What's Hot?!

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How Broadcasters are Adapting in the Age of Social

With each passing year, the UK's public service broadcasters seem to lose more ground to digital competitors. By monthly reach, YouTube has overtaken ITV and, according to Barb, Netflix is not far behind. Online video and social platforms have usurped broadcast and online news as the nation's main sources of news. With each quarter, commercial radio's lead over BBC grows.

As Ofcom's annual *Media Nations* report lays bare, broadcasters continue to play a vital role for the British public, but their long-held dominance over the nation's living room is under threat. Netflix (26%) is now level with the BBC (25%) as viewers' first-choice when looking for something to watch, and it holds a clear advantage among 25-34s. The average person now watches 19 minutes of YouTube on a TV set each day, more than double the 9 minutes per day recorded in 2022.

Broadcasters retain the ability to court mass appeal. Live sport, big family entertainment and election nights still predominantly play out on the big screen. The BBC remains the service most trusted for impartiality in the country. But as Ofcom's report shows, consumers are shifting their everyday viewing behaviour towards SVOD, online video and social.

Faced with this potentially existential threat, broadcasters are adapting their strategies. In Q1, the BBC signed a landmark partnership with YouTube to create purpose-built content for the platform, aiming to re-engage younger users. This follows a separate deal agreed in 2024, whereby ITV made available large swathes of its content on YouTube and offered bespoke packages to advertisers.

In each case, the broadcasters' strategy is clear: create additional revenue streams (through international viewers only, in the case of the licence fee-funded BBC) by monetising content on video-sharing platforms where it is likely to exist regardless. Long-term, each would hope to funnel users back towards in-house channels, such as ITVX or BBC Sounds, by boosting salience among younger audiences. Short-term, each concedes the need to meet viewers where they already are.

The Ofcom report shows signs that this strategy may be having an effect: BVOD viewing grew by 9% year-on-year, even as SVOD largely plateaued. However, this increase was insufficient to offset the continued decline of linear TV. Moreover, by making full episodes available outside of owned platforms, broadcasters risk surrendering control of advertising revenue without comparable gains in reach.

According to data from Enders Analysis for Barb, YouTube adds just 500,000 unique weekly viewers to ITV's portfolio compared with 30m who exclusively watch on ITV-owned properties, where it possesses far superior ad tech capabilities. This, combined with YouTube's 45% cut of long-form revenue, makes broadcasters' shift towards social an inherently risky proposition.

This exposes the paradox: to maintain control of audience viewing behaviours, broadcasters find themselves surrendering more control. New government proposals seek to safeguard broadcasters' future by giving content from established media companies greater prominence on social media platforms. These plans have already drawn sharp rebuke from independent content creators and will likely face even greater pressure from big tech companies.

What follows is a battle for the ages. More than seven decades on from its origins, the UK's broadcasting sector faces its greatest threat. Public service broadcasters are fighting back hard by shifting strategies to social. Whether audiences follow will determine if their gamble has paid off.

When a Trend is No Longer Trending: Lessons from Gen Z's Behaviour

When thinking about the behaviours of Gen Z, a few tropes likely come to mind. They spend a lot of time on social media. They don't like making phone calls. And they're drinking a lot less than previous generations.

Except at least one of those tropes might not be true, after all. For years, reports have suggested that Gen Z consume a lot less alcohol than their older peers did at the same stage of life. Common causes cited include an aversion to social settings, a greater focus on personal health, or coming of age during a global pandemic, when traditional options for socialising were shuttered.

So common was this storyline that it became accepted lore, with particular attention paid to future ramifications for pubs and nightclubs, which are already struggling under growing cost pressures. The BBC pondered why Gen Z were coming of age 'sober conscious', while the Independent described their apparent behaviour as a 'cultural reset'.

Yet, new research suggests that Gen Z now drink just as much as prior generations as they get older. A University College London longitudinal study found 68% of 22-year-olds have engaged in binge drinking in the last year, while 29% report doing so at least monthly. A similar pattern has emerged in the US, where Gen Z (the oldest now reaching their late 20s) report drinking at a comparable rate now to other age cohorts.

