Media Nations

UK 2026

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Overview

Ofcom's annual Media Nations report is for industry, policymakers, academics and consumers. Our main objectives are to track evolving consumer behaviours and key trends in the media sector, and to set out how audiences are served in the UK. We draw on a range of evidence, and adopt a cross-platform perspective, including the TV, online video, radio and audio sectors. Later in the year we plan to publish in-depth research on people's use of, and attitudes towards, news; we present some initial findings in this year's Media Nations.

As with previous editions, this UK-wide report is accompanied by an interactive report containing an extensive range of data published as part of the Communications Market Report. We also publish separate Media Nations reports for Northern Ireland, Scotland and Wales, covering specific themes and issues relevant to those nations.

Ofcom's Media Nations report meets the requirements on Ofcom under Section 358 of the Communications Act 2003 to publish an annual factual and statistical report on the TV and radio sector. It also addresses the requirement to undertake and make public our consumer research (as set out in Sections 14 and 15 of the Communications Act 2003).

What we have found – in brief

TV AND VIDEO VIEWING

Broadcaster content still accounts for the majority of video watched in UK homes, despite the continued rise of streaming and online platforms

- A century on from the first demonstration of broadcast television, content provided by broadcasters - whether watched live, recorded or accessed via a broadcaster's video-on-demand (BVoD) service - made up 53% of the daily average of 4 hours and 27 minutes that people in the UK spent watching video in their homes in 2025.

Fewer people watch linear TV each week… but more people watch BVoD

- Overall, a weekly average of 70% of people in the UK watched programmes - live, recorded or on-demand - from broadcasters in 2025, down from 73% in 2024 and 78% in 2022.
- While the proportion of people watching live or recorded television has fallen in recent years to a weekly average of 54% in 2025 (down from 71% in 2022), there has been consistent growth in the reach of BVoD, with 46% of people watching it at least weekly in 2025 (up from 38% in 2022). Time spent watching BVoD has also grown – up by three minutes a day in 2025.
- Live events, such as sports and time-sensitive entertainment programmes, continue to generate large audiences for broadcasters. The BBC's *The Celebrity Traitors* was the third most watched title in 2025, while ITV and the BBC reported peak audiences respectively of 18 million and 24 million for England's quarter and semi-final games in the 2026 FIFA World Cup.

Overall satisfaction with public service media remains high among adults and children

- Seven in ten public service broadcaster (PSB) viewers said they are satisfied with public service broadcasting. They are seen to deliver well for most features, in particular delivering 'a wide range of different types of programmes and content' (73%), 'programmes and content made for UK audiences' (72%) and 'high quality and creative programmes and content' (72%).
- There are similarly high levels of satisfaction among children with PSB viewers aged 8-16 and the parents of younger children (aged 3-7) agreeing that PSBs overall provide 'high quality programmes they enjoy' (72%) and 'programmes and content that helps them learn' (71%).

Video-sharing platforms (VSPs) such as YouTube provide people with a wide range of content both on and off the TV set

- VSPs include content from a wide range of outlets, including independent creators, the PSBs and other media groups. People spent an average of 51 minutes viewing VSPs across all devices in the home in 2025, unchanged since 2024 but up from 43 minutes in 2022. YouTube accounted for 41 minutes of this viewing in 2025, up 18% year on year.
- Much of the growth of in-home viewing of YouTube since 2022 can be attributed to an increase in watching on a TV set, with the average time spent viewing the service this way increasing by 111%, from 9 minutes per day in 2022 to 19 minutes in 2025.

TV AND VIDEO INDUSTRY

The UK commercial TV and online video market exceeded £18bn in 2025, driven by online platforms, but commercial broadcaster revenues declined

- The UK commercial TV and online video sector grew again in 2025, with total revenues increasing to £18.4bn, up from £17.1bn in 2024 (+7%), driven by growth in online video. But despite a 9% nominal growth in BVoD revenues, commercial broadcaster revenues (which includes the commercial PSBs) declined in 2025, falling from £4.98bn to £4.83bn due to declines in traditional TV advertising.
- UK subscription revenues for pay TV and subscription video-on-demand (SVoD) grew by over £1bn to £11.4bn in 2025. However, as subscriber numbers plateau, growth has been driven by price increases and bundled offerings. SVoD platforms are also building advertising, diversifying their revenue bases. Seventy per cent of UK households had at least one SVoD subscription in Q1 2026, an increase of only two percentage points since Q1 2022.

Despite revenue challenges, the PSBs have broadly maintained their investment levels and continue to act as the cornerstone for investment in UK TV and TV-like content

- Excluding sports, first-run UK-originated spend by PSBs increased by 2% in 2025, suggesting relative stability in investment despite ongoing pressure on broadcaster revenues.
- Total PSB first-run UK-originated hours increased in 2025, rising to just over 31,400 hours (up by about 3% year on year), reversing two consecutive years of declining output. BVoD libraries have also expanded steadily and now offer more than 60,000 hours UK originated programming to audiences – more than SVoD and advertising funded video-on-demand services combined.

RADIO AND AUDIO

93% of UK adults listen to at least one type of audio content each week

- Music is the key driver of weekly listening, with 90% of UK adults listening to music audio, and 53% listening to speech audio such as podcasts or talk radio. Audio behaviours vary significantly between age groups, with 25-34s the most likely to listen to speech audio (65%).
- 27% of UK adults listen to podcasts each week with news and current affairs are the most popular genres, listened to by 47% of weekly podcast listeners.

Radio remains at the heart of UK media habits – especially in the car

- Just under nine in ten adults tuned in each week in Q1 2026. Of the 1 billion radio hours listened to in an average week, 55% were to commercial radio.
- In-vehicle listening has become increasingly important for radio, accounting for 26% of hours in Q1 2026, up from 21% in Q1 2022, while in-home's share of listening declined. Just under a quarter of listeners only listen to the radio while in the car.

Overall revenues for the audio sector have continued to be resilient, with growth in both advertising (especially digital advertising) and subscription revenues

- Commercial radio revenues increased to £674m in 2025, up from £651m in 2024. National advertising revenues continued to outperform local, at £349m and £89m respectively, extending a longer-term structural shift in the market.
- Digital audio advertising expenditure on streaming services and podcasts was £317m in 2025, up from £287m in 2024.
- The large majority of consumer spend on recorded music is on streaming services, which accounted for over £2.0bn of the £2.45bn spent in 2025, up 3% year-on-year.

Media in context

Introduction

People in the UK continue to experience, engage with and consume content in a myriad of ways

Media and content matters to audiences in the UK. In the financial year ending in 2025, households in the UK spent over £1bn a week on subscriptions, media and content and devices (such as smartphones and TVs) to access it on, as well as related live experiences such as spectator sports, cinema and live music.[1] McKinsey estimates that in 2024 people in the UK consumed about 274 billion hours of content across live and non-live content – an average of over ten hours per person per day.[2] But the role of media goes beyond entertainment and engagement. As our research on public service media and news demonstrates, media plays a role in keeping us informed about our communities, country and the world, and contributes to our civic and cultural realm.

Five and a half centuries since William Caxton established England's first printing press in 1476 (arguably the first mass media business in the country), people continue to read printed books, newspapers and magazines. A hundred years after John Logie Baird first demonstrated television, people continue to watch programmes and films on TV sets in their homes. As media theorist Marshall McLuhan noted, the growth of new media forms does not make old media disappear. But they do require these old media to evolve in the light of changes in audience expectations, behaviours and technology. This ongoing evolution, in particular around TV and radio, is a core theme throughout this report. Newer media forms, including video games and social media, compete with established media for attention, time and revenues. But the widespread availability of connected devices, IP networks and digital production technologies creates new opportunities associated with audio such as video podcasts, audio summaries of articles and personalised audio bulletins, and around new formats of video such as vertical video, shorts, live streams and video essays.

The alignment of live events and experiences with other forms of content allows fans to engage with content in deeper ways and for more people to experience elements of these events. Sport continues to be a key genre for broadcasters and streamers, attracting large audiences for simultaneous coverage of live sporting events. Broadcasters in the UK, including the BBC, Global and Bauer, have long-established links to live music events, using these not only as a source of content for their broadcast and on-demand services, but also as opportunities to engage with audiences and broaden revenues beyond broadcasting and on-demand. Theme parks are another area where live experiences merge with TV and film; NBC Universal (the owner of Sky) plans to open its Universal United Kingdom Resort theme park in Bedfordshire in 2031.

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[1] Source: Ofcom calculations based on ONS Family Expenditure FYE 2025. Includes expenditure codes: 8.3.3, 8.3.4, 8.4, 8.5 (Communication), 9.1.1, 9.1.2.1, 9.1.2.6, 9.1.2.7, 9.3.2, 9.1.2.1, 9.1.2.6, 9.1.2.7, 9.3.2, 9.4.1.1, 9.4.2 (Recreation and culture).

[2] Live sector includes events such as sporting events, live music, amusement parks and theatrical video accounted for under 1% time spent but 13% of the total sectoral revenues. Non-live sector content includes live video, streaming video, social media, audio, gaming and print and digital publishing sectors. See: McKinsey (12/12/2025) Mind the attention gap winning the Battle for UK consumer attention.

Audiences

Comparing monthly media use in 2019 (chosen as a comparator year as it was the year before the Covid-19 lockdowns) and 2026 highlights both continuity and change in how adults engage with different types of media. While many traditional ways of accessing media remain widely used, online and on-demand services feature more prominently. The extent of change varies considerably by medium, with some activities experiencing substantial growth over the period while others have remained broadly stable. Social media and video-on-demand (VoD) services were the most widely used media in 2026, reaching 85% and 80% of adults respectively at least monthly, up from 2019 levels (72% and 64%).[3]

Audio consumption has also evolved over time. While live radio on a radio set continues to be widely used, there has been some decline with 65% of people listening to live radio each month in 2026 compared to 81% in 2019. In contrast, listening to streamed music at least monthly is now also at 65%, up from 46% in 2019, and podcast listening has more than doubled (18% to 39%) even more so when watching video podcasts are included (43%).

Over half of adults in Great Britain play a video game at least monthly, with 56% doing this in 2026 (53% in 2019).

Printed books remain the most widely used book format despite the expansion of digital alternatives, only slightly lower than 2019 levels with 52% reading a book at least monthly. eBooks have seen a small increase, with 28% of adults reporting reading them in 2026 compared to 24% in 2019, while audiobook use has doubled over that period, with a fifth of adults now listening to them. In contrast to books, the proportion of people reading a printed newspaper at least monthly has almost halved from 41% in 2019 to 21% in 2026.

Despite becoming more common in 2026 than in 2019, renting or buying a film digitally remains a far less common activity than using video-on-demand or watching live TV, with only 15% of adults doing this at least monthly in 2026, while 12% go to the cinema at least monthly.

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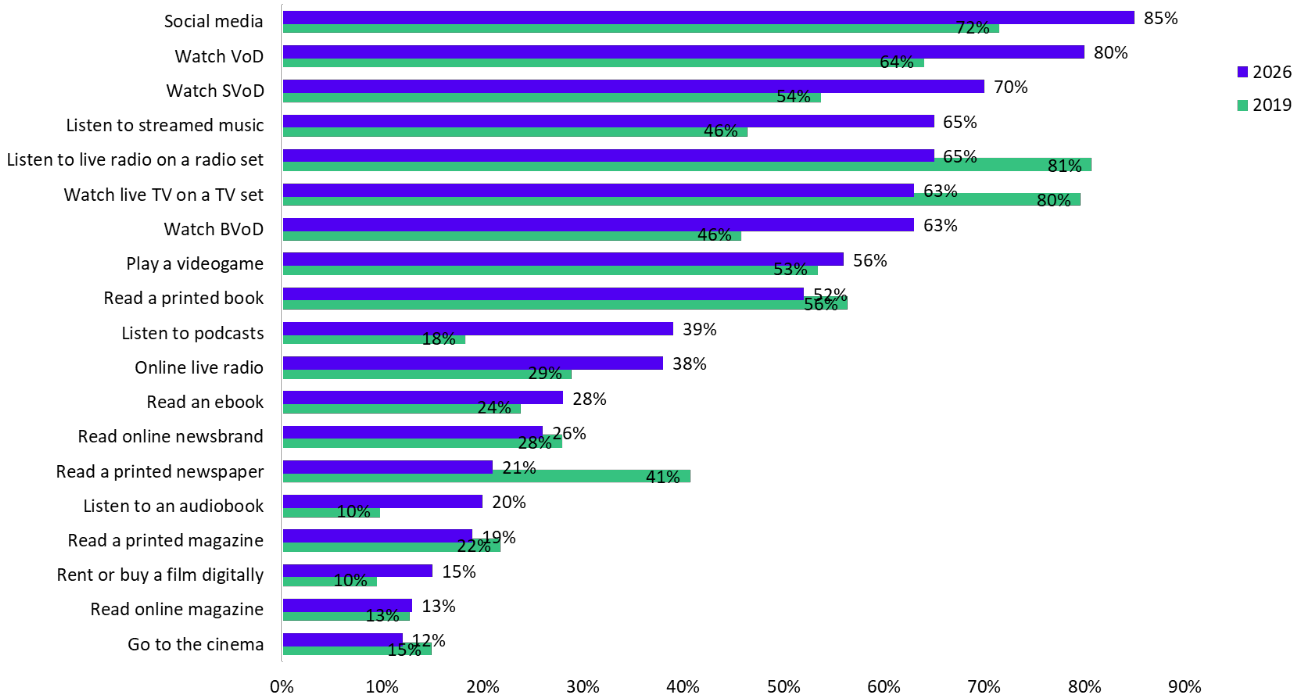
[3] We use monthly reach figures here from the IPA TouchPoints survey as this enables us to compare reach between different types of media. This may differ from, and not be directly comparable to, other media-specific or industry reach figures in this report such as those for TV (Barb) and radio (RAJAR). The IPA TouchPoints survey covers Great Britain only and does not include Northern Ireland.

Figure 1: Monthly reach of selected media activities to GB adults: 2026 vs. 2019



Source: IPA TouchPoints SuperHub 2026 & IPA TouchPoints 2019. Aged 16+.

Media consumption patterns vary by age. Among the top three media activities carried out at least monthly by people aged 16-24, all of these (social media, streaming music and VoD) are delivered online to connected devices. In contrast, the top three media activities among those aged 75+ are watching live TV on a TV set, listening to live radio on a radio set and reading a printed book.

Almost three-quarters of adults aged 16-24 play a video game (on a console, computer, tablet or smartphone) at least monthly – more than twice the proportion of those aged 75+ doing this (36%).

Figure 2: Top ten monthly media activities, adults 16-24 vs adults 75+: 2026

16-24 year-olds		75+ year-olds	
Social media (exc. YouTube)	96%	**Live TV on a TV set**	78%
Streamed music	88%	**Radio on a radio set**	74%
VoD	84%	**Printed book**	65%
Gaming	74%	**VoD**	58%
Printed book	50%	**Social media (exc. YouTube)**	56%
Podcast	48%	**Printed newspaper**	44%
Live TV on a TV set	46%	**Printed magazine**	38%
Radio on a radio set	44%	**Gaming**	36%
ebook	29%	**Online radio**	35%
Online newspaper brand	25%	**Streamed music**	31%

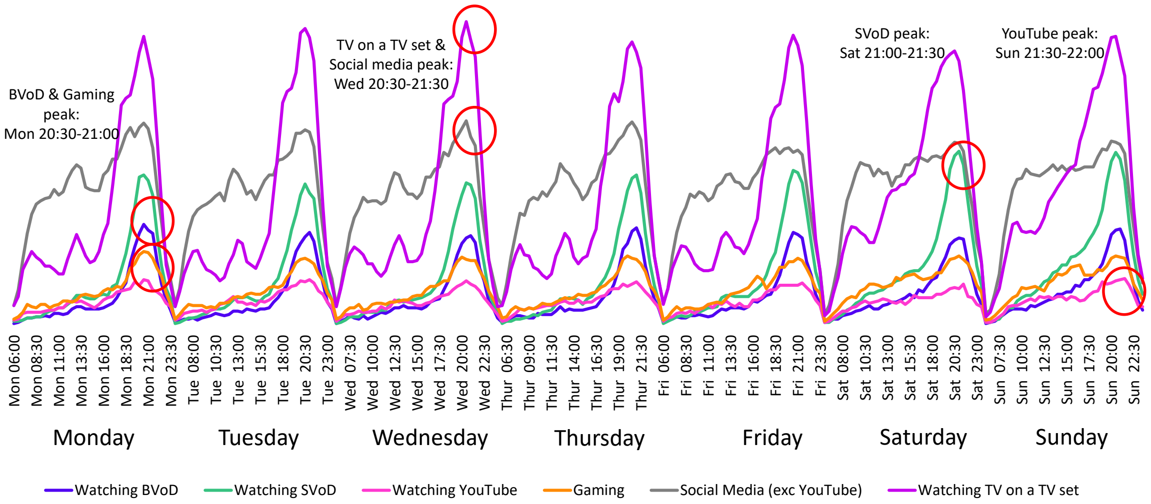
Source: IPA TouchPoints SuperHub 2026.

