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THE **WHITE PAPER**  
SERIES

DIGITAL SHIFT—  
SPRING/SUMMER  
2026: North America  
& Western Europe

# DIGITAL-SHIFT WHITE PAPER

Insights, analysis and case studies on coming to grips with the new screen economy.

**Broadcaster Evolution Pay-TV Shifts  
Niche SVODs FAST/AVOD Platforms  
The Creator Economy/The New Studios  
Producers&DistributorsGoDigital-First  
Digital Optimizers YouTube Strategies**

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- Electrify
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# The New Screen Economy

**Practical insights for making sense of the trends reshaping content production, monetization and distribution.**

**Compiled by Mansha Daswani**

You'll see some recurring themes across this report, which explores how consumption changes are impacting the production, distribution, and monetization of content. Fragmentation, fandom, being multiplatform in distribution and creation, and constant optimization.

In this White Paper, I aim to distill what those things mean in practice, drawing on insights from the executives who are figuring them out every day. From panels and keynotes at global content summits to dozens of interviews and countless news stories, this White Paper features practical intelligence for making sense of this new screen economy.

We've all seen the numbers, over and over again. Audiences of every age are spending more and more of their time on social video platforms. *The YouTube Era: 2025 in Review* report from Digital i Research laid this out clearly. Across 20 major markets, average daily usage of YouTube per account rose from 87.2 minutes to 99.1 minutes from 2024 to 2025. In contrast, Netflix's daily engagement slipped from 100.5 minutes to 93.4.

"YouTube's evolution from a social video service into a dominant global attention platform is one of the defining media shifts of the decade," said Matt Ross, Digital i's chief analytics officer, in the study. "Our data shows audiences increasingly treating YouTube not as social media,

but as a primary entertainment destination.”

Social media has become the “top of funnel for every brand, studio, and creator in the entire world,” Chronicle Studios’ Aaron Sisto said on ScreenMDM Talks. “Unless you are getting discovered, unless you’re getting your content to the right audiences on these platforms like YouTube, you’re in many ways irrelevant. That’s the number one challenge that we’ve seen for anyone from an indie creator to a massive studio. How do you get your content discovered? How do you really engage that core fan base? And then ultimately, how do you bring them along for the journey?”

Gen Z is still the most engaged audience on YouTube at 111 minutes a day, Digital i said, but the biggest gains were seen among men 55 to 64, with usage up 15% year on year. Usage by women across demos also rose, with the biggest

**"Unless you are getting discovered, unless you're getting your content to the right audiences on these platforms like YouTube, you're in many ways irrelevant. That's the number one challenge that we've seen for anyone from an indie creator to a massive studio." — Aaron Sisto, Chronicle Studios**

gain among women aged 18 to 24. Overall, daily usage among the 55 to 64-year-olds rose to 81.4 minutes.

Crucially, younger audiences are not going to magically return to traditional platforms when they reach their 30s and 40s.

“If you think your media enterprise can speak to millennials, and

"Television has been replaced by the combination of streaming and social video. You have to think of the whole consumer, not the TV consumer and the mobile consumer, not horizontal or vertical, but the whole consumer, wherever they go." —Evan Shapiro

younger, who grew up with supercomputers in their pockets, who have had social media in their hands since grade school, you're out of your minds," media cartographer Evan Shapiro said at StreamTV in Lisbon. "You have to change the way you do business, because the way people consume has dramatically shifted, not because of technology. Technology is definitely the tool that makes new consumption possible, but the generational shift of the population of the planet Earth is what always drives innovation. That's

what drives change. And you need to see the world through the eyes of younger consumers in order to see the whole consumer."

"Young people have a different content paradigm," explained Jon Giegengack, founder and principal at Hub Entertainment Research, also at StreamTV Europe. "People 35 and over, the number one and number two things they watch regularly are movies and TV shows. People under 25 watch short videos and YouTube is number one and number two. But

61% of them still watch movies regularly. 54% still watch TV shows regularly. But the reality is that long form is not where they begin."