A sobering thought: That a behavioural change once framed as a long-term shift has seemingly receded should give marketers pause for thought. Alongside statistics highlighting that Gen Z are generally more risk averse, this was framed as evidence of a generation unlike those that came before them.

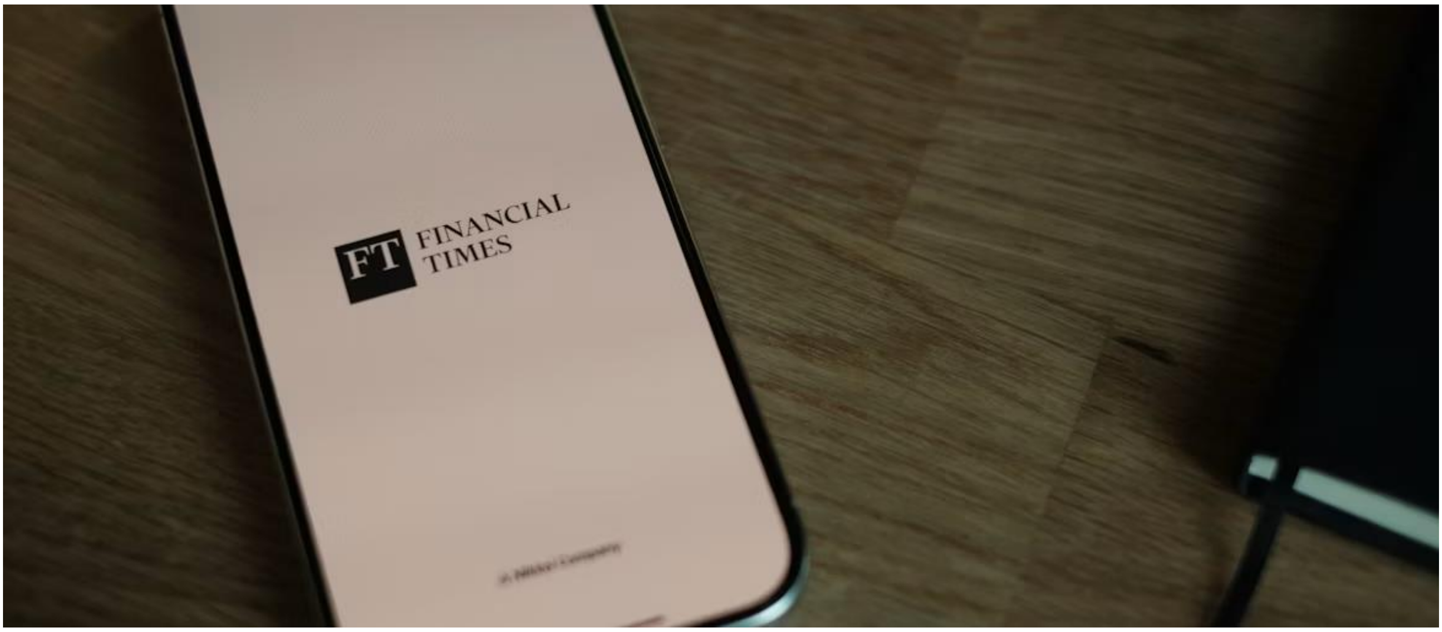
At the same time, mental health, anxiety and vulnerability had become greater priorities for young people, with alcohol framed as an unwanted distraction. John Holmes, professor of alcohol policy at the University of Sheffield, described these factors as part of 'a natural progression for Gen Z' and forecasted that this would become the norm for future generations, with the no-boozing trend growing as it became normalised.

This forecast seemed entirely plausible at the time, because available data pointed to declining alcohol consumption. Equally, many of the factors cited as contributors to this trend, including the cost-of-living crisis, showed no signs of abating. But clearly, we weren't observing a long-term descent into teetotalism, but a temporary change in behaviour.

Sorting cultural shifts from flash-in-the-pan fads: Lashantay Richards, Strategy Director, suggests that to understand culture, brands need not scrutinise the habits, values and everyday behaviour of their audience's lives. Rather, brands can track the signals and shifts that shape their attitudes and ultimately impact their purchase behaviour.