Media consumption fits around and reflects people's other daily activities. As Figure 3 shows, reach of audiovisual media activities varies throughout the day, with a pronounced peak in the evening. While broadcast media retains clear appointment-to-view and appointment-to-listen patterns, online activities tend to be spread more evenly throughout the day and across the week, although they also exhibit notable peaks in the evening.

Live TV set viewing remains concentrated in the evening, when it attracts the largest audiences of any activity measured. Across most weekdays, viewing builds steadily through the afternoon before peaking in the late evening, reflecting both established audience habits and the continued role of scheduled programming in driving collective viewing.

Among online activities, social media shows a broader pattern of use across the day. The largest peak is Wednesday at 8.30pm, along with live TV set viewing, reinforcing the idea that social media serves as a complementary activity alongside other media.

Figure 3: Pattern of use of selected TV, video and gaming activities throughout the day, by adults: 2026



Source: IPA TouchPoints SuperHub 2026.

Devices

Consumers access content from a range of complex multifunctional devices

A large majority of people in the UK have access to at a least one connected device which can be used to access multiple types of content. For example, in Q1 2026, 92% households had at least one smartphone, 81% had a laptop/desktop computer and 72% had a connected TV (i.e. a TV with a direct internet connection).[4]

As our Communications Market Report shows, the take-up of many of these connected devices has been relatively stable over time. However, take-up of certain other devices through which content can be consumed, such as VR headsets and smart glasses, remains much lower, despite early versions of these devices having been on the market in some form for a decade or more. The past year has seen companies including platform operators Meta, Google and Snap develop new connected smart glasses with some form of built-in display. These glasses can be controlled by voice,

[4] Barb Establishment Survey Q1 2026.

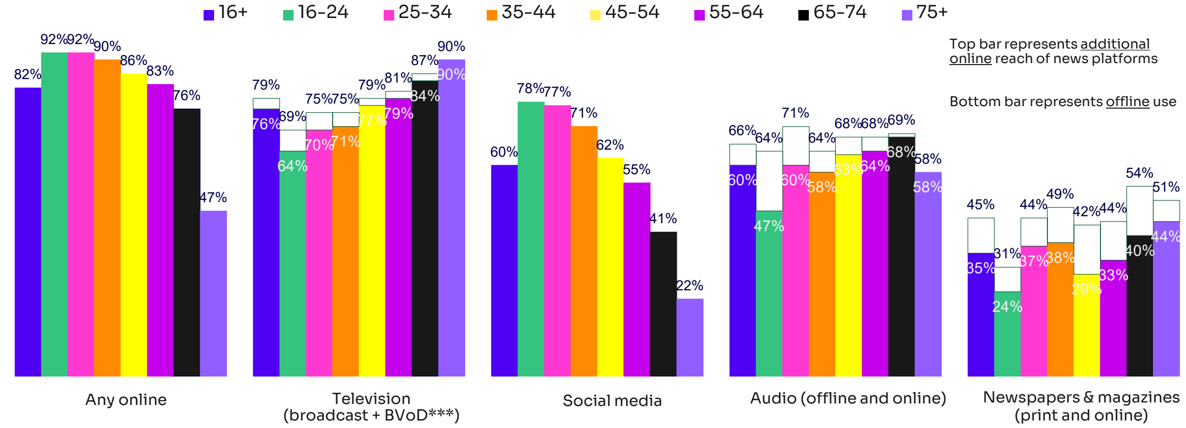
the devices integrating with a voice assistant. Voice assistant integration is also increasingly seen with other devices for media consumption, including smart TVs, enabling users to navigate and find content as an alternative to a traditional electronic programme guide (EPG), text search box or icon-driven interface. The widespread availability of these connected devices has seen a growth in business models built around the monetisation of the use of the device such as rather than initial sales of the device itself, such as TV manufacturers launching their own VoD services, monetised via targeted advertising.

News

News is most commonly accessed online

News consumption in the UK is increasingly being shaped by digital behaviours. Online is used as a source of news by 82% of UK individuals aged 16+ in a month, compared to 76% who say that they watch broadcast television news. Social media plays a central role, with 60% using it for news. There is a generational divide in news consumption habits. Television (including on-demand) as a source of news skews towards older people, with 90% of those aged 75 or older getting their news this way, compared to 69% of people aged 16-24. The reverse is seen for those who use online news, with 92% of 16-34s using *any* online method to access news, compared to only 47% of those over 75.

Figure 4: Platforms used to access news in the past month, by age: 2026



Source: Ofcom News Consumption Survey 2026. Question: D1-D22. Which, if any, of the following [MEDIA TYPE] have you seen or heard news on in the last month? As a reminder… This could be news that you actively watch or listen to and it could be news that you just happen to see or hear. We're interested in news of all types – whether it's recent events in politics, sport, entertainment, celebrities, in your local area or around the world. Base: All adults (5397), 16-24 (583), 25-34 (981), 35-44 (1060), 45-54 (783), 55-64 (711), 65-74 (672), 75+ (602).

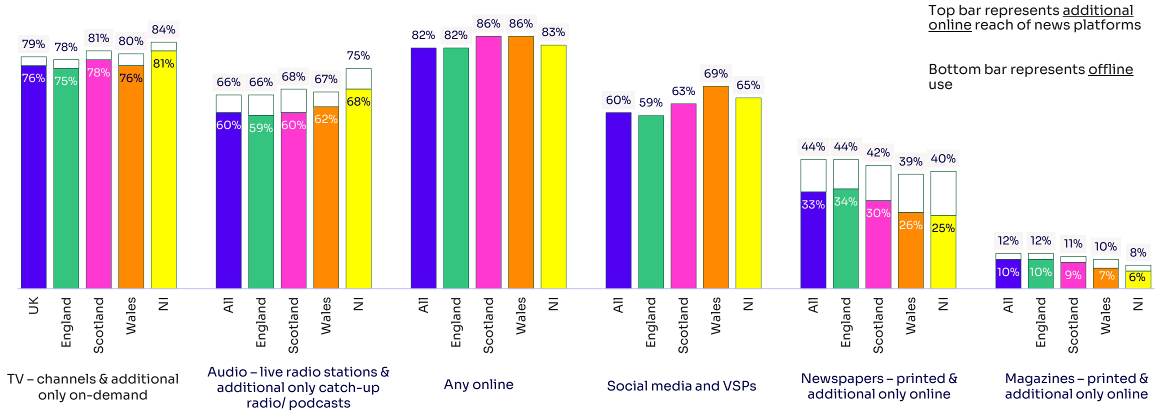
Although online news consumption is increasing, the more traditional methods of accessing news continue to be rated higher for trust than news accessed through social media, video-sharing platforms, search engines or AI. Two-thirds of those using broadcast TV (65%), and those using printed newspapers (66%), rate them highly for trust, compared with 39% of users of social media or video-sharing platforms and 51% of those using search engines or AI to access news.[5]

In all UK nations except Northern Ireland, people are more likely to have seen or heard their news online than on broadcast TV (including on-demand TV). In Northern Ireland, broadcast TV (84%) is on

[5] A 'high' score for trustworthiness constitutes scoring the platform 7-10 on a 10-point scale.

par with online (83%). Social media is most prominent as a news platform in Wales (69%), while audio (live, catch-up or podcasts) is most prominent in Northern Ireland (75%).

Figure 5: Platforms used to access news in the past month, by nation: 2026



Source: Ofcom News Consumption Survey 2026. Question: D1-D22. Which, if any, of the following [MEDIA TYPE] have you seen or heard news on in the last month? As a reminder… This could be news that you actively watch or listen to and it could be news that you just happen to see or hear. We're interested in news of all types – whether it's recent events in politics, sport, entertainment, celebrities, in your local area or around the world. Base: All adults (5397), England (3597), Scotland (600), Wales (600), Northern Ireland (600). Data are not comparable with previous surveys due to methodology changes.

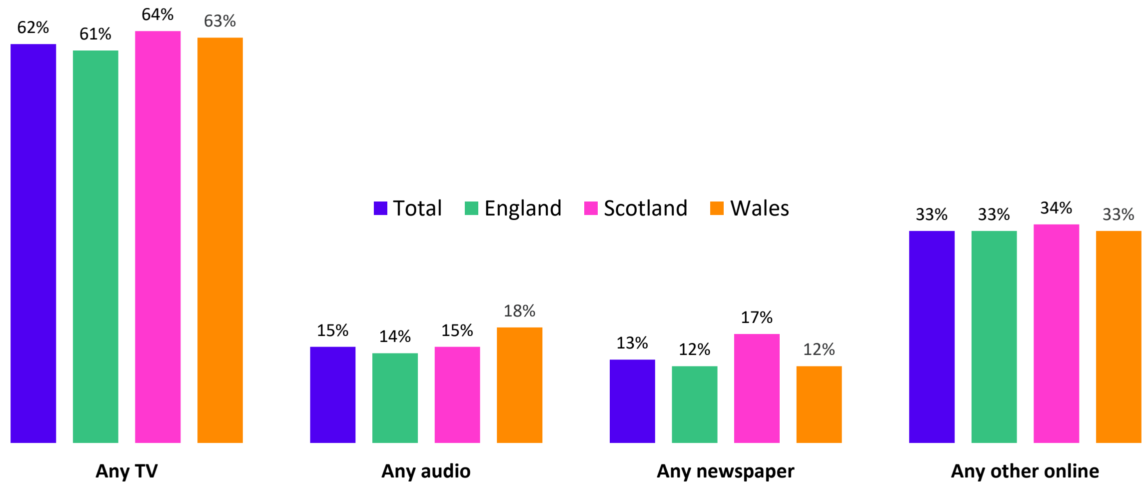
TV coverage of the 7 May 2026 elections reached just over six in ten people aware of the elections in voting areas

People's experience and use of news during an election period provides a snapshot of how news media helps people understand and engage with the world around them. We carried out audience research in Scotland and Wales immediately after the Scottish Parliament and Senedd Cymru elections, and also in those areas of England[6] where local elections / mayoral Elections took place – collectively, the largest set of elections in the UK since the 2024 General Election.

Across the surveyed areas, six in ten (62%) people who had been aware of the election(s) had seen news about the elections on TV, with a third (33%) having seen news or information about the election online. 15% had received election-related news through radio or podcasts, while 13% reported getting election news from newspapers.

[6] 136 local authorities including all London boroughs, and six directly-elected mayoralties.

Figure 6: Platforms used for news and information about the 7 May 2026 elections

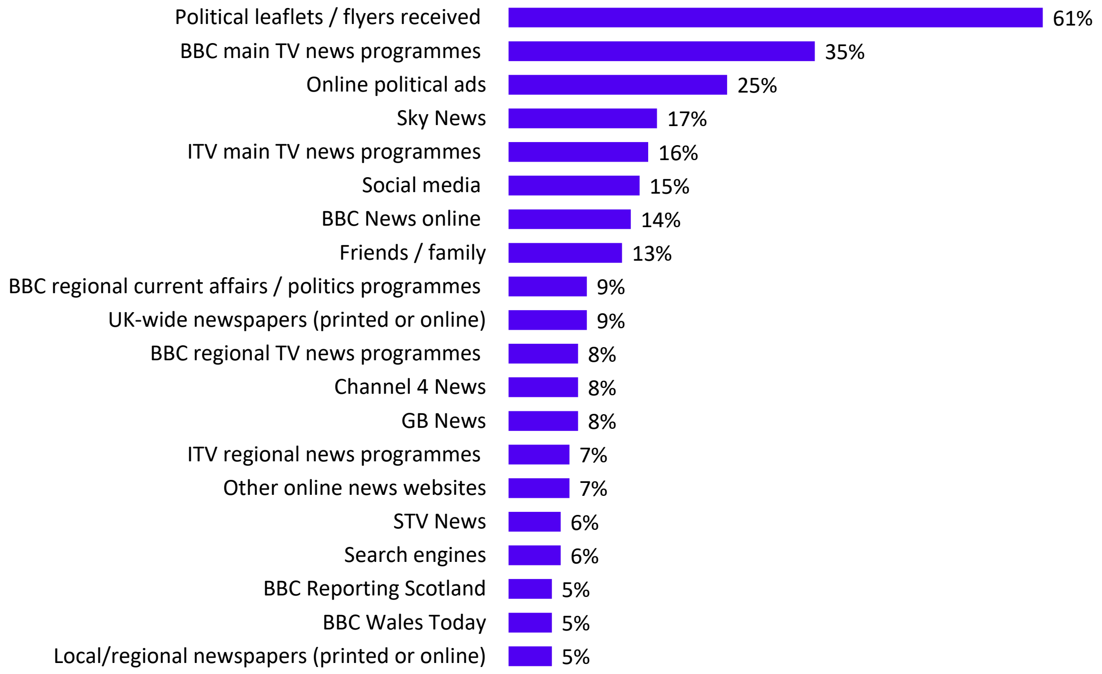


Source: Ofcom Local Election Survey. Q3A. Thinking about the weeks leading up to the [election], through which of the following sources, if any, did you see news and information about the election? Base: all aware of elections aged 16+: (5550), all aware of elections in [region]: England: (3566), Scotland: (1007), Wales: (977).

Using newspapers for news relating to the election was done more by older people, with 22% of those aged 65+ using them for news about the election, compared to 4% of those aged 16-24. Conversely, social media, video-sharing platforms and online forums, used by 14% of UK adults 16+ for election-related news and information, were most used by people aged 16-24 (21%) and 25-34 (23%) and far less likely to be used by those aged 65+ (5%).

The most common individual sources of news and information about the elections were political flyers or leaflets delivered to the door (61%), the BBC main TV news programmes (35%) and online political ads (25%). In Wales and Scotland political leaflets were reported as a source of information on the elections by 74% and 77% respectively. The main BBC TV news programmes were more likely to be used for election-related news and information among those aged 65+, compared to those aged 16-24 (50% vs. 20%). In contrast, 41% of those aged 16-24 had seen online political ads about the elections, compared to only 14% of those aged 65+.

Figure 7: Top 20 ways to access news and information about the 7 May 2026 elections



Source: Ofcom Local Election Survey. Q3A. Thinking about the weeks leading up to the [election], through which of the following sources, if any, did you see news and information about the election? Base: All aware of 7 May elections (5550).

Participants were asked the extent to which they agreed the ways in which they accessed election-related news and information were accurate, trustworthy and impartial. Television news performed well on these metrics: the main BBC TV news programmes were rated highly[7] for accuracy by 74% of viewers, for trustworthiness by 68% of viewers and for impartiality by 56% of viewers. Other TV news channels were similarly highly rated for their election news among their viewers: ITV News: accuracy 72%, trustworthiness 67%, impartiality 57%; Sky News: accuracy 76%, trustworthiness 71%, impartiality 59%.

Driven by the range of voices and sources available through social media compared to other ways of accessing news, ratings for news seen on social media as a whole are lower for election-related information: it was rated highly for accuracy by just 45% of users, for trustworthiness by 32% and for impartiality by 29%.

We highlight key findings around the elections in Scotland and in Wales in the respective nations' Media Nations reports. A full analysis of the elections survey including data tables will be made available later this year when we publish our annual News Consumption Report.

[7] A 'high' score constitutes rating the metric as either 4 or 5 on a 5-point scale.

