What's Hot?!

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ITV–Sky Merger: What It Means for Brands

The proposed ITV–Sky merger would represent the most significant structural change in UK television advertising for decades. By bringing together the UK's two largest commercial broadcasters and sales houses, it would create a scaled media owner with unprecedented reach, data capabilities and trading influence. The merger presents both opportunities and challenges, making an independent agency position an even greater advantage in a market where flexibility, objectivity and buying agility will be increasingly important.

A combined ITV and Sky business would strengthen the UK's ability to compete for advertising investment currently flowing to global technology platforms. The combination of ITVX, Planet V, AdSmart and Sky's first-party data assets could create the UK's most sophisticated premium video proposition, offering advertisers greater scale, addressability & enhanced measurement capabilities across high-quality content environments.

However, the loss of competition between the two largest TV sales houses would fundamentally change the commercial dynamics of the market. The advertising market has historically benefited from competition between ITV and Sky to drive value, innovation and commercial flexibility. A merged entity would hold significantly greater influence across premium video, entertainment and sport, increasing scrutiny around pricing, conditional selling, share commitments and any future evolution of CRR-style protections.

The merger also reflects a broader trend towards the globalisation of UK media ownership. With Sky owned by Comcast, there is a risk that commercial and strategic priorities are increasingly shaped by the objectives of a global US media giant rather than the needs of UK advertisers. Should the deal be cleared by CMA regulators, local market accountability and UK advertiser interests must remain protected.

It will be important that any future trading model preserves transparency across the industry, advertiser choice and fair market competition while supporting the long-term sustainability of UK broadcasting.

What this could mean for the UK media market: The merger would significantly reshape the wider competitive landscape. Channel 4 would become the only remaining scaled alternative broadcaster AV proposition, increasing its strategic importance for advertisers seeking diversity of supply and maintaining competitive tension in the market. Further consolidation across broadcasters, streaming platforms and production businesses could also follow.

The industry will need to ensure that any combined proposition is underpinned by transparent, independently validated measurement and delivers clear, demonstrable value for advertisers.

Ultimately, while the merger could strengthen the UK's broadcasting sector and improve its ability to compete globally, it raises important questions around market concentration, pricing power, trading flexibility and accountability that regulators, agencies and advertisers will need to help shape over the next 12–18 months.

Commercial implications for brands: While the merger is expected to have significant long-term implications for market structure, we don't expect any immediate impact on how clients transact with either ITV or Sky, as significant changes to sales structures or trading arrangements are unlikely until at least the end of 2027.

the7stars will continue to engage with both organisations as the process develops, with further clarity expected over the coming months on the commercial, regulatory and trading implications for our agency and advertisers.

Latest IPA Touchpoints Data Highlights Continued Change for Industry

The 2026 edition of the IPA's Touchpoints dataset marks a special milestone. This year, the industry's primary source for tracking how the UK public spends its media day celebrated its 20th anniversary. At an event at London's iconic Picturehouse Central, industry leaders past and present gathered to toast to just how much has changed in that time.

In 2006, the iPhone was still in the development phase. Most travelled the country without the internet in their pocket; the UK's 3G network was still in its infancy. In a few months' time, the Nintendo Wii would become the hottest Christmas gadget of the year.

Over the last two decades, the IPA Touchpoints survey has evolved, from pen and paper time diaries to a mobile app. Ways respondents document their daily activity have inevitably grown more complex, as the media landscape fragments and content has evolved from a one-to-many to a many-to-many ecosystem.

At a topline level, the changes in the nation's media day reflect this. Our habits have shifted from linear to digital spaces, and, increasingly, from non-commercial to commercial media formats, giving advertisers more opportunities to reach consumers throughout the day.

Yet, on another level, our media day remains fundamentally similar to how it looked in 2005. We still start our mornings with audio, read text throughout the day, and enjoy video content later into the evening. Except for the lockdown era, little has changed in these rhythms in 20 years.

2026's Touchpoints release reflects this, with more gradual changes continuing recent trends, while the fundamentals of how, when and where the nation likes to consume its media remain the same. Digital now accounts for 66% of the average media day, a 3%pt increase year-on-year. This rises to a staggering 85% for 16-34s, while now accounting for almost half (47%) of over-55s' media day, too.

There is more good news for advertisers, with commercial media's share of this pie up by 2%pts year-on-year, rising to 68%. Within individual channels, Linear TV's share has fallen from 21% last year to 19% , while Online Video and Commercial SVOD each gained 1%pt. For 16-34s, almost half of the total curated media day is spent with Social and Online Video – a reminder of just how crucial these channels are for reaching younger audiences.

