RA BRITTON CONSULTANCY

Brands and Micro-Dramas

What 104 branded series tell advertisers

A white paper by Rupert Britton, RA Britton Consultancy

Global audit, 10 November 2025 to 10 November 2026, with a UK angle

November 2026

1. Foreword

Brands have discovered micro-drama. Over the past year I have tracked every branded micro-drama I could find: 104 series, from 10 November 2025 to 10 November 2026, made for brands as different as Crocs, Mastercard, Gucci, Co-op and a Chinese sauce-duck chain. This paper sets out what they did and what I think it means for brands to maximise ROI in the format.

My argument is simple. Brands have embraced the micro-drama format, but most have not yet embraced the people who make it work on social. Only 21 of the 104 series involved social creators, as cast, writers, producers or distributors. Over half (56) used professional actors or celebrities. Those brands are buying the look of a micro-drama without the audience and trust a creator brings.

Few brands say publicly what they spent or what they achieved. Only 3 of the 104 series disclose a budget, and 61 have no public results specific to the series. That does not mean they did not measure: brand-lift studies are usually kept private. But it does mean the market has little shared evidence to learn from.

There is a second, more surprising finding. Most brands have borrowed the look of micro-drama without its engine. The drama apps run long series of 50 or more short episodes, built to keep viewers coming back through hooks and cliffhangers. The typical branded series has six. That is a mini-series, not a micro-drama, and it changes what brands should expect from the format.

I work in branded entertainment in the UK, so I have written this with a UK reader in mind. The UK has one of the largest micro-drama audiences in the world and only a few branded series of its own. That gap is the opportunity.

This paper is the free edition. The evidence behind it is in the full report: the complete audit of all 104 series with sources, and detailed chapters on deals, AI, commerce, creators and effectiveness. The final section explains what it contains.

Rupert Britton
RA Britton Consultancy, UK, November 2026

2. Executive summary

What the audit found

- **Brands are making mini-series, not micro-dramas.** Of the 70 branded series with a known episode count, the median is 6 episodes, and two-thirds have 10 or fewer. The median English-language series on the drama apps has 58.
- **Creators are the exception.** Only 1 in 5 series involved social creators. Over half used professional actors or celebrities.
- **Brands are staying off the apps.** 78 of the 104 series were hosted on open social channels such as TikTok, Instagram, YouTube and Douyin. Only 13 appeared on a dedicated drama app, and only 6 on an app alone. Brands are wary of the apps' content and prefer platforms they already buy and measure.
- **Brands want you to laugh; Chinese brands want you to fall in love.** Comedy features in 63% of the series made outside China and in 24% of Chinese series, where romance and drama lead.
- **Banks and payment brands have quietly become big users.** Financial services accounts for 9 series, level with technology and ahead of luxury. Mastercard, Visa, Venmo, Mizuho and Absa are among them.
- **The brand is in the story.** In 93 of the 104 series the brand is part of the story, not just a logo or a product on a table.
- **Little is published on cost or results.** Only 3 series disclose a budget, and 61 have no public results specific to the series.
- **The market is at least doubling.** 70 series launched in the second half of the year, against 32 in the first.
- **There are seven ways to do the deal.** I have identified seven deal structures that brands are using around the world, from sponsoring a studio's slate to owning the series outright.

What I recommend

1. **Pay to be seen, off the app.** Put the series on the open social channels the brand already buys, and budget for distribution as its own line, not as an afterthought. A good series that nobody finds is wasted money. It will also open doors to content partnership teams in media agencies.
2. **Measure properly.** Make a brand-lift study the standard measure, and agree what success looks like before episode one.
3. **Pay for performance.** Link part of the creator's or producer's fee to performance they cannot buy: organic viewers who stay to the end.
4. **Ask for a data window.** Ask for time-limited access to the series audience, so the brand can follow up with the people who watched.

For a UK brand, a high-end content partnership costs about **£500K** all-in, covering production, talent, distribution, paid media and a brand-lift study. Production can be as little as a fifth of that. This is my benchmark from working on these deals, not a published industry figure.

3. Why micro-dramas, why now

Omdia put it best: micro-dramas are "winning the battle for attention, rather than scale, at least for now" (Omdia). In the US, ReelShort users spend 35.7 minutes a day in the app on mobile, against 24.8 minutes for Netflix. In the UK, FlickReels users spend 22.39 minutes a day, slightly more than Prime Video's 21.47.