Advertising

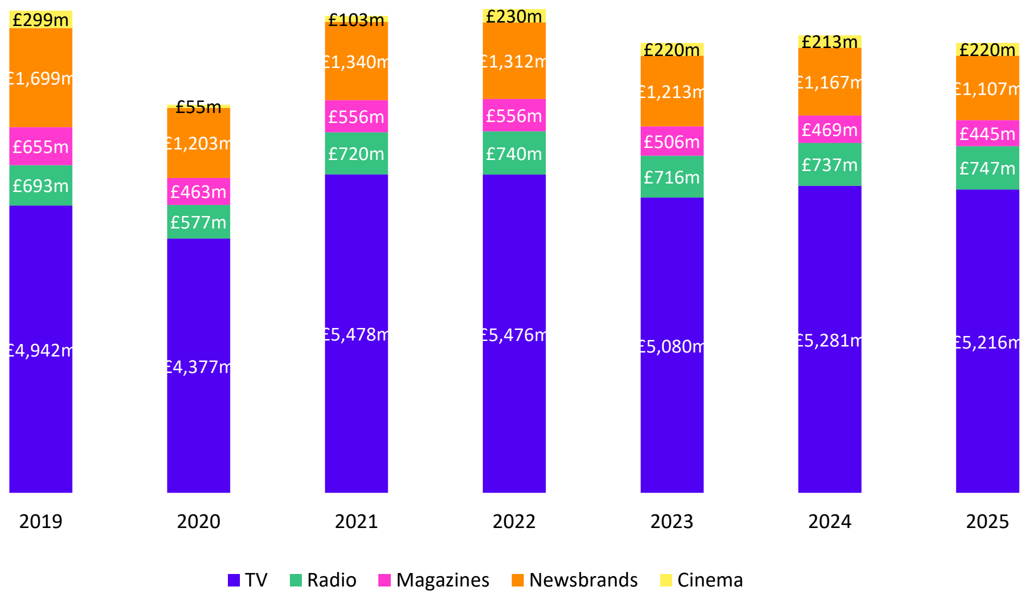
TV, radio and other media advertising expenditure was generally flat in 2025

The UK advertising market grew by 6% in nominal terms to £46.7bn in 2025, according to the AA/WARC Expenditure Report. This was primarily driven by growth in online advertising, which is structurally different to other media.

Expenditure on TV advertising declined in nominal terms by 1% to £5.2bn, following growth in a sports-driven 2024. Radio was more resilient, with nominal growth of 1% to £747m; it was less impacted by cyclical events and economic uncertainty. Cinema noted a 3% increase to £220m, although this was still significantly below pre-Covid levels.

News brands (i.e. online and print newspapers) and magazines continued to see ongoing year-on-year declines. Expenditure on national and regional news brand advertising fell by 5% between 2024 and 2025 to £1107m. Magazine advertising expenditure also fell by 5% in this period, to £445m.

Figure 8: Total advertising expenditure on selected media: 2019-2025



Source: AA/WARC Expenditure Report. Traditional media categories include online elements. Please note a change from 2025 onwards in the method for the calculation of online elements. Figures are nominal.

Advertising expenditure on selected media, as shown in Figure 8 above, which comes largely from advertising agencies, has recorded a generally flat nominal performance over the past seven years. This is against a context of macroeconomic challenges and reduced advertising investment by the large brands.

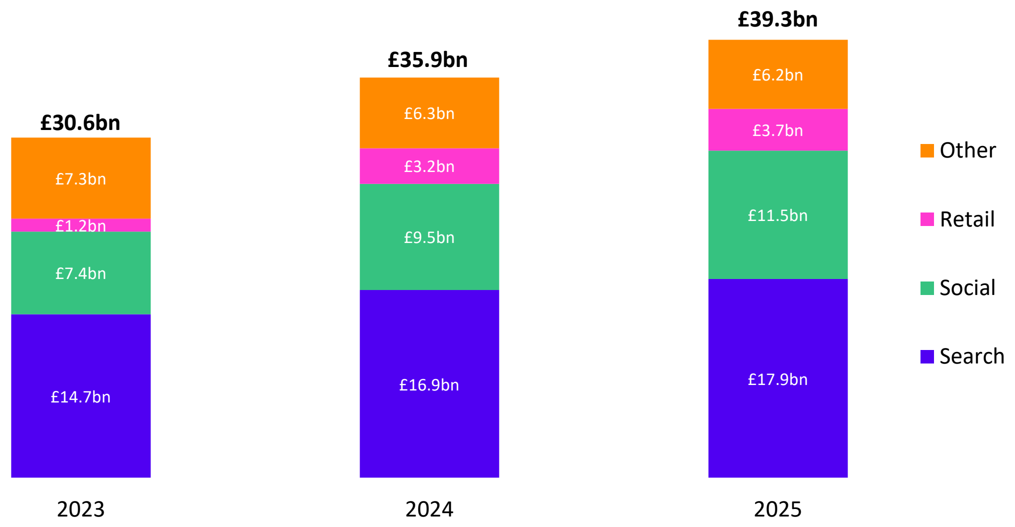
Online advertising revenues have grown

Online advertising (excluding digital-out-of-home) grew by 9% in nominal terms between 2024 and 2025, reaching £39.3bn. But performance varied between formats. Those operating outside social, retail, and search are experiencing similar trends to traditional media. Growth was driven in particular by a 21% increase in expenditure on social media advertising, which reached £11.5bn. This continues to be driven by the large volume of advertisers active in social media; for example, Meta has previously reported 10 million active advertisers buying advertisements on its platforms.

Expenditure on online retail media grew by 17% year-on-year to £3.7bn, driven both by online marketplaces (e.g. Amazon, eBay) and spend on the online assets of grocery stores (e.g. Sainsbury's, Tesco). AA/WARC predicts that retail media will continue to achieve double-digit growth in the next few years, outperforming all other media.

Search, the largest element of online advertising at over 45% of the total, grew by 6% to £17.9bn, suggesting that AI-generated responses are not yet affecting search revenues.

Figure 9: Online advertising expenditure: 2023-2025



Source: IAB UK, Ofcom calculations. Note that data has been restated following a change in methodology from 2025 onwards. Digital out-of-home has been excluded by Ofcom from total as published by IAB UK.

Significant proportions of the growth in expenditure in these three categories are probably on the large online platforms, Alphabet, Meta and Amazon,[8] although no UK-specific data is reported in their annual earnings reports. In contrast, 'other' online advertising, which includes much advertising around content providers such as news brands, broadcasters and other types of online native publishers (in addition to online audio and in-game advertising) fell by 2% in nominal terms to £6,188m. This signifies that even though the online advertising market continues to increase strongly, the growth is not spread evenly across the market.

Meanwhile, TV and radio broadcasters and news brands are investing in expanding their online and addressable offerings to capture some of the growth in the online advertising space coming from small and medium-sized enterprises. In June 2026, UK TV broadcasters[9] launched 'Universal Ads', a self-service platform which mimics the advertising sales process on social media to draw in new budgets and make the process of buying TV advertising simpler. In the same month, radio broadcaster Global also launched a self-service platform, its AdPower product, which allows advertisers to purchase both audio and outdoor media much more quickly than through traditional ad sales channels. These systems, originally pioneered by the online platforms, broaden the

[8] Press Gazette estimates that Google, Meta and Amazon accounted for 2/3 of total advertising expenditure in 2026.
[9] Including broadcasters represented by ITV Media, Channel 4 Sales and Sky Media for advertising sales.

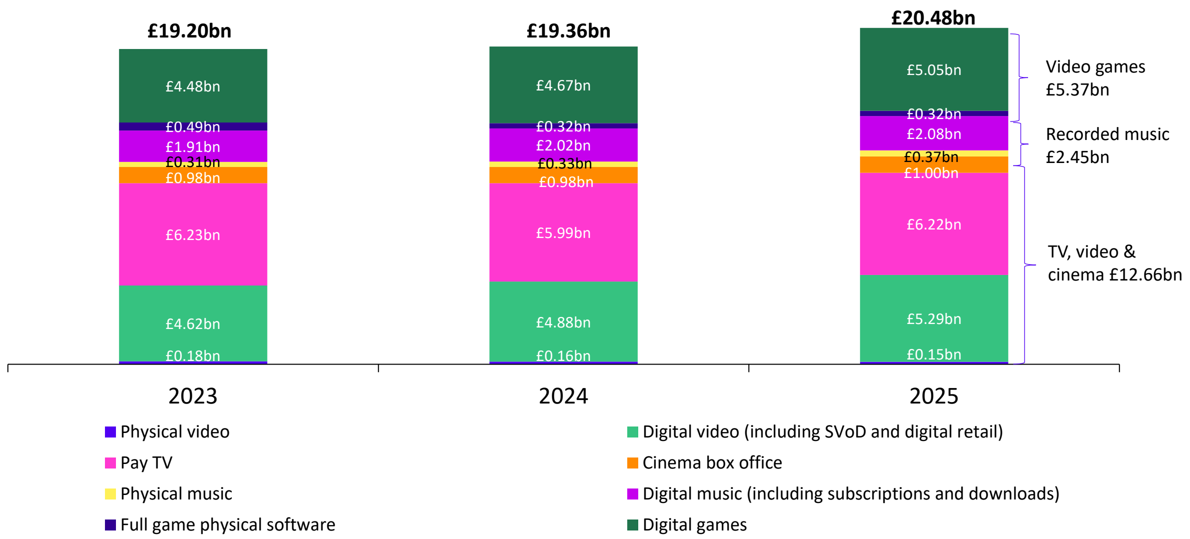
potential range of advertisers by simplifying cross-media advertising purchases, and may appeal to existing local radio, local print and smaller TV advertisers, as well as companies which historically have not bought inventory from traditional media.

Retail expenditure on media

Expenditure on media has continued to grow

Overall, in 2025, UK consumers spent £20.48bn across audiovisual media, recorded music and video-game software, an increase of 6% on 2024. Their expenditure on TV, video and cinema (£12.66bn) represented an increase of 5%. Total recorded music expenditure rose by 4% to £2.45bn and expenditure on video-game software rose by 7% to £5.37bn, with £1.10bn of this (21%) relating to subscriptions.[10] We look at TV/video and recorded music revenues in more detail in chapters 3 and 4 respectively.

Figure 10: Expenditure on audiovisual media, recorded music and video-game software



Source: ERA Yearbook 2026 (physical video, digital video and games) / BFI (cinema box office) / BPI (recorded music) / Broadcaster returns to Ofcom (pay TV), Ofcom calculations.

Expenditure on physical media formats such as DVDs, CD, vinyl and games on disc or cartridge was £840m in 2025, accounting for only 4% of the total compared to 6% in 2024, and was highest for music (15%) and just 1% for TV, video and cinema. The relative stability of physical music (driven by vinyl purchases) has been insufficient to counterbalance the shift away from DVD and BluRay for video, and physical formats for video games.[11] However, physical releases continue to play a role for consumers. Research has found that some people, notably in generation Z,[12] purchase physical

[10] Source: ERA Yearbook 2026. Includes console subscriptions, PC casual (sales & subs) / PC pay-to-play, cloud gaming and mobile/ tablet subscriptions.
[11] Although the release of the Switch 2 console in 2025 slowed the expenditure on physical formats between 2024 and 2025. Looking forward, in June 2026 Sony announced that from 2028 new PlayStation games would no longer be distributed on physical discs, with Rockstar Games having indicated a few days previously that the physical retail version of Grand Theft Auto VI, due for release in November 2026, would contain a download code rather than a physical disc.
[12] Exact definitions vary but this generally refers to people born in the late 1990s to the early 2010s.

media formats such as vinyl and cassettes even though they lack the means to play the content, seeing physical media as a form of fan merchandise. The potential to buy and resell in the second-hand market may also make physical formats attractive to some consumers, as may concerns about long-term access to previously purchased and downloaded content in the event that servers are switched off or rights agreements expire.

Conclusion

People in the UK can choose to consume a wide range of media. As this chapter demonstrates, media activities in the TV and video, and radio and audio spaces, continue to remain at the heart of peoples' lives. In the following chapters of this Media Nations report we look in more detail at audience behaviour and industry developments in these sectors.

For additional data and analysis of these topics in Northern Ireland, Scotland and Wales, please refer to the nation-specific Media Nations reports.

In autumn 2026, we will publish additional data and analysis in as part of our annual report on news consumption in the UK.

TV and video audience trends

Total video viewing

Video viewing definitions

Broadcaster TV: Live, recorded playback and BVoD

Linear: Live and recorded playback

BVoD: Broadcaster video-on demand

SVoD/AVoD: Subscription and Advertising-funded video-on demand

VSP: Video-sharing platform

Viewing of broadcasters' on-demand services was the fastest growing segment in 2025 - but did not offset the decline in viewing of linear TV

Total in-home video viewing[13] across all devices declined slightly in 2025, averaging 4 hours 23 minutes per person per day, down 7 minutes year-on-year. BVoD was the fastest growing segment in 2025, rising by 3 minutes (9%) to 28 minutes per person per day.

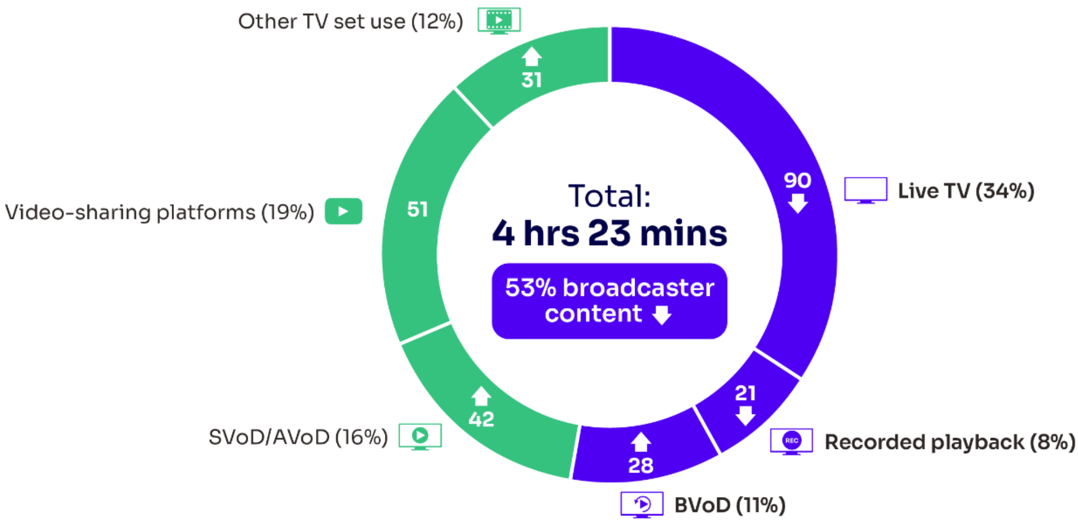
Linear viewing fell by 14-minutes (12%) to 1 hour and 51 minutes per day – the steepest annual decline in recent years. As a result, overall viewing of broadcaster TV content fell by 11 minutes (8%) year-on-year to 2 hours 19 minutes per person per day, with growth in BVoD viewing outweighed by declines in linear viewing.

While the year-on-year decline partly reflects higher sports viewing in 2024, driven by the men's UEFA European Football Championship and the Paris Olympics, the longer-term trend of declining linear viewing remains evident. Despite this, broadcaster content continued to account for more than half of all in-home video viewing in 2025, representing 53% of viewing, compared with 56% in 2024.

Viewing of SVoD/AVoD services increased, by 3 minutes year-on-year to 42 minutes per person per day, while viewing on VSPs remained stable at 51 minutes per day after several years of growth.

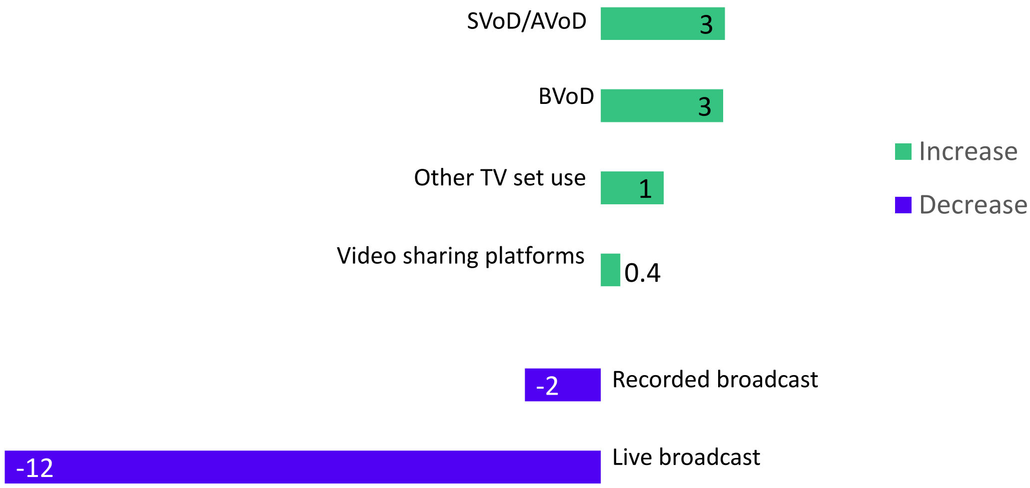
[13] Includes all broadcaster TV, SVoD/AVoD, VSPs and unidentified viewing. Refer to Figure 11 for full details.

