



What's Hot?!

August 2024



How Brands Can Amplify Paralympic Sport

A bumper summer of sport continues in Paris with the return of the Summer Olympics and Paralympics – the first to face capacity crowds since the Rio Games in 2016. Yet, whilst attention focused historically on the Olympics, this year's Paralympics are set to continue breaking records both on and off the track.

Ahead of an explosive two-week showpiece, here are three considerations for brands looking to join the action.

Cross-event support is fast becoming a must

Brands who align with sporting events should be prepared to put their money where their mouth is by simultaneously backing disability sport (Parasport). For the first time at Tokyo 2020, the International Olympic Committee's (IOC) Worldwide Partners each also sponsored the Paralympics, a trend continuing for Paris 2024. The Paralympics, it seems, are no longer 'sport's best kept secret', as described by BP's Duncan Blake in 2018.

Openings for longstanding association with Parasport exist. Two of the current Worldwide Paralympic Partners – ABInBev and Ottobock – are absent from the IOC's list, whilst Paralympics GB work with several unique sponsors from the Team GB list. In an arena where athletes must fight for every penny of funding, brands could make a lasting difference to thousands of lives.

Accessibility for all

As Parasport becomes rooted in the public conscience, so the narrative around Paralympic athletes has shifted, as Channel 4's successful awareness campaigns exemplify. Since London 2012, the broadcaster's early campaigns focused on the 'superhuman' ability of Paralympians. More recently, this messaging has pivoted to illustrate Parasport athletes in day-to-day life, faced with accessibility barriers and shouldering condescending comments like: 'you're doing so well, considering...'

Brands seeking placements around the Paralympics can acknowledge these very human needs by ensuring advertisements are fully accessible. Indeed, both sponsors of this year's Channel 4 coverage, Toyota and Allianz, have placed accessibility 'at the centre' of their idents by including audio description, British Sign Language and subtitling. Brands should ensure these creative elements are considered year-round, and not just under the Parasport spotlight.

Grow the conversation

This year, all 22 events will be telecast live from the official Paralympic feed, with Channel 4 once again serving up a feast of entertainment for Team GB fans, as the nation attempts to better its 2nd place finishes in Rio and Tokyo with the highest number of athletes across all countries.

Despite the groundbreaking support Channel 4 has provided, the Paralympics are not immune to wider TV viewership declines, with audiences for Tokyo 2020 below that of 2016. This is also reflected in social conversation, where post volume and unique authors peaked in Rio and have fallen since. Amidst these broader trends, brands can leverage their platforms to amplify Parasports back into the nation's conscience – and keep it there.

Indeed, for Parasports to continue thriving long-term, brands must play a pivotal role in carrying the torch. Yet, such support should extend beyond opening and closing ceremonies. Public perception of disability has evolved in the past decade – but, as the tropes highlighted by Channel 4's Paralympics campaign show, there is still much work to be done.



How Authenticity Is Transforming the YouTube Creator Economy

With over 56 billion logged-in monthly UK users and content spanning every conceivable niche, YouTube offers brands unparalleled reach and the ability to forge genuine connections with audiences of all kinds. YouTubers have become pivotal in bridging the gap between brands and consumers, but as audiences become more discerning, the need for authenticity, loyalty and credibility in influencer collaborations has never been greater. This shift is redefining the way YouTubers create content and impacting how brands approach influencer marketing on the platform.

A greater demand for authenticity

Audiences today are more sceptical of overtly sponsored content and can easily distinguish between genuine endorsements and paid ads. YouTubers are responding by integrating products and recommendations into their content in a way that feels natural and relevant to their channel, and therefore more likely to engage their audience. Beauty blogger Patricia Bright does this seamlessly with many of her brand deals, weaving products in as part of a comprehensive makeup look, rather than naming them at the beginning of her videos and listing the benefits up front. On the other side of the coin, influencers have faced significant backlash for attempting to secure freebies in exchange for social media exposure – the Elle Darby White Moose Café debacle is a cautionary tale, as is the more recent Logan Paul and Crypto Zoo scandal.

Building loyalty through transparency

Transparency is another critical component that YouTubers are embracing to build loyalty, and this goes beyond mere regulatory disclosure. Being honest about the pros and cons of a product and sharing personal experiences and opinions is always going to be more effective than reading off a script provided by the brand. Influencers that are candid about their views are more likely to be seen as trustworthy.

Credibility through consistency

Credibility is enhanced when influencers collaborate with brands that align with their values and interests. Influencers that stick to their niche and only collaborate with brands with whom they genuinely have an affinity are more likely to be perceived as credible. This consistency reassures followers that they can rely on an influencer for trustworthy content, thus increasing relatability and engagement.