The money is real. Omdia values the global market at $14bn in 2026, rising to nearly $25bn by 2031 (Omdia), and it is already nearly twice the size of FAST, the free ad-supported streaming channels (Omdia). China takes about three-quarters, but the growth is international.

The UK has the audience

The UK had 8.2 million monthly micro-drama users in 2025, the largest audience in Europe and roughly one person in eight (Broadband TV News, citing Omdia). It is also the only market Omdia surveyed where men are the majority, at 54% (Omdia). Anyone who still thinks of micro-drama as a niche for one kind of viewer should look again.

2026 is the year UK media arrived. Channel 4 commissioned its first vertical drama, *The Guest List*, funded by Sol de Janeiro (Channel 4). BBC Scotland opened commissioning for micro-budget vertical series (BBC Scotland). Raindance launches a vertical festival in London on 4 December, with a market that matches producers with "financiers, platforms, commissioners and brands" (Variety). An RTS event put the problem plainly: "the UK already has a microdrama audience, but we are not there yet in terms of production and commissioning pipelines" (RTS).

The platforms and advertisers are moving

Micro-dramas on YouTube passed 6.5 billion views in the first half of 2026 (YouTube). Active advertisers on short-drama apps rose 132% in the same period (Marketing Dive). dentsu found that half of micro-drama viewers would research a brand they saw featured in a story (dentsu).

The catch, and why brands are staying off the apps

The apps have problems. ReelShort still earns 95% of its revenue from subscriptions, and AI-made titles rose from 5% of its new releases in April to 96% by October (Forbes). ReelShort's owner says brand advertising "reduces the cost for viewers" (Broadcast), but many brands are wary of the company they would keep. The apps' catalogues lean on age-gap romances and erotic storylines, and few marketing directors want their brand next to them. Brands would rather be seen off the app, in open social channels such as TikTok, Instagram and YouTube. They already spend on those platforms, know how to buy and measure them, and see far less risk there than in a new and unfamiliar app. The audit bears this out: 78 of the 104 branded series were hosted on open social channels, and only 13 appeared on a dedicated drama app. My view is that brands should treat micro-drama as an elevated form of creator-led entertainment on social, not as advertising inside someone else's app.

4. What we audited

The audit covers branded micro-dramas launched between 10 November 2025 and 10 November 2026, anywhere in the world. A branded micro-drama, for this paper, is a scripted, episodic series made for phone screens, funded at least partly by a brand, in which the brand appears in the story, the setting or the credits.

We found 104 series. Each is recorded with its brand, country, platforms, story, how the brand appears, who made it, the deal, any disclosed budget and results, and links to the sources. Everything comes

from public sources: brand and agency announcements, trade press, platform pages and the series themselves. Two series are flagged as lightly sourced. Four series launching just after the window closed, three Taobao Double 11 dramas and Christmas at Maple Hollow Inn, are included because they were announced and promoted within it. Two further series that launch later are kept on a watch list, including Fetch's *The Receipt.*

Public sources have limits. Brands rarely publish costs or results, so the audit records what is known, not what is true. Some launches will have been missed, particularly older ones and those outside English and Chinese-language media. The method note at the end of this paper gives the definitions.