Figure 11: Average daily minutes of in-home video viewing across all devices, all individuals aged 4+: 2025



Source: Barb as-viewed, all individuals (4+). Average daily minutes viewed on TV sets and other devices connected to the home broadband. Excludes unidentified TV set use via a connected games console.[14]

Figure 12: Change in average daily viewing minutes of in-home video viewing, all individuals aged 4+: 2025 vs 2024



Source: Barb as-viewed, all individuals (4+).

[14] 'Broadcaster content' includes live TV, recorded playback and BVoD. Viewing of content watched live (at the time it is being broadcast on a linear channel) via a BVoD player is included within the 'BVoD' section and not the 'Live broadcast TV' section. 'Other TV set use' includes viewing of some SVoD/AVoD/VSP that cannot be definitively measured separately, as well as some unmeasured broadcast channels, some EPG/menu browsing, viewing when the audio is muted, piracy, unmeasured box-sets/pay-per-view content, DVDs/VHS/Blu-ray, and non-video internet activity through a PC or other device connected to the TV. 'SVoD/AVoD' excludes viewing of NOW, which is captured within BVoD along with Sky Go/Sky TV On Demand (these two services stream the same content, so measured viewing cannot be separated).

Under-35s continue to favour streaming, while over-74s remain broadcast-led

Generational differences in TV viewing habits remain clear, with those under the age of 35 continuing to favour SVoD/AVoD and VSP content over traditional broadcaster TV, and older audiences consuming mainly broadcaster content. However, those aged 35 and over increasingly exhibit hybrid behaviour, watching a varied mix of content.

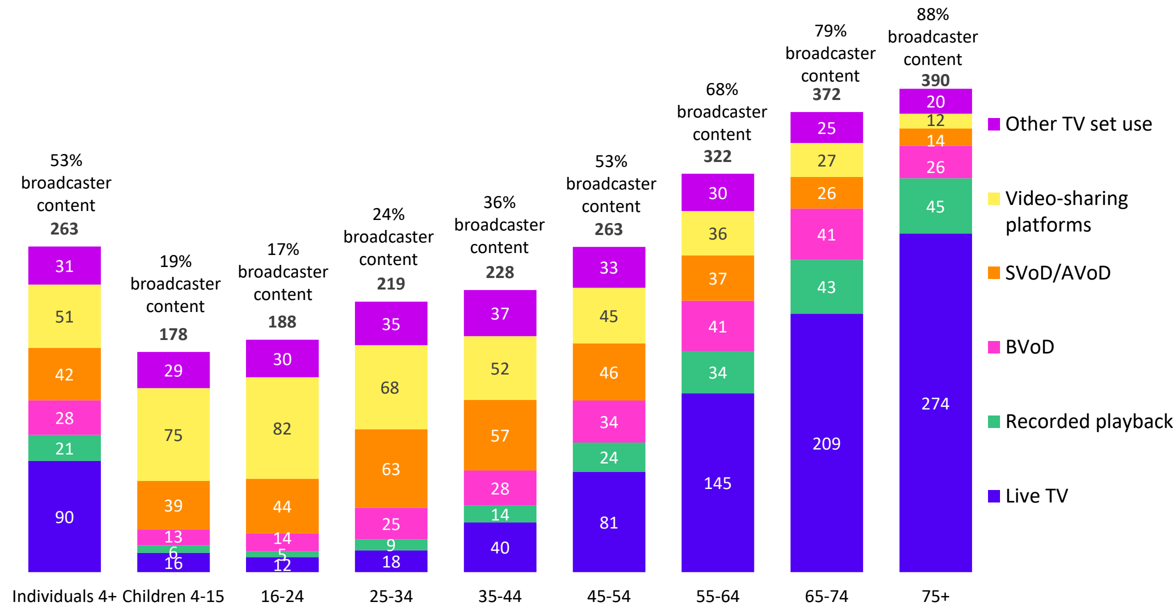
Young adults (aged 16-24) continue to watch the least video in-home overall, at 3 hours 8 minutes per day in 2025, a decline of 11 minutes since 2024, and 8 minutes since 2022. VSPs still account for the largest proportion of total in-home video viewing among this demographic (44%), although after several years of growth, viewing has fallen by 8 minutes (9%) year-on-year and by 6 minutes since 2022, more than any other age group. SVoD/AVoD continue to account for just under a quarter, flat since 2024 and 2022.

Total in-home video viewing increases significantly with age, peaking among those aged 75+, who in 2025 watched on average 6 hours 30 minutes of video content per day, a 4-minute increase on 2024 and up 33 minutes since 2022. Although it continues to make up the largest proportion of viewing, live TV was the only content type to decline for this demographic, falling by 9 minutes year-on-year. Once again, BVoD viewing had the largest increase, albeit smaller than last year, up 6 minutes to 26 minutes in 2025, compared to the 12-minute increase seen in 2024. SVoD/AVoD also increased, growing by 4 minutes year-on-year.

Among 35-54 year-olds viewing habits are more evenly split. SVoD/AVoD and VSPs maintain a strong presence, but live TV continues to account for a substantial share, particularly among those aged 45-54, despite seeing the biggest decline since 2022.

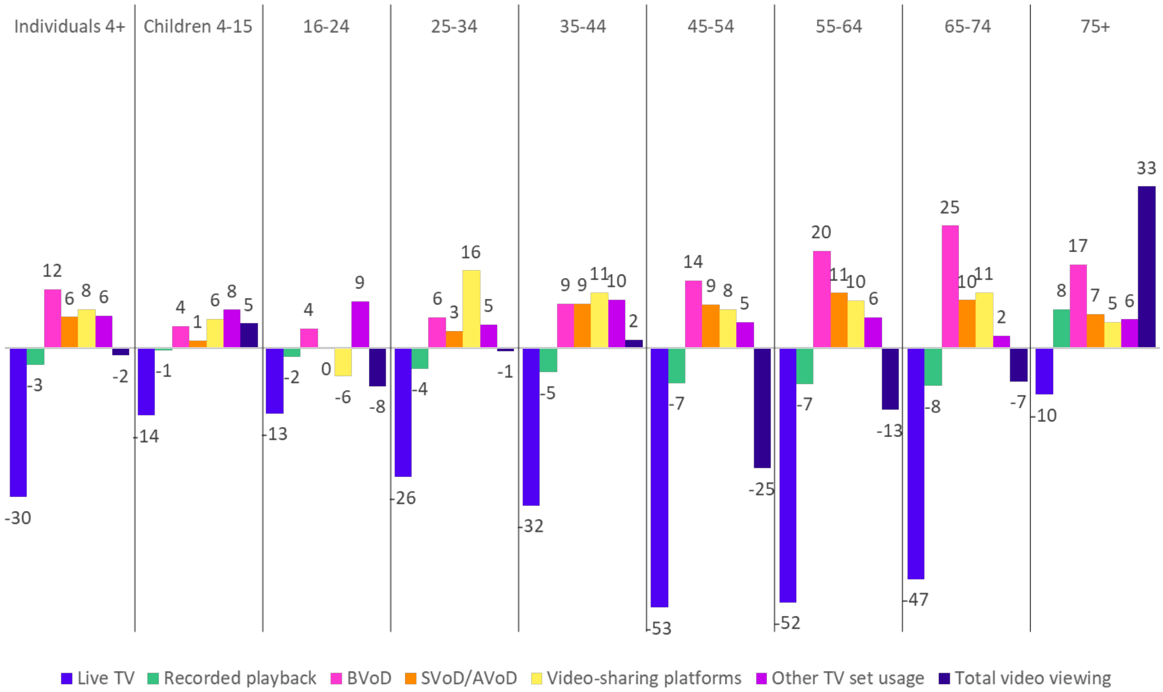
Overall, while the long-term shift towards streaming and on-demand viewing continues, growth is more concentrated among older demographic groups, who have expanded their consumption, while continuing with traditional TV, driving an increase in total viewing time. Younger audiences, on the other hand, appear to be reaching saturation in streaming and on-demand consumption, with viewing time under pressure from competing activities including, but not exclusively, social media, gaming and other online entertainment, resulting in an overall decline in total viewing time.

Figure 13: Average daily minutes of in-home video viewing, by age: 2025



Source: Barb as-viewed on TV sets and other devices using the home's WiFi network.

Figure 14: Change in average daily minutes of in-home video viewing, by age: 2022 vs 2025



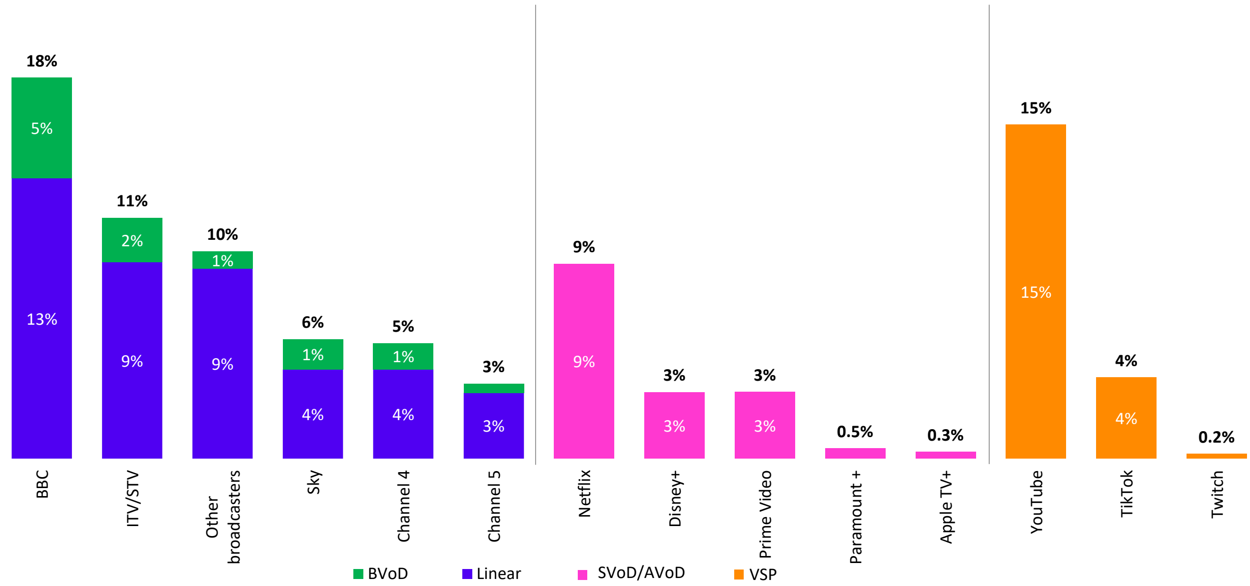
Source: Barb as-viewed on TV sets and other devices using the home's WiFi network. Figures show difference in average daily viewing minutes between 2022 and 2025.

Video viewing patterns vary considerably by service and age group

To provide a sense of viewer behaviour, Figure 15 shows the share of total video viewing across individual services. It should be noted that YouTube aggregates content from a wide range of sources, including broadcasters and SVoD/AVoD. Consequently, viewing attributed to YouTube may include viewing of content that originates from those providers.

In 2025 the BBC accounted for 18% of all in-home video viewing across devices by all individuals, level year-on-year due to an increase in BBC iPlayer viewing offsetting the linear decline. ITV accounted for 11% overall, with linear falling by one percentage point and ITVX continuing to account for 2%. Sky remained in-line with the previous year, while Channel 4 saw linear account for 4% of in-home video viewing, down from 5% in 2024. Netflix accounted for 9% of in-home video viewing, up one percentage point year-on-year, while Disney+ and Amazon Prime Video accounted for 3% each, unchanged since 2024. YouTube accounted for 15% of all in-home video viewing among all individuals, up one percentage point from 2024, while TikTok and Twitch remained in-line with the previous year.

Figure 15: Share of total video viewing for individual services; all individuals aged 4+: 2025



Source: Barb as-viewed on TV sets and other devices using the home's WiFi networks, all individuals (4+). 'Linear' includes broadcast content watched live or via recorded playback. Broadcaster services include all portfolio channels.

The services viewed also varied considerably by age. Among 16-34 year-olds the BBC accounted for 6% of all in-home video viewing, with BBC iPlayer accounting for the majority (4%). For adults aged 55+ the BBC accounted for 26% of video-viewing, with BBC iPlayer accounting for around a fifth of this (5%). YouTube accounted for the largest share of in-home video viewing among 16-34 year-olds at 23%, compared to only 7% among those aged 55 and over, while Netflix accounted for 14% among 16-34s and 4% for those aged 55+.

TV sets captured a growing share of VSP viewing

Of the 4 hours 23 minutes of all in-home video viewing across all devices, 88% was on TV sets, unchanged since the previous year. The proportion of BVoD watched on a TV set was 18%, up from 15% in 2024. SVoD/AVoD watched on the TV set was unchanged at 88%, while VSPs watched through the TV set grew from 32% to 37%, with YouTube driving viewing.

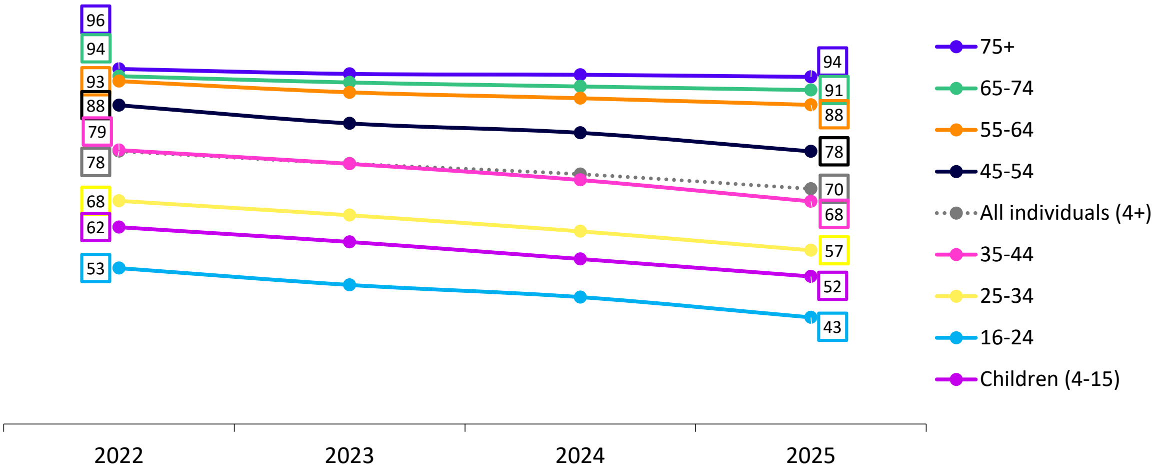
Among young adults (aged 16-34) the proportion of total time spent watching video in-home on a TV set increased from 74% in 2024 to 76% in 2025. This growth was driven by an increase in viewing of BVoD and VSPs, with the former rising from 34% to 44%, and the latter from 24% to 28%. Those aged 35 and over also increased their viewing of VSPs via the TV set, with adults aged 65+ seeing the most growth from 38% to 46%.

Broadcaster TV viewing

BVoD continues strong growth, expanding reach across audiences

Over two-thirds (70%) of people aged 4+ watched broadcaster TV for at least 15 minutes in an average week. This is down from 73% in 2024 and 78% in 2022, indicating that declines have continued rather than plateaued. Linear TV reach fell further in 2025, reinforcing the long-term structural shift away from linear viewing.

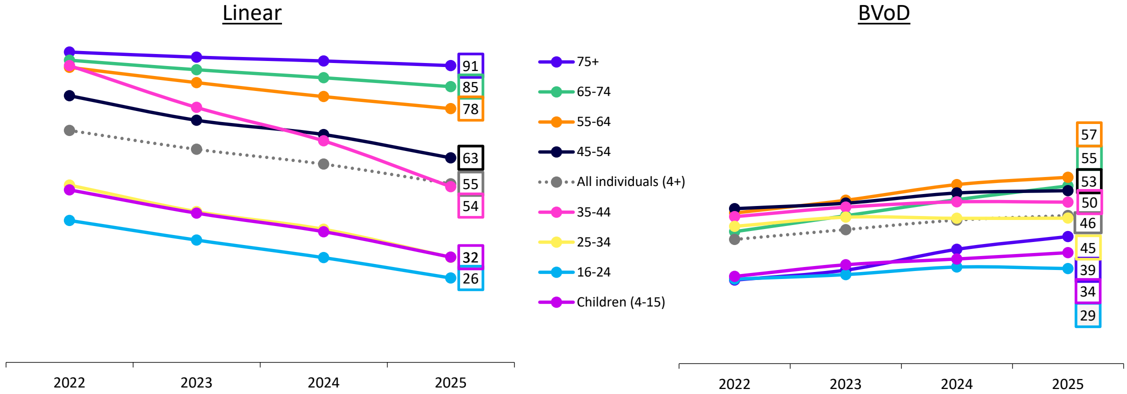
Figure 16: Average weekly reach of broadcaster TV, by age: 2022-2025



Source: Barb as-viewed. Live + recorded playback and BVoD. Reach criteria 15+ consecutive mins.

