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THE BUSINESS OF DIGITAL VIDEO

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Welcome to the first issue of The Drop, a new magazine that explores the interaction between the digital-first and TV content businesses. Published by TellyCast, it aims to identify opportunities for collaboration between these two dynamic sectors.

In some respects, The Drop is a neat illustration of the evolving landscape. Initially conceived as a creator pitching session at TellyCast's annual Digital Content Forum, it subsequently morphed into an online platform – providing news and analysis on a daily basis. Now, with the launch of a paper magazine, it encapsulates the "digital-first not digital only" philosophy that underpins the burgeoning creator economy.

Issue one of The Drop is a scene-setter, reporting on some of the seismic shifts taking place. Topics covered in the following pages include the meteoric rise of microdramas, the migration of formats from digital to TV, and the growing collaboration between creators and FAST. We also explore the increasingly sure-footed way in which traditional TV studios are embracing social platforms and building fandom around their IP.

It's obvious that everyone is still finding their way – but there is no question that the content economy has changed for good. With MrBeast headlining on Amazon Prime Video and Gordon Ramsay now a social media star, the way the industry thinks about content, audiences, and platforms has changed irrevocably.

There is also much to be said about the role of brands in the new content economy and the emergence of AI – topics that will be covered in more detail in future issues of the magazine and at the upcoming edition of the Digital Content Forum (November 6, 2025).

There is no simple way to summarise what is happening in the content business right now. But a few messages come through in this issue. Firstly, there is no content hierarchy anymore. Great IP can originate anywhere and doesn't necessarily cost $100 million to make. Secondly, the critical differentiator going forward will be fandom – the ability to connect with communities at a deeper level than views and clicks.

Finally, unlikely creative partnerships will be the lifeblood of the new content economy. Yes, some collaborations will fail to overcome the cultural differences between the two sectors. But a willingness to embrace experimentation will deliver the kind of authentic, diverse, surprising content that today's restless audiences demand.

Andy Fry, Editor

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THE DROP

A spirit of curiosity

Justin Crosby, founder of TellyCast and The Drop, has been on quite a journey since he launched his podcast four years ago. Here he explains how his events and publications support and embrace the new production economy

When I launched the TellyCast podcast four years ago, it was with a simple aim: to start a conversation about how our industry was changing. At the time, the pandemic had thrown production into turmoil, audiences were shifting online at pace, and the division between television and digital-first content was beginning to blur.

What started as a weekly podcast quickly grew into something bigger - an industry forum, a community, and eventually a set of events - the Digital Video Awards, Digital Content Forum and How to Make Money in Digital - that bring people together to make sense of this new production economy.

That spirit of curiosity and connection is what led to The Drop. We first tested the idea at the Digital Content Forum, where we created a live space for creators to pitch to buyers and producers. The response was hugely positive, leading to several commissions and collaborations between the old world and the new. But it was clear that people wanted more than a single annual moment – they wanted an ongoing place to understand what was really happening in digital-first, social video, and the evolving TV landscape. So The Drop became a daily news and analysis platform and newsletter. And now, with this magazine, it steps into the physical world.

The Drop is about bridging two sides of the content industry that often talk past each other. On the one hand, traditional TV, with its heritage of storytelling, scale, and professionalism. On the other, the creator economy, fast, experimental, and platform-native. Both sides are now colliding, competing, but also collaborating. That's where the opportunity lies – in cross-pollination, in learning from each other, in building new models of partnership that serve audiences wherever they are.

The Drop is here to make sense of change and to give space to the people driving it. The future of our industry isn't about broadcast or digital, television or YouTube, but about ideas, talent, and audiences. That's the journey we've been on – and the one we're inviting you to join.

"The future of our industry isn't about broadcast or digital, television or YouTube, but about ideas, talent, and audiences."
Justin Crosby, TellyCast & The Drop

We hope you enjoy the first issue of The Drop. If you do, why not join the thousands of subscribers to our free newsletter, YouTube channel and audio podcast to keep up to date with the fast-moving world of social video. Just scan the QR codes below to sign up.

Welcome to the new production economy.

Justin Crosby
Founder, TellyCast and The Drop

TellyCast YouTube channel

The Drop


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Clockwise from top left: *Clone Heads, Pink Courtroom, Don't Get Catfished, Odd One Out, CEOs Go Wild, Heartwired*

Digital's next top format?

After Amazon Prime Video's *Beast Games* and Netflix's *Inside*, the hunt is on for digital entertainment formats that can cross the divide into TV and streaming

As of 2025, there are 114 million channels on video sharing platform YouTube. Between them, the owners of these channels upload 189 million hours of content every year. In sum, there are currently 5.1 billion videos residing on the platform.

True, many of these channels feature pet owners scaring cats with cucumbers or helpful older men explaining how to jump start your car. But the fact remains that YouTube is by far the largest reservoir of original IP on the planet - dwarfing Hollywood majors, linear broadcasters, super-indie producers and distribution houses.

All of which begs the question: why do so few digital-first entertainment formats migrate to TV and streaming? Despite this endless array of content – complete with detailed audience analytics – the number of formats that have been picked up for adaptation by the traditional content industry barely reaches double digits (see panel).

Superficially, there seems like an obvious business case for building a format development pipeline around digital-first IP – particularly as it often has a global fanbase. As Jonathan Shrank VP, streaming and content partnerships, at TheSoul Publishing, observes: "Unlike legacy media, social video transcends borders. A viral hit in Brazil or Indonesia can become a global phenomenon overnight. That makes the creator space a globally scalable IP factory, perfect for the international ambitions of traditional platforms."

Thom Gulseven is as well-placed as anyone to dissect this issue, having worked at Channel 4 and LADbible Group before co-founding Strong Watch Studios with Ben Powell-Jones. Since launching in 2023, with backing from Hat Trick Productions, the studio has created formats such as *The Snake* and *People Are Deep* – and is now crafting a slate of comedic shows for Channel 4's new digital-first channel A Comedy Thing.

For Gulseven, a key component of the explanation is that broadcasters and streamers "are not so much interested in finding digital-first formats as tapping into the huge audiences that leading creators have built. The priority is to get the creator on board then devise a show that is likely to bring the audience over with them."

The standout example of this is Amazon Prime Video's *Beast Games*, a huge entertainment vehicle devised in partnership with YouTube superstar Jimmy Donaldson (MrBeast). An outsized competition show with 1000 contestants, *Beast Games* attracted 50m viewers in its first 25 days and is reported to be returning for a new series.

Amazon Prime Video's *Beast Games*

Just as instructive is the more recent news that Netflix is planning to launch a new kids & family competition series in 2026 with ex-Nasa engineer turned social media star Mark Rober (76m followers across platforms). Underlining Gulseven's point, the process here has been: get Mark Rober, then make a show that leans into the ambitious science experimentation that has become his trademark.

The creator-centric nature of social media has another implication for the migration of digital-first formats to traditional media, adds Gulseven. "I think a lot of firms looking at formats in this space may be asking themselves – what is actually ownable? Formats in the digital space are often quite simple, familiar devices like line-ups, that are designed so that the audiences can get to know the creators better. The priority isn't always to create an innovative format, but to showcase the talent."

Gulseven doesn't rule out the potential for digital-first formats to blow up on television, but argues that the most likely candidates are those where "the combination of talent and idea evolves into a format".

"There are too few opportunities on TV, with broadcasters commissioning de-risked IP that's already tried and tested."
Lucy Smith, Fawkes Digital

This is something Strong Watch is exploring through its comedy content for Channel 4. *The Split*, for example, sees comedians pair up to use their wit and prejudice to decipher what side of a binary line public participants will fall on. Here, the alchemy of talent plus game mechanic is key.

After Party Studios head of entertainment Sam Ewen says anyone serious about taking their format from digital-first to TV needs to thoroughly understand the differences between the two ecosystems. "Social and TV audiences have different expectations, so if you want to migrate a format you need to be sure it makes sense for the new platform. The most important thing is winning audience trust."

Ewen identifies format flexibility as one factor that can make or break a show's ability to bridge the gap. "You need the core IP to be adaptable. In digital, content is fast-paced, fast cuts, joke, joke, joke. But the TV audience isn't really looking for shows that get straight to the action in the same way. So the core format must allow for that."

He also stresses that "the talent needs to make sense for the platform. We work with creator Specs Gonzalez on Sky Sports' *Scenes*, and he is an example of someone who can bridge the two spaces because of his passion for football. But bringing the format and talent over to TV together doesn't always work out."

Ewen expects to see more formats migrate to TV – and is backing

The Download... on digital formats

Danny Rowlands is SVP global unscripted content at entertainment powerhouse Fremantle. He told The Drop why social platforms could be a breeding ground for new format ideas.

A few entertainment/reality formats have crossed from social platforms to TV. Do you expect to see more of this?
Yes, I think it's just the start of the crossover. Social is a breeding ground for creative – everyone is inspired by each other; ideas can be tested quickly; creators get real-time feedback; and those successful concepts arrive with a built-in audience. Traditional broadcasters and streamers are competing for eyeballs. If you have the option to commission a tried and tested format with a built in loyal fanbase and a huge audience, it would be less of a risk to greenlight this over an unknown format.

"My advice to creators would be to consider the universality and the scalability of their format."

What are the key hurdles on bridging this gap?
On social you live in moments – you can watch something that really engages you, but then you move on quickly to the next piece of content. Social and digital platforms are built for this. They often focus on engagement, speed and interaction with their community, which can be captured in minutes. Whereas TV demands more – not every moment on social can stretch to a 45-minute episode or an eight-part series.

There's also a cultural difference: creators often operate with complete control of their creative and can be agile and reactive to the buzz of culture, whereas TV has layers of production, compliance, and opinions which lengthens the timeline of the process.

What is your advice for creators looking to bridge the divide?
Consider the universality and the scalability of the format. Ensuring the idea has themes that would resonate with a much broader audience is important.

What about digital first talent as hosts and contestants?
When it comes to creators as hosts, it's definitely more of a consideration now, but it's not as simple as just dropping them into a format and expecting a quick win. We've seen in the past that shoehorning creator talent into shows doesn't guarantee success - if the format isn't relevant to their audience or authentic to who they are, it just doesn't land. Audiences can sniff that out instantly, and they're much more unforgiving.

one of After Party's own shows – *Don't Get Catfished*. But he warns "it is a marathon not a sprint. When you're trying to build trust with audiences there is no quick fix."

While the creative differences between the two sectors is clearly key, another barrier to digital format cross-over is the bed-blocking of slots by mega-formats, with risk-averse commissioners more likely to greenlight a *Masterchef* spin-off than a foodie format that has just started to come to the boil on YouTube. "There are too few opportunities on TV," notes Lucy Smith, founder of digital-first studio Fawkes Digital, "with broadcasters commissioning de-risked IP that's already tried and tested."

Smith is pragmatic about this: "IP-generators need to find fresh ways to prove new formats," she says. "At Fawkes, we've reached a point where we don't distinguish between channels and tourism boards, broadcasters and beauty brands, commissioners and social media managers. For us, the game is on to get a first iteration of a format commissioned at whatever scale, test with audiences quickly, promote through creator communities and derisk formats ourselves."

Fawkes Digital has built up a robust slate in this way - including LinkedIn adventure format *CEOs Go Wild*, Channel 4.0 dating show *Baddest in the World*, dance competition *MOVE IT: The Dance Off* and L'Oreal-sponsored hair podcast *Texture Talks*. "We work with innovative brands and digital broadcasters to fund formats, in addition to self-funding shows we believe have commercial potential."

Bart Frank, co-founder of digital first studio Objekt, echoes Smith, saying his studio has pivoted towards brands as format commissioners in recent times: "Our strategy is all about making valuable IP that can live beyond YouTube – and we have created formats like *Mukbang Dates* and *Clone Heads* that I believe could go beyond social and be exploited worldwide across platforms. But a recent trend I've seen is for digital commissioners to move away from complex world-building towards formats that are quick to produce and easier to hook the audience into. That doesn't necessarily align with an IP-led strategy of building original formats that can travel."

