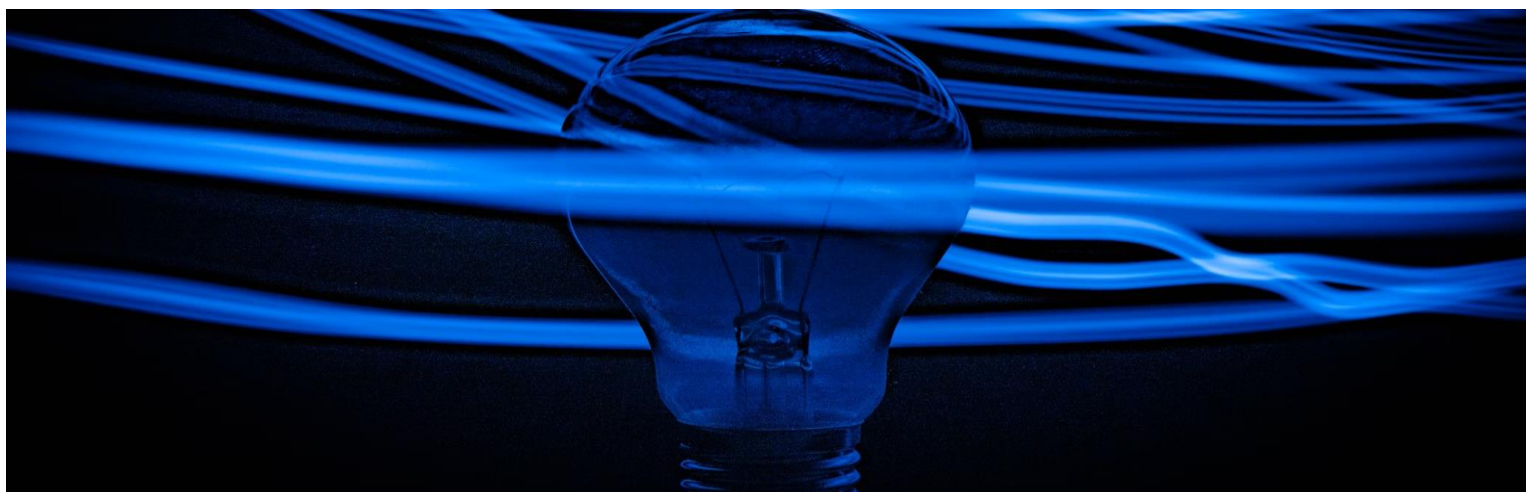




What's Hot?!

February 2025



All Change Please

As we move swiftly through the first month of 2025, clear trends and opportunities for the year ahead are starting to emerge. Change will be rapid and far reaching across seven (of course 7) key areas:

Search Evolution - AI-powered tools like ChatGPT and Bard are revolutionising search, with 60% of Google searches now ending without a click. Brands must adapt by overhauling their search strategies, adopting advanced frameworks for paid and organic search integration and optimisation.

AI Agents - AI agents, already well established in platforms like Alexa and Spotify, are rapidly becoming indispensable. In 2025, brands must identify and maximise the potential of existing AI tools while integrating new ones into media workflows to improve efficiency and streamline processes.

Relevance vs. Scale - The rise of hyper-personalisation poses challenges, including execution complexity, higher data costs and a lack of transparency. Brands should prioritise relevance by leveraging data-driven strategies that optimise timing, context and consumer behaviour, to balance scalability and impact effectively.

Commerce Media and AI Campaigns - Retail media and AI-driven performance campaigns, such as Google's PMax, look set to continue their rapid growth this year. These present lucrative growth opportunities, but brands need to tread with caution. With AI optimisation, it's crucial to keep safeguards in place to maintain effectiveness while avoiding issues like poor inventory quality and undisclosed margins. Commerce and retail media are highly fragmented, with numerous players vying to take a slice of media budgets, making it a complex landscape to navigate to manage effective campaigns. Much like the early days of paid search back in its infancy, success will depend upon testing, learning and scaling with skilled teams, resources and skillsets.

Creative Innovation - With declining ad attention on social media, businesses must break out of their creative comfort zones. Combatting low-quality AI-generated content requires bolder strategies, empowering content creators, and loosening rigid brand guidelines to better engage audiences.

Video Advertising Transformation - The shift toward digital video platforms accelerates, opening up new advertising opportunities through partnerships with broadcasters and streaming platforms. Innovations such as addressable video and new ad-supported platforms allow for precise targeting, scale and cross-platform measurement. Brands should adopt agile strategies to capitalise on these advancements, making video a key area for increased investment in 2025.