Reductions in reach were evident across all age groups, driven by a fall in the reach of people watching live and recorded playback. The number of people who watched regularly remained strongly age-dependent: linear TV continued to play a near-universal role among older audiences, with 91% of those aged 75+ watching weekly, compared to just over a quarter (26%) of 16-24-year-olds.

Figure 17: Average weekly reach of linear and BVoD viewing, by age: 2022-2025



Source: Barb as-viewed. Linear includes live + recorded playback. Reach criteria 15+ consecutive mins.

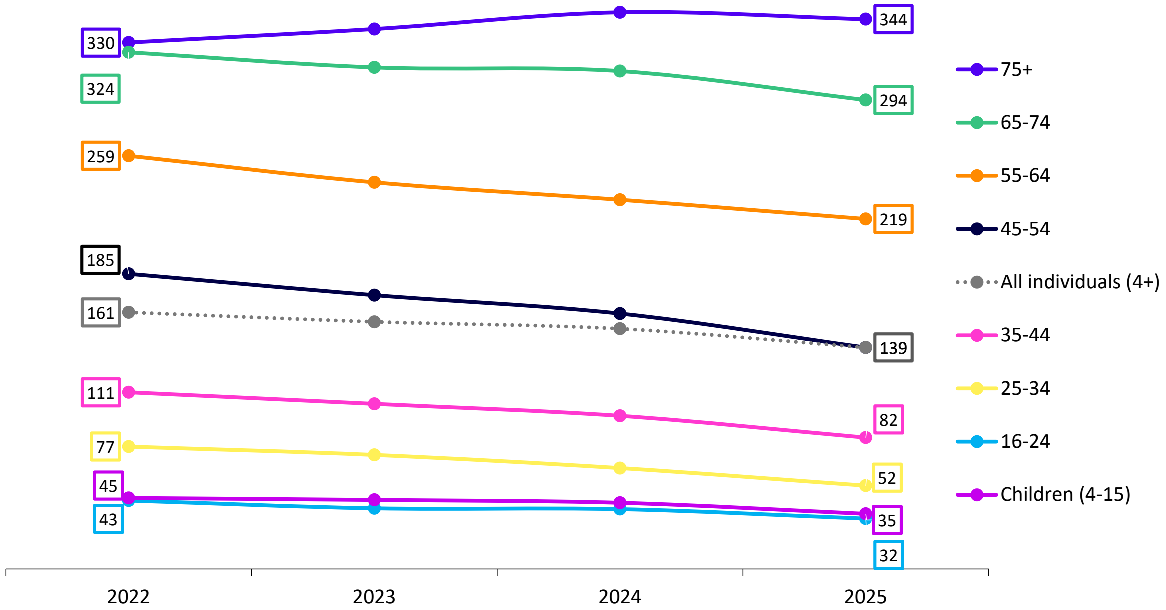
BVoD has seen growth, with weekly reach rising to 46% in 2025 following consistent increases since 2022 and was up just over one percentage point from 2024 with all individuals aged 4+. While take-up varied by age, it peaked among 55-64-year-olds at 57%, broadly reflecting the age profile of linear TV. Older adults aged 65-74 and those aged 75+ saw the fastest growth in BVoD reach – up four percentage points in 2025 from 2024, while young adults 16-24 saw a small decline of 0.5

percentage points. This suggests that BVoD is successfully extending the appeal of linear TV brands into on-demand environments, engaging both younger viewers and reinforcing use among older, broadcast-oriented audiences.

Linear TV declines drove lower broadcaster TV viewing across audiences

The decline in broadcaster TV viewing was observed across all demographic groups, with even over-74s recording a fall in viewing in 2025, although this was higher than both the 2022 and 2023 figures. Adults aged 25-34 and children aged 4-15 had the largest decline, falling 17% year-on-year, followed closely by 16-24 year-olds, down 16%. However, the scale of the year-on-year decline was partly influenced by differences in the sports calendar, with major sporting events (Paris Olympics, men's European Football Championships) in 2024 contributing to higher broadcaster viewing levels.

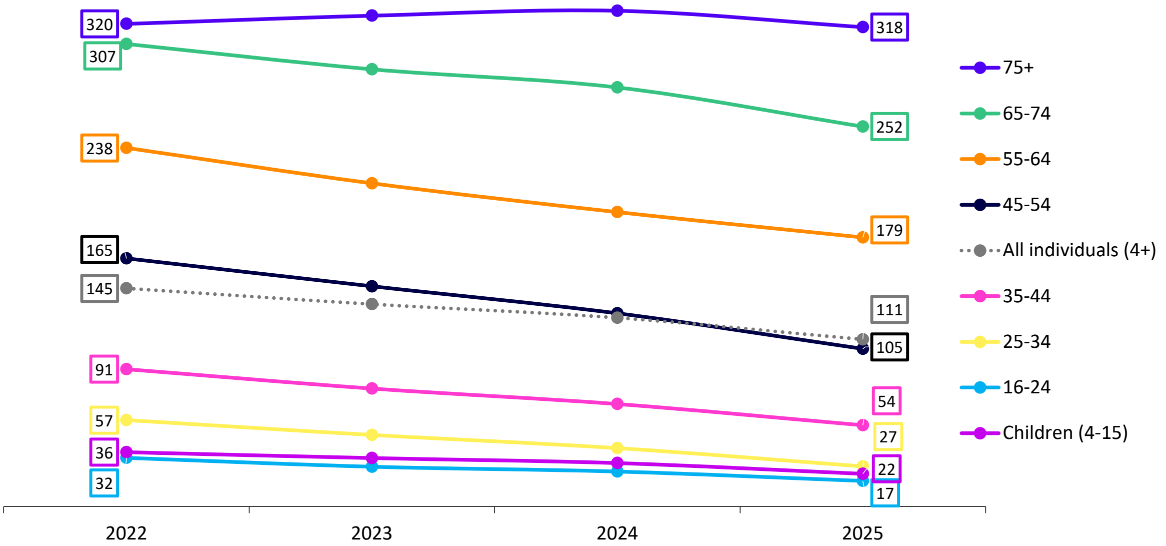
Figure 18: Average daily minutes of broadcaster TV viewing, by age: 2022-2025



Source: Barb as-viewed. All devices. Live + recorded playback and BVoD.

The decline was driven by linear TV viewing falling across all demographics, with the largest falls among the under 35s. Of this group, adults aged 25-34 saw the biggest drop, with viewing down 31% year-on-year, while adults aged 75+ saw viewing fall just 3%. Although this reflects the ongoing trend of younger audiences moving away from traditional broadcast viewing, some of the year-on-year decline is likely amplified by differences in major sports programming, with high viewing to the Paris Olympics and wen's European Football Championships in 2024. Adults aged 75+ continued to watch the most linear TV, averaging 5 hours 18 minutes per day, while children and young adults aged 16-24 watched the least, at just 22 minutes per day.

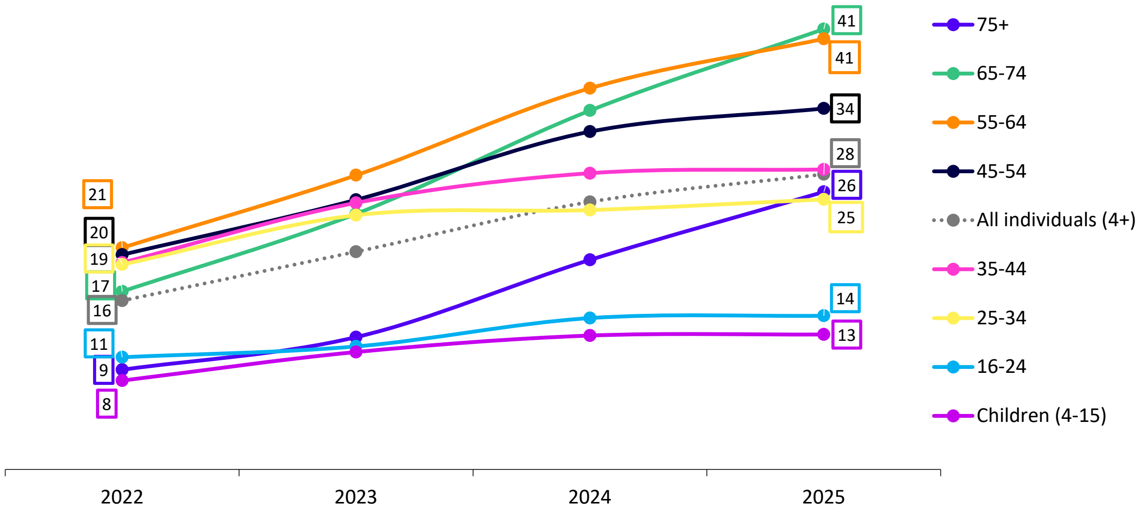
Figure 19: Average daily minutes of linear TV viewing, by age: 2022-2025



Source: Barb as-viewed. All devices. Live + recorded playback.

While linear viewing declined, growth in BVoD viewing minutes was seen across age demographics. Older adults aged 55–64 and 65–74 watched the most, both averaging 41 minutes per day, while the oldest group (75+) saw the steepest increase in viewing, rising by 32% to 26 minutes. This indicates a broadening adoption of BVoD across the population, particularly among older audiences.

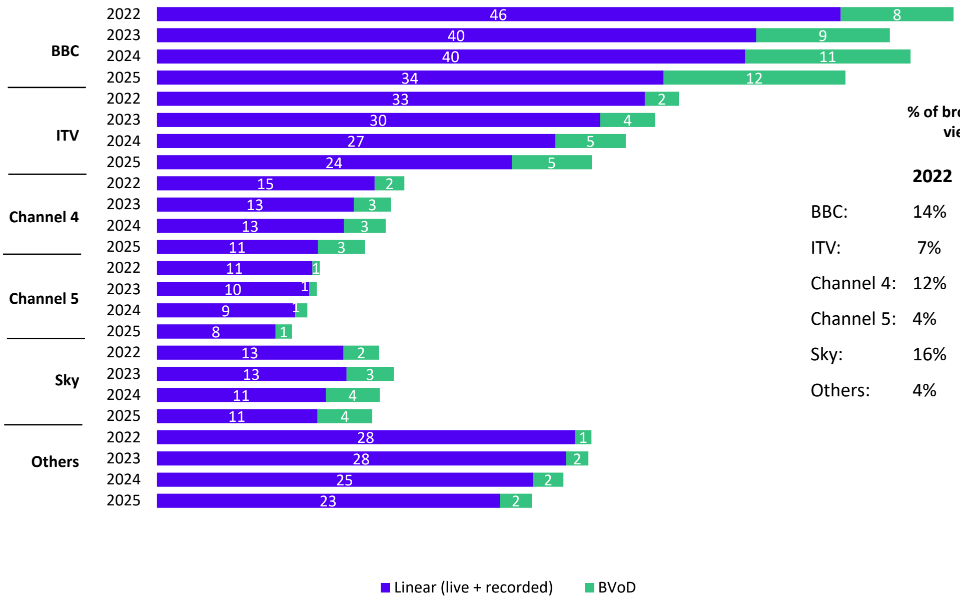
Figure 20: Average daily minutes of BVoD viewing, by age: 2022-2025



Source: Barb as viewed. All devices.

Broadcaster TV viewing continued to shift towards BVoD services in 2025, while linear minutes viewed on broadcast channels continued to decrease year-on-year, BVoD minutes for the main broadcasters held steady or showed a slight uplift. In 2025, 26% of BBC viewing was through BBC iPlayer. Overall, resulting from the decline in daily minutes watching linear TV, there was a decrease in viewing of each of the PSBs in 2025. The largest decreases between 2024 and 2025 were to the BBC and ITV (down nearly five minutes and three minutes respectively).

Figure 21: Average daily minutes viewed of linear and BVoD, by broadcaster, all individuals aged 4+: 2022-2025



% of broadcasters' content viewed on BVoD

	2022	2023	2024	2025
BBC:	14%	18%	22%	26%
ITV:	7%	11%	15%	18%
Channel 4:	12%	16%	18%	23%
Channel 5:	4%	5%	8%	12%
Sky:	16%	20%	24%	25%
Others:	4%	5%	7%	8%

Source: Barb as-viewed on TV sets and other devices using the home's WiFi network, all individuals (4+). BVoD includes all content watched via the on-demand services owned by each broadcaster including non-linear programming, as well as viewing of their content via other services like Sky Go/On-demand and Virgin Media Catch-up. Sky's BVoD figure includes viewing of Sky's content on its SVoD service, NOW, because Barb's measurement is unable to separate this from Sky Go/Sky TV On Demand.

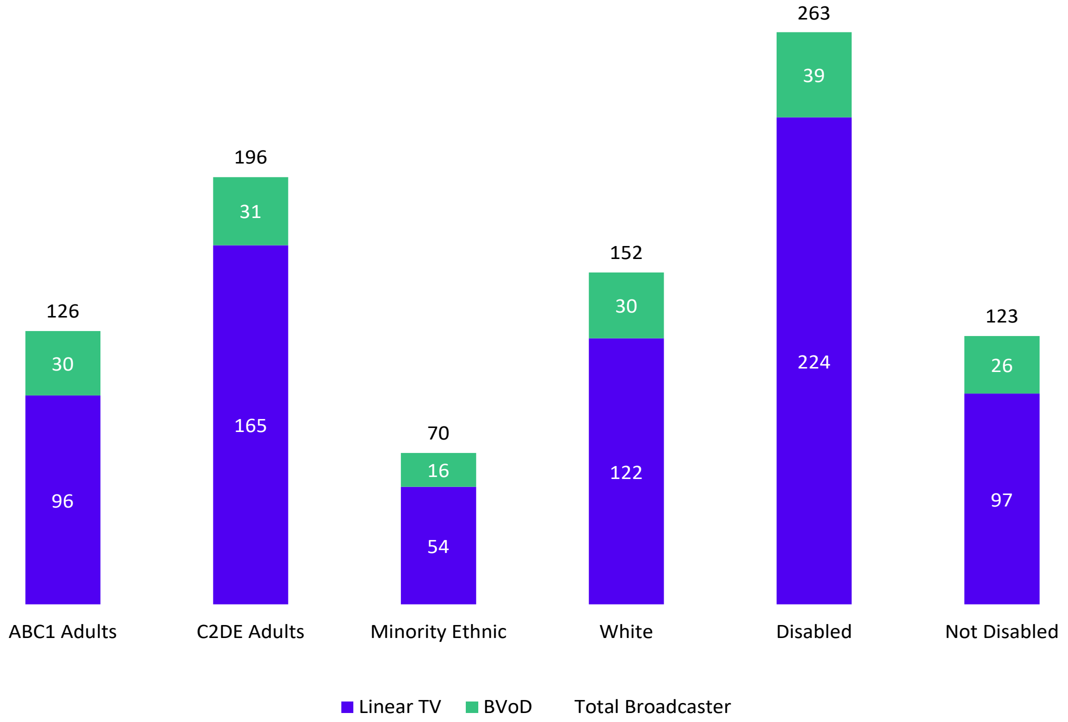
Broadcaster viewing patterns continued to vary by ethnicity and socioeconomic group

Minority ethnic audiences continued to watch a lot less broadcaster TV than White audiences, averaging 1 hour 10 minutes per day compared with 2 hours 33 minutes. Viewing among minority ethnic individuals also declined more sharply than among White individuals in 2025 (an 11% decrease from 2024 to 2025, compared with a 7% decrease among White viewers). The decline across both groups was driven entirely by reduced viewing of linear. Among minority ethnic audiences, viewing decreased by 10 minutes, while BVoD viewing increased by over one minute between 2024 and 2025.

Adults from C2DE household[15] continued to watch more broadcaster TV than those in ABC1 households,[16] averaging 3 hours 16 minutes per day compared with 2 hours 6 minutes for ABC1 adults – a gap of 1 hour 10 minutes in 2025. The overall decline in broadcaster viewing was entirely driven by reductions in live and recorded playback viewing. In contrast, BVoD viewing increased across both audience groups year-on-year, rising by 15% among C2DE adults to 31 minutes per person per day, and by 8% among ABC1 adults to 30 minutes per day. As a result, despite differences in broadcast TV viewing, both groups now spend almost the same amount of time watching BVoD.