"The YouTubers of the first generation are in their 40s," said Tobias Schiwek of We Are Era at MIP London. "Their children do not watch linear TV. It's the last window that is closing. If people do not replace centralized power with distributed power, they will lose the next round."

Ultimately, "television has been replaced by the combination of streaming and social video," Shapiro said. "You have to think of the whole consumer, not the TV consumer and the mobile consumer, not horizontal or vertical, but the whole consumer, wherever they go."

And that is as much a creative shift as it is a distribution one, A+E Global Media's Robert Sharenow said at

Realscreen Summit. "It always ends up being a creative foot race. Whatever the disruption is, some people are going to win, some people are going to lose."

Helpful tips on how to win follow. All of these companies featured are in different stages in their own evolutions. Free-TV broadcasters embracing social video strategies, traditional studios launching digital-first slates, channel brands reinventing their businesses, tech providers powering expansion, AVOD platforms and streamers leaning into the creator economy, the new studios that have emerged from social media, and the optimizers at the center, helping players from both sides intersect.

Two big areas not covered here because they deserve their own deep dives: vertical video, with that report launching later this summer, and sports, also planned for later this year.

# Expert Insights From...

**60-Plus Sources: Industry Reports / Interviews /  
NATPE Global & Realscreen Summit / MIP London /  
StreamTV Europe**

- Aaron Sisto, Co-Founder, **Chronicle Studios**
- Adam Cohen, Head, **Sidemen Productions**
- Alberto Fernandez, Director, Digital Platforms & Services, **RTVE**
- Alex Piper, EP, Sports & Creator Content, **YouTube**
- Alexia Laroche Joubert, CEO, France, **Banijay**
- Amie Parker-Williams, Director, Digital Commissioning & Production, **MTV Entertainment Group International**
- Aurélie Brunet de Courssou, Senior Director, Marketing, **RTL AdAlliance**
- Ben Sinden, SVP, Content & Creators, **Electrify**
- Brian Briskman, Co-Founder, **Likewise Media Consultants**
- Caroline Cooper, COO, **Sky**
- Ceyda Sila Çetinkaya, COO, **Merzigo**
- Chiara McKee, VP, EMEA Global Channels & Streaming, **Blue Ant Media**
- Christine Waage, Head, Sales, **Bell-Phillip Television Productions**
- David Ball, VP, BizDev, EMEA, **Crunchyroll**
- David Bouchier, Chief TV & Entertainment Officer, **Virgin Media O2**
- David Couret, Director, Technical Solutions Distribution & FAST/CTV Partnerships, **France 24**
- Deep Halder, Chief Commercial Officer, **Everyone TV (Freely & Freesat)**
- Dhar Mann, Founder & CEO, **Dhar Mann Studios**
- Dominic Smales, Co-Founder, **GloMotion Studios/WinnieWood**
- Evan Shapiro, **Media Cartographer**
- Francisco Balsemão, Chairman & CEO, **Impresa**
- Fredrik af Malmberg, CEO, **Dubhub**
- Frédéric Balmary, CBO, **Banijay**
- Gaspard Guermonprez, **Content Creator**
- Gus Grimaldi, Senior Director, Head, EMEA, **Samsung TV Plus**
- Helen O'Donnell, VP, Content & Creators, **BBC Studios**
- Igor Draguzet, Chief Content Officer, **CME**
- James Loveridge, Co-Managing Director, Agency, **Little Dot Studios**