Instead, Frank sees the current trend for brands to launch their own entertainment-led YouTube channels as an emerging opportunity to develop and own formats. Currently, for example, Objekt has two new shows, *Are You Even Real* and *You're Lying*, on boohooMAN's channel. Elsewhere, brands like Foot Asylum (*Locked In*) and PrettyLittleThing (*Pink Courtroom*) have proved it is possible to generate big audiences on their channels with the right combination of ideas and talent. "Brands have a competitive advantage when it comes to creating high-value YouTube content," says Frank. "Unlike other creators, they aren't producing the content as a means to directly generate revenue from that video. As they start to see a connection between content creation and commercial returns, they will spend more on bolder ideas."

Of course, there's nothing to stop digital-first studios nurturing new formats via their own channels. Jubilee is a high-profile proponent of this with its highly-watchable *Odd One Out* and *1 vs 20* formats. StudioB is pursuing a similar route with *Heartwired*, an original format

Tresor Productions is currently producing a German version of *Hot Ones*

that "puts AI at the centre of modern dating". Dropped in March 2025, *Heartwired* "explores just how easily AI can deceive even the most confident daters—and how hilarious the results can be when influencers attempt to charm a robot". *Heartwired* was created with the backing of Connect Management and filmed at StudioB's studio. Brandon Baum, CEO & founder of StudioB, says: "The combination of AI and dating creates an experience that is as thought-provoking as it is entertaining."

This last model is also attracting interest from more traditional producers. Keshet International's Germany-based subsidiary Tresor Productions, for example, is currently producing a German version of First We Feast's digital-first format *Hot Ones* for a dedicated YouTube channel in Germany. Working with Endgame Entertainment and inSocial Media, Tresor expects to have completed 20 x 30-minute German episodes of the popular US interview format before the end of this year. The ultimate ambition is to be producing 36 original episodes a year of the German version.

Axel Kühn, managing director at Tresor Productions, says: "We first thought about the format potential for *Hot Ones* when StoryNation Productions successfully adapted it for Canal Plus in France. So we approached BuzzFeed (the owner of the format at the time) and secured the rights to make a version in Germany."

Kühn says Tresor tried to sell the format to broadcasters and platforms with little success. "They all liked it. But with most of them, the answer was that it didn't fit their strategy. For us it was a surprise, because there are still so many episodes of the US show on YouTube and they continue to deliver huge audiences."

Kühn says he pitched the show to a streamer as brand-funded. "But when the streamer couldn't find a brand partner, we did it ourselves and created our own YouTube channel. It's such a strong brand we didn't think it would be difficult, and we were right. We got a lot of positive feedback from brands and Uber Eats came in as our partner. They've been great, funding a full season, cross-promoting the show on their platform, and doing events and giveaways."

Tresor is now committed to building *Hot Ones Germany* as a digital-first proposition, supporting the flagship YouTube channel with shortform activity on TikTok, Instagram and YouTube. "We have a weekly episode on YouTube and then daily shorts, which is great for building audience. On YouTube, our most successful video so far has had 190,000 views, but on TikTok one video reached 5.7 million views," says Kühn. Although YouTube rollout wasn't Tresor's first line of attack, Kühn says he would probably roll out any future digital-first formats in the same way. "It's an interesting model because it allows us to keep control. If we make a great show for the traditional television business and they get the scheduling or promotion wrong, we suffer."

In a sense, this desire for independence hints at another reason why digital formats don't often travel to TV: because creators don't always want them to. While the pull of an SVOD payday may be hard to resist, there's also a recognition among creators that chasing TV exposure is risky if it compromises their own creativity or undermines the relationship they have crafted with their online community. ●

Extreme digital makeover

Students of social media will have noticed an intriguing trend – creators getting their hands on classic formats and rebooting them on their own channels. Beta Squad, for example, has created content based on ITV Studio's *Come Dine With Me* format, while The Sidemen have produced *Supermarket Sweep* and *The Chase* specials.

To date, this model is relatively underexploited, but it does raise a key question – can IP owners freshen up formats by putting them through the digital-first washing machine? Banijay Entertainment chief content officer, operations, Lucas Green, thinks so – arguing that "convergence presents huge opportunities for our business. We're already seeing success in reimagining our formats through a creator lens, such as *MasterChef Creators* in Brazil. We're also developing IP in partnership with creators, and leveraging their platforms with shows like *Atlantic: Mission Unknown with Knossi*".

Indeed, Banijay in France is attempting to formalise this approach, by unveiling the Banijay Entertainment Creators Lab in partnership with YouTube. Launching at MIPCOM, the lab will select five creators to reimagine five of Banijay's classic shows: *Première Compagnie*, *Dilemme*, *Minute to Win It*, *La Tête et les Jambes*, and *Got to Dance*. The creators will produce pilots to be broadcast on YouTube.

Each creator will receive funding for their pilot, along with TV exec mentorship and exposure through both Banijay and YouTube. So why is YouTube involved? Because it wants to showcase the collaborative potential of TV and YouTube. "The goal," says the platform, "is to test and refine a sustainable business model that incorporates creators and brands, with the potential to expand this programme beyond France".

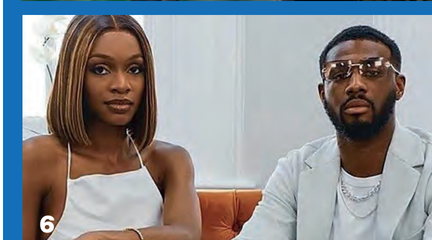
Bridging the divide

Six digital formats that have captured the TV industry's imagination

1: *Inside* is a reality competition created and hosted by social platform supergroup The Sidemen. The show has been loosely compared to Big Brother. A group of online influencers/creators are locked in a house and perform crazy challenges in a bid to win a cash prize. Initially Inside appeared on the group's YouTube channel but was then picked up by Netflix. The streamer ran season two of the show in March 2025 and then dropped a US version in September 2025.

2: *Tapped Out* This is a digital-first prank show produced by indie Wall of Entertainment for Channel 4.0. In its original incarnation, creator Nella Rose and friends turned practical jokers to see who could last the longest in a range of hilarious, cringe-worthy situations. The show spawned a one-off celebrity edition for Channel 4, featuring Nella Rose, Harry Pinero and showbiz guests. Evie Buckley, digital commissioning editor & Channel 4.0 lead, calls *Tapped Out* "one of the most boisterous and brave shows on Channel 4.0 with millions viewing across our YouTube and social platforms."

3: *Let's Play Ball* This Dutch format was originally piloted on YouTube via Signal. Stream's channel StukTV, where it drew over 1.2 million views. It was then picked up by Banijay Entertainment and converted into an eight-part series for SBS6 in the Netherlands. Firmly in the Banijay wheelhouse, *Let's Play Ball* is a larger-than-life physical game show, which sees contestants rolling a gigantic ball across varied terrain from narrow city streets, to rivers and countryside meadows. James Townley, chief content officer, development, Banijay Entertainment, calls it: "a riotous format, that perfectly reflects our commitment to delivering fresh, escapist entertainment."



4: *Pop The Balloon* This year Netflix streamed a reimagined version of viral dating series *Pop the Balloon*, which has racked up millions of views on YouTube. *Pop The Balloon* is a speed dating–style online show created by Bolia Matundu (BM) and Arlette Amuli. In the show, participants line up, and others "pop the balloon" of those they're not interested in, eliminating them from the dating pool. The SVOD platform says: "*Pop the Balloon LIVE* is the same show fans know and love, but with even higher stakes, fresh twists, and celebrity surprises, all unfolding in real time."

5: *7 vs Wild* is a reality format that came to prominence via YouTube in Germany. Developed by German YouTube producers Fritz Meinecke, Johannes Hovekamp and Max Kovacs, the show sends seven content creators and influencers into the wilderness with just seven basic survival items. The first two 16-episode seasons of *7 vs Wild* were filmed in Sweden and Panama and streamed on YouTube in November 2021 and 2022. They achieved a total of over 200 million views. In a significant step-change, season three was commissioned by streaming service Amazon Freevee. Amazon has now closed Freevee but *7 vs Wild* is up to season four and is still available on the Amazon platform in Germany.

6: *Blue Therapy* Netflix commissioned a version of digital-first counselling series *Blue Therapy* for its global audience. The series, which started life on YouTube, was made by production company Osun Group. *Blue Therapy* provides an intimate look into the lives and relationships of culturally diverse young couples and offers an intriguing perspective on modern dating. *Blue Therapy* started out on YouTube channel TrendCntrl and quickly built a passionate fanbase. At this point, it was spotted by Channel 4, which greenlit its own six-part version for E4. Distributor All3Media International also got involved, taking the series out to the global market as a format.

The re-creator economy

TV's heavyweights used to be depicted as slow to grasp the digital opportunity but now they are key players on social platforms, monetising their IP and forging alliances with creators

ITV Studios' *Love Island* has gained 1.8m followers on social media since the start of 2025, with 1m of those on Tik Tok, according to a BBC report. The BBC says there has been an explosion in *Love Island* content

The television industry's big beasts are no strangers to digital media. But for all their investment to date, it stills feels as though the last year has been a tipping point in terms of the way the sector's heavyweights are harnessing the power of social.

While there are still cultural and commercial barriers between what are loosely described as 'traditional' and 'digital' media, a seismic shift is discernible through a series of distinct but connected events. YouTube's reinvention as a TV platform is one, while the hoovering up of creators by FAST and AVOD platforms is another.

MrBeast's appearance on Amazon Prime Video and Jake Paul's showdown with Mike Tyson on Netflix both caught the eye, but just as significant is that TV chef Gordon Ramsay now has 25m subscribers on hisYouTube channel. In kids, *Cocomelon* is regularly cited as a digital to TV success story – but just as impressive has been *Peppa Pig* and *Bluey*'s reinvention as digital properties.

Behind the scenes, legacy content studios are restructuring their businesses to embrace the change. Among recent announcements, Sony Pictures Television International Production has hired digital-first specialist Matt Ford to supercharge the group's work on digital-first original content. Ford is now VP - commercial, digital, SPTIP and has a remit to build creator partnerships. He wants to "hear from UK creators who have bold ideas for new shows, new formats and new channels."

Another company that has moved decisively into digital-first is ITV Studios, with the launch of dedicated unit Zoo55. Zoo55 sits within ITVS's Global Partnerships division and has a key role to play in exploitation of the company's IP. But managing director Martin Trickey says there is more to it than that: "I like to think of us as the growth engine of ITV studios, with a broad remit to try new things."

ITV Studios is a complex business housing numerous production labels. According to Trickey, Zoo55 is there to support them all. "Our goal is to be a digital centre of excellence for all our labels. For example, we have a close relationship with So Television, which makes *The Graham Norton Show*, running social activity for them. Lifted Entertainment, which makes shows like *The Voice* and *Love Island*, has a digital team which runs activity when shows are on-air. Outside that, we run areas like YouTube channels, to make sure those brands are always on."

Trickey says Zoo55's work is a mix of monetisation and marketing. While it has a part to play promoting upcoming shows, some of its most eye-catching work has involved archive content. "A good example is a show called *River Monsters*, which ran for many series," says Trickey. "We have created YouTube and FAST channels that are running in multiple languages. That kind of work has really reinvigorated the IP."

With 90,000 hours of archive to play with, Zoo55 has a vast array of clips and episodes to bring to YouTube in the form of either single IP or genre-based channels. "If there's enough content, it could justify a single IP channel," says Trickey, "but if you're dealing with something like a one-off documentary it's more likely to sit within a genre channel. For example, our natural history content is aggregated within Our World (490,000 subscribers). Then again, if we have a show that doesn't fit either of those models then it might go to a third party like Little Dot Studios, which has its own network."

As if that isn't enough to get your head around, ITV Studios' sister division ITV Media & Entertainment also operates YouTube channels like ITV Retro, where audiences can view iconic series such as *The Prisoner*.

YouTube and FAST are currently the most useful platforms for revenue building, with TikTok, Instagram and YouTube Shorts playing more of a role in the promotion of series like *Love Island*. "TikTok is still not easily monetisable," says Trickey, "but it does play a key role in building a buzz around shows like *Love Island*."

