Track Record: Streaming Predictions 2020-2026

A decade of confirmed anticipations on the evolution of the streaming industry: creators on traditional TV, new business models, and battles for content control.

LAST UPDATED: FEBRUARY 2026

Why this track record?

With 25+ years in the streaming industry (M6 Web, Afrostream, TRACE+), I have developed the ability to identify trends before they become obvious.

This page documents my predictions that have come true since 2020, and my three bold bets for 2026: **Creators × French Operators**, **AI Agents 30% Ad Buying**, and **Big 5 acquires micro-drama app**.

Sources: my LinkedIn posts and my newsletter Streaming Radar (https://streamingradar.substack.com).

2020
Year of my first documented prediction

12+
Major predictions confirmed

25+
Years of streaming experience

3

Bold bets for 2026

🎯 My 2026 Predictions

Beyond the consensus (streaming >50%, industrial AI, M&A $80B+), here are my contrarian bets for 2026.

BET #1: Creators × French Operators

By end of 2026, **3+ French creators will sign with Free/Bouygues/SFR** for dedicated channels. Le National (Ligue 3) has been looking for a broadcaster since DAZN 2024, rights are nearly free. Operators have every incentive: low-cost exclusive content, market differentiation, younger audiences. **Zack Nani proved the model** with his Free channel 181 for Saudi Pro League + Espoirs.

BET #2: AI Agents Buy 30% CTV Ads

PubMatic already completed a CTV purchase **100% automated with 192% ROI**. By end of 2026, **30% of CTV ad purchases = AI agents**. Traditional media agencies are losing their added value (expertise, relationships) against AI that optimizes better, faster, cheaper. **Employment impact:** ~15K US media buyer jobs eliminated in 18 months.

BET #3: A Big 5 Acquires a Micro-Drama App

Before end of 2026, Netflix, Disney, Amazon, Apple or Warner will have acquired a micro-drama app (ReelShort, DramaBox) or launched a dedicated vertical hub. The global market reaches $11B in 2025 (projected $26B by 2030). TikTok launched PineDrama (January 2026), Disney+ integrates vertical video (CES 2026), Aronofsky produces with Google DeepMind. **Consolidation is inevitable.** ReelShort (70M users, $400M revenue) is an obvious acquisition target for Netflix at ~$2B.

GP Explorer: Streaming surpasses TV

June 2025

> ***What I predicted:*** *"GP Explorer 3 is much more than a community event. It's an economic laboratory for the future of live."*

> **Achieved ✓** GP Explorer 3 broadcast on France TV (France 2 & France 4). Hybrid model: ticketing (sold out in 2h, 80K spectators/day), merchandising, sponsoring, Twitch drops, + newly negotiated TV rights.

Key points:

- Controlled co-streaming with Ibai, Pokimane, HasanAbi → internationalization without costs
- 2 days NOT broadcast on Twitch = new exploitable rights (concerts, qualifications, sprint)
- Each spectator becomes a multiple revenue lever

My analysis: "Television and sports leagues would do well to learn from this agile, modular, ultra-engaging model."

Creators invade television

2023-2024

> ***What I predicted:*** *"French creators are invading TV. By being absorbed."*

> **Achieved ✓** Massive wave of creators recruited by traditional French media.

Confirmed examples:

- **Kameto** signs with Webedia
- **Joyca** goes prime time on RMC Découverte (1.8M viewers)
- **GP Explorer 6** reaches 6.7 million French viewers
- **France TV** recruits Rivenzi and Poneeey Club for Winter Olympics 2026
- **Logan Paul** joins WWE
- **MrBeast** signs $100M with Amazon (50M viewers, 2 seasons)

My analysis: "Creators are no longer outsiders courted by the industry: they are becoming its new strategic pivots. For platforms that would refuse this evolution, the message is simple: ally or disappear."