But to distinguish a trend from a fad, we must pay attention to how fast the data is moving. Fads often gain rapid traction before disappearing, whereas true cultural shifts are quieter and more gradual. Attention slowly accumulates and behaviours are subtly adopted. At the7stars, we describe these as cultural codes: a series of signals that evolve and expand over time, rewarding longevity over flash-in-the-pan thinking.

When statistics show a rapid shift in behaviour, brands should resist jumping on the fast-moving train and focus on gradual cultural changes. Often, that's the data worth listening to stay on top of culture in the long term.



Will Trump's Truth Social Paywall Present a Challenge to Publishers

President Trump's decision to charge for enhanced access to his Truth Social posts has reignited concerns about insider trading, market fairness and the monetisation of public policy. If statements on tariffs, foreign policy or regulation can move markets, should investors be able to pay for earlier access?

For critics, the answer is simple: no. Public policy should not be a premium product. Information that affects markets, businesses and citizens belongs in the public domain, not behind a paywall accessible only to those who can afford it.

But if that principle holds, the media industry may face an uncomfortable question of its own.

For the past decade, publishers have successfully rebuilt their businesses around the idea that information has value. The subscription success of titles such as *The New York Times*, *The Wall Street Journal*, *The Times* and *The Daily Telegraph* rests on a simple proposition: some information is worth paying for. Exclusive reporting, investigative journalism, expert analysis and high-profile interviews are not freely distributed. They sit behind paywalls, available first and sometimes only to subscribers.

In many ways, Trump's model simply exposes the same economic principle in its most extreme form. The commodity is exclusive access to information. The debate is about where society draws the line.

If regulators or courts conclude that monetising access to policy signals creates an unfair advantage, publishers could find themselves caught in a broader discussion about the value of exclusivity itself. After all, markets can be moved just as easily by an exclusive interview in *The Wall Street Journal* as by a social media post from a politician. A CEO revealing a strategic shift, a minister hinting at regulatory change, or a central banker signalling future policy can all have significant financial consequences.

Of course, journalism and political self-publication are not the same thing. One exists to hold power to account; the other often seeks to exercise it. Yet both increasingly depend on monetising access to information before it reaches the wider public.

For publishers, that presents a potential challenge. If society begins to view information asymmetry as inherently unfair when public policy is involved, does that undermine the value proposition underpinning subscription journalism? Have news brands spent years convincing audiences that premium access to information is worth paying for, only to find that the principle itself is coming under scrutiny?

The real significance of Trump's paywall may not be political at all. It may force a broader debate about whether exclusivity remains a legitimate revenue model amid growing concern about fair access to information.

The Enduring Power of Audio in a Fragmented Media Landscape

Radio might be a legacy channel, but it has endured for a reason. Far from fading into the background, the latest Ofcom *Media Nations* report showcases the varied listening behaviours across the audio landscape and proves that audio continues to provide the soundtrack to lives across the UK. For brands, the findings highlight three key reasons why audio remains one of the most powerful and versatile channels in the media mix.

Audio remains one of the UK's highest-reaching media channels, with 93% of adults consuming some form of audio content every week. Live radio alone reaches 87% of UK adults weekly, making it a truly mass-reach channel that still provides cut-through in a fragmented media landscape. At a time when brands are increasingly challenged to build broad awareness efficiently, commercial radio continues to offer exceptional scale. Recent RAJAR listenership figures reinforce this picture. UK radio now reaches a record 51 million listeners, while Heart has overtaken BBC Radio 2 to become the UK's biggest radio brand.

New listening environments are driving growth in the channel. More than a quarter of UK adults now listen to podcasts weekly and, while younger audiences continue to lead adoption, listening is increasingly mainstream. Reach among over-65s has grown from near zero a decade ago to 13% today, while 45-54s now listen at above-average levels. News and current affairs combined now form the most popular podcast genre, reaching 47% of weekly listeners, while entertainment, comedy and discussion formats continue to attract large audiences. With preferences varying significantly by age and interest, podcasts give brands opportunities to connect with audiences around their passions, moving beyond broad demographic targeting.