As intimated already, Zoo55's priority right now is to exploit existing IP – but Trickey does see a pathway towards digital originals. "My initial focus has been to make us as effective and efficient as possible, maximising margins on the content we make. Originals are a natural progression but creating content has cost associated with it."

He strikes a similar note when discussing collaboration

"I like to think of us as the growth engine of ITV Studios, with a broad remit to try new things"
Martin Trickey, Zoo55

ITV Studios' *River Monsters* has been a resounding success on YouTube and FAST

Gordon Ramsay's *Scrambled* is a digital-first original that appears on the celebrity chef's YouTube channel

with creators. "We have done one-offs like linking *The Chase* with *The Sidemen*. But what we're really looking for are strategic partnerships. Collaborations have not always worked as well as they could, so I'm keen to get it right and make sure that it works for both parties."

In terms of areas where Zoo55 is innovating, he points to a *Hell's Kitchen* activation on Roblox and a Fortnite-based partnership with McDonald's, activated via ITV Studios' next gen creative agency Metavision. Trickey calls brand-funded a work in progress but anticipates "robust growth in the coming years."

Banijay Rights VP digital Shaun Keeble is exploring similar opportunities to Zoo55's Trickey. He says BR's digital distribution strategy "is incremental to our format and finished tape business. So we are fundamentally about maximising the value of catalogue, and building global partnerships across all the major digital platforms."

Keeble says Banijay first engaged meaningfully with YouTube around a decade ago: "Initially, it was about protecting IP but then it became more about monetising our content and building communities around brands. Roll forward to 2025 and we're working with IP, talent, broadcasters and licensees across YouTube, Facebook, TikTok and emerging opportunities like AVOD and FAST channels. The job today is all about turning billions of monthly views into revenue opportunities."

One success story, says Keeble, is the *Mr Bean* YouTube channel, which now has around 35m subscribers on YouTube – primarily built on catalogue content. "Increasingly, longer form content is what drives awareness and monetisation on YouTube, so that points towards thematic clip compilations and full episodes."

The challenge when publishing content daily, says Keeble, is "how you get there without saturating the product and triggering a subscriber decline."

This is where modestly-budgeted original production can help, says Keeble. 'We've started creating more ancillary content, for example behind the scenes moments. It's important not to miss opportunities, for example if Rowan Atkinson (aka *Mr Bean*) is in the studio recording some lines for the animated series. We've also created tutorial-based content called the *Mr Bean Handy Bean* videos."

Like ITVS, BR also publishes genre-based channels, with Banijay Documentaries, Banijay History, Banijay Science currently attracting between 600,000 and 1.3m subs. Some of Banijay's megaformats – such as *Masterchef* and *Big Brother*– have also proved perfect for YouTube channels, because of the number of localised versions that exist. Keeble says that BR has a key role to play supporting licensees of shows. "We found in the past that some of our broadcast partners would only be active in the few weeks running up to the launch of a show. But our role has been to ensure YouTube channels stay active all year round."

One intriguing development is BR's move to work directly with talent on their social strategies. "We're working with several comedians that have established themselves through TV but now want to build their presence through social. An example would be Jimmy Carr, who is known both for his live stand-up work and for shows such as *8 out of 10 Cats*. Here, the approach has been to utilise content that he has retained rights to, and also generate some original production when he is on tour."

Over at Fremantle, head of social and digital platforms Robert Cocker says some of the company's content is almost synonymous with online viewing: "If you search 'talent' on YouTube you will get a Fremantle show due to our hugely popular *Got Talent* franchise. Last year, according to Tubular, we were the 7th biggest provider of TV content in terms of views across YouTube and Facebook, with 32 billion views."

Cocker says Fremantle is keenly aware of the need "to ensure we're

Platform Innovation: *Seven Wonders of the Ancient World*

Keshet International (KI) partnered with SandStone Global Productions and Snapchat's AR Studio in Paris to create an at-home augmented reality (AR) experience to accompany three-part history documentary series *Seven Wonders of the Ancient World*. The series launched on broadcaster 5 in the UK on Saturday August 2, and has already sold to numerous territories around the world. The AR experience has been made available to all international buyers and will be accessible to viewers via an on-screen QR code. Kelly Wright, KI's MD of distribution, says: "Incorporating this interactive tech into *Seven Wonders of the Ancient World* is a point-of-difference and the QR codes allow viewers around the world to explore, learn and connect with these famous historic sites from the comfort of their own homes."

Shula Subramaniam, senior producer at SGP, adds: "When the chance to collaborate with the Snap AR Studio arose, it provided a great creative opportunity to bring the Seven Wonders to traditional viewers and a new generation in a fresh way. We would love to do more with the Snap AR Studio and keep exploring digital content creation around our projects. Our USP is that everything we produce always needs to be authentic to the stories we're telling so it's not a one-size-fits-all approach."

Platform Innovation: *Macy Murdoch*

Produced by Shaftesbury, in association with CBC, *Macy Murdoch* is a spin-off of the long-running *Murdoch Mysteries* drama series. It follows the adventures of teen detective Macy Murdoch as she travels back to 1910 to find the real perpetrator of a crime. To support the launch of the show, Shaftesbury brought its 1910 world to life via a five-week activation on gaming platform Roblox.

Running from April 2025, the Roblox activation generated more than 42,000 hours played and 128 million impressions. Jay Bennett, producer of Macy Roblox and senior strategic consultant at Shaftesbury, says: "I came to this project with the benefit of having done a few Roblox projects previously. It's an exciting, powerful platform that is like the YouTube of gaming. In the case of Macy, it supported discoverability by the right demo. You're not trying to get everyone to listen to you. You're trying to get a specific group. The partnership also worked because all of the brand attributes of *Macy Murdoch* - teamwork, investigation, problem-solving – were a good fit with the platform. With the help of the Roblox team we identified games that were already successful in the market that hit our demo and the DNA of the show."

where audiences are. *Britain's Got Talent* (BGT) has been using clips and creating content for digital since 2008, and the ability for audiences around the world to watch, engage and share performances has been pivotal in keeping formats like *Got Talent* front and centre."

Fremantle's top priority, says Cocker, "is to be a great partner to our commissioners. Their success is our success and helping to drive awareness and bring viewers to tune into the linear broadcast and their catch-up services is key. We want to be the best partners possible to secure recommissions, and social plays a key role."

Today, Fremantle has over 500 YouTube channels which appeal to both large and niche audiences alike. "Our digital team at Talkback Thames worked on a great example, with *BGT Unseen*. This gave fans of BGT access to unseen footage – including auditions and key moments with judges. This was created for streaming platform ITVX, in the form of eight episodes to complement the season of *Britain's Got Talent*. After the main show aired, BGT Unseen streamed clips for fans, which also went out on the *Britain's Got Talent* YouTube and Facebook accounts. A week after the season ended, the *BGT* socials had accumulated over 93m views."

Cocker says digital originals is still a tough business, because "CPMs are still a country mile away from any sort of TV figures". But there have been successes. "Out of Italy we worked with Discovery+ and TikTok on *Call Of Beauty*," says Cocker. "There has also been a 6-part digital series with Carrie Underwood titled *Idol to Icon*; and we help create and manage a channel for Daniel Mantana, a popular Indonesian creator."

Little Dot Studios is doing similar work to the above firms, but sits apart from them. Although owned by All3Media, it operates independently, says James Loveridge, co-managing director, agency. "We do run channels and distribute content for A3M, but we also work with other distributors, producers, broadcasters and talent, helping them leverage their IP across multiple social platforms."

The exact role depends on the KPI in each case, says Loveridge, "but in entertainment, I would say 80% of our work for partners is about monetisation, and the other 20% is about fandom - building points of engagement and marketing. That would encompass work for platforms like Netflix and Amazon Prime Video in the UK, creating social content that can help elevate their marketing campaigns. Recently, I had the whole team in watching every episode of *Wednesday* to formulate a launch campaign."

For most clients, says Loveridge, the process involves "taking a back catalogue, creating a YouTube channel, building a brand, and working with the partner to understand tone of voice. We use data analysis from the channel and the wider ecosystem to iterate and improve it. There are two languages we try to understand, the language of the algorithm and the language of the audience."

One of LDS's most intriguing roles has been helping build the Gordon Ramsay YouTube channel virtually from scratch to 25m subs. "What makes this interesting," says Loveridge, "is that this is an aggregation

Britain's Got Talent (top) and *Mr Bean* (right) have both developed robust fan bases on social media platforms of content from different rights holders. So that means working with the likes of Studio Ramsay Global (SRG), All3Media, Optomen and ITV Studios to help build an ecosystem of content."

That said, the Gordon Ramsay channel is now so big SRG is adding originals like *Scrambled* and *Ramsay In 10*. "It's an example of a channel that has reached a point where it is sustainable to create original content."

In the case of LDS's work with Dr Seuss Enterprises, original content has been especially important, adds Loveridge: "Dr Seuss is a globally recognised brand, but the rights to a lot of films and TV shows associated with the brand are tied up with large studios. So our work with DSE has involved creating original content to reinvigorate the brand in the digital first space. We started with low-fi animation, but as the channel has grown rapidly we've produced series like *Seuss Circle Time*, *Crafty Fun with The Cat in the Hat* and *Learn to Draw Dr. Seuss Babies*."

LDS has 11.2bn organic views passing through its network every month, so unsurprisingly is right on top of channel trends. Loveridge's top line observations are that video podcasts have become much more prominent and that YouTube's reinvention as a TV-style platform has led to a shift towards long-form lean-back viewing – with 45-60 minutes the current sweet spot. This in turn is having an impact on the look of channels: "I'd say 3-4 years ago, best practice was prominent use of thumbnails and very over-produced, bright, bold text. That isn't really the case anymore with simplified, clean thumbnails moving the dial. A crisp image of the show, the talent and the title works well in the connected TV context."

On creators, he says the crucial takeaway is "to avoid shoehorning creators. We work with the gardener Monty Don, who has a phenomenally engaged audience. But we wouldn't package that channel in a kind of ultra fandom, Gen Z style. Equally, you have to make sure that any ideas you develop with creators resonate with them. You want them embrace the idea of sharing content on their own socials - not just turn up and take a pay cheque." ●

The Download... on inspiring fandom

Jasmine Dawson, senior vice president, digital, BBC Studios, will deliver a keynote at on the opening day of MIPCOM CANNES (Monday, October 13). Her key message will be the way that increased emphasis on "fandom" has transformed the relationship between BBC Studios content and its diverse array of audiences.

In fact, she doesn't really have much time for the word audience: "We've come a long way from when we used to talk about our audience - because audience and fandom are very different things. The triggers that move someone to become a fan that not only wants to engage and consume but also purchase is the killer insight."

Dissecting what it takes to create fandom, Dawson says: "It has to be a two-way relationship. Our approach is to give fans the power to help shape brands and content with us. So that's not just about listening to comments and shares, but thinking about how they play with our brands."

A large part of BBC Studios' work has involved leveraging pre-existing in-house IP, like *Bluey*, *Doctor Who* and *Top Gear*. *Bluey* is often held up as a blueprint for digital exploitation, but Dawson says BBCS has also had a lot of success with BBC Earth: "BBC Earth showcases how you can take the incredible work of the BBC Natural History Unit and embed it into the zeitgeist for social media. BBC Earth allows us to speak to a broad range of fans in terms of age-range. It also enabled us to introduce spin-off brands like BBC Earth Explorer, BBC Earth Kids and BBC Earth Science."

Dawson says her division has also had success building brands that are rooted in BBC heritage but speak to a new generation. "Comedy platform Funny Parts leans into the BBC's heritage but isn't so male-dominated. It has shone a light on incredible up and coming female comedians."

Alongside BBCS-owned IP, Dawson says her division is open to working with third parties. "We have a partnership with Acamar Films, the company behind preschool favourite Bing. We want to take what we've learnt about fandom and build an agency model."