What this means for our clients

The need for authenticity, transparency and credibility has significantly impacted how brands approach influencer marketing across YouTube. Brands are increasingly seeking longer term partnerships and becoming more selective about the influencers with whom they work, prioritising those who align with their values and have a loyal, engaged following. Furthermore, brands are now open to giving influencers creative freedom in how they present sponsored content, providing broad guidelines and letting influencers create content that resonates with their followers in a natural way. This ensures that the content remains credible and relatable, ultimately leading to better engagement rates.

Audiences across the board are demanding greater authenticity, transparency and consistency from influencer marketing. As the home of longer-form, evergreen content, where production budgets are typically higher, this shift is more pronounced on YouTube than other creator platforms such as TikTok or Instagram. On YouTube in particular, brands and creators need to adapt to a landscape where genuine engagement is the new currency for success, by focussing on integrated brand partnerships, long-term relationships and developing high quality UGC that plays a role distinct from brand assets in the marketing mix.



Google Cookie Depreciation Plan Crumbles

Google have announced that their planned deprecation of third-party cookies in Chrome, originally planned for roll out later this year, then delayed to 2025, has now been scrapped. At least for the time being. For now, an alternative has been proposed, putting user choice first.

Pivoting the focus

The third-party cookie deprecation has been a long time coming. The team at Google has been working on it for years in favour of the Privacy Sandbox, a collection of APIs that sought to replace third-party cookie functionality in a more privacy-safe way. This monumental shift away from cookies, however, would have a wider impact on publishers and the open web. Industry adoption of the Privacy Sandbox is ongoing, as vendors test its performance and capabilities, but remains moderate, as the industry is far from having fully prepared for change.

With the background of regulator and market challenges, the Google team has chosen to put the brakes on the deprecation plan, shifting focus to user choice: '[Google] would introduce a new experience in Chrome that lets people make an informed choice that applies across their web browsing, and they'd be able to adjust that choice at any time.'

Industry relief, mostly

This shift means relief for the industry after panic over potential signal loss, with a lack of viable products compatible with the Privacy Sandbox prepared in time for the original deadline. While the move will be largely favourable, privacy advocates are unlikely to be pleased with the announcement. Indeed, the third-party cookie lives on, and concerns about its usage remain outstanding and unchanged.

Industry reaction has also been mixed, with most favouring additional time for development but also pushing forward towards a more privacy-safe industry future.

The landscape is still shifting

For now, the timelines have relaxed, and the industry can continue to work on privacy-safe solutions and adoption of the Privacy Sandbox at their own pace.

At the7stars, we are far from complacent in response to this announcement. Privacy-centric measurement is still the gold standard of modern advertising. Signal loss remains abundant with other regulatory and technical changes impacting advertisers right now, with more likely to come in future. Advertisers still need roadmaps for privacy-safe solutions to prepare for where the industry is heading.

The importance of privacy-centric marketing is more important now than ever, and advertisers should continue to prioritise their users and privacy as key pillars for long-term growth. The plan for Chrome third-party cookie deprecation might no longer have a due date, but that shouldn't stop the industry improving the online ecosystem for the better for everyone.



How Euros 2024 Viewing Figures Highlight Shifting Audience Habits

The final of this year's Euros drew in over 23.8m adult viewers across coverage on BBC1 and ITV1, making it (unsurprisingly) the highest viewed match of the tournament. Despite this, viewership was lower than for the previous final against Italy, which delivered just over 31m viewers at its peak.

Admittedly, in 2021 fans had been patiently waiting an extra year for a good festival of football due to the pandemic. But this year's decline isn't just seen in the viewing of the final, as all adult linear impacts were down 14% across the whole tournament.

Although the quality of football played by the England squad was a bit more boring than the last tournament, it's unlikely to have been the main driving factor in the decline.