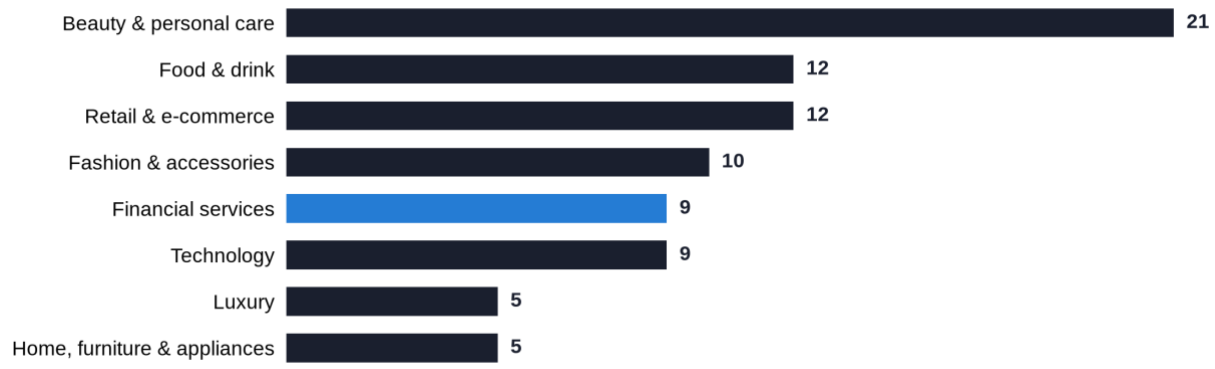
5. The landscape

Who is making them

North America accounts for 37 of the 104 series and China for 25. Asia-Pacific (outside China and India), India, and the UK and Europe have 12 each. Latin America and the Middle East and Africa have 3 each.

Beauty and personal care is the biggest category by far, with 21 series, and over a third of Chinese series are beauty brands. The surprise is further down the list.

Figure 1. Beauty leads, and banks are close behind the big consumer categories
Branded micro-dramas by brand category, top eight of 18 categories (104 series)



Source: RA Britton Consultancy audit of 104 branded micro-dramas.

Financial services has 9 series, level with technology. These are not niche fintechs. Mastercard made a K-drama about payment scams across South-East Asia (Mastercard); Visa made a dance romance with Daddy Yankee (Variety); Venmo wrote an app feature into a group-chat comedy (Branded Entertainment Brief). Japan's Mizuho and South Africa's Absa followed (PR Times; Absa). Money is a subject full of anxiety, ambition and secrets, which is exactly what drama runs on. I expect more banks to follow.

The brand is in the story

In 93 of the 104 series, the brand is part of the story: either written into the plot, or the reason the story exists at all. Only 11 are simple sponsorships or product placements. That is a big change from the first wave of branded short drama in China, where brands mostly bought placements in other people's hits.

It is speeding up

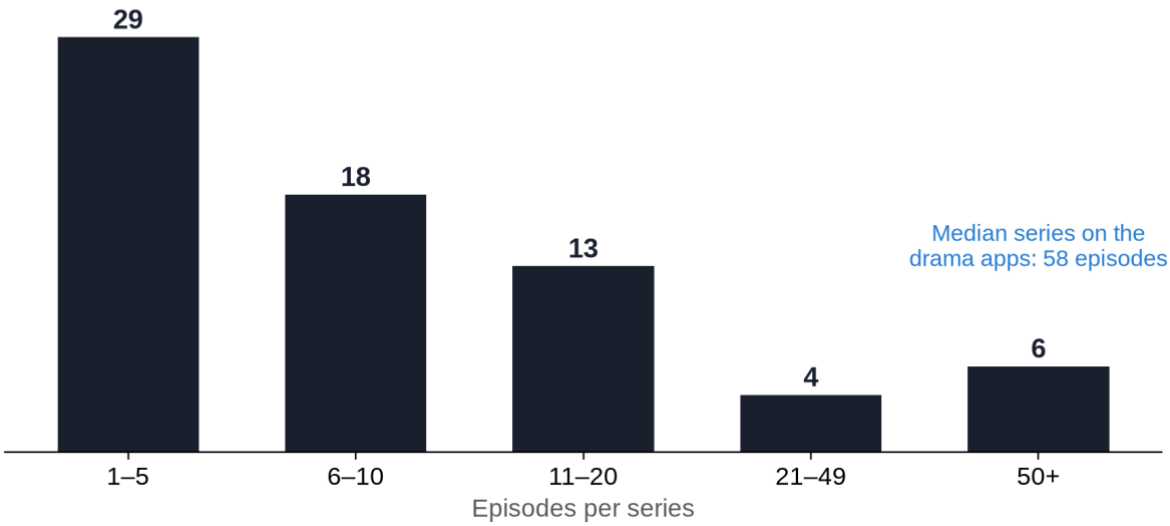
70 of the series launched in the second half of the window, from 10 May to 10 November 2026, against 32 in the first half. Older launches are more likely to have been missed, so the true growth may be smaller, but the market has at least doubled. September and October 2026 alone had 31 launches.

6. What the series look like

Mini-series, not micro-dramas

This is the finding I did not expect. Of the 70 branded series with a known episode count, the median is 6 episodes, and two-thirds have 10 or fewer. On the drama apps, the median English-language series has 58 episodes (MicroDramaList).