[15] Adults in households classified as C2, D or E social group (skilled manual workers; semi- and unskilled workers; and those at the lowest levels of subsistence, including some pensioners and unemployed people). Social group is assigned based primarily on the occupation of the household's chief income earner.
[16] Adults in households classified as A, B or C1 social group (higher/intermediate managerial, administrative and professional occupations; and supervisory, clerical and junior managerial, administrative and professional occupations).

Figure 22: Average daily minutes of broadcast TV viewing by, selected demographics: 2025



Source: Barb as-viewed. All devices.

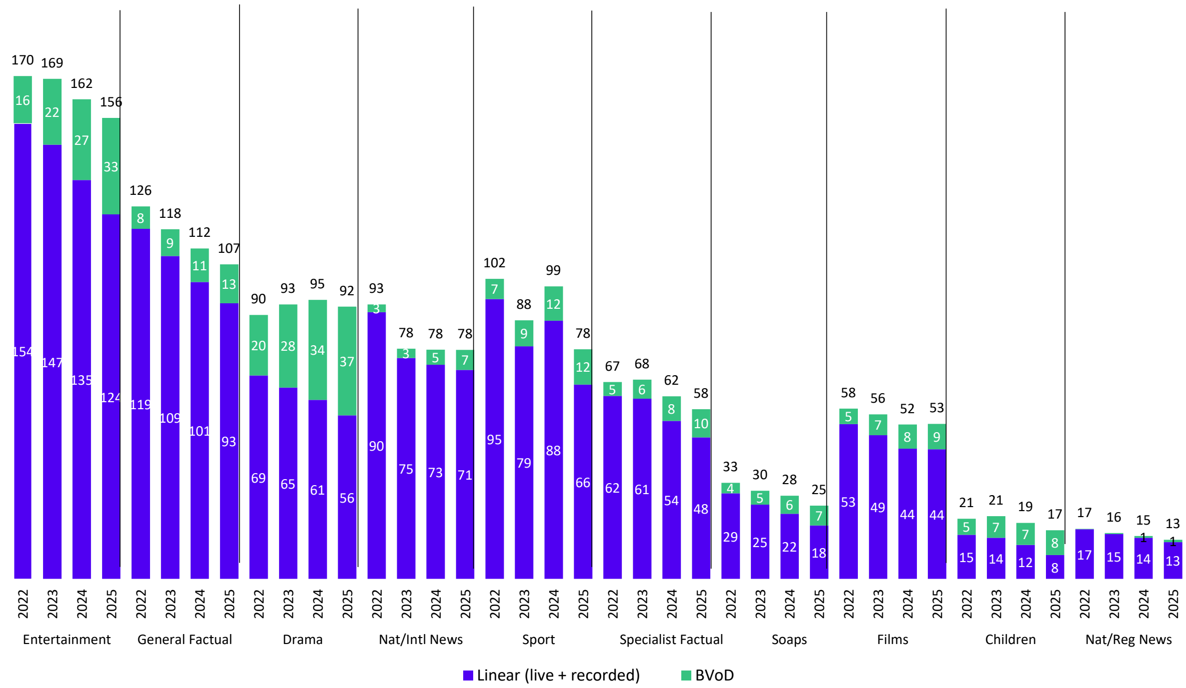
Drama and children's content lead the shift to on-demand viewing

As viewing habits continue to evolve, audiences are increasingly supplementing linear TV viewing with BVoD services. Between 2024 and 2025, total broadcaster viewing hours per person declined across most genres, with sport experiencing the largest fall (declining by 21 hours year on year), followed by entertainment (6 hours) and general factual (5 hours) However, this largely reflects the fact that in 2024, there was an exceptionally strong schedule of major sporting events. Despite lower overall viewing, BVoD consumption of sport also increased year on year, mirroring the broader trend seen across all genres. National/international news was the only genre to remain stable year-on-year, while film saw a slight increase. Importantly, the broadcaster TV declines were driven entirely by reductions in linear TV viewing, while all genres remained stable or recorded growth in BVoD consumption, highlighting the continued shift towards on-demand viewing.

Drama provides a clear example of this trend. Although total drama viewing declined by two hours per person, BVoD viewing increased by three hours, with 40% of all broadcaster drama viewing via BVoD in 2025. This indicates a growing preference for on-demand viewing in this genre. This comes amid increasing competition from SVoD services, where drama was also the main driver of viewing growth in 2025 (see Figure 30).

Viewing to the children's genre also continued to shift towards on-demand platforms. BVoD viewing increased by one hour year on year, resulting in an equal split between BVoD and linear viewing in 2025.

Figure 23: Total linear and BVoD viewing of all broadcasters by genre [total hours per person per year], all individuals aged 4+: 2022-2025



Source: Barb as-viewed on TV sets and other devices using the home's WiFi network, all individuals (4+). 'Linear' refers to viewing across all the broadcast channels (whether watched live or on catch-up). 'BVoD' includes all content watched via the on-demand services owned by each broadcaster including non-linear programming. Year-on-year changes in viewing of sport are dependent on the sporting events in each year. Figures are rounded to the nearest whole hour, so some smaller differences are not apparent.

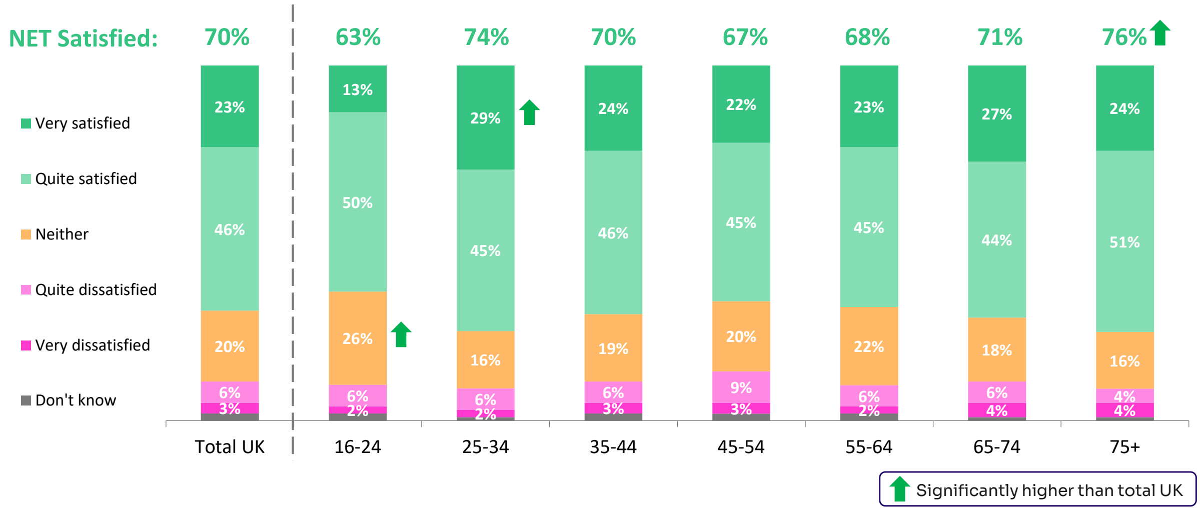
Audience attitudes towards PSBs and BVoD

Seven in ten viewers are satisfied with PSBs overall

According to Ofcom's Adults' PSM Tracker 2025/26,[17] seven in ten (70%) PSB viewers[18] said they were satisfied with the PSBs combined, 9% said they were dissatisfied and 20% were neither satisfied nor dissatisfied. This is broadly in line with last year's findings.[19] Those aged 75+ were more likely to be satisfied compared to all viewers aged 16+ (76% vs 70%), while those aged 16-24 were less likely to be satisfied (63%). Those in AB households were more likely to be satisfied than those in DE households (76% vs 63%).

[17] In 2025, following a review of the PSM Tracker and the BBC Performance Tracker, Ofcom combined them into one survey – the new Adults' PSM Tracker. As a result, changes were made to the methodology and questionnaire. For further information, please see the Technical Report for details of the new tracker.
[18] In the Adults' PSM Tracker 'PSB viewers' are defined as those who have watched any PSB channel/service in the past six months.
[19] Trends are indicative only due to changes in methodology.

Figure 24: Satisfaction with PSBs overall and by age: 2025/26



Source: Ofcom Adults' PSM Tracker 2025/26. Main Survey. Question C15. And now, if you think about ALL the public service broadcasters combined - in other words, the BBC, ITV (ENGLAND) STV/ ITV (SCOTLAND) ITV Cymru Wales/ ITV (WALES) UTV/ ITV (NORTHERN IRELAND), Channel 4, Channel 5, and S4C... How satisfied are you that combined they provide the different areas asked about in the previous questions? Base: All who have watched any PSB channels or on-demand services in the past six months (4684), 16-24 (482), 25-34 (809), 35-44 (808), 45-54 (664), 55-64 (693), 65-74 (644) and 75+ (584).

Among viewers of each channel, around seven in ten said they were satisfied with ITV1 (72%), BBC One (71%) and Channel 4 (70%).[20] Around two-thirds said the same for BBC Two (66%) and Channel 5 (65%). Viewers aged 65+ were more likely than viewers overall to say they were satisfied with BBC One and ITV1, while viewers aged 16-24 were less likely to be satisfied with these two channels and BBC Two. Women were more likely than men to say they were satisfied with ITV1 (75% vs 69%).

Focusing on the PSBs' BVoD services, 79% of BBC iPlayer viewers said they were satisfied with the streaming service. Around three-quarters of viewers said the same for ITVX or ITVX Premium (77%), Channel 4 or Channel 4+ streaming service (76%) and Channel 5's streaming service (75%). There are few demographic differences in satisfaction with BVoD services, but as with ITV1, women who use ITVX or ITVX Premium were more likely than men to be satisfied with the service (80% vs 74%), and users of BBC iPlayer aged 75+ were more likely than all users to be satisfied with the service (86% vs 79%).

Most children 'like' BBC, ITV and Channel 4 TV channels

In 2025, Ofcom introduced the Children's PSM Tracker which aligns with the Adults' PSM Tracker.[21] In this survey, we ask children aged 8-16 and the parents/guardians of younger children (aged 3-7) answering on their behalf[22] whether they 'like' various TV channels. Among viewers of these channels, over six in ten (63%) children said they liked BBC TV channels while 57% said they liked ITV

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[20] When asking respondents to say how satisfied they are with each PSB, we ask them to rate on a scale of 1 to 10, where 1 means extremely dissatisfied and 10 means extremely satisfied. In previous iterations of the PSM Tracker, respondents rated individual PSBs on a 5-point scale. The change in format of this question, alongside the methodology changes, means time series is not available, even indicatively.
[21] For further information on the new Children's PSM Tracker, see the Technical Report here.
[22] The sample for Ofcom's Children's PSM Tracker is children aged 3-16. For children aged 3-7 their parents/guardians answer the questions on their behalf while children aged 8-16 answer the questions themselves. Where we discuss the responses of children aged 3-16 throughout this report, we are referring to the answers of both the older children themselves (8+) and the parents/guardians of younger children (3-7).

TV channels and 55% liked Channel 4 TV channels. Around half (49%) said they liked Channel 5 TV channels. Looking at differences by age, children aged 3-7 who watch Channel 4 and Channel 5 TV channels were less likely than *all* children who watch to say they liked them. There were no differences by age for ITV and BBC TV channels. Children in ABC1 households were more likely than those in C2DE households to say they liked BBC and Channel 5 TV channels.

Around two-thirds (65%) of children who use BBC iPlayer said they liked it, compared to 58% of users of ITVX and 55% who used the Channel 4 streaming service (55%). Around two-fifths (41%) of children said they liked the Channel 5 streaming service.

PSBs continue to deliver a wide range of programmes made for UK audiences

The Adults' PSM Tracker asks PSB viewers how 'well'[23] PSBs overall deliver a range of features of programming. PSBs overall were seen to deliver well for most features; in particular, for *'a wide range of different types of programmes and content'* (73%), *'programmes and content made for UK audiences'* (72%) and *'high quality and creative programmes and content'* (72%). The lowest rating was for '*programmes and content which reflects the lives of people like me'* (62%). Those in AB households were more likely than all viewers to rate PSBs positively for most features. There was little difference by age and gender.

When looking at the delivery of these features by individual PSBs, across TV channels and their streaming services,[24] we see some variation. However, '*programmes and content which features the region/nation of the UK I live in'* and '*programmes and content which reflects the lives of people like me*' are two of the lowest-rated features across PSBs.

[23] The Ofcom Adults' PSM Tracker uses questions asking respondents to say how 'well' or 'badly' different features of programming are being provided, using a 1-10 scale where 1 means extremely badly and 10 means extremely well. When referring to 'well' throughout this report, it is a NET of scores 7 to 10.
[24] When asking respondents to rate PSBs for each feature, we ask them to think about their TV channels and BVoD service combined (e.g. BBC TV channels *and* BBC iPlayer). In previous iterations of the PSM Tracker, respondents rated PSB TV channels separately to their BVoD service, so each PSB effectively had two different ratings for each feature. The change in format of this question, alongside the methodology changes, means that time series data is not available, even indicatively.

Figure 25: Perceptions of PSBs (TV channels and BVoD)

	BBC	ITV/ITV Cymru Wales/STV/UTV	Channel 4	Channel 5
Programmes and content made for UK audiences	73%	72%	67%	62%
News and information to help people understand what is going on in the world	69%	66%	60%	56%
A wide range of different types of programmes and content	69%	70%	67%	63%
High quality and creative programmes and content	69%	70%	67%	62%
Programmes and content which feature people from different backgrounds	68%	68%	67%	59%
Trusted and accurate news	67%	66%	60%	55%
Programmes and content that bring the nation together for a shared viewing experience	65%	65%	59%	54%
Programmes and content that help encourage people to learn about new things	65%	59%	59%	52%
Programmes and content which feature the region/nation of the UK I live in	62%	61%	55%	52%
Programmes and content which reflect the lives of people like me	58%	61%	57%	53%

Source: Ofcom Adult's PSM Tracker 2025/26. Question NC1-6. Thinking of [broadcaster] overall… How well or badly does [broadcaster] provide… Base: Those who have watched … in last six months: BBC TV (4293), ITV/STV/ITV Cymru Wales/UTV (3890), Channel 4 (3247) and Channel 5 (2720).

Our Children's PSM Tracker found that around seven in ten PSB viewers aged 3-16[25]agreed that PSB services combined provide *'high quality programmes they enjoy'* (72%), *'a wide range of programmes they enjoy'* (71%), '*programmes and content that helps them learn'* (71%) and '*programmes for children their age'* (70%). For all these features, children aged 3-7 were more likely than all children to agree while those aged 12-16 were less likely.

However, as with adults, there were some differences in opinion when children are asked to rate the PSBs individually. As shown in the table below, the BBC was rated highest across all aspects of delivery; most notably, three-quarters (75%) of children say that the BBC provides *'programmes and content that helps them learn'*.

[25] For children aged 3-7 parents/guardians answer on the child's behalf while children aged 8-16 answer the questions themselves.

Figure 26: Perception of PSBs (TV channels and BVoD) among children

	BBC	ITV/ ITV Cymru Wales /UTV/ STV	Channel 4	Channel 5
Programmes and content that help them/ me learn	75%	59%	54%	54%
High quality programmes they/ I enjoy	72%	63%	60%	58%
Programmes for children their/ my age	72%	62%	55%	55%
A wide range of programmes they/ I enjoy	68%	62%	57%	56%
News and information that helps them/ me to understand what is going on in the UK and the world	65%	56%	51%	51%
Programmes that show children that live in the same part of the country as them/ me	62%	56%	52%	51%

Source: Ofcom Children's PSM Tracker 2025/26. Question C8a-d. Now thinking just about [PSB NAME], how much do you agree or disagree it provides the following things for your child/ for you? Base: Those who use each service. BBC (4489), ITV/ UTV/ ITV Cymru Wales/ STV (4134), Channel 4 (3770), Channel 5 (3716).