The "Final Cut" trap: MrBeast vs Markiplier

2024

> ***What I analyzed:*** *"The real question, the one we never ask: who has the final cut? Creators built themselves a superpower. Do what they want, make money, without asking anyone's permission. What do they get in exchange for that freedom?"*

> **Validated by facts ✓** Two opposite cases perfectly illustrate my analysis.

MrBeast:

- The biggest creator in the world (460M subscribers)
- Before Amazon: 100% independent
- Result: Beast Industries lost $110M in 2024 (Bloomberg)
- Three consecutive years of losses
- WSJ: "negative money", borrows from his mother for his wedding
- After Amazon: less risk, more formatting, price of the deal

Markiplier (counter-example):

- Budget: less than $3M, self-financed, self-distributed
- No studio, no deal, no permission
- Marketing: one Instagram post, one trailer
- Result: $18M US opening, $22M+ global, 3000 theaters
- Keeps 60% of worldwide box office

My conclusion: "The problem isn't independence. It's the model. You can keep control. But not by copying Hollywood. By staying what you are: a creator. Who has the final cut? **The one who never needed to ask for it.**"

BeNarative: The future of production no longer looks like the 1989 TV control room

2024

> ***What I predicted:*** *"Remote commentary, co-streaming with talents (even 8000 km from the set), secure access and exploitation of goal/try/summary highlights. The future of production fits in a pocket, goes through the cloud, and speaks directly to fans where they are."*

> **Being realized ✓** Jean-Marc Denoual (Founder BeNarative) picks up exactly this vision in his post that mentions my analysis.

What BeNarative offers:

- Agile, mobile and cloud-first production
- So your stories reach more people, faster, with more impact
- Whether you're a sports rights holder, federation, traditional media or digital platform

My validated analysis: The convergent production that Christian Bombrun (CEO Webedia) talks about: "Elephant, the group's production subsidiary, supplies TF1, France 2, Canal+, Disney+. Free gives a channel to Zack Nani. RMC programs YouTubers in prime time."

My "Hot Takes" for 2023

January 2023

What I predicted in January 2023:

- *Streaming aggregators (Canal+, Amazon) will win the SVOD war*
- *Netflix will do sports*
- *Dazn or Fubo will be eaten by one of the big four (Amazon, Disney, Netflix, Warner)*
- *New social networks will take significant market share*
- *We'll stop talking about NFTs, but we'll buy more and more NFTs*

2023-2026 Assessment:

- ✓ **Aggregators win:** Canal+ and Amazon dominate in France
- ✓ **Netflix does sports:** WWE, NFL discussions, Jake Paul boxing
- ⏳ **Dazn/Fubo:** Fubo financial difficulties confirmed
- ✓ **New social networks:** Meta's Threads broke through (not Post.news or Bluesky)
- ✓ **NFT:** No one talks about it anymore, but silent adoption continues

The return of the Hollywood model

2024

> ***My observation:*** *"Christian Bombrun, CEO of Webedia, calls it 'convergent production': Elephant, the group's production subsidiary, supplies TF1, France 2, Canal+, Disney+. Free gives a channel to Zack Nani. RMC programs YouTubers in prime time."*

I call it the return of the Hollywood model.
The real question, the one we never ask: **who has the final cut?**
Even at this scale, independence doesn't hold. MrBeast wanted to build an empire, he lost $110M. Markiplier made a $3M film in a submarine, multiplied his stake by six in three days.
"The problem isn't independence. It's the model. You can keep control. But not by copying Hollywood."

Zack Nani: Creators become sports rights broadcasters

August 2025

> ***What I predicted:*** *"Streaming becomes the central axis of sports rights with three winning models: premium super-aggregators (ESPN), league platforms (NBA, LFP Ligue 1+) and creator-broadcasters."*

> **Achieved ✓** Zack Nani signs a direct deal with IMG to broadcast Saudi Pro League for free on Twitch/YouTube (August 2025), bypassing traditional broadcasters.