Data Transparency and AI Governance - The demand for data clarity is rising. Brands must scrutinise the provenance, costs, and effectiveness of the data used in their campaigns. With AI playing a greater role in media planning, brands must establish governance frameworks to ensure ethical practices and align AI decisions with their commercial interests.

In conclusion, 2025 will require brands to embrace AI, scale innovative strategies, prioritise transparency across media, data and tech, and venture beyond traditional creative boundaries. By doing so, brands can ensure they remain relevant and poised for growth in an ever-evolving landscape.



How Brands are Interacting with Awards Season

At the London premiere of *A Complete Unknown*, the red carpet featured an unexpected star, although a familiar sight to many Londoners – a bulky, bright green electric bike. Leading actor, Timothee Chalamet, sparked a cultural moment by arriving at the event on a Lime bike, reportedly earning a £65 fine in the process.

As awards season approaches, we can expect to see more brands infiltrate the red carpet and beyond, aligning themselves with the stars and conversations, boosting their visibility and social currency. This article explores how brands can navigate their brand presence during award season, and the increasing importance of a 'behind-the-scenes' presence.

Becoming not just visible, but front-of-mind

To the surprise of many, Timothee Chalamet's appearance on the red carpet with London's most conspicuous bike was 'unplanned' and 'unpaid'. Lime has had several celebrity sightings. Yet, what may appear spontaneous and a stroke of marketing luck for the brand is actually the result of Lime's longer-term strategy to embed itself into culture, as brand communications director Carolyn Rosebrough claims. During award season, we might expect to see the usual headline sponsors – EE for the BAFTAs, Rolex for the Oscars – but whilst these brands might be conspicuous, it is the brands like Lime who embed themselves in the cultural moment and become part of the conversation, who stand to benefit the most.

Benefits to a behind-the-scenes presence

Lime was able to build on their red-carpet moment by amplifying the event across socials. It is the online conversation surrounding awards season that provides opportunities for brands to enter the awards space. Whilst celebrities are the traditional faces of these events, brands can also tap into influencers, dressing them or becoming part of their red-carpet preparations, as H&M and L'Oreal have done in recent years. While celebrities embody aspiration, influencers create a sense of connection. Loyal followers will go to them for recommendations, because they are relatable enough to build trust and inspire purchase behaviour. Influencers, therefore, are the people who can bring audiences closer to these events.

Opportunities for brands in 2025

It is perhaps through this kind of behind-the-scenes presence that brands can take advantage of the star power and glamour of awards season. We have moved beyond a world in which only the official sponsors of awards season can be visible – the opportunity to embed themselves in the cultural conversation is open to all. By strategically aligning themselves with the glamour and conversation surrounding these events, brands can amplify their cultural relevance and consumer engagement.



WELCOME TO Grow

Grow 25

On January 16th we opened the door to our first ever client summit – Grow 25 - a big day out with an agenda dedicated to helping our clients navigate the media and marketing landscape in 2025.

How brands REALLY grow

The first section of the day – held in the Picturehouse Central in Picadilly Circus – focused on advertising effectiveness. Kicking things off, our very own Chris Herbert-Lo and Terri Squibb talked us through the commercial power of independent thought, demonstrating how impactful campaigns are designed. Following this, Professor Felipe Thomaz of Oxford University delivered an insightful presentation on marketing effectiveness, which included a Q&A session with Marketing Week Editor, Lucy Tesserars.

Maximising media

After coffee (and enormous pastries brought to us by social enterprise, Humdingers) the spotlight shifted to maximising media effectiveness. Caroline Tucker and Nick Shields delved into embedding effectiveness across the business, from the relationship with finance to experimentation and investment planning. We then heard from Billy Ryan and Miglena Dimitrova, who highlighted the very latest advances in measurement – from the compelling correlation between ad awareness and share of search, to cutting-edge AI-driven digital attribution. The morning concluded with Lauren Fishwick and Ian Daly showing us how to respond to the ongoing fragmentation of video viewing, using a framework rooted in audience behaviour.