Trusted and accurate news are considered the most important features of PSBs

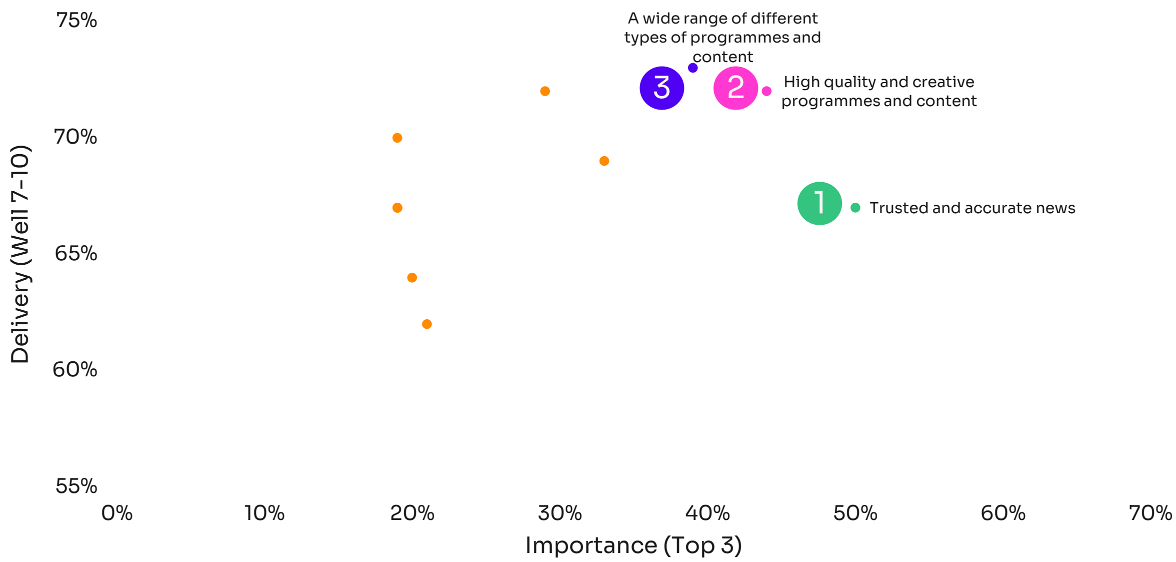
The Adults' PSM Tracker asks all adults to consider what they think are the three most important features of programming for PSBs to deliver for society overall. Half (50%) of all adults ranked *'trusted and accurate news'* in their top three, followed by *'high quality and creative programmes and content'* (44%) and *'a wide range of different types of programmes and content'* (39%). These findings are broadly similar to when this was last asked in the previous iteration of the PSM Tracker in 2023, where *'trusted and accurate UK news'* was also seen as the most important feature of PSB delivery.[26]

There are some variations by age; for example, those aged 65+ were more likely than all respondents to rate '*trusted and accurate news'* as one of the top three most important features for PSBs to deliver for society (63% vs 50%). Those aged 16-34 were more likely than all respondents to say the same for '*programmes and content that help and encourage people to learn new things*' (25% vs 19%), '*programmes and content that bring the nation together for a shared viewing experience*' (23% vs 19%) and '*programmes and content which feature people from different backgrounds'* (24% vs 19%).

We found that that the three most important features for PSBs according to all adults were generally seen by viewers to be delivered 'well' by PSBs overall, as shown in Figure 27 below.

[26] Trends are indicative due to changes in methodology.

Figure 27: Importance (all adults) and delivery (PSB viewers) of PSB features: 2025/26



Source: Ofcom Adults' PSM Tracker 2025/26. Main Survey. Question C14A-J. We now want you to think about what you feel is most important for public service broadcasters - in other words, the BBC, ITV (ENGLAND) STV/ ITV (SCOTLAND) ITV Cymru Wales/ ITV (WALES) UTV/ ITV (NORTHERN IRELAND), Channel 4, Channel 5, and S4C - to deliver for society overall, so for everyone in the UK. Base: All respondents (5248). And question C13A-G. Thinking about public service broadcasters combined - so the BBC, ITV (ENGLAND) STV/ ITV (SCOTLAND) ITV Cymru Wales/ ITV (WALES) UTV/ ITV (NORTHERN IRELAND), Channel 4, Channel 5, and S4C... How well or badly do the public service broadcasters combined provide. Base: All who have watched any PSB channels or on-demand services in the last 6 months (4684). The orange dots represent the other PSB features.

Similarly in the Children's PSM Tracker, children aged 3-16 were asked to rate how important it is that PSBs deliver on each statement. The statements with the highest proportion of children rating them as important were *'high quality programmes they enjoy'* (75%), *'a wide range of programmes they enjoy'* (74%), *'programmes for children their age'* (73%) and *'programmes and content that helps them learn'* (73%). The statements most rated as important also had the highest proportion of children who said that PSBs delivered these features. Slightly fewer children said it is important for PSBs to provide '*news and information that help children understand what is going on in the UK and the world'* (64%) and '*programmes that show children that live in the same part of the country as them'* (61%).

Subscription and advertising video-on-demand services

SVoD subscribers increasingly shift to ad-funded tiers

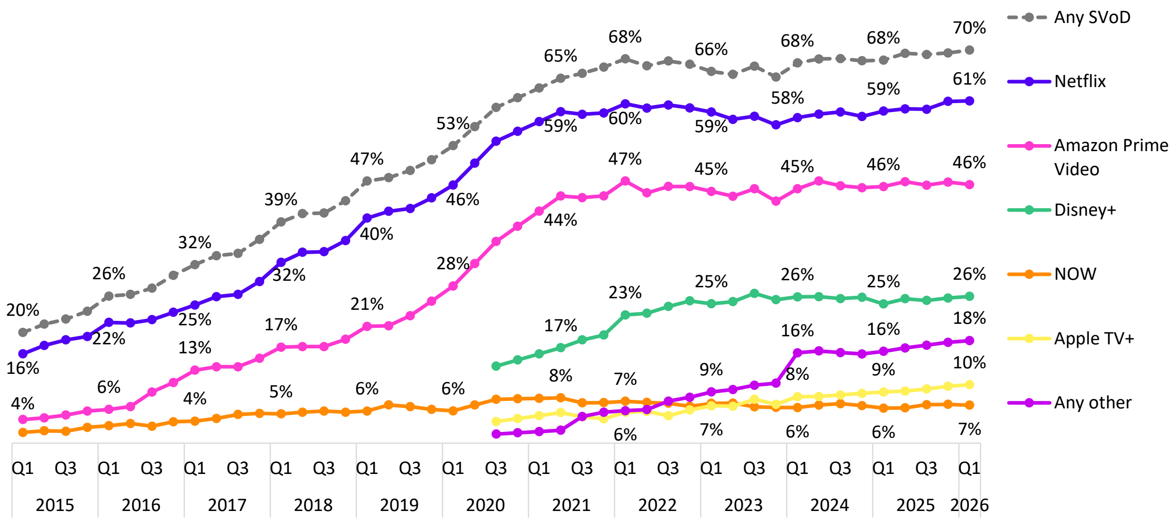
The proportion of UK households with an SVoD service in Q1 2026 (70%) continued to plateau and was only two percentage points higher than it was in 2021.[27] Take-up of the top three SVoD services has not changed significantly over the past two years. Netflix remains the most-subscribed-to service, present in 18.1 million (61%) UK households, followed by Amazon Prime Video in 13.7 million (46%) households and Disney+ in 7.8 million (26%).

[27] Barb Establishment Survey.

Over two-thirds (69%) of UK households subscribe to at least one of Netflix, Amazon Prime Video or Disney+, and 20% to all three. UK viewers now have many different on-demand services to choose from, and 18% of households subscribe to at least one service outside the top five.

Most of the largest SVoD services now have ad-funded tiers, with lower prices than the service without ads. The proportion of Netflix subscribers using its 'Standard with Ads' subscription tier increased sharply to 43% in Q1 2026, compared to 31% in Q1 2024. Disney+ subscribers taking up its ad-supported tier also increased significantly, to 43% of subscribers in Q1 2026 versus 27% in Q1 2025.[28] Ofcom's VoD Survey shows the reported reach of a long list of online video services, not all of which are asked about in the Barb Establishment Survey, but which can be seen in our Communications Market Report.

Figure 28: SVoD penetration of UK households, by provider: Q1 2015 to Q1 2026



Source: Barb Establishment Survey. Includes paid-for subscriptions and free trials. No data for Q2 2020, Q4 2020, and Q1 2021 due to the suspension of fieldwork during the Covid-19 pandemic. 'Any other' includes Hayu, Discovery+, Paramount+ and BritBox.

Netflix accounts for over half of all SVoD viewing, with viewing among older audiences increasing

Netflix remains the most-watched SVoD service, averaging 24 minutes per individual per day in 2025 and accounting for more than half of total SVoD/AVoD[29] viewing time for all age groups. Disney+, while in third place in terms of household take-up of these services, ranked second equal in terms of overall daily viewing with Amazon Prime Video (an average of 8 minutes across all individuals).

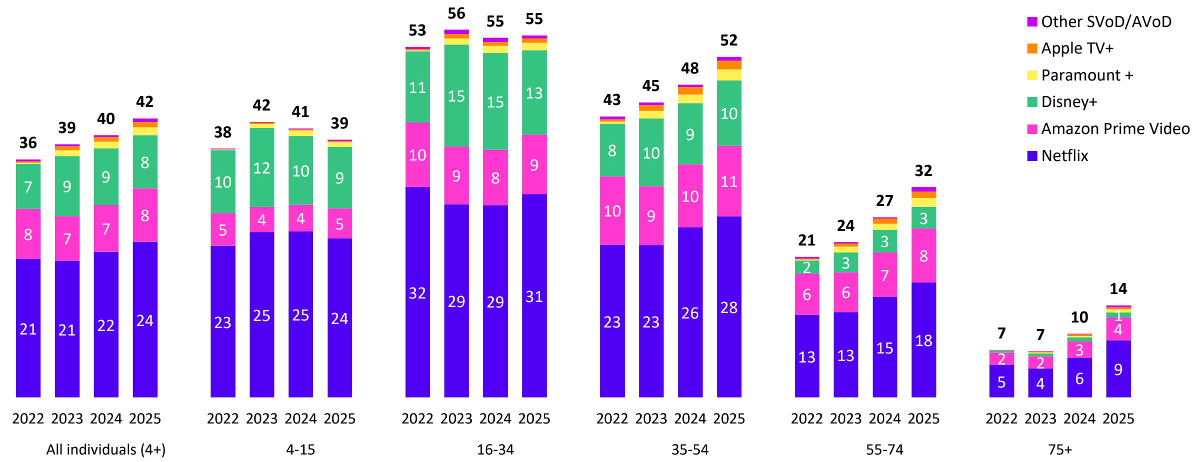
Viewers aged 16-34 continue to watch the most SVoD content, compared to other age groups, averaging 55 minutes a day across 2025, with Netflix accounting 31 minutes of this viewing. However, viewers aged 55-74 have provided the strongest growth in SVoD viewing in recent years,

[28] Barb Establishment Survey, proportion is share of all subscribers excluding those who responded 'don't know' when asked if they had the ad-tier.

[29] SVoD/AVoD includes both subscription video-on-demand services (where subscribers have access to specific programming for a regularly charged fee) and advertiser-funded video-on-demand services. Barb combines these so services such as Netflix, Amazon, Pluto TV, and Tubi are included under the same definition.

from an average of 21 minutes a day in 2022 to 32 minutes in 2025. In contrast, overall viewing of SVoD among children 4-15 declined for the second year running, from 42 minutes in 2023 to 39 minutes in 2025. Unsurprisingly, by virtue of its brand and the content on its platform, Disney+ skews younger, accounting for 23% of children's SVoD/AVoD viewing time.

Figure 29: Average daily minutes viewed of SVoD/AVoD services per person, by age: 2022-2025



Source: Barb as-viewed on TV sets and other devices using the home's WiFi network.

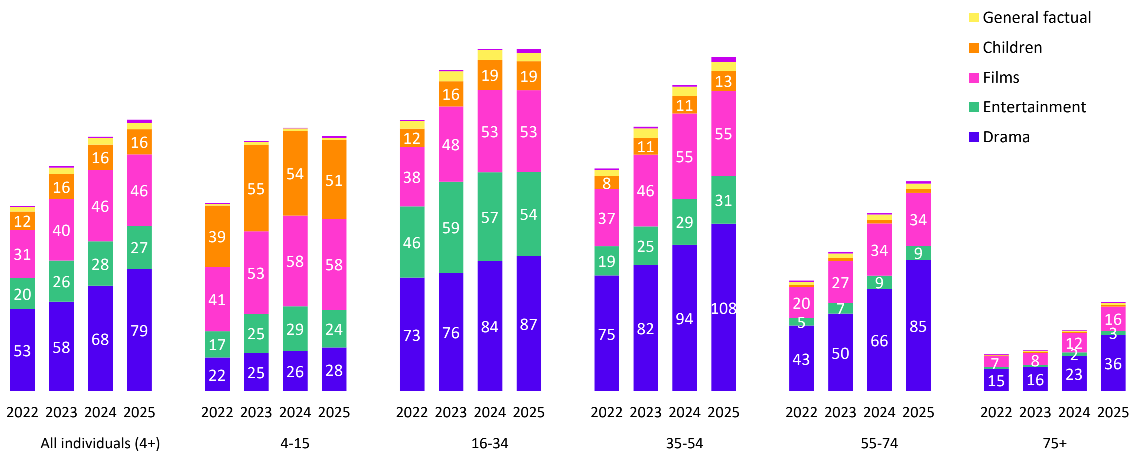
Drama drives continued growth in SVoD viewing

Viewing of SVoD services continued to grow in 2025, driven primarily by the increased consumption of drama content. Among all viewers, total time spent watching drama on SVoD services rose by 11 hours year-on-year per person, while viewing of most other genres remained broadly stable.

Growth in drama viewing was particularly pronounced among older audiences. Those aged 35 and over recorded larger increases than younger age groups, with viewers aged 55-74 showing the greatest growth, watching 19 additional hours of drama content on SVoD services across 2025 compared with 2024.

In contrast, entertainment viewing on SVoD services declined among younger audiences. Children watched five fewer hours of entertainment content in 2025 than in 2024, while viewing among 16-34-year-olds fell by three hours. In contrast to the decline seen in entertainment, drama continued to underpin overall growth in SVoD viewing, reflecting its importance in attracting and retaining audiences across age groups.

Figure 30: Total viewing of SVoDs/AVoDs by key genre [total hours per person per year], by age: 2022-2025



Source: Barb as-viewed. TV sets only.

Viewers are satisfied with SVoD services

According to Ofcom's Adults' PSM Tracker, just under nine in ten (88%) viewers were satisfied with Netflix, followed by Disney+ and Sky On Demand or Sky Go (both 86%), NOW (84%) and Amazon Prime Video (83%). There was little variation by age, gender and socioeconomic groups when looking at the proportion of viewers who said they were satisfied with SVoD services.

The Children's PSM Tracker shows that just over nine in ten children (aged 3-16) who watch each service said they 'liked' Netflix (93%) and Disney+ (92%) followed by around four in five (81%) who said they liked Amazon Prime Video. Just under seven in ten said they liked Apple TV+ (69%), Paramount+ (69%), Sky On Demand or Sky Go or Sky Kids (68%) and around six in ten (61%) said they liked NOW.

According to Ofcom's VoD Survey, 65% of Disney+ users agreed that *'Video on demand services are the main way I watch programmes and films',* with 57% of Netflix users and 58% of Amazon Prime users saying the same. Just under seven in ten Disney+, Amazon Prime Video and Netflix users (69%, 68% and 67% respectively) agreed that they would *'miss video on demand services if [they] no longer had access to them'.*

Most watched programmes and events

Four of the top five most-watched titles of 2025 were on streaming services

While viewing has fallen overall as it becomes more divided across different services and apps, global phenomena like Netflix's animated film *K-Pop Demon Hunters* shows how video platforms can still draw in huge audiences, averaging 24.4 million viewers[30] from its release in June until the end of the year on TV sets in the UK, and ranking as the number one title of 2025. Netflix also took the number two spot averaging 16 million viewers for the first episode of drama *Adolescence*.

Broadcasters once again accounted for half of the top ten highest-performing titles in 2025. Despite the entertainment genre seeing the biggest fall in viewing overall, BBC's *The Celebrity Traitors* was

[30] Average audience is a total cumulative average from release until the end of the year.

the most-watched broadcast title of 2025, averaging 14.9 million viewers for its finale across BBC One and BBC iPlayer. This is explored more later in this section. Celebrity formats clearly still retain their cultural influence with ITV's *I'm a Celebrity… Get Me Out of Here!* also ranking as one of the strongest PSB titles of the year.