Figure 2. Brands are making mini-series: median 6 episodes
Branded micro-dramas by number of episodes (70 of 104 series with a known count)



Sources: RA Britton Consultancy audit of 104 branded micro-dramas; app median from MicroDramaList, October 2026.

The apps' long format exists for a reason. Each cliffhanger brings the viewer back, and each return is a chance to sell another episode. A five-part branded series borrows the vertical frame, the pace and the heightened tone, but not the habit. That is not necessarily wrong: brands are not selling episodes, and a short series is cheaper and easier to finish. But brands should be honest about what they are buying. A mini-series is a campaign. A long-running series, or a franchise with seasons, is a relationship with an audience. The handful of brands that have gone long, with 50 episodes or more, or a second and third season, are the ones to watch.

The craft that matters

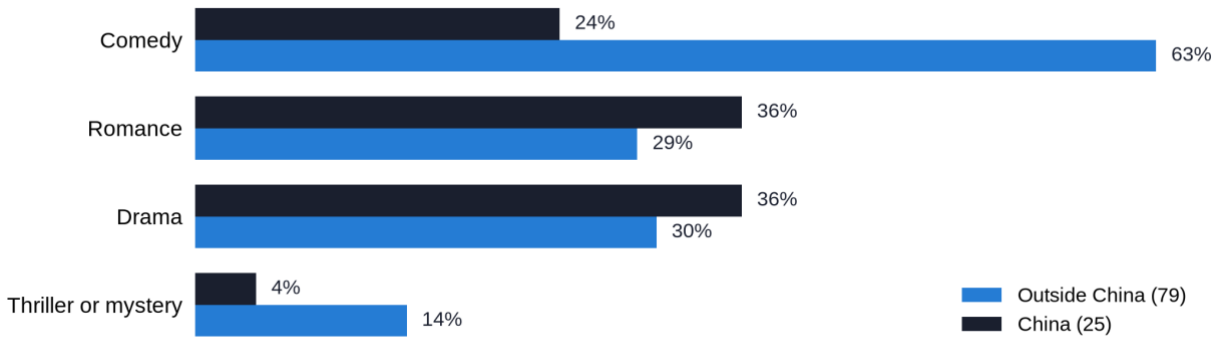
Micro-drama is a writer's format before it is a production one. Every episode has to stop the thumb in its first few seconds, turn once, and end on a question the viewer needs answered (Kapwing). One experienced TV writer describes each episode as "one strong beat with a hook at the end that forces the viewer to unlock the next one" (Stage 32).

Brands tend to spend on the look: the cast, the location, the product shot. The hook and the cliffhanger cost nothing extra, but they decide whether anyone reaches episode two. In a six-part series, losing viewers after episode one loses most of the story, and most of the brand. This is also where creators have the advantage: hooking a viewer in seconds is what they do every day.

Brands want you to laugh

Outside China, brands overwhelmingly choose comedy. It features in 63% of non-Chinese series and in 9 of the 12 from the UK and Europe. In China, comedy features in only 24%, and romance and drama lead, closer to the drama apps' own diet of love stories and revenge.

Figure 3. Brands want you to laugh; Chinese brands want you to fall in love
Share of series featuring each genre. A series can feature more than one genre.



Source: RA Britton Consultancy audit of 104 branded micro-dramas.

Two smaller patterns are worth noting. North American beauty brands have gone dark: four of their six series are thrillers, mysteries or heists, including e.l.f.'s *Parental Advisory* (Muse by Clios), Maybelline's *Maybe This Christmas* (PR Newswire) and Native's *The Golden Pear Affair* (Native). And seven series send up the genre itself, such as Apple's telenovela parody *Nido de Villanas*, shot on iPhone in Mexico (9to5Mac), and Soap & Glory's *Suds* in the UK (LADbible Group). Comedy is a sensible choice for brands. It is forgiving of product moments, travels well on social feeds and is easier to get past legal teams than a revenge plot.

7. How the deals work

I have identified seven deal structures in use around the world. They differ in who has the idea, who pays, who owns the series and what the brand gets.

Deal structure	What it is	Series
Brand-owned original	The brand commissions an agency or studio, owns the series and distributes it	61
Brand-funded partner commission	A broadcaster, publisher or creator network makes and badges the series; one brand funds it	13
Platform-produced custom series	A drama app or platform makes a series to a brand's brief	9
Sponsored slate title	A studio sells brand partnerships into a series it has already developed	6
Talent or property tie-in	The series is built around a star, a film or another property	6
Co-development	Brand and producer develop the idea together and share the rights	5
Buy-in to an existing hit	The brand pays to appear in an established series or a new season	4

Source: RA Britton Consultancy audit of 104 branded micro-dramas.