The creator business model:

- **After Canal+** abandons Saudi Pro League (insufficient audiences), Zack Nani picks up up to 3 matches/week for free
- **Monetization:** Twitch algorithmic advertising, community donations, interactive engagement
- **His credibility:** "Zack en Roue Libre" (90-120min interviews) with Benzema (2.6M views), Drogba, Nasri
- **Free channel 181:** Saudi Pro League + Espoirs + creator content

Model validated by CazéTV: FIFA confirms CazéTV will broadcast all 104 World Cup 2026 matches in Brazil (free AVOD, interactive formats).
My thesis: "Three winning archetypes emerge: premium super-aggregators (ESPN $29.99/month), league platforms (Ligue 1+ €19.99), and creator-broadcasters (Zack Nani free). Creators sell attention as much as the match."

Vertical fiction: micro-drama as a feature, not a standalone product

May 2025

> ***What I predicted:*** *"Micro-drama (vertical drama) will not survive as a standalone product. Consolidation will not be between apps (ReelShort, DramaBox) but absorption by generalist platforms. No one will pay €9.99/month JUST for vertical drama."*

> **Being validated ✓** The market confirms the signs: Fox invests in Holywater (200+ vertical titles), Disney+ explores "vertical video" APAC. Standalone apps show structural weaknesses.

The numbers impress:

- China market: $500M → $7B (2021-2024), projected $16.2B by 2030
- ReelShort: 70M active users
- DramaBox: $31M revenue/month June 2025

But fundamentals are cracking:

- Overseas revenue growth **-68% Q2 2025**
- Apps explode: 41 → 237 in 1 year = saturation
- Catastrophic unit economics: ReelShort $400M revenue but unprofitable
- DramaBox $323M revenue, only $10M profit
- Customer acquisition: $15/user North America

My counter-argument vs Marion Ranchet: She bets on collapse. I bet on consolidation as a feature.

"Micro drama = feature, not product. Apps die. The vertical drama functionality integrates into Netflix, Disney+, Amazon as a complementary feature (like Instagram Stories, not a separate app). It's an addictive complement, not a standalone destination."

Creator-Led Content: 2025, the year of the advertising tipping point

June 2025

> ***What I analyzed:*** *"2025 marks a historic turning point: content creators will surpass traditional media in advertising revenue this year. Netflix sponsors Squeezie, Disney+ acquires Inoxtag, Amazon Prime invests 100M in MrBeast."*

> **Achieved ✓** More than half of content advertising revenue now comes from platforms like TikTok, YouTube and Instagram, surpassing for the first time content produced by studios and traditional media.

Major confirmed deals:

- **Netflix × Squeezie:** GP Explorer 3 team sponsorship (1.4M Twitch, 6.7M TV)
- **Disney+ × Inoxtag:** "Kaizen" acquisition after 43M YouTube views + 340K cinema admissions
- **Amazon × MrBeast:** $100M for Beast Games (1000 participants, $5M prize)
- **Samsung TV Plus:** Exclusive partnerships Mark Rober, Dhar Mann, Smosh, The Try Guys
- **Roku × Jellysmack:** 2 FAST channels "Hello Inspo" + "Mysteria" with 17 creators

The economy tips:

- Creator marketing budgets: **+143% since 2021**, 74% of companies still increasing
- "Influencer Marketing Manager" = top 25 fastest-growing positions US
- Multi-channel model: YouTube → Cinema → TV → Streaming (Kaizen generates revenue across 4 segments)

Further Adventures illustrates the third way: independent studio (ex-YouTube Beckman + Imitation Game producer Stillman) gives creators like Andrew Rea (Binging With Babish, 10M subscribers) $1-30M budgets to develop features with creative control.

My conclusion: "Creators are no longer outsiders courted by the industry: they are becoming its new strategic pivots. For platforms that would refuse this evolution, the message is simple: ally or disappear."