Among all adults, there is growing distance between Social Media and Linear TV/BVOD in average hours spent per day – though each of these channels continues to command near-unrivalled usage, bettered only by the superior reach and frequency of Outdoor.

For brands, there is little in this data to shock but much to ponder. The recent trends towards digital, commercial, and creator-led platforms show no sign of slowing down, yet all channels remain of critical importance to reaching varying audiences. As the national media day continues to fragment, smarter media planning is needed more than ever to keep up with these changes.

So here's to a very happy birthday to IPA Touchpoints, to all of the advancements we have seen over that time and all of the things that have stayed the same – without a crystal ball, we won't attempt to predict the average media day 20 years from now.

How Brands Can Seize on Cultural Relevance in a Sea of Sameness

Cultural relevance is something of a hot topic at the moment. In a post Barbie-pink world, the pressure to be part of the cultural zeitgeist has never been greater. As audiences fragment across platforms, communities and interests, brands increasingly embrace major cultural moments as opportunities to connect with consumers and build their brand.

The recent FIFA World Cup is a prime example. From Iceland changing its name to 'England', to Greggs suspending sales of its Mexican chicken range, brands across the UK rushed to activate around the tournament, eager to tap into the shared excitement and national conversation it generated. Every brand from smartphones to sushi wanted a slice of the pie, desperately trying to insert itself into the World Cup narrative.

When done well, these activations can be highly effective. Shared cultural moments provide brands with attention, emotional engagement and memorable connections. However, in the race to be culturally relevant, brands risk becoming indistinct.

Brands increasingly gravitate towards the same moments, the same trends, influencers and conversations. Everyone wants to be where the attention is. The problem is that when every brand shows up in the same place, saying remarkably similar things, differentiation starts to dissolve.

This is where cultural relevance and cultural insight diverge. According to WARC, cultural insight comes from genuine understanding, not simply from associating with whatever happens to be popular. As culture becomes more fragmented, the idea that every brand should participate in the same conversations becomes increasingly flawed. Different brands need different identities, different audiences and different cultural territories. Just because a moment is attracting widespread attention does not mean it represents the right opportunity for every brand.

Kantar's research highlights that in today's landscape, being different and distinctive is crucial for brands seeking to create lasting connections and drive growth. If brands consistently borrow the same cultural signals as everyone else, those distinctive associations can quickly erode. This is why brands should focus less on following culture and more on defining their place within it.

We often see brands flock to the same personalities when they break into popular culture. Joe Marler's post-Traitors popularity led to a wave of brand partnerships, with marketers eager to capitalise on his newfound cultural relevance, including a rumoured appearance on Gladiators. While these partnerships can deliver short-term attention, overreliance on the same faces risks creating another sea of sameness. Partnerships can be highly effective when they are the right fit. the7stars Partnership Affinity Score can help ensure a partnership is right for an individual brand and its audience.A strong cultural strategy starts with a clearly defined brand identity. Brands need to understand who they are, what they stand for and the role they want to play in consumers' lives. Only then can they identify cultural spaces that genuinely align with their values and resonate with their audience. The goal is not to be part of every conversation, but to engage in ways that feel authentic, relevant and uniquely ownable.

Cultural relevance becomes far more powerful when it reflects the specific interests, passions and behaviours of your audience rather than broad cultural popularity alone. The brands that win in culture won't be those shouting the loudest in the most crowded spaces. They'll be the ones that understand themselves best, find their own place in culture and, increasingly, create it themselves.

How Cultural Codes Shape Our Behaviour

As brands move away from chasing universal appeal, the7stars' Insight team set out to uncover the UK's established and emerging cultural trends in its upcoming 2026 Cultural Codes whitepaper.

The Cultural Codes is the7stars’ framework for understanding how behavioural shifts shape our society, not through fleeting fads and temporary trends, but through a collection of longstanding, evolving signals (or codes) that grow, dissipate, and interact with one another to make up the melting pot of culture.

The codes themselves reflect distinct shifts in culture, spearheaded by younger cohorts. For better cultural accuracy, the team used quantitative, qualitative and social listening data, making strong use of their innovative social listening capabilities. To surface these codes, the7stars Cultural Insight Engine uses an iterative data collection process to understand how the codes are evolving over time, if they are no longer relevant or if fresh codes have emerged.