The brand-owned original dominates, with 61 of the 104 series. Brands are becoming publishers. That gives them control, but it also leaves them to find the audience themselves.

The more interesting models give the brand someone else's audience. Ensemble, which sells brand partnerships into HOORAE's TikTok series, describes the offer simply: "what they're hoping for is what we're guaranteeing, which is distribution" (Digiday). In China the market is moving the other way, from placements in existing hits towards custom series, which rose from 48% to 88% of brand content according to Miaozhen research (Shanghai Securities News).

Several brands can also share one series. Singapore's Mediacorp sold integrations in LOVE Angels to six partners (see the case study in section 9). Retailers have brought their suppliers into a series, and

Fetch's *The Receipt*, launching in December, gives each episode to a single brand. Shared series spread the cost, but someone must decide whose product gets the best scene. Chinese platforms such as Hongguo limit deep integration to one brand per drama for that reason (Imtw).

CASE STUDY **Crocs: three routes in one year**

Crocs tried three different deal structures. *Charmed to Meet You* was made with ReelShort, the drama app, and reached its Top 10 at launch (Tubefilter). *Déjà Shoe* was developed by SuperOrdinary's studio for TikTok, with products tagged for shopping in the episode (PR Newswire). Crocs also appeared in a crossover episode of InStyle's established series *The Intern* and *The Boss* (Wired Middle East).

What Crocs told investors is revealing. Its ReelShort series had "garnered nearly 20 million views, reaching both new and existing consumers" (Crocs Q2 2026 earnings call). What it shared publicly was reach. That is typical of what brands publish, as section 11 shows.

The full report sets out each structure in detail: who owns the IP, who has creative control, what the brand gets, the audience data rights, how shared series work and which of the 104 series uses which model.

8. Creators and celebrities

Creators are the exception, not the rule. Only 21 of the 104 series involved social creators, as cast, writers, producers or distributors. Over half (56) used professional actors or celebrities. India is the outlier, with creators in half its series. We found no creator involvement in any of the 25 Chinese series, which use professional short-drama casts, the brand's own staff or AI.

That may be about to change. dentsu has an exclusive partnership with Made By Us Studios that lets brands "partner into that IP from the first idea" (afaqs), and TikTok has agreed to co-produce creator-led micro-series with the same studio (TikTok). For UK brands, that could be the easiest way into creator-owned series.

What creators bring is an audience that already trusts them, and the ability to distribute the series on their own channels. What they risk is that trust. A series that feels like an advert can cost a creator followers, so the creative must work for their audience first.

CASE STUDY **Jamie Oliver × Life360: the celebrity as creator**

Finding Jamie While He's Finding Himself is a five-part comedy in which Jamie Oliver leaves the kitchen in a fictional midlife crisis, trying regression hypnosis and a woodland cult, while his family uses Life360 to keep track of him (LBB Online). It ran on Jamie's own Instagram, TikTok and YouTube channels.

It is the clearest UK example of a celebrity using the creator playbook. Jamie brought distribution, and he brought trust: he and his family were long-term users, and he remained a paying member (Jamie Oliver).

The evidence on creators supports patience. The IPA found that influencer marketing in the UK has the highest long-term return multiplier of any channel, ahead of linear TV (IPA). It also warns against judging by engagement: research by WPP Media, System1 and TikTok found that engagement rate had "effectively no relationship" with brand memory (WPP Media). My view is that creators and producers should be paid partly for performance, and that the performance should be something paid media cannot inflate: organic viewers who stay to the final episode. It rewards the people who make the series good, not those with the biggest media budget.

9. From story to sale

In China, you can buy without leaving the episode. In-episode shopping features in 8 of the 25 Chinese series, against 3 of the 79 elsewhere. Another 10 series link to a shop page. The other 83 have no shopping route that we could find.

The best Chinese example is Pechoin's *Lingyu: A Tale of Another World.* Among viewers who watched closely, store orders and conversion rose 80% compared with the same people before watching, and the new cream sold more than RMB 10m in 30 days (163.com). Those are the brand's own figures, with no control group, but they are more specific than anything published in the West.