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- James Ross, CEO, [Lightning International](#)
- Jane Stiller, Chief Viewer Officer, [ITV](#)
- Jay Bennett, SVP, Franchise Strategy & Innovation, [Shaftesbury](#)
- Joan Cruells, VP, Partnerships & Growth, [Viaplay Group](#)
- Jonas Engwall, CEO, [Bedrock](#)
- José Fragoso, Program Director, [RTP](#)
- JR Griffin, SVP, Digital, U.S., [Fremantle](#)
- Julien Laurent, Chief Digital Officer, [TF1](#)
- Katie Stamp, Head, Content & Programming, EMEA, [Samsung TV Plus](#)
- Kelly Williams, MD, Commercial, [ITV](#)
- Kerry Ball, EVP, BizDev & Partnerships, Global Channels & Streaming, [BBC Studios](#)
- Kim Larson, Global MD & Head, Creators, [YouTube](#)
- Kudzi Chikumbu, VP, Creator Partnerships, [Tubi](#)
- Lisa Holme, Head, Content, [Roku Media](#)
- Marcos Milanez, Chief Content Officer, [Rakuten TV](#)
- Marion Ranchet, [Streaming Made Easy](#)
- Marion Rathmann, Group VP, Content & Programming, GSA & Benelux, [Warner Bros. Discovery \(WBD\)](#)
- Martin Trickey, Managing Director, [Zoo 55](#)
- Matt Ford, Co-Head, Digital Studio, [Sony Pictures Television International Production](#)
- Maxime Carboni, CBO, [Euronews](#)
- Nico Lockhart, Managing Director, [TeamFalco](#)
- Pedro Pina, VP, EMEA, [YouTube](#)
- Philipp Rotermund, CEO & Co-Founder, [wedotv](#)
- Pilar Blasco, CEO, Iberia, [Banijay](#)
- Rafael Herrera, Director, Programming & FAST Channels, [The Mediapro Group](#)
- Raju Jayakumar, Deputy Chief Editor, CNA, [Mediacorp](#)
- Rick Murray, CEO, [Workerbee](#)
- Robert Sharenow, President, Programming, [A+E Global Media](#)
- Ruth Berry, President, Global Partnerships, [ITV Studios & Zoo 55](#)
- Scott Greenberg, Co-Founder, [Chronicle Studios](#)
- Scott Lewers, Chief Content Officer, [CrunchLabs](#)
- Scott Winkler, Head, Commercial Partnerships, [Dude Perfect](#)
- Sean Atkins, President, [Dhar Mann Studios](#)
- Shujah Farooq, Partnerships & Content Acquisition Manager, [TCL](#)
- Stéphane Coruble, CEO, [RTL AdAlliance](#)
- Tamara Rothenberg, Head, Talent & Creators, [Samsung TV Plus](#)
- Tobias Schiwiek, CEO, [We Are Era](#)
- Victor Bengtsson, CEO, [Sidemen Entertainment](#)
- Will Scougal, EVP, Brand & Commercial Partnerships, [ITV Studios](#)

# Legacy Shift

From making full episodes available on YouTube to launching their own BVOD services, leading broadcasters worldwide are finding ways to remain relevant in the digital-first streaming era. As are pay-TV operators and 24-hour cable channels.

**Featured:**

**Free-TV Legacy: Perspectives from [ITV](#) & [Freely](#)**

**CEE's Local Champion: [CME](#)**

**Iberia in Focus: Input from [RTVE](#), [RTP](#), & [Impresa](#)**

**The News Angle: [TF1](#)'s Digital Creator Pact**

**The Economics of Streaming: The [Bedrock](#) Perspective**

**It's Not Aggregation, It's Curation: The View from [Virgin Media](#)**

**[Cable](#) Evolution: The Channel Perspective**

**Winning the Living Room Battle: : Insights from [RTL AdAlliance](#)**

**[News](#) Right Now**

**Digital Commissioning: The View from [MTV](#)**

# The Other SVODs: Niche Streamer Wins

## Insights from:

**David Ball, VP, BizDev, EMEA, Crunchyroll**

**Joan Cruells, VP, Partnerships & Growth, Viaplay**

**Kerry Ball, EVP, Business Development & Partnerships, Global Channels & Streaming, BBC Studios**

**Viaplay, operating D2C in the Nordics and the Netherlands, is powering its international footprint via partnerships rather than going it alone. In the U.S., it's an add-on subscription on Prime Video Channels, The Roku Channel, and others. Viaplay Select hubs are carried on several international platforms, including SBS in Australia, WOWOW in Japan, CINDIE in LatAm, and Magenta TV in Germany. The dual D2C and licensed model is key for Viaplay, Joan Cruells said at StreamTV Europe. That informs the way it structures its content deals.**

“We assess the acquisition and design the content distribution path at the point of acquisition. There's always internal friction—who is going to get some pieces of content? At the end of the day, it's about how best to have that piece of content travel across markets, platforms, and even different monetization models. We've seen things go from SVOD to AVOD, with FAST in the middle in some markets. In some other markets, it may be with a partner. We do co-exclusive, we do different windows. We basically look at the journey of the content from the beginning.”