Audio travels with audiences throughout their media day. Radio has enduring importance in the car, with 69% of all in-vehicle audio listening time still spent with live radio. In-car listening now accounts for 26% of all radio consumption, up from 21% four years ago, and almost a quarter of listeners tune into radio only while driving. Yet the wider audio ecosystem means brands can now reach audiences far beyond the commute. Music streaming continues to dominate digital listening, with consumers spending over £2bn on streaming subscriptions in 2025, while podcast reach has grown to 27% of UK adults, expanding across every age group. Together, these behaviours create touchpoints throughout the day, from commuting and exercising to working and relaxing.

Ultimately, the latest *Media Nations* highlights how audio is becoming more powerful through diversification. Broadcast radio continues to provide reach, frequency, and efficient buying routes, while digital audio, podcasts and connected listening environments offer richer audience targeting, contextual relevance and addressability. Whether through breakfast shows, on-demand podcasts, smart speakers or streaming platforms, audio remains deeply embedded in daily life for audiences across the UK.

How Long-Form Comedy Can Thrive in the Age of Shorts

In the 2010s, YouTube was the hottest place online, with new channels popping up left and right doing sketch comedy, character videos and long-form 'trying' or vlog-style content.
It was the birthplace of sketch icons like *Dropout*, became a breeding ground for new format creation and writing from BuzzFeed, and laid the table for formats like *Hot Ones*, *Chicken Shop Date* and *Last Meals*. Five-to-ten-minute videos were cropping up, rolling out across Facebook to audiences desperate to share content they identified with.

SNL was also at its height of popularity, with sketches travelling around university campuses faster than freshers' flu. Relatable, tongue-in-cheek comedy was rife; it seemed it would never die. And then short-form content and its impact on our attention spans arrived.

Betches (US, not its LadBible-owned UK counterpart) releases *Sisters,* a scripted series highlighting familial bonds and the hilarity that ensues, based on their original sketch series. Concurrently, SNL is renewed for another season, so one can't help but wonder if long-form laughs are back.

Sure, short, energetic comedy content still does numbers on social, but as permitted video length increases on platforms like TikTok, an appetite for longer content is returning. The ability to share a full set or clips of stand-up comedy, for example, makes social platforms the perfect outlet for comics grieving the loss of *Live at the Apollo*.

Sisters, the comedy series 'that proves you never outgrow your family', was developed by and stars homegrown Betches comedy stars Tess Tregellas and Madeline Mahoney. The long-form show's debut season will be distributed across Betches' Instagram, TikTok and YouTube accounts, as Betches evolves from a media platform into more of a production studio.

What makes this kind of content so engaging, particularly noting that everyone is reporting the benefits of branded micro-dramas? What can sketch-style content that lasts up to 15 minutes per episode do that shorter formats can't?

Natural product placement in narrative arcs: Fitting a product into a one-minute short video and making it more than just backdrop isn't easy, but longer episodes give products more scope to be part of the narrative. More time, more opportunity.

Greater story breadth: Equally, there can be more to the story and less left for the audience to fill in themselves. Sketch-style, scripted comedy gives greater opportunity to build familiarity with characters and cover more relatable elements of identity and experience, making the content more shareable too.

Longer on the platform: Longer stories equal more time spent on platforms. Be it social, YouTube or another media platform, the more time people spend there, the greater the ad opportunity.

Earned and organic: There is more opportunity for earned and organic coverage and social content when stories are longer and contain more faces and names.

You can fit more and longer jokes into a ten-minute video than a one-minute clip, and shows like SNL generate huge earned presence from them. It's the same for shows like *Trolley Problems* or *Escape the Kitchen* on hit US scripted platform, Second Try TV. In sketch comedy, the loop is closed for audiences with jokes, callbacks and a final punchline, taking them on a journey of anticipation before enjoying the payoff when it comes. This provides a short but satisfying format that people will just keep coming back to.