RA BRITTON CONSULTANCY

REPORT

Brands and Micro-Dramas

The Global Report

A global audit of 104 branded micro-dramas, with analysis of deals, creators, commerce, AI, effectiveness and the UK market

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Foreword

Brands have discovered micro-drama. Over the past year I have tracked every branded micro-drama I could find: 104 series launched between 10 November 2025 and 10 November 2026, made for brands as different as Crocs, Mastercard, Gucci, Co-op and a Chinese sauce-duck chain. This report sets out what they did, how the deals worked, what is known about results, and what I think it means for the businesses that make, sell and distribute these series.

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, and this report tries to gather what there is.

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.

Brands are also staying off the apps. They are wary of the age-gap romances and erotic storylines that fill the apps' catalogues, and would rather be seen in open social channels such as TikTok, Instagram and YouTube, which they already buy and measure. In my view micro-drama should be treated as an elevated form of creator-led entertainment on social, not as advertising inside someone else's app.

I work in branded entertainment in the UK, so the report has a UK angle. The UK has Europe's largest micro-drama audience and only a handful of branded series of its own. That gap is the opportunity for the media agencies, producers, creator and talent agencies and platforms this report is written for.

Rupert Britton
RA Britton Consultancy Ltd, UK, November 2026

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PART 5

From story to sale

Data window: 10 November 2025 to 10 November 2026 | Next edition: series launched to 10 May 2027

This part looks at commerce built into branded micro-dramas: whether viewers could buy a featured product straight from the series, for example through a TikTok Shop tag or an in-drama product link, and what results have been published. In China you can buy without leaving the episode. Elsewhere, commerce is held back less by technology than by habit.

In this part

- How often a series links to purchase, by region
- Five routes to purchase, and rewarded viewing
- Every series with an in-episode link or shop page
- What the results show

Key findings

Buying from the episode is rare. Only 11 of the 104 series let viewers buy from inside the episode, through a shoppable tag, button, product showcase or on-screen QR code. A further 10 send viewers to a shop page built around the series. For the other 83, no shopping route was found.

China leads. 8 of the 25 Chinese series (32%) carry an in-episode link, against 3 of the 79 series elsewhere (4%). The three outside China are Crocs' Déjà Shoe (TikTok Shop, US), JCPenney's Spanish-language micronovela (QR codes, US) and Mediacorp's LOVE Angels (buttons and QR codes, Singapore).

In China, commerce and AI go together. All eight Chinese series with an in-episode link were made with generative AI: seven fully AI-generated and one hybrid. AI makes it cheap to produce a series around a shopping festival and to write products into many scenes.

The link comes from the platform. An in-episode link depends on the host platform having commerce built in: Taobao, Hongguo, Kuaishou with JD.com, TikTok Shop, or a broadcaster with its own commerce arm, as with Mediacorp. Five of the eleven are platform-produced custom series. Brands that make their own series and post them on social channels usually send viewers to their own website instead: seven of the ten linked shop pages belong to brand-owned originals.

Fashion and retail lead outside China. Nine of the ten linked shop pages are North American, and four are fashion brands (Crocs, Alexis Bittar, Aéropostale and Anthropologie).

Sales evidence is thin. Only three series, all Chinese, publish commerce figures for the series itself: Dexter and Pechoin report sales or orders, and Tmall Global reports product clicks. No series outside China publishes sales from a shoppable link. Brands that do report figures use different measures, such as page views, store visits, orders or site visits, so the results cannot be compared.

A new route is coming: rewarded viewing. Fetch's The Receipt, on the audit's watch list, pays viewers in Fetch Points for watching and for buying the featured products through Fetch Shop (PR Newswire). It premieres on 3 December 2026, after the audit window, so it is not counted in the figures here.

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How the audit codes direct commerce

In-episode link: a shoppable link, tag, product showcase or on-screen QR code sits inside the episode or its player page, so viewers can go straight to purchase.

Linked shop page: a shop page, app feature or retail offer is built around the series but sits outside the episodes, for example a collection page on the brand's website.

None found: no shopping route from the series is described in published coverage or on the brand's pages. Individual posts may still have carried links that coverage did not mention, so this category is likely to overstate the absence of commerce.

