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Trends in the format industry 2025

FRAPA TREND REPORT 2025

This report provides an overview of the most important trends influencing the format industry today according to the FRAPA Advisory Board.

It contains the focus on strategic adaptability, content innovation, and the importance of protecting intellectual property in the digital era. The report is based on the information extracted through a survey amongst boardmembers and business experts.

Format industry Trends, insights and recommendations

The global format industry is undergoing significant shifts driven by advancements in technology, changing viewer habits, and economic pressures due to political unstability. This report highlights key trends and insights from industry experts, focusing on how the sector could be adapting to these changes and what strategies are emerging for future growth.

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Societal trends

Respondents often mention the shift toward data-driven media, audience fragmentation across multiple platforms, and the rise of short-form content as key factors impacting the format industry. Globally, the rise of VOD and the decline of linear television are the most significant trends.

Technological trends

The shift to digital platforms such as streaming services and social media is changing how formats are developed and consumed. Many respondents emphasize that linear television is declining, and the industry must adapt to the preferences of new generations who prefer short and interactive content.

Format protection

In the digital age, protecting formats remains a challenge. Effective strategies include building strong relationships with buyers, legally protecting content, and creating international partnerships.

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Formats, the concepts that are repeatable and protectable and scalable will still have relevance going forward, but the distributors and creators of those formats have to widen their views to other forms of delivery, as well as other metrics of success, in order to adapt to the new universe
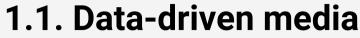
HMBC Hayley Babcock.

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1. Societal and global trends impacting the format industry

1.1. Data-driven media

The integration of data analytics is revolutionizing content creation, enabling producers to tailor content more effectively. Big data analytics allow for deeper audience insights, influencing both marketing strategies and content development. This trend underscores the importance of data in targeting content to meet audience preferences.

1.2. Rise of traditional formats

Reality shows, game shows, and quiz shows remain popular, proving resilient despite the influx of new digital content types. The durability of these formats is attributed to their broad audience appeal, demonstrating the continued relevance of traditional television formats in a rapidly evolving landscape.

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1.3. Creator-mode content on the rise

Platforms like YouTube and TikTok have popularized user-generated content, particularly among younger audiences. This shift has transformed the industry, where short-form, creator-driven content is increasingly prominent. Engaging with independent creators and leveraging short-form formats is becoming crucial for attracting younger demographics.

1.4. Economic actors and budget constraints

Global economic downturns – mainly because of political unstability in many regions. have led to reduced advertising revenues and production budgets. As production costs rise, content creators must adapt by finding innovative ways to maintain high production values on tighter budgets. Strategic partnerships and budget-efficient content development are key responses to these financial pressures.

1.5. Audience fragmentation and platform diversification

With viewers consuming content across a multitude of platforms, from linear TV to digital and on-demand services, the industry faces challenges in reaching fragmented audiences. Multi-platform strategies are essential for ensuring visibility and engagement across various devices and media channels.

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2. Changing Viewer Habits and Content Consumption

> ❝
>
> *Cultural values, trends and demographics play a huge part in the relevancy of television formats. Viewers want to feel part of a conversation and it's important that media reflects the world around us.*
>
> ❞
>
> **Micah Hewson ITV Studios Australia**

2.1. Shift to VOD and digital platforms

The move from traditional TV to Video on Demand (VOD) is transforming viewing habits. Audiences now prefer on-demand, flexible content consumption, pushing producers to adapt their content for streaming services. Developing multi-device accessible content is vital in this context, as viewers expect seamless experiences across smartphones, tablets, and televisions.

2.2. Emerging consumption patterns

Content must now be consumable across various platforms and devices. Multi-platform availability is no longer a luxury but a necessity, as consumers increasingly demand flexibility in how, when, and where they watch.

2.3. Engaging Short-Form creators

Short-form content, driven largely by social media platforms, is becoming more integral to the media landscape. Industry leaders advocate for closer collaborations with creators of short-form content to address the challenges posed by this fast-evolving format and to ensure high-quality productions that captivate audiences.

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3. Legal Protections and Intellectual Property

3.1. Legal frameworks

The protection of intellectual property is a pressing concern, especially as digital piracy and unauthorized distribution grow more prevalent. Strengthening legal frameworks and fostering industry-wide collaboration are essential to safeguard content. Strong relationships with local partners and legal experts can help ensure content is protected in different regions.

3.2. Local Adaptations and Strategic Partnerships

Collaboration with local partners is key to adapting global formats for local markets. Tailoring content to resonate with local cultures while maintaining global appeal allows producers to successfully navigate regional differences.

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4. The Impact of Artificial Intelligence

Artificial Intelligence (AI) is becoming a pivotal force in reshaping the international TV formats industry, with significant implications for both creativity and the legal protection of intellectual property (IP).

• AI has the potential to enhance creative processes by assisting in content development, while also presenting new challenges for originality and artistic expression.
• On the legal front, AI could strengthen the protection of TV formats through advanced IP monitoring systems but also complicates issues related to ownership and authorship of AI-generated content.

The Impact of AI on creativity in TV Format development

4.1. AI-Augmented creative processes

AI is transforming the creative landscape of the TV formats industry by offering tools that enhance, but do not replace, human creativity. AI-driven technologies can analyze massive datasets of past formats, audience preferences, and emerging trends, which helps producers and writers craft new concepts that are more likely to succeed.

4.2. AI as a creative assistant.

AI can be used to generate ideas, storylines, and even character profiles by drawing insights from previous successful formats and viewer data. This does not replace the human creative process but enhances it by providing data-driven suggestions and sparking inspiration. For instance, AI can assist in developing unique plot twists based on what has resonated with certain demographics.