Of the eight codes unearthed in this year’s whitepaper, three are discussed below.

Nouveau Nostalgia is one of the longest-standing codes. People soaking themselves in the warm cosiness of the ‘good old days’ is nothing new. But what constitutes the past has changed. For many, it isn’t just 90s fashion or 80s music that makes them feel nostalgic, but 2014 Tumblr, pre-2016 politics or even 2020 lockdown. Nostalgia seeking is also on the rise. 77% say they sometimes or regularly actively seek content that makes them feel nostalgic, while half of UK adults say they are seeking more nostalgic experiences this year. Nouveau Nostalgia is gathering momentum, and brands that creatively embed the retro into their offering will benefit .

Unapologetic Self explores a tension within the UK that is particularly resonant amongst young adults. While identity becomes ever-more complex and the desire to express these multi-faceted identities is growing, spaces to express themselves are shrinking. the7stars QT, running for over 10 years, shows that more factors than ever contribute to people’s sense of self. Strong identification with social class, careers and the industries in which people work has risen by 17%pts since 2016, while ethnicity has risen by 14%pts. The average number of identities people strongly identify with has also increased. However, according to Foresight Factory, 20% of 18-24s say they don’t alter themselves to please others, while 75% of the same age group want more openness when talking about more difficult subjects. For brands, offering spaces where people can feel like they can be fully themselves is not just a nice-to-have; it taps into a strong unmet need that can inspire greater consumer loyalty and ultimately engagement.

The final code is an evolution from previous iterations, **Neo-collectivism**. Previously it reflected the broad desire for greater community. Now the code has shifted to recognise greater emphasis on the niche collectives that inspire stronger loyalty than traditional relationship structures. Over half of Brits said that they felt more understood by fellow fans at concerts than they did by people close to them in their everyday lives. Building on the Unapologetic Self code, the rise in multi-faceted identities is having a strong knock-on effect on this code, as people seek harder-to-reach communities that better emulate who they are. Neo-collectivism recognises that niche interests within areas such as music and film matter as much, if not more than, traditional social factors when building communities. For brands, facilitating these pockets of expression is key, but they should keep in mind that they needn’t be too serious to generate interest.

The full Cultural Codes whitepaper, including implications for brands, will be available to download in August.

As The Telegraph is Sold For £575m, Who Are Buyers, Axel Springer?

European media giant Axel Springer's £575m cash bid for iconic British publisher, The Telegraph, has been successful, with the paper set for a new era. This follows an unsuccessful offer late last year by Daily Mail and General Trust (publishers of The Daily Mail) of £500m.

According to PAMCo data from H1 2026, the Telegraph reaches 11m UK adults every week.

The sale of Telegraph Media Group will include the Daily Telegraph, the Sunday Telegraph, the Telegraph Magazine and the website and app.

The huge investment by the German company is part of a push for multinational news dominance. Axel Springer chief executive Mathias Dopfner said he wanted to 'preserve the distinctive character and legacy' of the Telegraph.

'More than 20 years ago, we tried to acquire the Telegraph and did not succeed. Now our dream comes true,' he said.

Axel Springer also owns Bild, Die Welt, Politico and Business Insider. The Berlin-based group has further offices in New York and Hamburg and has made no secret of its international ambitions.

In his books, interviews and the frequent op-eds in its outlets, Chief Executive Mathias Döpfner portrays the purchase of the Telegraph and Politico as being motivated above all by a desire to firm up the values of the West.

Döpfner plans to invest in the Telegraph to make it the 'leading centre-right media outlet in the English-speaking world', with rapid growth in the US supported by the 'significant expertise' Axel Springer has gained from its ownership of Politico and Business Insider.

He is quick to stress, though, that political motivation will not interfere editorially.

Axel Springer has been publicly pro-tech in journalism, and Döpfner has been pictured with Tesla and SpaceX boss Elon Musk, who Axel Springer presented with an award for innovation in 2020. He has also been closely linked to US President Donald Trump, with reports he emailed his executive team at Politico to 'pray for' his re-election. In 2025, the company announced its intention to double its value within five years, by expanding media marketing platforms and exploring 'AI-based journalism' in a push for a more American-style media business and growth trajectory.

The purchase of the Telegraph presents huge opportunities for international and digital growth, as investment in news wanes for the industry. Its impact may be felt in the newsroom first, but brands, readers and the broader media landscape are sure to see steady change within TMG as seen following Axel Springer's acquisitions of Politico and Business Insider.