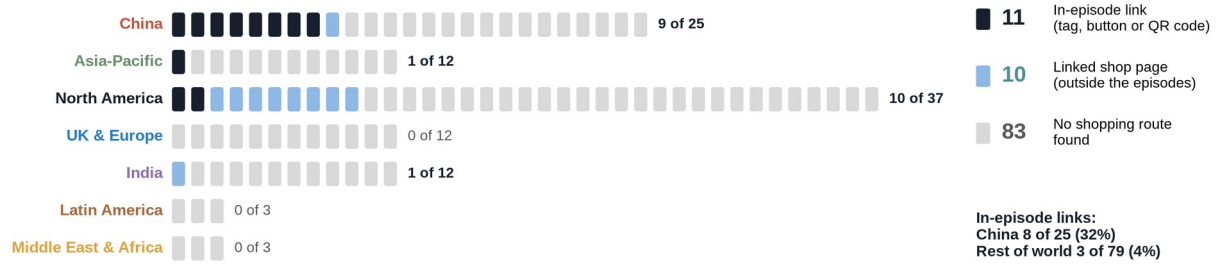
Results: figures are given only where a source links them to the series or its shopping route. Almost all are reported by brands or platforms and are not independently audited.

Route to purchase by region

Figure 5.1

Few branded micro-dramas let viewers buy from the episode

Series by region and route to purchase. Each icon is one series (104 series). The figure after each row counts series with any shopping route.



Coded from published coverage and brand pages. "None found" means no route was described; individual posts may still have carried links. China figures are a sample of notable cases.

Source: RA Britton Consultancy audit, Direct commerce column, 104 series. China figures are a sample of notable cases, not a census.

Five routes to purchase

1. Product tags and anchors inside the platform

The most direct route. On TikTok, Crocs tagged featured styles in each episode of Déjà Shoe, so viewers could buy without leaving the app; the launch release billed it as a series "built for conversion" (PR Newswire).

In China, the short-drama apps owned by e-commerce and content groups build this in. Taobao's Double 11 AI dramas let viewers "move from an episode to product links, creator reviews and brand livestreams, and on to checkout" (ZGLG). Tmall Global's 618 drama My Plane-Fan Dimension was the first of more than 30 AI brand dramas Taobao has released this way (QbitAI). On Hongguo, La Mer's AI drama placed product anchors inside the story that jump straight to Hongguo's shop, keeping the whole journey in one app (rmzxw.com.cn).

2. A jump from the video platform to a retailer

JD.com and Kuaishou co-developed From the Stars, We Are for JD's 618 festival. Episode and actor-preview pages on Kuaishou linked to the JD app, where viewers searched for "the same fan" used by the lead characters (Sohu). The series shows how a retailer and a video platform can share one shopping route.

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3. On-screen QR codes and buttons

Where the episode cannot carry a tap-through link, a QR code can. In JCPenney's micronovela, "every product visible in the show, from dresses to Christmas decor, was available for purchase from JCPenney using on-screen QR codes" (Wall Street Journal).

Mediacorp's LOVE Angels goes furthest outside China. It uses "Shop Now" buttons on digital platforms and QR codes in the episodes broadcast on Channel 8, and lets each of its six partners choose its own checkout: its own site, TikTok Shop or Shopee (Marketing-Interactive).

4. Linked shop pages and retailer apps

The common Western approach is a shop page built around the series but outside the episodes. Examples include a "ReelShort Charmed to Meet You" collection on crocs.com (Crocs), "The Intern Edit" at Aéropostale (Aéropostale), a Margeaux and Jules collection at Alexis Bittar (Alexis Bittar) and Anthropologie's Pooja Tripathi collab page (Anthropologie).

Retail media takes this a step further. P&G's Rico's Tacos, built on Albertsons' shopper data, has a "shop-the-series" feature in Albertsons' mobile app (Marketing Dive). Welch's ties its holiday series to a Welch's Sparkling offer on Instacart (DesignRush).

5. Livestreams as the bridge

Several series hand viewers on to a live shopping stream. La Mer's AI male lead left the drama to appear in the brand's Hongguo livestream (Beijing Daily). Taobao's dramas link to brand livestreams, and LOVE Angels runs live commerce through Mediacorp's The Wonder Shop on TikTok (C21Media).

A route to watch: rewarded viewing

Fetch's The Receipt is billed as the first "rewarded" micro-series. It is a six-part holiday rom-com starring Lana Condor and Anthony De La Torre, premiering on 3 December 2026 on Fetch's Instagram, TikTok and YouTube channels. Viewers earn Fetch Points for watching the trailer and episode clips in the Fetch app and for buying featured products through Fetch Shop, then redeem the points for gift cards (PR Newswire). It is on the audit's watch list because it launches after the window closed.