Developing a fan-first mindset has involved thinking about the ways creators building communities, says Dawson. "We've worked hard to think like creators. How do they talk to their fans? How do they think about partnerships?"

BBCS is also working closely with creators via a division called TalentWorks, run by director of development Helen O'Donnell: "Talent Works is there to build long-term relationships with talent and creators," explains Dawson. "A great example is our work with Amelia Dimoldenberg, which has unlocked opportunities for both of us."

While ad funding is still core to the digital-first economy, Dawson notes a growing emphasis on payment models – from subscription to platforms like Patreon: "There is more focus on monetising fandoms through payments – not just for revenues but for the insights it brings. We all have to be realistic about the weighting of this within our overall businesses; but a diversified business model means you aren't over-reliant on algorithms or a single platform."

Underwater photographer Anthony Ochieng Onyango for BBC Earth

Drama under the microscope

After taking off in China, microdramas are enjoying a boom all around the world. The Drop investigates this latest digital-first phenomenon

When Jeffrey Katzenberg-backed streaming platform Quibi collapsed in 2020, after just six months, it looked like the market for shortform drama was dead in the water. But roll forward five years and one of this year's hot topics is rampant consumer demand for what are now referred to as 'vertical dramas' or 'microdramas'.

Katzenberg may have been right to blame the impact of the Covid-19 pandemic for Quibi's catastrophic collapse. But just as likely is the fact that the platform was off target when it positioned itself as subscription-based platform with a sweet-spot of 10-minute stories. In reality, global audiences have fallen big time for freemium mobile apps that offer snack-sized series made up of 1-2 minute episodes.

In hindsight, it also looks like Quibi landed in the US a few years too early. While North American consumers are now flocking towards mobile-first microdramas (more below), the trigger for the current surge in interest has been Chinese apps like DramaBox and ReelShort. Research by OMDIA estimates that Asia's top five microdrama apps reached a total of 150 million monthly active users in February 2025.

Cassandra Yang, co-founder of microdrama studio Rising Joy, says microdramas really began to dominate the Chinese market in 2023/24. "Remarkably, within just two years, daily viewing time for microdramas grew from a niche interest to surpassing traditional long-form dramas, a testament to their explosive popularity in China".

Perhaps not surprisingly, consumption of microdramas seems to be complementary to traditional drama viewing. It happens on the move, during work breaks and at bedtime. One factor that Yang believes is fuelling the genre is interaction between fans. "Consumption is quite individual," she says, "but young audiences are engaging through social sharing, comments, and community-building."

Now, she says, Rising Joy's data shows demand for microdrama is increasing rapidly across the Americas (US, Brazil, Mexico), APAC (Japan, Indonesia, Thailand, India) and MENA (Turkey, Saudi Arabia, UAE). "This is no fleeting trend limited to a single region," she insists, "but a multi-billion-dollar global market with staying power."

Yang's assessment is borne out by the fact that the above-mentioned ReelShort has broken into the US in a big way. Launched by Crazy Maple Studio in August 2022, the app now generates around 60-70% of its revenues from the US.

Seeking to tap into this momentum, entertainment studio Cineverse and Banyan Ventures, the venture arm of former ABC Entertainment Group and WME Chairman Lloyd Braun, have now launched a US-

based studio and AI native platform built specifically for microseries (currently operating under the working title MicroCo).

"The average person scrolls through hundreds of feet of content a day, but almost none of it is built to last," said Braun at launch. "We're merging the storytelling rigour of series television with the pace, energy, and intimacy of short-form."

Targeting a market segment that is projected to reach $10bn outside of China by 2027, MicroCo plans to produce series that are 1-3 minutes per episode and designed for binge-watching. MicroCo says it is exploring various revenue models, "including a mix of advertising, in-app transactions and other premium options for superfans".

Digital entertainment powerhouse TheSoul Publishing is also getting in on the act, launching a microdrama app called SHRT in partnership with mobile tech company Playkot. At time of writing the app, available on Android and iOS, featured around 30 complete English-language series, with new dramas added weekly. Each series is developed in-house or in collaboration with global content partners.

Explaining the appeal, TheSoul's VP, streaming and content partnerships, Jonathan Shrank said the company sees microdrama as "an opportunity to utilise our experience in data-driven, flexible production in creating content that works across formats".

Like his peers, Shrank believes microdramas are here to stay: "Microdrama isn't just a trend - it's episodic television for the mobile generation. They fill a crucial gap in the entertainment ecosystem by providing snackable, sharable, emotionally-charged stories that can be consumed quickly, between tasks or commutes. Audiences are drawn to their immediacy, relatability, and frequency of pay-off."

In terms of genres that work, romance, thrillers, mystery, horror, comedy and fantasy stand out. Dubai-based producer/distributor Kedoo Entertainment, for example, just launched Love Drama, an app devoted to short-form romantic drama series.

According to Kedoo, the app focuses on "universal themes including forbidden love, high society romance, timeless and historical tales, second chances and rekindled love, fated encounters and coming-of-age drama". Series include *Billionaire's Secret Baby*, *From Gate 'A' to Her Heart* and *Wings After 40*, with new titles added weekly.

Nick Okorokov, CEO & co-founder, Kedoo Entertainment says Love Drama is "dedicated to short-form romantic drama. Available worldwide on the App Store and Google Play, the app targets emerging audiences outside Asia, especially the English, Spanish and Portuguese speakers, where the format is underrepresented."

Okorokov says the app builds on insights derived from "managing over 30 romance-focused YouTube channels since 2023". Explaining the editorial tone, he says Kedoo dramas are "fast-paced, emotionally charged stories with frequent cliffhangers. This makes them irresistibly binge-worthy, especially during busy or stressful moments."

According to Okorokov, some of Kedoo's microdramas began life as traditional drama – but this is not the optimal approach, he says. "Due to the series' strong YouTube performance, we adapted them into vertical format by reimagining pacing, emotional appeal and narrative style to suit mobile-first consumption. That said, content resonates best with audiences when it's created specifically for the purpose, and thus we're actively exploring co-financing original productions."

In terms of business model, Kedoo is keeping things flexible. "Users can access content via a freemium model, unlocking episodes after sampling the series by watching ads and completing daily missions. For quick access, they can get token bundles via optional in-app purchases to unlock content instantly at around $/£/€1.99 for 20 eps to start with. We also offer subscription plans providing features including ad-free viewing, offline downloads, and early access to content."

One element that seems non-negotiable is that the production budget needs to be low. Assessing the MicroCo announcement, media analyst Evan Shapiro concludes: "Microdramas are red hot but the costs must be small both for your studio and your consumer. The transactional mechanics are way different from anything (traditional studios) have done before. It's actually closer to gaming than television."

Despite the budgetary challenge, one producer keen to enter the market is UK-based Spirit Studios. Co-founder and creative director Matt Campion says his company is about to embark on the production of a slate of around six microdramas: "We're always really excited about

Microdramas are appealing to an on-the-move audience. Images courtesy of Rising Joy and FlareFlow new business models," he says, "and we're a company that knows how to make quality content at low cost. So we're just prepping our first microdrama production, with a plan to launch in around mid-October."

Campion said the aim is to produce around 90 to 100 minutes of content at a budget of around £200-300,000 "which is very tight for drama. We'll split it into around 90 episodes for microdrama platforms, but we also envisage that it could have a secondary life as a movie-length piece of content on YouTube. That said, it's really important to realise that making a microdrama is very different to a traditional drama."

The plot for the first film was under wraps at press time, but Campion said it is based in the fashion world: "The story is going to be based around a collective of creators. Because that way we can tap into an in-built audience at launch."

Much of the noise around microdramas concerns dedicated apps like ReelShort. But it's important to recognise there is also a parallel outlet for shortform drama on social platforms like YouTube and TikTok. This market isn't getting the same attention as the dedicated drama app market – presumably because it doesn't deliver an obvious path to subscription/transactional revenues. But it does have a dynamism of its own.

Viral Nation head of programming Paul Telner points to *Rags 2 Richmond* as a "great example" of what can be achieved on social platforms. "This Vancouver series was shot in just eight days and hit nine million views in four weeks. It went viral globally, got media coverage across Canada and Asia, and within two months, we signed them at Viral Nation. Now it's heading to production as a feature film."

Telner says there is "a real hunger for something fresh" in the social media sphere though he believes there are still audience expectations around quality: "*Rags 2 Richmond* worked because the quality was as good as any major TV series, plus it had this musical element and really distinct early-2000s look that made it stand out."

Asked why microdramas appear to have taken off on dedicated apps in a much bigger way than social, Telner says: "The thing about dedicated apps is that they solve the discovery problem. On social platforms, you're fighting algorithms that are constantly changing. When you know there's a dedicated app with curated microdramas, it's so much easier for viewers to find what they want and just binge."

"*This is no fleeting trend, but a multi-billion-dollar global market with staying power.*" Cassandra Yang, Rising Joy

For shortform or microdramas to break through on social, they generally need the kind of in-built audience that Campion referenced earlier. This could be spinoffs from traditional scripted series, stories rooted in iconic IP or dramas centred on creators. For an example of

Viral Nation's *Rags 2 Richmond*

Thumbnail: FlareFlow's battle-tested infrastructure

Chinese media company COL Group launched microdrama platform FlareFlow in April 2025 and has enjoyed rapid growth. In just three months, FlareFlow said it has surpassed 10 million downloads across 177 countries and regions, while monthly user spend has grown by more than 500%. Audiences, particularly women aged 20–35, are now bingeing an average of 22 episodes a day, drawn by a rhythm of "empathy–conflict–release" storytelling.

The platform already aggregates over 1700 titles and is scaling up aggressively, with plans to produce 100 original dramas in 2025 and 180 in 2026. Genres span family conflict, romance and revenge, social realism, and suspense-driven comeback stories. Recent breakout titles include *Mommy, It Hurts... Where's Daddy?*

FlareFlow said it runs on "a sophisticated, battle-tested infrastructure that combines AI-assisted creation with a data-driven content optimisation cycle". Teams run 400 creative experiments per month — from hook strength testing to cultural adaptation trials — ensuring every title is designed for maximum resonance and conversion.

Ray Tong, CEO of COL Group, said: "FlareFlow's rise is not an easy feat — it is the culmination of years spent mastering content, audience insight, and consumption patterns. Success in microdramas is never about chance; it requires the discipline to know when to spark emotion, when to drop the hook, and how to sustain engagement."

Thumbnail: Shaftesbury, short-form and Sheridan Le Fanu

The boom in shortform drama is currently being driven by tech-driven platforms and digital-native producers that get the economics of the creator economy. But some of the TV industry's leading drama producers also see microdrama as a tantalising creative proposition. Jay Bennett, a senior strategist at Canadian producer Shaftesbury (*Murdoch Mysteries*), says: "I believe a story can be told very compellingly in 60 seconds. Shaftesbury is not afraid of that. If that's how the audience wants to consume, then it becomes an opportunity for producers to play in that space."

Shaftesbury has never hesitated about experimentation. A decade ago, the company led the way when it produced a modern-day shortform version of Sheridan Le Fanu's vampire epic Carmilla – and brought feminine hygiene brand product U By Kotex on board as a partner. Ten years on, *Carmilla* (pictured) plus spin-off shows is still racking up strong audiences on Shaftesbury's own YouTube channel Kinda TV.

The key question for Bennett is "what is the right project and the right model for us? Are there, for example, existing female skewing dramas – like *Carmilla* – that could be reformatted for this space. Or is it possible to launch new IP as a vertical drama first? We're even exploring if it is possible to run two drama productions in parallel – one typical series and one short-form vertical. Same IP but different audience reach."

Back when Shaftesbury made *Carmilla*, Bennett says: "We were watching successful shortform dramas and they were just shooting into a beige wall. We felt there was room to turn the dial up a bit in terms of quality – the writing, the production design - and that is what we are discussing now, can we push the quality bar a few degrees on the typical microdrama."

Bennett isn't talking about bringing unrealistic budgets to the genre, however. "I don't think for this type of storytelling, the audience cares quite so much about production value. It's all about character, story, emotion and connection. So this is not me saying that Hollywood-style budgets need to come to this format. Shows that are a bit imperfect, creator-made, are actually performing the best right now."