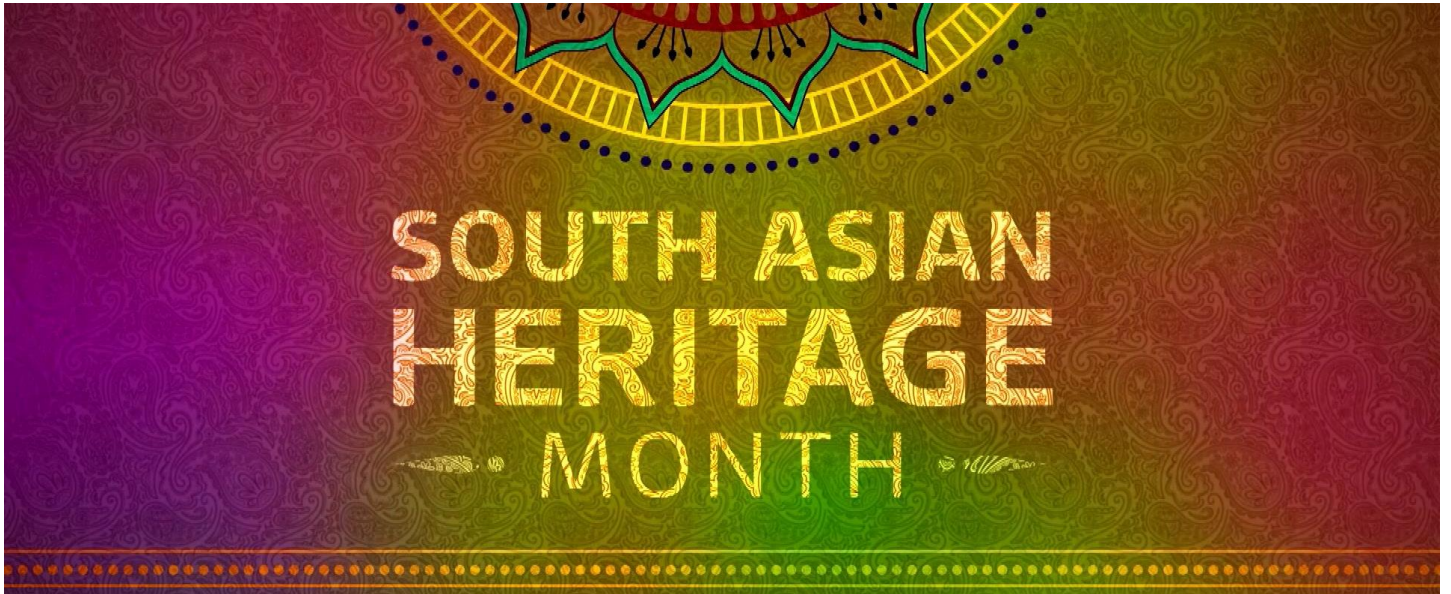
Research from Thinkbox shows that, from 2022-23, linear TV viewing declined 6% while BVOD viewing increased by 23%. Although this trend is mostly driven by catch-up and on-demand viewing, there is a growing trend in watching live broadcast content through BVOD services such as ITVX. Furthermore, in 2021 we were just beginning to return to normality after Covid. Watching the game down your local wasn't as popular then. Crowds gathered freely this year, with fewer people watching from home, where BARB records its impression data.

Another interesting takeaway from this tournament isn't just where and how sports fans got their football fix, but also on which channel. In 2021, the final was viewed on the BBC by 81% of total viewers. In this tournament, this figure dropped to 74% with ITV increasing their viewing share by 7 percentage points.

Despite slight linear declines, strong overall viewership of the Euros has been a cherry on the cake for ITV, who have seen their revenue increase 10% year on year, despite total viewing across H1 being down 7.7% for all adult viewing. It would seem that ITVX has helped keep the ship afloat with an increase of 12% digital advertising revenue, as well as a 15% increase in viewing hours and a 17% increase in active users.

While there has been increased viewing across the Euros, this does buck trends that we have been seeing across regular viewing. Ofcom has recently reported that, for the first time, less than 50% of 16-24-year-olds tune into linear TV in an average week. This audience isn't totally disappearing from the AV landscape, though, as this is one of the audiences who consume the most VOD content.

Overall, we are seeing viewing continue to remain steady across the AV landscape with big appointment to view programming like the Euros drawing in large numbers to linear TV, although viewing trends from this tournament do suggest that there is a growing appetite to watch through online services. This makes it more important than ever for advertisers to consider their linear vs BVOD investment to ensure they are delivering the best reach possible.



How Brands Are Honouring South Asian Heritage Month in 2024

South Asian Heritage Month, observed annually from July 18th to August 17th, is a time to celebrate and honour the rich heritage of people with roots in the South Asian countries India, Pakistan, Bangladesh, Sri Lanka, Afghanistan, Nepal, Bhutan, and the Maldives. When brands engage with this month, they not only amplify the celebration but also play a crucial role in educating consumers about South Asian culture. This year, several brands have stood out in their efforts to get this outreach right.