Fetch is not a retailer. It describes itself as "both a rewards app and an outcomes-based advertising platform", with item-level data on $212 billion of annual purchases from scanned receipts (Fetch). Each episode features a single brand partner, among them Betty Crocker, Blue Buffalo, OLIPOP, KiZE, Nehemiah, Breyers and Dove. Fetch's marketing head says Fetch "extends that connection beyond the screen and into the shopping experiences people have every day" (The Hollywood Reporter).

The model differs from the five routes above in two ways. The incentive is paid to the viewer, not only offered as a link. And because Fetch sees receipts from any retailer, it could in principle connect viewing to verified purchases of each partner's products, wherever they were bought. The nearest audited parallel is JD.com's From the Stars, We Are, whose promotion included collectible energy points alongside the JD shopping link (Sohu). In my view, The Receipt is the case to follow for purchase-verified results; none have been published yet.

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Series with an in-episode link (11)

Audit #	Series	Brand	Market	Hosted on	How viewers buy	Published results	Sources
14	**Déjà Shoe**	Crocs	US	TikTok	TikTok Shop product tags in each episode	None published	PR Newswire
7	**El amigo de mi novio es millonario**	JCPenney	US (Spanish-language)	n.a.	On-screen QR codes for every product shown	16 million+ impressions and 5.6 million views; 28,000 visits to JCPenney's site after viewing. Sales not disclosed	WSJ; US Chamber
71	**Lingyu: A Tale of Another World**	Pechoin	China	Taobao Short Drama	In-episode product links, creator reviews and brand livestreams	Among deep viewers, store orders and conversion up 80% and searches up 130% against before viewing. The new cream passed RMB 10 million in 30 days (not attributed to the links)	QbitAI; NetEase
79	**The Humiliated Herb Gatherer Was Actually the Lu Family's True Young Master**	Dexter	China	Taobao (exclusive)	Product showcase on the viewing screen ("watch and shop")	45 million+ shopping page views, 6,000+ store visits, sales over RMB 27,000	Juduanduan; NetEase
81	**From the Stars, We Are**	JD.com	China	Kuaishou	Episode and actor-preview pages link to JD.com	Fan-category sales beat JD's overall 618 promotion; no figures	Sohu; iTopMarketing
87	**Shocked! I Have a Child with My Mortal Enemy, Season 2**	La Mer	China	Hongguo	Product anchors in the drama jump to Hongguo's shop; AI lead in brand livestream	None published	Beijing Daily; rmzxw.com.cn
90	**Nine-Tailed Deity**	Midea; Dyson	China	Taobao	Episodes link to product pages, reviews and livestreams	None published by title	ZGLG
91	**Beyond the Final Chapter**	Quanyou	China	Taobao	As above	None published by title	ZGLG
92	**The Furry Restaurant**	Tmall Global	China	Taobao	As above	None published by title	ZGLG
82	**My Plane-Fan Dimension (《我的飞机通次元》)**	Tmall Global	China	Taobao Short Drama	Product links to Tmall Global listings; link format not described	70 million+ plays and 300,000+ product clicks across the drama and spin-off videos. Sales not published	QbitAI; NetEase
103	**LOVE Angels**	Six partners incl. Tuas Power, Maxi-Cash, Haleon	Singapore	LOVE 972 social, mewatch, YouTube, Channel 8	"Shop Now" buttons online; QR codes on Channel 8; TikTok live commerce	None published yet	Marketing-Interactive; C21Media

Audit # is the row number in Appendix A. Seven of the eight Chinese series are fully AI-generated; From the Stars, We Are is a hybrid of live action and AI.

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Series with a linked shop page (10)