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4.3. Efficiency in conceptualization

By using AI tools, producers can speed up the brainstorming process. This technology can test different variations of a format concept, identify the most promising ideas, and even predict viewer reactions before a show goes into production.

4.4. Creativity versus data-driven content

AI's reliance on existing data could cause a saturation of derivative content, as AI algorithms tend to favor trends that have already been successful. This raises concerns that AI-generated formats may lack innovation and originality, making it harder for fresh, creative ideas to emerge.
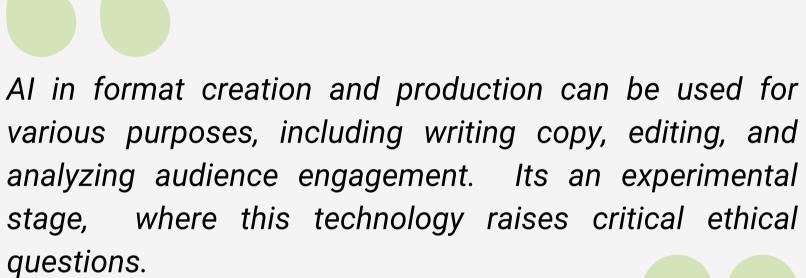
4.5. Challenges to authenticity

Despite its benefits, there are concerns about how AI might impact the authenticity and originality of TV formats. The reliance on data-driven models may lead to the production of formulaic content that prioritizes viewer appeal over creative risk-taking. AI tools might generate content that feels repetitive or lacks the emotional depth that human creativity provides.

AI in format creation and production can be used for various purposes, including writing copy, editing, and analyzing audience engagement. Its an experimental stage, where this technology raises critical ethical questions.

Sunita Uchil Karman Unliimited

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4.6 Strengthening IP protection through AI

In the digital age, where content piracy and unauthorized use are rampant, AI has the potential to revolutionize the protection of intellectual property within the TV formats industry. AI-driven tools can monitor a wide range of digital platforms, track unauthorized usage of formats, and automatically report or take action on copyright infringements.

4.7. AI for automated monitoring

AI systems can be deployed to scan online platforms and identify instances where formats are being illegally shared or replicated. These systems can use pattern recognition to detect similarities between protected formats and unauthorized copies, even in different languages or regions. AI tools like content recognition algorithms are already helping major platforms and production companies track and remove pirated material quickly and efficiently.

4.8. Blockchain and IP protection

AI, combined with blockchain technology, can create a secure and transparent method for tracking IP rights. Blockchain provides an immutable record of content ownership, while AI can be used to automate the verification of these rights and ensure that they are upheld across global markets. This combination enhances the traceability and enforcement of IP, making it harder for unauthorized parties to claim ownership or use of a format.

4.9. Challenges in AI-driven IP enforcement

While AI offers robust tools for IP protection, it also introduces new complexities in the legal landscape. One significant issue is determining the ownership and copyright status of AI-generated content. If AI contributes to the creation of a format, it raises questions about who owns the final product—does it belong to the original creator, the company that owns the AI, or some combination of both?

4.10 Legal ambiguity in AI-generated content

Current copyright laws may not fully account for AI-generated works, creating a gray area in terms of IP ownership. If AI plays a significant role in content creation, determining authorship and rights distribution can become legally complex. This ambiguity could lead to disputes over who owns the intellectual property when AI significantly influences the format's development.

4.11. Cross-border IP enforcement

The global nature of the TV formats industry means that content is often distributed across multiple regions with varying legal frameworks for IP protection. AI-driven enforcement systems need to be adaptable to different legal environments to effectively protect content worldwide.

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5. Strategic recommendations for the TV formats industry

Looking ahead, the industry is expected to further embrace data-driven strategies, digital platforms, and the integration of user-generated content. Legal protections, strong partnerships, and audience-centered approaches will continue to be central to navigating these changes effectively.

5.1. Monitoring

To safeguard intellectual property, companies must implement AI-based monitoring tools that can detect and respond to unauthorized use of TV formats on a global scale across digital platforms. Blockchain technologies, combined with AI, can offer additional layers of protection, ensuring secure tracking of ownership and rights.

5.2. Creating legal standards

The industry will need to work with legal experts to navigate the complexities of AI-generated content ownership and ensure that appropriate copyright frameworks are in place. Developing clearer legal standards for AI-assisted content creation will be crucial in avoiding disputes and protecting creative works.

Engaging with international legal bodies to create standardized regulations for AI-driven format creation will reduce future disputes and provide clarity on IP rights.

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5.3. Leverage AI for creative augmentation, not replacement

AI should be used to enhance the creative process, allowing creators to experiment with data-driven insights without undermining originality. Producers should adopt AI as a tool for creative assistance, ensuring that human-led innovation remains at the heart of format development.

5.4. Balance Data and Creative Risk-Taking

While AI can predict audience preferences and trends, companies should avoid over-relying on these predictions. Encouraging creators to take risks and push creative boundaries will ensure the industry continues to produce fresh, innovative content that stands out in a crowded marketplace.

5.5. Training and education

Industry players should use AI as a tool to augment creativity rather than replace it. Investing in training for creators on how to best leverage AI without stifling innovation will be essential.

5.6. Overcoming challenges in smaller territories

In smaller markets, collaborative legal strategies and partnerships are critical for addressing issues related to format protection and distribution. Tailoring content strategies to these smaller regions while ensuring legal protections is a top priority.

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