Bennett's hunch is that Shaftesbury would look to social platforms first "because there is greater scope for getting content out to as many different places as possible". But that does raise the question of brand funding. "10 years after *Carmilla*, the brand conversation is still not easy," says Bennett, "because many brand companies still see this narrative driven storytelling world as quite risky. But if that's where their audience is, that's where they need to go. Fortunately, there are still companies that want to be creative mavericks – and that is who we want to talk to."

the latter, look no further than *Alan's Universe*, a shortform series that features on AlanChikinChow's YouTube Channel (96.4 million subs).

Then again, the beauty of social is that there is always someone blowing up expectations. Creator Dhar Mann, for example, has built a short-form drama business with "stories that inspire, uplift, and bring a little more positivity into the world".

With 25.9m subscribers on his YouTube channel, Dhar Mann drops a remarkable four new videos a week – produced at his 125,000 sq. ft. studio in Burbank, California. Key characteristics of his production model include "moving from idea to execution in days (not years), and letting real-time audience feedback drive decisions."

If there's one thing that unites shortform drama producers in the social space, it's the need for brand funding. Speaking via LinkedIn, Dhar Mann acknowledged this is still a challenge: "Brands are used to spending in three lanes - linear, programmatic, influencer. Scripted creator studios don't quite fit into these, so they often get overlooked, despite having massive viewership and emotionally engaged audiences."

But he believes this is changing. "Brands are following their audiences and shifting more resources toward creators."

In parallel, he is not oblivious to the opportunity the dedicated microdrama platforms represent. He told his LinkedIn audience that "it looks like the future of scripted storytelling may just be one minute at a time. We've got exciting announcements coming soon in this space."

One final question is whether microdramas can act as pilots for more traditionally-produced dramas. The general view is that this pathway is not easy, but no one is ruling it out: "Microdramas tend to be lighter and less complex than long-form dramas, which explore broader themes with greater depth," observes Kedoo's Okorokov. "However, I imagine microdramas can serve as a valuable testing ground to build engaged audiences and gather feedback, similarly to a pilot episode, before they're expanded into longer formats. Together, these formats could complement each other, engaging audiences with different viewing preferences." ●

TellyCast DIGITAL CONTENT FORUM

With the 2025 edition of the Digital Content Forum just around the corner, The Drop spoke to leaders in the digital-first content business about trends, insights and strategies

GEORGE COWIN is co-founder and CEO of social content agency Cowshed Collective

Content strategy: "The content we create depends on the client KPI. One model is the brand channel model, where the client is trying to build up a fan base using their own platform. Another is branded series. A lot of what we do is 1-3 part branded series with talent, where the client is seeking a direct call to action. This can work well but typically requires paid media to hit the target audience."

Access to brand spend: "At first it was hard to open doors because most of the money was caught up in media agencies and they didn't see the true value. That's changed because brands increasingly hold the purse-strings and are shifting money away from the traditional media. But I still think there is a lack of understanding about the difference between branded entertainment and a commercial."

Use of creators: "Branded content isn't always about using creators - it's probably half and half. If the brand doesn't have a big following, we would lean into talent channels to get reach. Sometimes objectives might call for a more traditional celebrity."

Production trends: "I think the industry has created a rod for its own back with bulk shooting of social experiment-style episodes. There's a trend towards brands asking producers to shoot as many episodes as they can in a day - but that is limiting the creativity you can introduce."

Diversification: "We're investing in our own channels, including some JVs with talent. There's a massive opportunity for collaboration, with us providing production and channel management expertise and the creator bringing their time and audience. Another interesting model for us is working with traditional TV production companies, leveraging their underexploited content via social platforms."

AMIE PARKER-WILLIAMS is director, digital commissioning and production for MTV & Comedy Central in the UK

Content strategy: "In the factual space, I tend to lean into MTV's iconic IP. Recent documentaries like *Nathan and Dad* and *Every Woman* featured *Geordie Shore* talent but were not about the party scene. They were personal stories about topics like LGBTQ+ in the context of Caribbean culture and fertility. By tackling social issues through an entertaining lens we reach a distinct audience."

Working with creators: "We work with creators and their communities, bringing them to our brand - and hopefully new audiences too. So, for example, we brought in Megan Jayne Crabbe who is known for body positivity. We created a podcast around her that discussed body image, and she also hosted MTV Faces season 3."

Representation: "The young generation engaging with digital content are from diverse backgrounds and different cultures, and we really need to tap into that to remain relevant. We have content that embraces key communities, for example *Queerpiphany*. But it's important that these shows are also presented as mainstream content, so we're not just pigeon-holing audiences."

Platform-agnosticism: "I don't think there should be a hierarchy. My shows go up on YouTube, but they are part of a connected experience. We also have to think about beats that we can pull out for Instagram and TikTok. Full episodes might sit nicely on Facebook or Paramount+ or linear. We have to meet audiences where they are."

Objectives: "You need to build a community to generate commercial value. Our KPI is to create fans not followers. We want people to be so invested they return whatever platform our content is on."

DEREK DYSON is chief commercial officer of Australian indie producer WTFN. Under his stewardship, WTFN has grown a successful digital business called Radar

Why digital: "Radar came along about five or six years ago when we realised we owned lots of IP that wasn't being fully-exploited. We saw an opportunity to build communities around TV shows such as *Bondi Vets*. We then started working with other IP owners in Australia and beyond – the likes of Seven Network, Nine Network, and Omnifilm and Cineverse from Canada."

Single IP vs genre channels: "Generally single IP channels work best because they've got their own established fandom around them. But YouTube is a volume game and you need to be publishing content on a regular basis. So there is definitely scope for multi-IP channels if that increases the amount of content you have to work with. We've got a wildlife channel, and we recently launched a Blue Light channel in partnership with Nine Network called Real Emergency."

Working with talent: "Radar has a talent division which works with different cohorts of talent. For example, there are native creators who own YouTube channels but need support to grow. We have one long-standing partnership with Oceanliner Designs, which we have helped grow from 15,000 subscribers to over 800,000 subscribers. We also anticipate a trend towards celebrity driven YouTube channels – for example actors. This could be very liberating and lucrative for them. One approach might be to explore their true passion – a hobby their audience may not already be aware of."

JONNY MADDERSON is co-founder of brand storytelling digital-first agency JustSo

Brand storytelling: "We don't use the word 'content' - it feels disposable. As a team we talk about brand storytelling, something worthy of people's time. The key is to find the sweet spot between what the audience cares about and what the brand needs to say. Right now, we're making a film for LEGO about an ultra-build. Everyone's aligned that the jeopardy, characters, and ups and downs have to be in the film."

Working with talent: "Expedia and Visit Britain briefed us to highlight the beauty that Great Britain has to offer outside London. Tapping into the popularity of set-jetting, the team created *Got the Shot* - a digital series where comedians Stevie Martin (*Taskmaster*) and Lara Ricote (*Mitchell and Webb*) embark on an cinematic road trip."

Brand channels: "Brand channels have moved so far since being "nice to haves". When we started out, we were working with pioneers like Red Bull, and over time this shift has only accelerated. For brands like LEGO, these channels are a way to build a direct and loyal audience over years rather than chasing short-term campaign spikes."

Seismic shifts: "YouTube is the world's most important TV channel right now, and it's changing how brands think about storytelling. Some still can't shake the muscle memory of how things used to be - their channels end up as a dumping ground for traditional ads... but the leading brands know it's about formats, depth, and connecting emotionally with a community that keeps coming back."

TAFARA MAKOPA recently launched a new outfit: Mako Studios. Key to the company's strategy is the relationship between brands, talent and producers

Mako's business model: "Building on my experience in the industry, the goal is to bridge the gap between brands, talent and production companies, creating a synergy that works for all three. My role is to take care of the development of the IP and the relationship with the brands and talent. I then bring in a trusted production partner to handle the shoot."

Why Mako as a partner? "There are the three pillars of success in production: the ability to sell and pitch ideas, the development of engaging IP, and the cultivation of strong relationships. Over the years, I've built all three. Mako launched with a vast network and the expertise to create content that resonates with audiences."

Brand clusters: "Brand-owned channels are a growth area, but they are still a risk. One way to reduce risk is by creating content around brand clusters. We've just produced two digital series, *Couples Clash* and *10v2*, which have boohooMAN, JBL and Afrikana on board as partners. They all target the same audience – but can share costs."

Creating sustainable IP: "Everything I touch has to have LEGS. That's an acronym for longevity, elevation, growth, and sustainability."

Nurturing new talent: "In the next phase of Mako Studios I'm going to launch a Creators Academy – a platform that can nurture the next generation of talent. There is a risk that leading creators will be overused so we need to think about how we bring in new faces."

TV/digital: "This digital ecosystem is doing a great job of bringing in new talent. I'm creating some of the most of technical shows I've ever done – without having execs with 25 years' experience." ●

Levelling the playing field

Elite live sport has mostly migrated behind paywalls; but the collective passion and creativity of fans, creators, athletes, rights holders and brands has transformed social media into a hothouse of sports action, entertainment and innovation

Since the late 1980s, the sports media business has been driven by insatiable demand for premium live rights. Initially the preserve of free-to-air and PayTV platforms, more recent intervention by telcos and streaming platforms has helped top franchises like the NFL, Olympic Games, the English Premier League, UEFA Champion's League, IPL cricket and UFC achieve stratospheric financial valuations.

Until recently, this titanic battle for top tier live rights operated independently of the social video sector. But that hasn't prevented the emergence of a thriving sports ecosystem on leading platforms. Earlier this year, YouTube estimated that a 35bn hours of sports content is consumed annually on the platform. TikTok, meanwhile, estimates that 57% of its users watch sports content on the platform every week. From a creator POV, it recently reported that there have been an incredible 67m creations under the #football hashtag alone.

Look behind those numbers and it becomes apparent that sport on social is a diverse, democratic and endlessly dynamic ecosystem, encompassing everything from elite soccer highlights and athlete channels to creator-inspired events and brand-funded series. As a result, the sector has birthed an array of agile and entrepreneurial companies – each with their own playbook on marketing, monetisation and fandom.

Little Dot Studios, for example, has built a sports-based model analogous to the work it does for IP-owning clients in other genres. Robbie Spargo, co-managing director, agency, explains: "For the last seven or eight years, we've been working with sports rights holders, like the England & Wales Cricket Board, Lawn Tennis Association, Italian football league Serie A and the Women's Super League."

"Social sports content would be unimaginable without creators. 54% of people say they would rather watch a creator break down a major event than watch the event itself."
Anne Marie Nelson-Bogle, YouTube

Utilising an impressive array of content assets, Spargo says: "Our role is to help rights holders develop a social media blueprint to achieve objectives like reach, monetisation and participation. So for the LTA, getting people to play tennis is a massive part of their strategy. We then implement right holder strategies, running social channels and creating everything from long form series on YouTube to TikTok shorts."

Getting the best out of each platform requires a distinct approach, he adds: "In general TV-style content - highlights and live content - performs well on YouTube. Instagram is more mixed media, so there's a lot of power in combining video with brilliant photos and graphics. TikTok, broadly speaking, is more stripped back, raw and authentic."

A lot of LDS's work involves leveraging the assets controlled by rights holders, but arguably the real revolution brought about by social has been the increased profile of talent, creators and fans. US female rugby star Ilona Maher is one example of how athletes can bring a new narrative via social. Spargo says: "If you have somebody cutting through to fans in a different way that's a phenomenal asset that should be embraced. With the Women's Super League, players now have rights to show clips from their games via their own social handles and that is a great way to cut through."

Spargo makes a similar case for engaging with creators, though he advises that "the crucial point about creators is that you have to do things the way they would. You need to approach it as a partnership where they have an authentic voice in conversations."

Spargo says monetisation is of increasing importance

to clients. "Today, it's about finding the optimum use of content to maximise both reach and revenue. What makes sport especially interesting is that many rights holders have commercial partners who are also interested in accessing the social audience. So often you find that things like branded content are built into partnerships between rights holder and sponsors."