Audit #	Series	Brand	Market	Hosted on	How viewers buy	Published results	Sources
1	**Margeaux and Jules**	Alexis Bittar	US	Instagram, TikTok, YouTube	Collection page on alexisbittar.com	Brand-reported 252% rise in Instagram sales in the franchise's first year (before the audit window)	Alexis Bittar; New York Times
4	**The Golden Pear Affair**	Native (P&G)	US	Series microsite; social	Microsite where viewers could buy the featured body scrub	None published	WSJ; Native
5	**Charmed to Meet You**	Crocs	US	ReelShort; YouTube	"ReelShort Charmed to Meet You" collection on crocs.com	10 million+ viewers; ReelShort top 10 at launch. No sales published	Crocs; Tubefilter
16	**Rico's Tacos**	P&G (Bounty, Head & Shoulders, Vicks)	US	Albertsons' channels and stores	"Shop-the-series" feature in Albertsons' app	None published	Marketing Dive
19	**The Intern Diaries (Season 2)**	Aéropostale	US	YouTube; TikTok; social	"The Intern Edit" collection page; collection announced in an episode	3.5 million views for the first two episodes; flagship store event beat the previous year's single-day sales	Aéropostale; Retail Dive
20	**The Swap**	Marc Jacobs	US	marcjacobs.com; social	Episode page with "Shop new arrivals" links	None published	Marc Jacobs
35	**Before the Toast**	Welch's	US	Instagram; TikTok; welchs.com	Welch's Sparkling offer on Instacart	Too early	DesignRush
36	**The Holiday Party**	Anthropologie	US	Instagram-led social	Shoppable Pooja Tripathi collab page	Too early	Anthropologie; PR Newswire
56	**Suit Yourself**	AJIO	India	Instagram; AJIO app	Valentine's Day curation page in the AJIO app, where the final episodes debuted	None published	Pitchonnet
74	**Feimao M6 AI spin-offs**	Feimao	China	Douyin	A "conversion entry" attached at launch; placement not stated	Over 100 units sold on launch day	Adquan

Audit # is the row number in Appendix A.

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What the results show

Dexter is the only full funnel. Its Taobao drama reports 45 million+ shopping page views, 6,000+ store visits and over RMB 27,000 in sales (Juduanduan). The sales figure is small, roughly £3,000, which suggests the drama worked as brand awareness more than direct selling.

Pechoin measures before and after. Among viewers who watched closely, store orders and conversion each rose 80% and active searches 130% compared with before viewing (QbitAI). This is the most useful form of measurement in the audit, but it is not a click-through figure.

Tmall Global counts clicks. My Plane-Fan Dimension and its spin-off videos report more than 70 million plays and more than 300,000 product clicks (QbitAI). That is a click-through rate of roughly 0.4% of plays, but no sales figure is given.

Western brands report traffic, not sales. JCPenney counted 28,000 "meaningful interactions", defined as visits to its site after viewing, but "declined to discuss sales generated by the show" (US Chamber; WSJ). Crocs has published no sales from Déjà Shoe's TikTok Shop tags.

Sales without a link. Some brands report strong sales with no shopping route described. Loso says its featured cushion foundation passed one million in sales at its Douyin flagship store (unit not given) (Jiemian), and Jinjiu viewers asked in the comments where to buy the featured mooncakes (China Commercial Network). Demand exists where no link is offered.

Views from the market

For: Ian Schafer, quoted by Marketing Dive, said the format's commerce potential "might be better than any format that's ever come before", somewhere "between live shopping and the promise that we've had forever to 'shop the look'" (Marketing Dive).

Against: The agency behind Nuuly's Heart On My Sleeve took the opposite view: micro-dramas "are not here to [enable] click to buy" (Yahoo).

Balance: Mediacorp's Jacqui Lim described designing the shopping path around each partner's own e-commerce set-up, rather than one checkout for all (Marketing-Interactive).

Related cases outside the audit

Samsung Brazil, Tudo Sob Controle (July 2025): viewers "could watch episodes and buy featured products on a page within Samsung's online store, without leaving the platform" (Valor International). It launched before the audit window.

StockX, Listed: a collector-closet series in which items shown "are available to shop on StockX" (Modern Retail). It is excluded from the audit as an adjacent format rather than a scripted drama.

Open questions

Can Western platforms and brands offer an in-episode link outside TikTok Shop, and where TikTok Shop is not available to a brand, are QR codes and linked shop pages enough?

Does in-episode selling weaken the story, or can the link sit alongside a light-touch integration, as LOVE Angels' fourth-wall asides attempt?

Will rewarded viewing, as in Fetch's The Receipt, produce purchase-verified results, and would paying viewers to watch distort completion and engagement figures?

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What should be the standard measure of commerce from a micro-drama: clicks, store visits, conversion uplift among viewers or attributed sales? The data-rights section of Part 3 sets out who holds this data under each deal model.

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This is a free sample

You have read the contents, the foreword and Part 5 of Brands and Micro-Dramas: The Global Report.

The full 100-page report also covers the market and the landscape, how the deals work, creators and talent, AI and the cost of entry, effectiveness and money, the UK angle, six case studies and what to watch, with the series-by-series audit of all 104 branded micro-dramas in the appendices.

Single-reader licence: £495
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