# IP Owners: Embracing YouTube, Monetizing on FAST & Driving Discovery

## Insights from:

**Christine Waage, Head, Sales, Bell-Phillip Television Productions**

**Helen O'Donnell, VP, Content & Creators, BBC Studios**

**Jay Bennett, SVP, Franchise Strategy & Innovation, Shaftesbury**

**JR Griffin, SVP, Digital, U.S., Fremantle**

**Rafael Herrera, Director, Programming & FAST Channels, The Mediapro Group & Director, OTT & FAST Barometer, GECA**

**Plus: Breakout sections on ITV Studios, Banijay Entertainment, & Sony Pictures Television International Production**

**A spotlight on how several leading IP owners are looking at the social video and FAST spaces to boost discovery, build fandoms, drive monetization, and sustain engagement between seasons. Dedicated breakouts on ITV Studios, Banijay, and Sony Pictures Television follow this section.**

**“Think like a fan.”**

That was a key piece of advice from Fremantle's U.S. digital chief, JR Griffin, on a panel about discovery I had the great pleasure of moderating at NATPE Global. “What would a fan want to see? What would they make if they could?”

**Build communities and fandoms, not marketing channels.**

“Five, six years ago, we probably were still seeing [social] as a marketing platform,” said BBC Studios’ Helen O’Donnell at StreamTV Europe. “It was a place that we could put out clips of our brilliant shows, and people would engage with them en masse. If you’ve got a big brand like BBC Earth, for example, we do get really good numbers when we put out a trailer. However, the business model has changed: it’s now creating a front door to some of our shows. Some people like to have a deep interaction with

“We have formed an integrated digital brands proposition, where we have channels that put out not just clips but also original content for audiences, tailored to the platform it’s going out on.”

—Helen O’Connell,  
BBC Studios

our shows by watching them on TV, while others prefer to engage with them on one of our digital platforms. So that means we have formed a really integrated digital brands proposition, where we have channels that put out not just clips but also original content for audiences, tailored to the platform it’s going out on. So I think we’re less worried about where our audiences sit, as long as it’s a front door and a window to some of our great channel brands.”

**Find new ways to resurrect beloved IP.**

# CTV Battles: The **AVOD** & **FAST** Platforms

## Insights from:

**Gus Grimaldi, Senior Director, Head, EMEA,  
Samsung TV Plus**

**Katie Stamp, Head, Content & Programming,  
EMEA, Samsung TV Plus**

**Kudzi Chikumbu, VP, Creator Partnerships,  
Tubi**

**Lisa Holme, Head, Content, Roku Media**

**Marcos Milanez, Chief Content Officer,  
Rakuten TV**

**Philipp Rotermund, CEO & Co-Founder,  
wedotv**

**Shujah Farooq, Partnerships & Content  
Acquisition Manager, TCL**

**Tamara Rothenberg, Head, Talent & Creators,  
Samsung TV Plus**

**“The battle for the living room is no longer only about streaming content. It is increasingly about controlling the platform, the advertising layer, the operating system, the data, and ultimately the consumer relationship.” —Maria Rua Aguite, Omdia**

More than 70% of European audiences are watching FAST channels daily or several times a week, according to research unveiled by Rakuten TV at SXSW London. Just over 80% consider FAST a primary way to watch television or an alternative to paid streaming services. Further, 60.7% expect to increase their use of FAST services in the future.

Viewers are also largely fine with watching ads on FAST (82.3%), especially if they are relevant, help discover new content, or are simply accepted as part of accessing said content for free.