Navigating change

After lunch (also enormous) we explored how marketers can navigate change in 2025. Times Radio host Lord Ed Vaizey painted a pretty stark picture of the political and economic outlook, and futurologist Helen Job then took us through the emerging consumer trends to watch. A brilliant panel then tackled the topic of inclusivity with a thorny question: ‘are we done with diversity?’, with the discussion making it clear we still have much progress to make. Marianne Matthews from Sky shared insights from their sustainability journey, followed by an engaging conversation with Gary Lineker and Tony Pastor, who reflected on their experiences of growing a major business in an emerging media channel. We finished up with the brilliant Dr Mark Bloomfield, a Cambridge University fellow, talking us through why he’s an AI optimist and sharing top tips for CMOs.

It was a brilliant day, which received an overwhelming response of positive feedback. We had an absolute blast and hope that those who were able to attend felt the same way. It was brilliant to spend time with you all, and to facilitate some great networking between marketing peers at different brands.

Roll on Grow 26!





Is Turbulence in the Social Landscape Eroding Consumer Trust?

If 2024 was a turbulent year for social media, then 2025 shows little sign of stabilising. From looming threats of shutdowns to the rise of AI-generated content, brands face an uphill struggle to cut through the noise.

Still, social media remains crucial for British audiences, accounting for 21% of total commercial media time in 2024, according to IPA Touchpoints data. Among 16-34s, that share is 35%, indicating greater significance for younger Brits.

While uncertainty persists, brands can embrace change and drive trust among audiences.

With the clock ticking for TikTok, competitors adapt

In mid-January, TikTok – with over a billion users worldwide – [briefly 'went dark'](#) in the US, after the Supreme Court upheld a ruling that it must be sold to an American company. The app flickered back to life just hours later, after President Trump extended the deadline for a sale, but its future remains precarious. No such ban has been proposed in the UK – where it [has over 22 million users](#) – although Government ministers in Britain have [expressed similar concerns](#).

Uncertainty around TikTok has prompted rivals to emerge. Earlier this year, BlueSky [became the latest](#) social media platform to embrace vertical video, joining rival platform X just days before in introducing a dedicated feed for 'TikTok-esque' content.

While creative that works on TikTok will not automatically perform well on other platforms, [evidence published in WARC suggests](#) 'the tactics of vertical video increasingly translate across platforms'.

As X loses users, communities are migrating elsewhere

While turbulence has affected all providers, perhaps X saw the most negative effects. Controversies surrounding Elon Musk sparked unprecedented departures. According to UKOM/Ipsos Iris web traffic data, X [lost 6.1% of its UK audience](#) in Q3 2024.

In contrast, Meta's Threads app witnessed a 37% uplift in its user base and a 29% increase in time spent per user, while smaller startup BlueSky saw a rapid but niche 445% growth in users.

More than a year after advertisers [first began leaving X](#) in droves, owing to concerns over brand safety and Musk's comments, 2025 could see a shift in text-based social advertising, as Meta is [planning a launch](#) on Threads early this year.

Fact-checking changes fuel scepticism

Meta's chief executive Mark Zuckerberg [announced](#) in January that Facebook and Instagram would replace third-party fact checkers in the US with a 'community notes' model first popularised on X following Musk's takeover. However, 'no immediate plans' exist to follow suit in the UK or EU.

According to the7stars Pulse research, Brits are highly sceptical already of the veracity of feed content. Earlier this month, 27% of UK adults said they 'don't trust much of what they see on social media at all', while a further 26% said they 'often fact check elsewhere'.

Opinions on community moderation are mixed: though 38% said they would be less inclined to trust such information on social media, 27% thought the community notes approach would make them more trusting of social content.

As misinformation proliferates and platforms evolve, there is increased onus on brands to build trust with audiences online. Adopting a clear brand tone-of-voice, and providing supportive information for consumers to verify claims, will help to drive trust amidst a murky social landscape.



Thinking Outside in 2025

UK out-of-home (OOH) advertising spend is expected to reach an all-time high this year, surpassing pre-Covid investment levels. In 2025, the market is forecast to grow by 7.5% year-on-year, reaching £1.515bn, up from £1.410bn in 2024. With the rapid expansion of digital infrastructure over the past decade, digital OOH spend is predicted to account for 67% of total investment – a share expected to continue to rise as more brands embrace programmatic OOH opportunities.

Brands need to leverage their USP and stand out from the crowd

As more brands embrace outdoor advertising, we anticipate a few key trends and themes emerging to help brands stand out in an increasingly cluttered space.