Outside China, commerce is held back less by technology than by habit. TikTok Shop is available in the UK and the US, and products can be tagged in episodes. Most Western brands have simply not built the series around a purchase.

CASE STUDY **Mediacorp's LOVE Angels: stories into storefronts**

LOVE Angels, a spy-caper comedy from Singapore's Mediacorp, ran for 20 episodes from 19 October 2026. Six partners, from a power company to a pawnbroker and a feng shui centre, bought integrations written in at the script stage (Marketing-Interactive). Characters sometimes turn to the camera to talk about the products.

It ran across Mediacorp's radio station's social channels, its streaming service and selected TV slots, with a livestream and its shop alongside (C21Media). It is a broadcaster selling a multi-brand series as a media product, a model UK broadcasters could copy.

A new route: rewarded viewing

Fetch, a US rewards app, launches *The Receipt* on 3 December: a six-part romantic comedy in which each episode features one brand partner and viewers earn points for watching and for buying the products (PR Newswire). Fetch is not a retailer. It reads shoppers' receipts, so it can see what they bought wherever they shopped (Fetch). Fetch bills The Receipt as the first "rewarded" micro-series, and its receipt data could let it link viewing to verified purchases, if it publishes the results. The caution is that paying people to watch makes the viewing figures hard to compare.

10. AI changes the cost of entry

22 of the 104 series used AI to make the series, and 18 of those were Chinese. Some are fully AI-generated; others mix real actors with AI effects. Europe has its own oddity: Jerónimo Martins, the retail group, ran AI-generated cat soap operas in Portugal for Pingo Doce (TikTok) and in Poland for Biedronka (Nowości AI; the Polish series is lightly sourced).

AI brings the cost of making a series down sharply. It does not change the cost of everything else. A brand still must pay to be seen, to measure the result and, often, to hire the talent the audience came for. For most brands, production is the smaller part of the budget, so AI makes a series cheaper, not cheap.

There is also a trust cost. In a July 2026 YouGov poll, 78% of Britons who had seen AI-generated actors in ads said they would trust a brand that used them less (YouGov). Equity, the performers' union, wants consent and time-limited licences for any use of a performer's likeness (Equity). My view is that AI is best used behind the camera and around the product: settings, effects, versions and product shots. It should not replace the people the audience is asked to care about, unless the series is clearly animated or fantastical, as the cats are.

11. Money and measurement

Little is published

Only 3 of the 104 series disclose a budget. 61 have no public results specific to the series. Most of the rest report views or chart rankings, and the 10 that report a sales result rely on the brand's own figures, with no control group.

The best result is just outside the audit window. Bob's Discount Furniture says its 2025 creator series drove nearly $9m in attributable sales and performed about 50% better than its usual social content (Chief Marketer). The warning comes from China. The skincare brand Kans was the format's first big success, but by its founder's account the format became about 40 times less effective as supply grew, and the brand largely stopped (163.com). Early results do not necessarily last.

What it costs in the UK

For a UK brand, I put the average cost of a high-end content partnership at about **£500K** all-in. That covers production, talent, distribution, paid media support and a brand-lift study. Production can be as little as £100K of it. The other four lines are where most of the money goes, and where most branded series are underfunded. This is my benchmark from market experience, not a published figure, and the right number depends on the brief.

Four recommendations

1. **Pay to be seen, off the app.** A series nobody finds is wasted money. Put it on the open social channels the brand already buys and measures, such as TikTok, Instagram and YouTube, rather than inside a drama app. Give distribution its own line in the budget, whether that means a creator's channels, a platform partner or paid media.
2. **Measure properly.** Views are not results. Make a brand-lift study the standard, alongside search, completion and, for bigger budgets, econometrics. Agree the measures before episode one.
3. **Pay for performance.** Link part of the creator's or producer's fee to performance that paid media cannot inflate: organic viewers who stay to the final episode, against an agreed benchmark.
4. **Ask for a series data window.** Ask the creator or platform for time-limited access to the series audience, so the brand can follow up with people who watched, within platform rules and without taking their data.

Each of these needs the right terms in the contract. That is where most deals are won or lost, and it is the detail I work through with clients.

12. The UK angle

The UK has barely started. Only 4 of the 104 series were made in the UK, and two of those were for US brands: Sol de Janeiro with Channel 4, and Life360 with Jamie Oliver. Co-op's Pop to Co-op, with dentsu and Carat, is the clearest UK brand-owned example (dentsu). Europe's largest micro-drama audience has almost no branded series of its own.