Producer After Party Studios has been one of the big beneficiaries of the growing involvement of creators in sport, making series in partnership with Sky Sports and Sky Bet, as well as handling the production of The Sidemen's annual charity match, which this year drew 90,000 to Wembley. APS CEO Joshua Barnett

The 2025 Sidemen Charity Match drew 90,000 fans to Wembley Stadium and attracted more than 8 million viewers online.

Right: COPA90 Kenyan creator Abu Numman watching his local team

After Party and Sky Sports' *Scenes* (top) and Red Bull's *Four 2 Score* format

says several powerful factors have come together to drive sports consumption on social media. "It all starts with the fact that fans want more around the action. We got into sport about five years ago because we saw an opportunity to focus on the characters within the sector – to show fans how being an elite athlete wasn't all about some unattainable lifestyle."

Barnett says: "We realised we could tap into the online audience's growing fascination with creators. Young sports stars had often grown up loving creators just like the rest of the social audience. That paved the way for us to bring the two worlds together – making shows where stars like Mason Mount and Jack Grealish interacted with creators like Harry Pinero."

Intuitively, APS hit on one of the key drivers of sport on social – the pivotal role of creators as spirit guides for sports fans. Earlier this year, YouTube VP ads marketing Anne Marie Nelson-Bogle alluded to this when she reported that social sports content "would be unimaginable without creators. 54% of people say they would rather watch a creator break down a major event than watch the event itself."

The increasing influence of creators in the sports world has led to some intriguing recent developments (see panel). For APS's Barnett one of the most prominent has been interest from brands: "We started to get a lot of brands reaching out to us about getting involved with creator talent. One of our biggest successes has been a partnership with Sky Sports on a football entertainment format called *Scenes*."

Scenes takes advantage of Sky Sports' access to English Premier League content and talent, says Barnett. "In a sense, it is an elevated match day vlog, but our approach has been to bring YouTube talent together with legends of the game and where possible, players from each of the teams. The audiences love it. We did 30 million views across the first couple of series and are now into series three."

Alongside its relationship with Sky Sports, APS is also working with Sky Bet, headline sponsor of the English Football League. It produces a similar show to *Scenes*, called *League of 72*, and has just been handed the task of leading digital production on the gaming company's digital-first Super 6 brand. This will include formats like *6th Sense*, which digs into the ridiculous ways fans predict fixture results, and *Prove Me Wrong* where fans debate football's biggest talking points.

While rights holder assets, athlete images, brand financing and creator content are all engines of growth for sport on social, it has become increasingly clear in recent years that the one thing they are all seeking to ignite is fandom. Content and audience may be the building blocks of monetisation, but there's a growing realisation that super fandom is the key to unlocking multiple sustainable revenue streams.

COPA90 chief strategy officer Ross Whittow-Williams says his company came to this conclusion as it built its presence out across social platforms. "We realised that more and more places were opening up where you could reach and engage with fans in meaningful ways. So we consciously embraced the antithesis of a platform-based approach. Our model adapts and flexes and evolves with fan behaviours."

This fan-centric model is crucial, he says, because "fans are retreating into harder to reach spaces that are protected by personalised algorithms – Whatsapp and so on. Nowadays, anyone can achieve reach but turning that into meaningful engagement and action is much harder, and that's the focus of the COPA90 model."

"We've built a data-led understanding of fans that allows us to productise our knowledge as a service to leading rights holders and brands"

Ross Whittow-Williams, COPA90

COPA90's mantra is that it is "about the world outside the 90 minutes, because that makes the 90 minutes matter more". Using this as its touchstone, the company sets out to understand where fans spend time (and why). "Then we create strategies that reach and engage with them," says Whittow-Williams.

This strategy is built around three pillars of content, he explains: 'Feed' content that meets fans in their personalised feeds and captures cultural conversations; 'Features' content and activations that demonstrate unique access to - and knowledge of - the world outside the 90 minutes; and 'Flagship' content, which focuses on season defining moments that establish a culture defining position in global football.

An example of feed content was a vertical series called *The 92 Club Challenge*. Here COPA90 sent a creator to every football league ground in England, where he scored and rated them: "We talk about content within Feed, as needing to pass the WhatsApp test line. Would you share this with a mate?," says Whittow-Williams.

At the Flagship end of the spectrum, he points to COPA90's four-part series *Once In A Lifetime: Argentina*. "While all of the world's media got on a plane to fly to the Qatar World Cup in 2022, we had production teams embedded in Argentina instead."

For COPA90, the next step is geographic expansion, with the 2026 FIFA World Cup in the US, Canada and Mexico viewed as a pivotal opportunity. This summer the company launched its *Best Job In The World* initiative to find six new faces for the brand in North America. And as the World Cup approaches, "there will be a lot of programming about the growth of soccer over the last 30 years in North America".

The core question is how does COPA90 make money. The answer, says Whittow-Williams, is "not the content itself, but the insight, influence and position our content gives us. We've built a data-led understanding of fans that allows us to productise our knowledge as a service to rights holders and brands."

Some brands, like Red Bull, have worked this out for themselves. The brand's long-standing association with adventure sports and athletes has powered a multiplatform social media strategy that encompasses live event coverage, branded content and always-on community engagement. The fact that its unit sales have increased from 4 billion cans in 2011 to 12.7 billion cans in 2024 just goes to underline the power of sport+social. ●

Creators storm the sporting citadel

Creators are taking on pivotal roles within the established sports landscape. Here are a few examples of their rapidly extended influence:

Commentary: The 2024 Paris Olympics broke new ground when it collaborated with creators to cover the event (the Olympic Creator Programme). More recently, the NFL signed up Katie Feeney to create content across its social and digital channels. BBC Studios and TikTok partnered on an entertainment franchise called *Last Pundit Standing*, to identify sports commentary talent from with the digital first community.

Participation: There's been a trend towards creators competing in sports events. This started as one-offs like Jake Paul's fight with Mike Tyson (65m streams on Netflix) and The Sidemen Charity football match. But there is a move towards building ongoing franchises. The Baller League features six a side football teams managed by football legends, celebrities, and influencers. The UK version is spearheaded by KSI and has had O2 as a sponsor. Even golf is going down this route, with the PGA Tour launching its own Creator Series.

Media ownership: Perhaps the most eye-opening trend of all, digital-first sports channels are starting to secure premium sports rights. 2025 has seen vodcaster Goalhanger secure LaLiga clips while That's Football and The Overlap have been granted live rights packages for Bundesliga. In Brazil, YouTube channel CazeTV will show every match from the 2026 FIFA World Cup. As creator channels build scale, it's inevitable that their fanbases will attract more attention from sports rights holders.

Thumbnail: LADbible Group on passion and participation

LBG head of sport Shaun Salmon says broadcasters created the tentpole moments fandom is built on, but that "in a social and creator-led era, the growth beyond the live event is happening in fan-first, ad-supported content. It reaches new audiences in the places fans consume every day, the feed. At SPORTbible we understand how fan groups cohere around passion points. The content explosion we see today can fragment audiences; our job is to connect them, from Wigan to Arsenal, from Southend to Newcastle."

According to Salmon: "As a group, we publish around 350 videos a day. That scale lets us be the companion to the live game, not a competitor - we don't fight the live moment, we prime it, and keep it alive after the whistle."

Salmon says there are three pillars to LBG's sports strategy. Firstly, creators that fans like and trust (James Alcott, Flav, Maz). Secondly, a reactive SPORTbible newsroom that finds angles broadcast struggles to cover at speed. Thirdly, participatory, platform-native IP that turns opinion into participation. "You can see this across YouTube hits such as *Agree To Disagree* and our new format *The Table Game*, through to social-first videos like *Red Flag/Green Flag.*"

Alternative facts

Factual programming continues to be a mainstay of traditional TV, but there's no question it has come under severe financial pressure in recent years. Could partnerships with digital-first producers and distributors provide an answer? The Drop investigates

While Netflix continues to have substantial budgets for factual – especially true crime and access docs – most broadcasters and streamers have either cut the number of factual shows they commission or reduced their licence fees.

The challenge for producers was graphically illustrated in 2024 when Banijay Entertainment decided to shut down famed factual label RDF Television. At the time, Banijay's UK chief Patrick Holland said: "The kind of mid-range factual content that used to fill terrestrial channels has disappeared from the commissioning market."

The prevailing response to this squeeze in factual TV has been to pursue co-production partnerships involving two or more broadcasters, a deficit-financing distributor and any soft money up for grabs. But one area that has largely remained untapped is the fast-growing factual channel business on social platforms.

Hearst Networks UK's *History Crush* hosted by TikTok star and historian Katie Kennedy

You only need to scratch the surface of the web to see that millions are flocking to factual content on channels like History Hit, Free Documentary, Underknown, Fern TV, Atrocity Guide, Veritasium and LADbible. And then there is the growing cohort of channels being launched by TV heavyweights such as Banijay Entertainment. So the question is – can this emerging ecosystem be part of factual's financial solution?

The answer is a qualified yes. While today's roster of YouTube channels is unlikely to displace ZDF or NHK as co-production partners on the next BBC Natural History Unit epic, there is a growing appreciation that traditional and digital-first platforms can be happy bedfellows on low to medium budgets.

"We've been working in this area for a long time," says Quintus Studios CEO Gerrit Kemming, whose company is both a factual content distributor and a YouTube channel operator. "There are opportunities for collaboration, but producers need to realise there is no standard business model. Because the market is constantly changing you can enjoy success with one approach then find it doesn't exist six months later. In the last three years, we have probably used 10 different ways to finance factual productions."

Key to Quintus' flexible model is the fact it straddles both digital-first and traditional. By combining a distributor's mindset with a channel operator's access to audience, the company has partnered with several traditional players. Last year, for example, it joined forces with A+E Networks EMEA on *Missing, Presumed Dead* – a 10-part series produced by Spirit Studios. In this case, A+E took rights in several key markets while Quintus played the series out on its Free Documentary Crime YouTube channel.

In parallel, it has also fired the starting gun on several projects – greenlighting them as Quintus Originals for its own channels, before taking them out into more traditional distribution afterwards. "Here, we start with a commissioning brief which is based on the core buckets of content that we know are performing well on our channels. We send that out to a pool of film-makers that we have worked with in the past. If they come up with an idea we like, our creative director Adam Jacobs can greenlight it."

Kemming acknowledges that the fee offered at this stage of the process is quite tight, but stresses there is financial upside for the producer once the show is made and starts gaining traction on the channel. "We'll always support the hard costs of production, but the profit typically comes at a later stage."

Quintus is not alone in seeing scope for collaboration between traditional and linear in the factual arena. On the eve of MIPCOM, Passion Distribution's digital division UpStream Media revealed that it is teaming up with production company Middlechild to create original, digital-first content, "designed for today's on-demand audiences". The slate will feature a mix of specials and series, like *41 Dogs*, which will air across UpStream YouTube channels such as OMG Stories, Filth, and Origin.

The originals will explore subjects such as people rebuilding their lives post-incarceration; the resilience of young mothers navigating financial hardship; and the hidden waste that lies beneath Britain's waterways. Nick Rees, chief operating officer at UpStream Media, says: "As well as creating content for our channels we're hopeful this collaboration will also uncover new talent and scalable formats."

Hearst Networks UK digital commissioning editor Sam Pearson is also exploring new models around channel brands Sky History, Crime+Investigation and Blaze. What began as AVOD uploads of archive content has evolved into a full-scale commissioning strategy that plays in both vertical and horizontal video formats and straddles everything from Snapchat and Instagram to Sky's own on-demand platforms. Take *History Crush*, for example. Hosted by TikTok star and historian Katie Kennedy, it's a snappy, tongue-in-cheek interview format designed to work equally well on Instagram Stories as on broadcast VOD. "It's produced with a quality that could sit on TV, but structured for social," Pearson explains.

