy, and 86% value professionally produced journalism over influencer content, particularly in an AI-driven media landscape.

News brands also drive action, with 76% acting on their values in the past year. Crucially, consumers understand the commercial reality: 76% believe advertisers should support independent journalism. For brands, buying media in trusted, regulated news environments does more than deliver reach: it aligns brands with credibility, responsibility and truth. Advertising alongside quality journalism builds trust, reinforces brand values, and supports the journalism audiences rely on most.

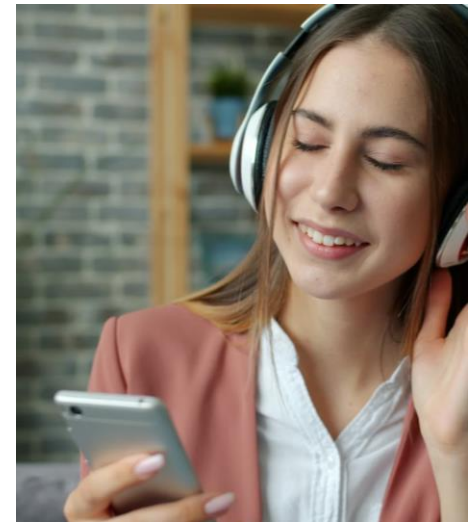


TikTok to Offer Comprehensive World Cup Coverage

TikTok [has partnered](#) with FIFA to announce a first-of-its-kind global partnership ahead of the Men's FIFA World Cup this summer. The deal, which names TikTok as FIFA's 'preferred partner' for the tournament, will grant TikTok the rights to broadcast live clips of games, match information, and other behind-the-scenes content.

The partnership, one of a number FIFA has struck with media giants in the build-up to the World Cup, is reflective of the increasingly omnichannel way in which fans enjoy the beautiful game. According to Footballco's *Future Fandom Report*, social media is the [primary channel](#) in which Gen Z fans consume football, with 92% engaging daily.

As discussed in last month's What's Hot, this highlights the multitude of ways brands can join the action, even if the traditional broadcaster routes are out of budget. From partnering with content creators to producing reaction videos, the 2026 World Cup's lifespan will stretch far beyond the final whistle.



RAJAR Results Show Strength of Commercial Platforms

The latest figures from RAJAR, the joint industry currency for the audio industry, show that Brits listen to the radio for over one billion hours a week, with 50 million tuning in. Additionally, commercial radio's lead over BBC stations continues to grow, now extending to a 55% share of all listening in Q4.

Much like other media channels, consumers are increasingly switching from linear to digital means of access, with online now accounting for a record 30% of listening, compared with 25% listening on AM and FM frequencies. Smart speakers, too, continue to be an essential part of many consumers' lives, across all age cohorts.

The results show that, despite widespread fragmentation of media time, radio maintains its pride of place in most Brits' media days. As commercial providers prosper, this provides excellent opportunities for advertisers to reach engaged audiences at contextual times of their day, safeguarding the role for brands in consumers' daily soundtracks.