Netflix algorithms: 4% added value, years of R&D

January 2026

> ***What I analyzed:*** *"The November 2025 Netflix study confirms what I anticipated: their 'state of the art' algorithm generates only 4 to 12% additional engagement compared to basic methods from the 2000s. Hundreds of millions invested for incremental improvement."*

> **Prediction being validated ✓** 80% of users end up on YouTube when they can't find anything on their paid services. The problem isn't the algorithm, it's trust.

Key data:

- Replacing current Netflix algorithm with basic matrix factorization → only **-4% engagement**
- Pure popularity recommendation → **only -12%**
- **48% of subscribers** cite "inability to find content" as reason for cancellation (Harris Poll 2023)
- Deezer (controllable curation): **+27% engagement**, **+75% social shares** vs Spotify (opaque AI)
- YouTube dominates CTV with **12.5% market share** (vs 7.5% Netflix)

My prediction for 2-3 years:
"In 2-3 years, you'll open Netflix and see: 'The 10 films by regelegorilla', 'Squeezie's selection'. Platforms will directly integrate influencer lists into their interface — not as a one-off marketing partnership, as a permanent feature. The question is no longer 'AI or human'. It's: who will be the new programmers? The data scientists in Los Gatos, or some guy in pajamas with 500K subscribers who's seen 3000 films? **I'm betting on pajamas.**"
Niches prove the model: MUBI (specialized curation) makes *The Substance* profitable at more than 5x, Shudder doubles its subscribers, Shadowz (500 films + ShadowzCast podcast) creates the discovery that Netflix's algorithm can't do.

Netflix will test third-party FAST channels with its legacy catalog (measured outlook)

December 2025

> ***What I anticipate:*** *"By end of 2026-early 2027, Netflix will test one or two third-party FAST channels with its legacy catalog. Not a massive rollout. A controlled test. Like 'Netflix Nostalgia' on Pluto TV US or 'Netflix Cult Series' on Molotov France. Paramount showed the way with Pluto TV (150+ channels, 80M users), Amazon tested it with Freevee."*

> **Awaiting validation** The economic logic and precedents exist. Paramount monetizes twice: premium content on Paramount+, recycled catalog on Pluto TV. FAST revenues are modest but it's found money on content that would otherwise be dormant.

Why it could happen:

- **Proven Disney model:** Theatrical release → VHS → Disney Channel cable → syndication → streaming. Same content, different windows, maximum monetization
- **Paramount already executes:** *Yellowstone* behind Paramount+ paywall, *NCIS* recycled on Pluto TV
- **Warner Bros. Discovery licenses** massively on Tubi and Pluto TV
- **FAST explodes:** 47% US households use FAST in 2025 (Parks Associates)

The economic calculation:
If a "Netflix Legends" channel on Molotov (20M users France) generates 10M views/month × CPM 5-8€ = 600K-1M€/year. Multiplied by 10-15 international channels = 50-100M$/year. Modest vs 43B$ Netflix 2025, but it's free money on amortized content. And it becomes a marketing funnel: discover *Stranger Things* S1 for free on FAST → hooked → wants the rest → subscribes to Netflix.
The limits: Netflix would have to negotiate with third parties (Samsung, Roku, Xumo), share ad revenue, lose UX control. Netflix doesn't like that. But Netflix launched an ad-supported tier (unthinkable 3 years ago), does live NFL, integrated games. Times change.

My outlook: "The question is no longer 'if', but 'when' and 'on which platforms'. History repeats itself, just with new acronyms. Like Disney with its classics, Netflix will monetize its catalog across all possible windows."

> *"Creators are no longer outsiders courted by the industry: they are becoming its new strategic pivots. The battle for tomorrow's entertainment is now being fought in these hybrid alliances that are redefining the rules of the game."*
>
> **— Ludovic Bostral, Streaming Radar**

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From M6 Replay (10M users) to Afrostream (YC S15), Majelan and Kessel, I have built and advised dozens of OTT platforms. Architecture, monetization, scaling: let's discuss your project in 30 minutes.

(https://cal.com/ludovic-bostral-ludobos-idg16l/30min-en)

Read Streaming Radar (https://streamingradar.substack.com)

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