Spirit Studios creative director Matt Campion says his company's IP360 division was launched to

"There is no standard business model. Because the market is constantly changing you can enjoy success with one approach then find it doesn't exist six months later."
Gerrit Kemming, Quintus Studios

Spirit Studios' *Outsmarting*

"IP360 is about turning original ideas into multi-dimensional brands that can generate digital revenues, unlock brand collaborations and drive distribution sales"
Matt Campion,
Spirit Studios

take advantage of the opportunities for collaboration between the two sectors. "IP360 is about turning original ideas into multi-dimensional brands that can generate digital revenues, unlock brand collaborations and drive distribution sales."

An example, he says, is *Outsmarting*, a series about survivors who have managed to turn the tables on their assailants. Originally a 10 x 10' series for C4's YouTube channel, *Outsmarting* was reimagined as *Outsmarting Evil*, a 6 x 60' series, with support from Quintus. "The digital version was essentially a simple but well-paced talking head series," says Campion. "We also made a podcast that used an AI host, news clips and experts. For the TV version, we took the same talking heads and added elements like archive – so now it looked like a fully-fledged documentary."

Campion says Spirit is close to forging an ongoing partnership with a TV company based around this IP360 model – but can't yet share details: "Essentially, we will make social first documentaries and podcasts in a particular genre and our partner will have first look deal with a view to securing a TV version. Assuming there is a TV version, that gives us a series that can then go into international distribution."

It's clear from the above that two key camps are emerging – distributors with digital channel real estate and producers with the expertise to scale up productions from digital to TV. But what hasn't yet fully-evolved is the notion of YouTube-first channels as co-production partners – ie YT channel A stumping up 20% of a show's budget in return for a set of regional rights. Banijay Rights' VP digital Shaun Keeble agrees this could be a future model – if channels build sufficient scale. But, for now, he says a more fruitful angle for digital-first factual channels might be bringing brands into the process. "We're building channels on YouTube like Banijay Documentaries that have significant reach. When you own real estate like that, then there is potential for brands come on board as partners for ideas that fit their objectives – particularly now we're seeing a lot more YouTube viewing migrate to Connected TV."

There are, of course differences between the two camps that can act as a barrier. Creator-led company Underknown, for example, has established itself as one of the leading producers of digital-first factual content. To date, it has amassed 75 million followers for brands including What If, How to Survive, Animalogic, and Aperture. It also launched a FAST channel based on magazine Popular Science.

Underknown co-founder and CEO Steve Hulford says the studio now has 50 full-time creators producing

Thumbnail: Radar & *Bondi Vet*

WTFN chief commercial officer Derek Dyson has oversight of the company's dedicated digital division Radar. He recalls going to his CEO "and telling him the exact date in the future we would run out of *Bondi Vet* episodes for the show's YouTube channel. So he told me we needed to get out and make some more."

The point of this anecdote is this: even though *Bondi Vet* was no longer being commissioned for TV, the scale of its online audience (now 1.7m subs on YouTube) was big enough to justify new episodes. "There was actually more demand for new shows from the YouTube audience than from networks," says Dyson.

The process involved some re-education in terms of managing production costs, but the end result was that "we seamlessly transitioned from the catalogue content to the digital-first original content," says Dyson. "Ironically, we were then able to distribute the new episodes in the way we had always done."

The broader point is that channel ownership can unlock funding models for producers. "It's unlikely you could go to a third-party YouTube channel and they'd write you a cheque. But investing in channels based around our own IP put us in a position to rationalise further investment – as with Bondi Vet. What producers are wrestling with right now is the level of risk these new models demand. But backing successful IP is less of a risk than making completely new shows and saying 'I really hope this works'."

QUINTUS STUDIOS

Bridging the worlds of TV and YouTube

If there is one clear message at MIPCOM this year it is that the worlds of traditional TV and YouTube have become inextricably entwined. Now more than ever producers and broadcasters need to embrace innovative business models that combine the best of both worlds, says Quintus Studios CEO, Gerrit Kemming.

"A NUMBER OF POWERFUL TRENDS are taking place at the same time, and that has transformed the production landscape," says Quintus Studios CEO Gerrit Kemming.

"One is that TV budgets are decreasing, making it harder for producers to get shows made. Another is that younger audiences have grown up with YouTube. And a third one is that there is a next generation of highly talented and tech-savvy independent film-makers out there. This doesn't just change the economics of production, but also influences the language of storytelling."

Kemming, who started out in TV production and distribution, saw the seismic shift early and shifted Quintus' centre of gravity accordingly. "Quintus still has its strong international distribution network," he says, "but we also realised about ten years ago that it was crucial for us to seize the emerging social video opportunity. Today, we own and operate one of the world's biggest independent professional documentary channel networks on YouTube – with our flagship channel Free Documentary alone attracting 5.6 million subscribers. Quintus Channel Networks in its entirety counts over 16 million subscribers, and is constantly growing."

This hybrid model is unique in the content market and has enabled Quintus to support next gen factual co-productions between YouTube and linear, including *Pirate Coasts*, *Red Zones* and *Missing Presumed Dead*. "We have created combinations between Free Documentary and leading industry names such as A&E, Discovery, Welt and ZDF, and are currently discussing projects with new partners in the US, Europe and Asia. This rapidly growing portfolio of Quintus Originals sits comfortably on both social and TV platforms."

Crucial to making this model work has been a pragmatic response to the new production landscape. "A lot of producers have struggled to get to grips with the economics of social media because they bring a TV mindset to the table. In this new world, producers need to rethink production costs and recoupment timeframe – while at the same time looking at incremental ways to generate revenues from their IP."

"We have created combinations between Free Documentary and leading industry names such as A&E, Discovery, Welt and ZDF, and are currently discussing projects with new partners in the US, Europe and Asia."

Kemming says a decade on the frontline of digital-first media has given Quintus two distinct advantages as a co-pro partner. "Firstly, we have worked out how to produce high-quality, very compelling content on tight budgets. Secondly, we have embraced the feedback we get from our vast online community. These days, story selections are based on our own data, which significantly derisks the development process."

The company has also adopted a creator mindset that Kemming believes is the right fit for the new content economy. "The social landscape changes all the time, so you have to be agile and adaptable – responding rapidly to changes in the algorithm and audience, not to mention new tech like AI. For Quintus, our decade of experience being positioned right in the middle between linear and digital-first equips us perfectly for the present and future of factual co-production."

Missing Presumed Dead, produced with Spirit Studios and A&E

Red Zones was licensed to ZDFinfo and other international broadcasters

youtube.com/@FreeDocumentary

SCAN ME

quintusstudios.com

SCAN ME

content for its channels. "Our four flagship brands are active across platforms and in different languages, which gives us 100 monetisable channels."

It's a successful model that moves to the rhythm of the social audience and algorithms. "Our business is a bit like catching a wave," he says. "Ride the wave properly and it will take you all the way to shore – but if not, you're dead in the water."

Illustrating what he means, he describes how the balance of Underknown's revenue shifted away from Facebook towards YouTube. He also says the style of content has evolved: "When we started, I intentionally wanted to build faceless content brands, so we weren't beholden to talent and could translate easily into new languages. But now the platforms give you more distribution if there's a human talking to the screen."

These rapid shifts are one reason why it is not easy to collaborate with traditional TV producers. "Our shows might look similar to traditional TV documentaries, but the way they come to life is different," says Hulford. "In the case of television, you have a concept that's based around an intuition. You build a pitch, go to 100 commissioners, 99 say no. One says they like it, but they'd rather have it set somewhere else. That whole process takes a year, and then you spend another year producing the show. In that time, we have made 50 hours of programming for our channels."

In a sense, this brings the question of collaboration back to a recurrent theme, which is that digital-first companies don't always feel the need to engage with traditional media. While there is scope for collaboration, it needs to begin with the realisation that many digital media studios have cracked the code – and are building viable businesses away from TV. As Hulford notes, "We own the rights to our content and are generating substantial revenue, without having to answer to commissioners." ●

The Download... on digital documentary

Production studio Zandland has launched *Human*, an original YouTube documentary series/channel - created, funded and distributed entirely in-house. In doing so, Zandland has chosen to "bypass traditional gatekeepers, and deliver the kind of documentaries it believes the world needs right now."

Each episode of *Human* focuses on one extraordinary person or collective, using their story to explore a broader global issue. From gang-afflicted neighbourhoods in Chicago to white-only towns in South Africa, the series is designed as an antidote to division.

Here, Zandland founder Ben Zand talks to The Drop.

What is the sweet spot for Zandland?
Crazy, amazing stories that have fascinating people at their heart. We tend to focus on documentaries about people who done something incredible - good or bad. That is the idea behind *Human*, which will give audiences raw, unfiltered access to communities and conversations they'd never normally see.

You've launched *Human* as a YouTube channel. How does that work?
We're aiming to do two access-style films a month, 24 a year. The plan is to keep budgets low and film each episode in a maximum of two days. With this kind of film-making it's always about what can we realistically make?

Is it possible to travel on digital-first budgets?
I went to Israel, the West Bank, Brazil, South Africa, and America for *Human*. Flights aren't super expensive anymore. The key to this style of production is advancements in technology, a clean premise and the disciple to shoot tight.

What about monetisation?
It starts by controlling production costs and utilising the assets at your disposal. What can we routinely do where there is an abundance of content? Then it is about building a community. As that happens, the opportunity is around revenue streams like sponsorship, live events, and payments from members of the community.

What comes after *Human*?
New shows with new talent, following the same model as *Human*. There's quite a few options – all based around talent we work with and idea that might work for them.

Why follow this model instead of the traditional TV commissioning model?
I want to be in control of my investment as best as possible. This way, I get tell the stories I want to tell. And as everyone knows, it's really difficult to get this type of content commissioned by broadcasters. There's also a commercial reality. TV networks are also struggling to make money so does it make sense to pitch into a shrinking market? There is a risk in what I'm doing but also big potential rewards.

Creators join the FAST (and AVOD) lane

From top: LADbible's *Agree To Disagree*, *Snack Wars* and *Jury Room*

AVOD and FAST platforms launched their businesses on the back of vast content catalogues. But as the sector matures, ad-supported streamers are turning to the creator economy to add diversity, dynamism and fresh programming to the mix. Andy Fry reports

One of the hottest topics in TV for the last 2-3 years has been the rapid growth of the AVOD and FAST channel segments. Partly a response to the overload of subscription-based platforms and partly driven by increased global penetration of Connected TV sets, the emergence of these advertising-supported, free to the consumer outlets has breathed new life into underexploited distribution catalogues.

The amortisation of established IP is still the backbone of this new ad-supported ecosystem; but as the sector matures it has become clear to AVOD & FAST platforms that wall to wall library channels are not enough in isolation. Increasingly, audiences expect to see fresh and original programming in the editorial mix.

In some respects, this echoes the early days of PayTV, when newly-launched cable & satellite channels established themselves with reruns then slowly started to increase their original commissioning as advertising and subscription dollars trickled in.

If there's a difference with the current crop of AVOD and FAST platforms, it's that very few can currently justify expenditure on originals. Large well-resourced AVOD platforms like ITVX, Tubi and Roku have built up slates of scripted and unscripted originals, but they are the exception rather than the rule. And there are very few dedicated FAST channels that can afford to commission original content – other than some rapidly-shot shoulder content (behind the scenes, interstitials etc).

This need for new programming is one reason why there has been a sudden surge of interest in bringing creator-led content into the AVOD/FAST fold. But it's not the only one. Emma Whitmore, senior vice president of sales, EMEA at FAST channel facilitator Amagi says platforms are "leaning into creator content as it brings fresh voices, younger audiences, and specialist interest areas into their ecosystems. It adds agility, authenticity, and new monetisation opportunities for all parties."

Put all these factors together and you can see why most of the sector's power players are flexing their creator credentials. Leading FAST platform, Samsung TV Plus, for example, recently announced partnerships with several creators including Mark Rober, Dhar Mann, Michelle Khare, Smosh, The Try Guys, Epic Gardening, The Sorry Girls, and Donut Media – all of which now have dedicated FAST channels.

"Samsung TV Plus is building a home for today's top creators on FAST," proclaims Salek Brodsky, SVP and global head of Samsung TV Plus. "This marks a new era where the most innovative and influential storytellers can reach audiences at scale."