FAST is being powered by both financial and discovery imperatives; 45.9% of viewers surveyed for the Rakuten TV study use it to decide which subscription services are worth paying for, and 29.9% use it to help reduce overall spending.

The key to success in FAST involves balancing broad reach and niche fandom. Per the study, movies and TV series remain the strongest drivers of engagement across Europe, while themed and genre-based channels are a key growth opportunity. Indeed, that is the only sector where audience demand exceeds current viewing behavior, suggesting that specialized content experiences are not yet available at scale. And local content is paramount.

There are differences emerging across key European territories; in the U.K., FAST is increasingly driving content discovery and subscription decision-making. In Germany, subscription fatigue is contributing to FAST adoption. Local is particularly important in Spain and Italy.

# YouTube on YouTube

## Insights from:

**Alex Piper, EP, Sports & Creator Content**

**Kim Larson, Global MD & Head, Creators**

**Pedro Pina, VP, EMEA**

**YouTube has had a significant presence at content markets as of late, stressing its role as a partner to the business and not a rival. You need only look at global media share rankings to see that YouTube is increasingly winning the battle for living room eyeballs. And broadcasters and producers are increasingly realizing their need to be there, as you'll read about in other sections of this report.**

**In this section, we recap insights from several YouTube executives shared at NATPE/Realscreen Summit, MIP London, and StreamTV Europe on the best ways to YouTube.**

## A Case Study in News in a New Age

"Our focus is making sure we deliver the best content that people are looking for," said Pedro Pina in a StreamTV Europe panel on the alliance between TF1 and content creator Gaspard Guernonprez for the digital-first news series *Les Dossiers*.

"Having a user-first perspective has always been what we want to do," Gaspard said, "We believe that there's a different way for us to deliver news. My generation needs a new language, a better understanding, or a different way to understand the news. I'm going to deliver that to them.' And sure enough, when you deliver to the viewers

# The Optimizers Making Sense of Social

## Insights from:

**Aaron Sisto, Co-Founder, Chronicle Studios**

**Brian Briskman, Co-Founder, Likewise Media Consultants**

**Dominic Smales, Co-Founder, GloMotion Studios/WinnieWood**

**James Loveridge, Co-Managing Director, Agency, Little Dot Studios**

**Nico Lockhart, Managing Director, TeamFalco**

**Scott Greenberg, Co-Founder, Chronicle Studios**

**Tobias Schiwek, CEO, We Are Era**

As the creator ecosystem has grown, another new industry has emerged alongside it: the optimizers—businesses built entirely to help creators scale their reach and “traditional” content firms maximize their IPs on digital.

# The New Studios

**Beyond boasting millions of followers across social video, these creator economy power players have built entire ecosystems of hit channels, live events, originals for premium streamers, FAST networks, and more.**

## **CrunchLabs: Authentic Multigenerational Appeal**

### **Insights from:**

#### **Scott Lewers, Chief Content Officer**

A veteran of the “traditional” ecosystem, Scott Lewers joined former NASA and Apple engineer Mark Rober at CrunchLabs to “lead the creation of original, high-impact science storytelling across screens and into classrooms worldwide,” the company said in announcing the appointment of the ex-Discovery executive.

CrunchLabs was founded as an ed-tech company providing physical and digital subscription boxes aimed at teaching kids (and adults) hands-on

engineering and STEM principles, but today, between Netflix, YouTube, and FAST, the company has become a creator-led studio with deep fan engagement. Building off some 77 million YouTube subs, CrunchLabs has parlayed its extensive audience reach into a Netflix deal, a consumer products partnership, and a Mark Rober TV FAST channel on Samsung TV Plus.

**Lewers only joined CrunchLabs in 2025, but he could sense, from his first meeting with Rober, that YouTube was going to change the game.**

“I saw him as the future of science,” Lewers said in an address at Realscreen Summit earlier this year. “I also saw linear TV getting older and older, but all of a sudden, YouTube and these creators

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