1. Blurring the lines with experiential marketing

Increasingly, consumers seek immersive, memorable brand interactions, and the lines between experiential marketing and OOH continue to blur. While not every outdoor campaign needs to combine these elements, choosing the right opportunities at the right time can deliver impactful results. Jaffa Cakes demonstrated this brilliantly in 2024 with their 'defaced' mural in Manchester and the 3D billboard in Brixton that dispensed Jaffa Cakes for passersby. These high-impact activations were selected strategically at key locations to create lasting memories, while also complementing broader campaigns at other OOH sites to extend their reach and influence.

2. Harnessing the Power of Data and Programmatic OOH

In 2025, the rise of programmatic OOH cannot be overlooked as it offers unparalleled targeting and contextual relevance. By utilising audience-first planning and real-time data, brands can deliver highly targeted and on-point messages, enabling deeper connections with consumers and cutting through the noise in a crowded market. A recent example of this approach was the Kopparberg campaign, which capitalised on the increase in sales during warmer, high-UV days. Using a targeted site list and real-time UV data, the Kopparberg ad not only promoted responsible drinking but also encouraged sun safety.

3. Meeting consumer expectations with sustainability

As consumers increasingly prioritise environmentally responsible brands, sustainability is a defining trend in OOH advertising. From eco-friendly materials to energy-efficient digital screens, brands are aligning their campaigns with green initiatives to resonate with environmentally conscious audiences. Many brands have taken innovative approaches to OOH by combining sustainability with experiential marketing. H&M's 'Circular Design Story' recycled billboards into handbags, while environmental charity Hubbub have ran a 'ballot bin' initiative since 2016 which encourages smokers to bin their cigarette butts through playful messaging with live 'polls'. This approach creates high-impact, memorable experiences for audiences, while reinforcing brand values around sustainability.

Trust, trust, trust.... the credibility of outdoor cannot be ignored

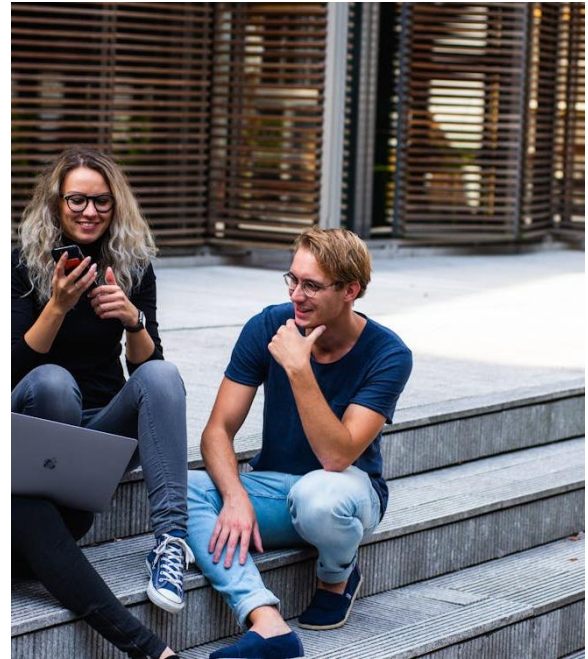
Outdoor advertising has proven to be a trusted channel in an age of digital misinformation, providing brands with a credible and tangible platform. According to 62% of consumers, trust is a key factor when deciding whether to engage with a brand. By selecting the right locations, outdoor advertising can effectively reach a wide range of demographics. When brands leverage outdoor in a thoughtful and strategic way, it allows them to connect with consumers at moments of trust, creating opportunities for meaningful engagement and long-term success.



A Different Way to Stream Channel 4 Content?

Channel 4 have recently launched a new dedicated section across its streaming services, 'the un-algorithmic algorithm', whereby viewers can access content collections created exclusively by people, for people.

The result is unconventional, unexpected and alternative human-curated content libraries, distinctly recognisable as C4's unique tone of voice. Arguably, they are the only broadcaster to be bucking the trend of an abundance of automation; instead, recharacterising their approach to content personalisation, championing the audience in the process.



Young People Drive Rise in Trust in Advertising

Trust in advertising has risen from 36% to 39% over the past year, driven by younger audiences, according to the Advertising Association (AA). Trust among 18-34-year-olds increased by 16 points, compared to just three points for over 55s, reflecting a 'digital divide'. Younger audiences are more likely to trust online ads (51%), social media (47%), and influencer marketing (45%), while trust in these channels remains low among older generations.

TV and cinema remain the most trusted media, with cinema leading for 18-34s (56%) and TV for 35-54s (49%) and over 55s (31%). Credos credits the rise to better ad experiences, festive campaigns, and ASA awareness efforts.