As part of this expansion, Samsung TV Plus and Dhar Mann Studios agreed to produce 13 original episodes to premiere on the Dhar Mann TV channel. Known for his uplifting, family-friendly dramas, digital-first creator Dhar Mann says the move is "a major milestone for us as storytellers and producers. It's a powerful new chapter—not just for our shows, but for how creators can lead on streaming."

In a separate but related announcement, digital-first pioneer LADbible Group also launched a FAST channel on Samsung TV Plus. Becky Gardner, head of originals at LADbible, says the new FAST channel was a no-brainer for her company: "With a dedicated YouTube audience already in place and a third of our audience already watching our shows via a television screen, the rise of FAST opened up an opportunity to expand our reach. Our existing content strategy already aligns with the FAST model, so no major changes were needed to deliver entertainment straight into living rooms."

Currently available in the UK, the new channel showcases some the group's most popular original programming 24/7, including hit series such as *Minutes With*, *Snack Wars*, *Agree to Disagree* and *Would You Rather?* To mark the launch, LBG also premiered its new format *Jury Room*, a debate show that takes on issues the public cannot agree on, hosted by Juries - from barristers, business owners, gangsters, to Gen Z influencers. "As an always-on studio, our bingeable programming is a natural fit for the FAST audience - it's fresh, timely, and rooted in the cultural zeitgeist," says Gardner. "With an average of three new episodes released weekly, each running 20–30 minutes, launching our own 24/7 channel was a natural next step."

"It's a powerful new chapter — not just for our shows, but for how creators can lead on streaming." Dhar Mann

Samsung TV Plus is not alone in targeting creators. Roku was an early entrant into the market when it collaborated with Jellysmack on the launch of two FAST channels, Mysteria and Hello Inspo, featuring content from 17 creators. And this year, Fox Corporation's Tubi has made a series of moves to lock in creators.

As of August 2025, the platform revealed that its collection of digital-first creator content on the platform had grown to more than 5,000 episodes, through partnerships with the likes

Thumbnail: TheSoul Publishing

TheSoul Publishing has built a suite of nine FAST channels which have received 131 launches on 31 platforms, says Jonathan Shrank VP, streaming and content partnerships at TheSoul Publishing. "These channels package professionally-produced versions (ie new bespoke episodes for streaming descriptions and metadata) of digital IP for 24/7, TV-like viewing, creating new reach, revenue and audience touchpoints."

Explaining why creator + FAST make sense, he says: "Creators bring massive cross-platform, pre-existing audiences, fresh formats, and proven engagement strategies, while FAST provides reach, monetisation, and legitimacy in the living room. For creators, entering the FAST ecosystem means diversifying revenue beyond platform algorithms, reaching cord-cutters, and building truly multiplatform brands. For platforms, creator-first FAST channels drive engagement with younger, digitally-native viewers hungry for content that feels personal and snackable, not legacy or generic."

There are challenges: "It's not just like dumping hours of unscripted social content onto TV. The shift requires re-editing for longer, coherent blocks to fit EPG grids; enhanced technical quality (sound, mix, captions); curation to avoid repetitive viral trends that work in-feed but not in binge blocks; and managing content rights and music licensing for the new medium. Simply put, professionalisation and reformatting are essential."

of Jimmy Donaldson (MrBeast), Alan's Universe, Jomboy Media and CelinaSpookyBoo. "We're committed to building a bridge to Hollywood for creators to help them reach new audiences," says Rich Bloom, general manager, creator programmes & EVP, business development at Tubi.

To underline this point, Tubi has also just named Kudzi Chikumbu as the company's new VP of creator partnerships. Previously global head of creator marketing at TikTok, Chikumbu says: "Tubi's dedication to empowering creators with creative freedom and meaningful incremental audience reach is unmatched, and I'm excited to bring fresh, bold and authentic storytelling to their viewers."

Of course all this begs the question – why should creators want to be streamers? Echoing LBG's Sharp, Amagi's Whitmore says FAST and AVOD allow "digital-first brands to grow their engagement, create a new revenue stream and extend their brand reach beyond social platforms. It's a chance to turn huge online communities into lean-back TV audiences and open to new audiences with wider demographics."

For digital-first studios seeking to migrate to FAST, there's no particular barrier to entry in terms of genre. While the majority of creator crossovers are entertainment-based, Little Dot Studios-owned factual specialist History Hit has been a successful early mover, launching a FAST channel in 2022. By offering a schedule comprising everything from ancient civilisations to modern history and pop culture, the channel has enjoyed robust growth. In 2024, it saw a 64% increase in total watch time vs 2023 – and has delivered a 200% increase in revenue since launch.

Arguably more of a barrier is the technical know-how required. But there are plenty of intermediaries on hand to make it happen. Amagi's Whitmore says: "We can lower the bar to entry and make linear channels more accessible to the creative storytelling community. With Amagi, companies can spin up channels quickly, scale globally, and monetise with the same sophistication as major broadcasters. It's the bridge from viral to viable, and it's opening the door for the next generation of media brands."

Little Dot's History Hit (top right), and Spud Gun's Mashed are spearheading a migration of digital-first content to FAST. Bottom picture, Baldur's Gate 3

Canadian media company Underknown, which operates several YouTube channels, recently launched a FAST channel based on the Popular Science brand. Available on platforms including Vizio WatchFree+, Sling Freestream and Plex, the channel offers content from NASA, Hacksmith and Complexly as well as Underknown's own content. Underknown co-founder and CEO Steve Hulford says his editorial goal is to make Popular Science "a destination for curious fans of science and technology".

The process of migration was handled by specialist company acTVe. AcTVe CEO Geoff Clark says his company "specialises in partnering with well-known brands, creators, and celebrity talent, acting as their network-in-a-box, a turnkey solution that seamlessly extends their reach from social media, websites, and YouTube into the CTV and broader streaming ecosystem".

For creators that don't necessarily have the scale or volume of content to launch their own FAST channel, there is also the option of placing their IP within some kind of content aggregation service – not dissimilar to what Jellysmack has done with Roku.

Spud Gun Studios creative director Tom Jenkins says this is an avenue his company has pursued, allowing its Mashed content to feature as part of Animation+, an animated comedy streamer that is available on platforms including Roku and Samsung TV Plus. "Animation Plus' view was that there is a massive audience for adult animation that has been poorly served," he says. "So they have brought a lot of that content into a single location. That's interesting for us, because people who have never heard of Mashed might come across our blocks of cartoons on the platform."

As creators know from their experience with YouTube, TikTok and Instagram, any kind of platform repurposing comes with challenges. But over and above the need for technical expertise, what are the key considerations? According to Whitmore: "The big considerations for digital-first companies are scale, as they want to reach the widest possible audience, consistency as they need to set and maintain standards aligned to the platforms, and monetisation. The concern platforms may have with creator-led content is whether it will maintain a consistent standard to ensure there are no standards or compliance issues at the platform end."

AcTVe's Clark says that one of the main issues for many creators "is that their work exists only in vertical video formats, which don't yet translate well to TV screens."

There's also still an expectation around quality: "When viewers intentionally sit down to watch television, they still expect a traditional, high-quality viewing experience".

But having said this, he contends that there is now a genuine opportunity for digital-first studios to expand their reach via FAST: "What was once impossible, due to high costs and industry gatekeepers, is now achievable. In the past, only a select few, like Oprah, had the resources and infrastructure to front an entire network. Today, while the process requires expertise, the opportunity has never been more accessible." ●

Thumbnail: Creator Television

LA-based Sabio Holdings has had a great year having launched a FAST channel called Creator Television. Here, the idea has been to aggregate content from popular digital-first creators and present it to a streamer audience. Among featured talent at launch were comedian Uncle Roger, known for his hilarious takes on food culture, and Jenny Lorenzo, who has brought authentic and comedic portrayals of Latin culture to the channel. As co-founder and head of content Charlie Ibarra explains, "By blending the raw creativity of digital creators with the narrative structure of traditional television, we're delivering an exciting new viewing experience."

The channel launched in partnership with Plex but has since joined platforms like Amazon Fire and Xumo Play – a Comcast/Charterhouse JV. Echoing his peers, Stefan Van Engen, SVP, content partnership, acquisition, distribution & experience at Xumo, says the addition of the channel "allows us to enhance our lineup with authentic, creator-driven stories that resonate with today's audiences".

If there is one key take out from Creator TV's experience it is that bringing diverse voices into the mix is another of the sector's superpowers. At launch, Creator Television co-founder and general manager Joe Ochoa said the channel was on a mission to "increase representation in the streaming space by building programming that better reflects today's world and champions under-represented voices. As a Filipino American, I understand the importance of amplifying unique stories on the TV screen and how this resonates at deeply personal levels with diverse audiences."

Social activist

Sacha Khari joined Channel 4 during 2021, in the role of head of digital commissioning. Previously LADbible Group head of video, he has championed a sustainable digital-first content ecosystem that embraces diverse talent and producers

"I look for content that is attractive and relevant to young people and that can build a fresh legacy and connection with Channel 4"
Sacha Khari,
Channel 4

What exactly is your remit?
Ultimately, Channel 4 needs to engage with audiences that watch content on platforms outside of TV. C4 has had success putting linear shows on YouTube, but there is a question around how effectively that speaks to audiences, especially younger ones, that see social as being their TV. So my role is to commission content that is attractive and relevant to young people and that can build a fresh legacy and connection with Channel 4.

How does that translate into action?
There are a few different ways. Channel 4.0 was created to build a community around this new style of content. And it's not just about one-off episodes or franchises. It's about how they connect to each other and how we generate fandom. Another focal point is documentary. C4 has been successful with strands like *Dispatches* but what does a YouTube-first doc look like? Talent including Max Fosh and Niko Omilana are Trojan Horses, delivering punchy, journalistic filmmaking through educational formats. We also launched a food channel that complements what you might see on Channel 4. And, most recently, there is our new comedy brand, A Comedy Thing – which explores what funny might look like if we started over again and subverted traditional genres. Finally, I would point to branded content, which is a really exciting area for us to work in because it doesn't necessarily have to be aligned to one of our strategic genres.

What would you single out as successes?
That depends on objectives. I can reel off shows that have generated millions of views across platforms, like *Tapped Out*, *Minor Issues*, *Worst In Class*, *Find The Cheater*. But there are additional layers that define success for us as a public service broadcaster. For example, Channel 4.0 has brought through such a lot of new talent in front of and behind the camera. We've also probably worked with 60 or 70 new indies – as well as traditional production companies. And we've been a great platform for supporting diverse voices.

How does your work relate to the C4 ecosystem?
I think there has always been a mindset in broadcast that digital content is a cheap way of making TV – providing a way to test pilots and introduce talent. But there's a whole world of creators and digital publishers who don't care about that. They just want to make content that's right for the platform – and this is broadly where my strategy is focussed. We have had examples like *Tapped Out*, which crossed over to linear. But my basic philosophy is that it's difficult enough to gain attention with fresh IP, without making life even more difficult for yourself by sticking on arbitrary KPIs. Our focus is on making a brilliant show. If it generates traction, that propagates opportunity.

What are you looking for?
On 4.0 we're looking for stripped back social formats. For any producer looking to pitch in, I'd say look at the content we've put out over the last six months rather than two years ago. Think about whether it has clip-farming potential. Is it authentic? Does it have friendship groups having fun together? Then there is branded content. What brilliant ideas can you integrate brands into, in a way that is editorially compelling and elevates the format?

Any messages about the grammar of a digital show?
There's a phrase we coined, which is that the show 'starts at minus 10 seconds'. With digital you have to capture someone's attention as they are doom scrolling. How do you compel somebody to click on a piece of content? Then how can it deliver on the expectation of that click within the first few seconds.

Behind all of this is how you create content in an attention economy. It's really noisy out there, so how does fresh IP cut through in a way that doesn't remotely feel like clickbait? Resonance is a major consideration for us and something that people don't talk about enough in digital. The longer people watch your content for, the deeper the connection – and that's how you build community and fandom. ●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