Four things a UK brand needs to know before commissioning:

- **Label every episode.** A branded series on social media is advertising under the CAP Code. On a creator's, talent's or broadcaster's channel, each episode needs an upfront "Ad" label, because viewers find episodes out of order. The new influencer guide sets out the rules (ASA), and the CMA can now fine up to 10% of global turnover for hidden advertising (CMA).

- **Watch food rules.** Paid-for online ads for identifiable less healthy food and drink have been banned since January 2026 (GOV.UK). Paying a creator or boosting the series counts as paid.
- **Plan for the under-16 ban.** The Government plans to ban under-16s from the main social platforms, expected from spring 2027 (GOV.UK; House of Commons Library). Series launching after that should plan for an audience of 16 and over.
- **Look at retailer-led series.** UK retailers with media arms and loyalty schemes could sell episodes of one series to their supplier brands, much as Fetch is doing in the US. No UK retailer has done this yet; it is my suggestion, and a route worth exploring.

13. What to watch

- **Creator studios.** The dentsu and TikTok partnerships with Made By Us Studios, the likeliest route for UK brands into creator-owned series (TikTok).
- **Rewarded viewing.** Fetch's *The Receipt*, from 3 December 2026, and whether it publishes purchase-verified results (PR Newswire).
- **Longer series.** Whether brands move from five-part campaigns to longer series and seasons that build a habit.
- **UK commissioning.** Channel 4's and BBC Scotland's next commissions, and the brands and financiers at Raindance Vertical in December.

The audit will be updated every six months. The next edition covers series launched up to 10 May 2027.

14. The full report

This free edition draws on a larger body of evidence, published in one document as Brands and Micro-Dramas: The Global Report. The full report contains:

- the full audit of all 104 series, with brand, platform, story, deal, budget, results and sources for each, plus the watch list;
- the seven deal structures in detail, with IP, control, data rights and multi-brand series;
- the full set of charts by region, category, genre, deal, platform and disclosure;
- how brands are using AI to put products on screen, and what it does to the cost of entry;
- every route from story to sale, including rewarded viewing;
- the roles creators and talent play, and what they bring;
- extended chapters on the market, the evidence on effectiveness, the UK angle and case studies.

To order the full report, or to talk about a branded series, contact RA Britton Consultancy at rupert@rabritton.com

Method note

Window. Series launched between 10 November 2025 and 10 November 2026. Three long-running franchises that began earlier (The Intern and The Boss, Roomies, and Margeaux and Jules) are included because they were active in the window. Four series launching just after it, three Taobao Double 11 dramas and Christmas at Maple Hollow Inn, are included because they were announced and promoted within it. Other series announced in the window but launching later, such as Fetch's The Receipt, are on a watch list and not counted.

What counts. A scripted, episodic series made for phone screens (vertical or social-first), funded at least partly by a brand, in which the brand appears in the story, the setting or the credits. One-off films, unscripted content and ordinary advertising are excluded.

How series were found. Searches of trade press, brand and agency announcements, platform pages and social channels in English, Chinese and other languages, plus specialist micro-drama newsletters and social accounts. Each series is recorded from at least one public source, with links. Two series are flagged as lightly sourced.

Definitions used in this paper.

- "The brand is part of the story" means a story-aligned integration or a story the brand owns, as opposed to a sponsorship credit or simple product placement.
- "No results specific to the series" means no published figure about the series itself, as opposed to the wider campaign.
- "Hosted on open social channels" means at least one episode was released on a social platform such as TikTok, Instagram, YouTube, Facebook or Douyin. "Dedicated drama app" means an app built for short drama, such as ReelShort or Hongguo. 17 series have no known host.
- "Creators involved" means a social creator in the cast, a creator studio or network, or a creator-led series. Celebrities working through their own channels are counted under professional or celebrity cast.
- Genres are recorded as described in the sources. A series can have more than one.
- Regions follow the brand's launch market: North America; China; Asia-Pacific (excluding China and India); India; UK and Europe; Latin America; Middle East and Africa.

Limits. The audit records what is public. Budgets and results are rarely disclosed, and some launches will have been missed, particularly older ones and those outside English and Chinese-language media. Growth figures should be read with that in mind. This paper is not legal advice.