Concerns Over Changes in Brand Involvement

Earlier this month, [The Media Leader](#) published a piece addressing concerns about a shift in how brands are participating in South Asian Heritage Month. Jasvir Singh, one of the founders of the celebration in the UK, expressed disappointment, noting that some brands have scaled back their involvement. He attributes this to factors such as a lack of diversity in senior roles, limited budgets, and inadequate representation within companies. Similarly, the Media For All (MEFA) organisation has pointed out that while internal initiatives around South Asian Heritage Month are on the rise in mainstream companies, external communications through advertising and promotion remain lacking. There's still much work to be done in terms of public outreach during this significant month.

Brands That Got It Right in 2024

To understand how brands can positively contribute to South Asian Heritage Month, it is essential that we highlight brands that have made impactful efforts this year.

- **Google** hosted online panels and discussions with South Asian leaders in technology and business, promoting dialogue around the community's significant impact on global innovation.
- **Netflix** curated a special collection of South Asian films and series, showcasing the region's storytelling brilliance and providing a platform for these narratives to reach a global audience.
- **Nike** launched a special edition of their iconic sneakers, featuring designs inspired by traditional South Asian art. They also ran a campaign spotlighting South Asian athletes and influencers, emphasising the importance of representation in sports.
- **Starbucks** introduced a limited-edition drink menu inspired by South Asian flavours, including items like the Cardamom Chai Latte and Mango Lassi Frappuccino, offering consumers a taste of the region's rich culinary heritage.

These brands have not only celebrated South Asian Heritage Month through their products and campaigns but have also shown a deep commitment to honouring and amplifying South Asian voices and traditions, which enables them to be authentic in their celebrations. In doing so, they are able to contribute to a greater recognition and appreciation of the diverse cultural tapestry that enriches our global community.



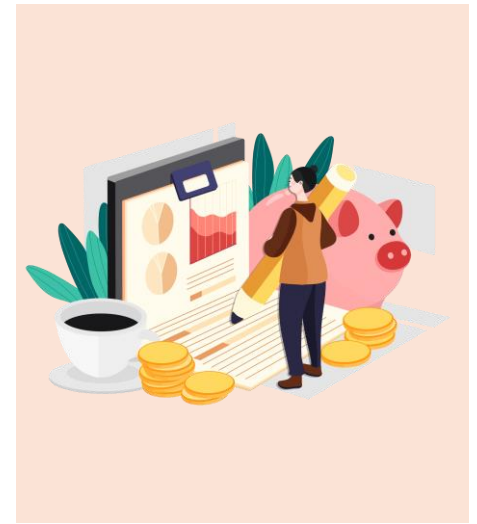
Channel 4 Boosts Streaming Audience amid Linear Decline

Channel 4 has boosted its streaming audience while experiencing a slight decline in linear viewership, with linear reach in June making 35.37 million (a 4% drop from June 2023). In contrast, its non-linear reach on TV sets rose to 11.55 million, a 9% increase. Combined platform reach on PCs, smartphones, and tablets grew to 2.76 million. Overall, Channel 4 reported a 3% year-on-year growth in viewing, totalling 4 billion viewer minutes in June. Streaming audiences saw a 30% increase, with viewing among the ABC1 demographic up by 23%. Top streamed shows included *The Fall: Skydive Murder Plot* and *The Big Bang Theory*.



JCDecaux UK H1 Organic Growth Surges to 30%

JCDecaux UK reported a remarkable €195.1 million in adjusted revenue for H1 2024, reflecting a 29.8% organic growth compared with H1 2023. Co-CEO Dallas Wiles hailed this as 'great news for the UK', attributing the success to double-digit growth across street furniture, billboards, and transport sectors, with strong returns from airport and rail audiences. Wiles highlighted that digital out-of-home (OOH) advertising, including programmatic capabilities, played a significant role, with programmatic growth up 61.8% across the group. He noted that OOH outpaced other media formats, including search and online, as the fastest-growing segment in Q1 according to AA/Warc figures.



UK Adspend Hits Q1 High as Optimism Continues

UK adspend surged by 9.3% to reach £9.2 billion in Q1, setting a new record according to the latest Advertising Association and Warc Expenditure Report. This growth, three percentage points above expectations, was driven by robust online adspend, which accounted for 79.7% of the total. Adjusted for inflation, real growth stood at 5.5%, representing an increase of £465 million. Key segments saw significant gains, with search (including retail media) and online display up 12.0% and 12.8%, respectively. Out-of-home (OOH) advertising led the growth at 16.4%. Broadcast media also rebounded, with radio, cinema, and TV adspend increasing by 7%, 6.4%, and 1.2%, respectively, and broadcaster VOD up by 19.2%. The consumables and services sectors were essential to this growth, expanding by 16.1% and 8.9%, respectively.