Family content remains a key driver for SVoD viewing, with *Moana 2* on Disney+ and *The Super Mario Bros Movie* on Netflix ranking among the top ten and reinforcing the importance of family co-viewing[31] content in service propositions.

Figure 31: Top ten most-watched programmes/films (highest-performing episode per title) on TV sets, all individuals aged 4+: 2025

Rank	Title	Genre	Broadcaster/ Service	Episode	Audience (millions)
1	KPop Demon Hunters	Films	Netflix	Film (2025)	24.4
2	Adolescence	Drama	Netflix	Series 1, Episode 1	16.0
3	The Celebrity Traitors	Entertainment	BBC	Series 1, Episode 9	14.8
4	The Thursday Murder Club	Films	Netflix	Film (2025)	12.1
5	Moana 2	Films	Disney+	Film (2024)	11.3
6	The Traitors	Entertainment	BBC	Series 3, Episode 1	10.9
7	The Super Mario Bros. Movie	Films	Netflix	Film (2023)	10.7
8	Wallace & Gromit: Vengeance Most Fowl (2024)	Films	BBC	Film (2024)	10.2
9	I'm a Celebrity... Get Me Out of Here!	Entertainment	ITV/STV	Series 25, Episode 1	9.9
10	Gavin & Stacey: A Fond Farewell	Documentaries	BBC	2025	9.7

Source: Barb, as-viewed, all individuals aged 4+. TV sets only. Highest-performing episode per title based on total cumulative viewing across the whole year. The broadcaster figures include live viewing, recorded playback and BVoD.

The BBC accounted for eight of the top ten most-watched titles of Q1 2026

The BBC's *The Traitors* was the most-watched show of the first quarter of 2026, watched by 13 million viewers across the period. The BBC led the top ten with eight titles, half of which were dramas. Entertainment accounted for four titles, including official companion series and visualised podcast *The Traitors: Uncloaked* which averaged 8 million viewers for its finale. New comedy-drama *Small Prophets* ranked number four, also averaging 8 million. Two Netflix titles made the top ten; the premiere of the Harlan Coben drama *Run Away* (7.4 million) which ranked number five, followed closely by the finale of the final season of *Stranger Things* (7.3 million) at number six.

[31] Where two or more members of the same household watch the same television or video content together at the same time, whether on a TV set or another device.

Figure 32: Top ten most-watched programmes/films (highest-performing episode): Q1 2026

Rank	Title	Genre	Broadcaster/ Service	Episode	Audience (millions)
1	The Traitors	Entertainment	BBC	Series 4, Episode 1	13.0
2	The Night Manager	Drama	BBC	Series 2, Episode 1	9.5
3	The Traitors: Uncloaked	Entertainment	BBC	Series 4, Episode 12	8.0
4	Small Prophets	Entertainment	BBC	Series 1, Episode 1	8.0
5	Run Away	Drama	Netflix	Series 1, Episode 1	7.4
6	Stranger Things	Drama	Netflix	Series 5, Episode 8	7.3
7	Call the Midwife	Drama	BBC	Series 15, Episode 1	7.2
8	Silent Witness	Drama	BBC	Series 29, Episode 1	7.0
9	Death in Paradise	Drama	BBC	Series 15, Episode 1	6.8
10	Wild London	Documentaries	BBC	Series 2026	6.7

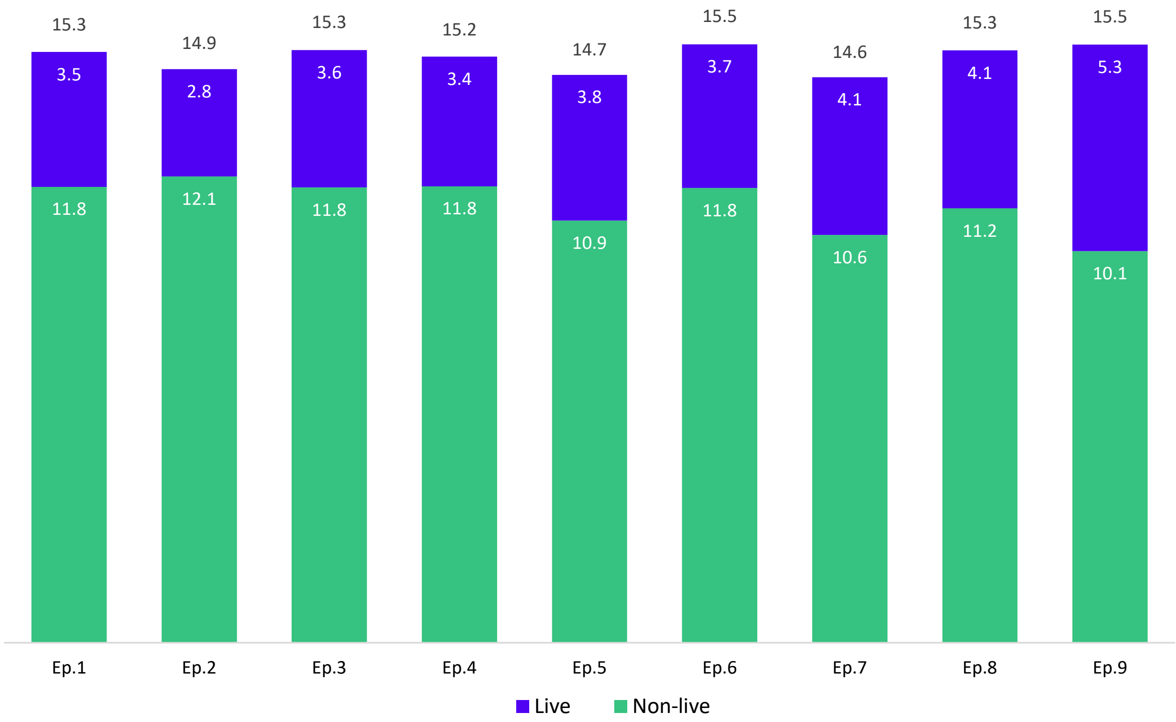
Source: Barb, as-viewed, all individuals aged 4+. TV sets only Total cumulative average viewing across the whole quarter. The broadcaster figures include live viewing, recorded playback and BVoD.

The Celebrity Traitors highlights how event-led programming can still drive engagement

The Celebrity Traitors proved a hit for BBC when it launched in October 2025, following three successful seasons of the original series. While total audience figures remained consistent across the series, live viewing[32] grew by 53% for the finale compared to the premiere, highlighting how event-led programming can still drive strong live engagement within an increasingly on-demand viewing landscape. Although time-shifted viewing still accounts for the bulk of viewing, this demonstrates how certain high-engagement formats retain the ability to cut through and attract audiences in real time. The use of cliffhangers, ongoing social discussion and audience speculation helped to encourage live consumption, creating moments of shared, timely viewing. Live viewing made up 23% of total viewing for the premiere across BBC One and BBC iPlayer, increasing to 35% for the finale, which delivered the strongest live performance of the series. Much of the remaining non-live viewing still took place on the day of broadcast, rising from 24% for the premiere to 61% for the finale. This trend was especially evident among 16-34s, where live viewing grew from 8% to 19%, alongside a notable increase in same-day catch-up from 22% to 60%, indicating that younger audiences may be particularly responsive to event-driven television moments, driven by social engagement.

[32] 'Live viewing' refers to people watching content at the same time as it is being broadcast on the TV channel.

Figure 33: ***The Celebrity Traitors*** **audience (millions), all individuals aged 4+**



Source: Barb, as-viewed, TV sets and other devices connected to the home WiFi. All individuals (4+). Cumulative audience size (average for any minute of the programme) across all channels, repeats, on-demand, recorded playback etc. Oct-Dec'25. 'Live' refers to viewing that took place live at the time episodes were broadcast on BBC and BBC iPlayer across the period. 'Non-live' refers to all other viewing including recorded and catch-up via BBC iPlayer or other catch-up services across the period.

Audiences for the FIFA World Cup 2026 highlights the strength of live sports for broadcast television

Live viewing continues to be central to sport events, with 85% of broadcast sport watched live in 2025. The FIFA World Cup 2026 drew huge live audiences to both BBC and ITV. England's opener against Croatia on 17 June peaked with 15.3 million viewers on ITV, watching on TV sets on the day of broadcast.[33] Scotland's group stage win against Morocco on 19 June had a peak of 6 million viewers across ITV1, STV, ITVX and STV Player, despite a later 11pm BST kick-off, the most-watched of Scotland's fixtures. England's win against Mexico in the Round of 16 had an even later 2am kick-off on 6 July (having been delayed an hour by weather conditions) but attracted a peak audience of 7.9 million on BBC One and BBC iPlayer, and an average 6.8 million viewers on TV sets on the day.[34] The match drew the largest TV audience ever for a live UK broadcast at that time according to the BBC. The England vs. Norway quarter final aired on ITV on 11 July, attracting a peak 16.8 million viewers on TV sets,[33] and a peak 18 million across all devices which at the time was the largest peak audience since the Euro 2024 final.

Audiences continued to grow throughout the tournament with the England vs. Argentina semi-final on 15 July watched by a peak 21.5 million viewers on TV sets on the day.[34] The BBC reported a peak audience of 24 million across BBC and BBC iPlayer on TVs and other devices for England's semi-final

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[33] Barb as-broadcast. Live+VOSDAL (viewed on same day as live). ITV1/STV and ITVX/STV Player on TV sets only.

[34] Barb as-broadcast. Live+VOSDAL (viewed on same day as live). BBC One and BBC iPlayer on TV sets only.

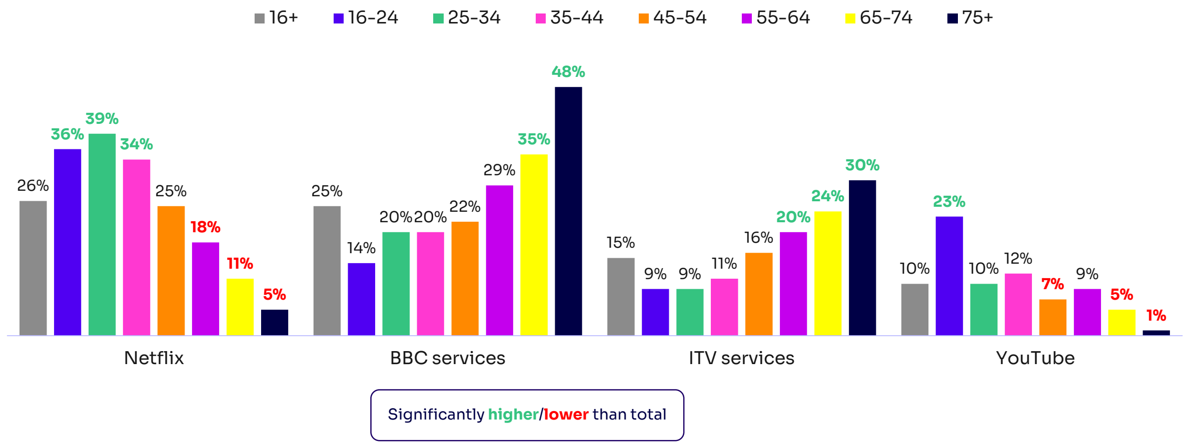
defeat, giving the BBC an 85% share of all TV viewing at that time. It was the most-watched live television event of the year across all broadcasters, attracting the largest live TV audience since the UEFA Euro 2020 Final between Italy and England in 2021. BBC Sport's FIFA World Cup 3D Experience, which allows audiences to view games from any angle and perspective[35] regardless of whether they were broadcast by the BBC or ITV, was used 192,000 times during the England v Argentina semi-final and 4.6 million times across the tournament according to the BBC on 16 July.

The Argentina vs. Spain final aired on Sunday 19 July at 8pm and averaged 15.2 million viewers across the BBC and ITV in homes on TV sets, with the BBC delivering 80% of the total audience. This year's final included a new addition to the tournament with a halftime show, marking the first time a major entertainment performance has been featured. The show, co-headlined by stars such as Shakira, Madonna, Justin Bieber and BTS, averaged 14.4 million viewers across BBC and ITV. [36]

Netflix and the BBC are where people say they would turn to first when seeking something to watch

We asked respondents, where they usually turn to first when thinking about what to watch. Around a quarter of all online adults say they usually turn first to Netflix (26%) with a similar amount saying a BBC service (25%) and 15% an ITV service.[37] There are clear differences by age when people are asked which service they would turn to first: those aged 16-24 are most likely to say Netflix, while those aged 55+ are most likely to choose a BBC service.

Figure 34: Where audiences say they would turn to first when thinking about what to watch



Source: Ofcom Adult's PSM Tracker 2025/26. Supplementary Survey. QA11. When thinking about what to watch, which one of these TV and video services do you usually turn to first? Base: All respondents (3050). See interactive report for more detail. Please note the chart is only showing the top 5, it is not showing data for Amazon Prime Video, ITVX or ITVX Premium, Disney+ or Sky On Demand or Sky Go.

[35] The system developed by Immersiv.io uses motion data captured during the games to map movement on to player models in an interactive immersive 3D environment.
[36] Barb as-broadcast. Live+VOSDAL (viewed on same day as live). ITV1/STV, ITVX/STV Player, BBC One and BBC iPlayer on TV sets only.
[37] Ofcom Adults' PSM Tracker 2025-6. Supplementary Survey.

Our Adults' PSM Tracker asks all respondents to choose which services they think best provide different types of content.[38] Figure 35 shows that overall, the BBC was most likely to be selected for nearly all the genres we asked about. Over three quarters (77%) of all online adults selected the BBC for 'News', followed by ITV (53%) and Channel 4 (44%). Two thirds (66%) selected the BBC for 'British drama', followed by ITV (56%) and Channel 4 (39%). PSBs performed well for most of the genres we asked about, although, perhaps unsurprisingly, Netflix, Amazon Prime Video and Disney+ were seen to best at providing USA content.

As shown in Figure 36, we also showed adults a range of features of programming that PSBs are typically associated with and asked them to select which broadcasters and services they thought the featuress applied to. Respondents were able to choose as many broadcasters and services as they liked. The BBC featured in the top three across all features. The BBC was ranked first for *'offer[ing] a range of points of view'* (44%),[39] as well as *'offer[ing] a different point of view from my own'* (36%).[40] Netflix was also associated with a majority of descriptions including *'high quality'* (57%)[41] and *'offer[ing] a wide range of different types of content'*[42] (57%) and 'content that is relevant to me' (53%).[43]

[38] Respondents were shown a list of broadcasters and streaming services including BBC, ITV (including ITV Cymru Wales/ STV/ UTV), Channel 4, Channel 5, S4C, BBC ALBA, Netflix, YouTube, Amazon Prime, Disney+ and NOW).
[39] Followed by ITV (35%) and Channel 4 (34%).
[40] Followed by Channel 4 (30%) and ITV (26%).
[41] Followed by BBC (50%) and ITV (41%)
[42] Followed by BBC (46%) and ITV (42%).
[43] Followed by BBC (48%) and ITV (43%).

Figure 35: Proportion of online adults associating a particular service with particular genres

	BBC	ITV	Channel 4	Netflix	Channel 5	YouTube	Amazon Prime Video	NOW	Disney+
News	**77%**	**53%**	**44%**	6%	29%	11%	4%	5%	4%
British drama	**66%**	**56%**	**39%**	24%	28%	10%	15%	8%	7%
Current affairs programmes	**64%**	**36%**	**34%**	9%	20%	11%	5%	5%	4%
Documentaries	**61%**	**35%**	**43%**	**35%**	29%	18%	18%	8%	12%
British comedy	**60%**	**43%**	**34%**	20%	18%	13%	11%	7%	6%
Live sport	**60%**	**46%**	20%	11%	12%	10%	**21%**	12%	5%
Science & nature	**57%**	**23%**	**24%**	16%	16%	17%	11%	6%	9%
Children's programmes	**49%**	**30%**	15%	29%	15%	22%	16%	7%	**42%**
Quizzes/ game shows	**49%**	**60%**	**32%**	10%	18%	10%	6%	6%	5%
Arts & music	**46%**	19%	**24%**	16%	13%	**28%**	11%	6%	8%
Religion	**34%**	**13%**	**12%**	8%	7%	10%	5%	3%	4%
USA drama	13%	14%	17%	**47%**	23%	13%	**30%**	13%	**25%**
USA comedy	12%	13%	20%	**42%**	18%	15%	**25%**	11%	**21%**

First place
Second place
Third place

Source: Ofcom Adults' PSM Tracker 2025/6. Supplementary Survey. Question C1A. For each type of programme, please select the logos of the broadcasters or services you think best provide that type of content. Please select as many or as few as you think that description applies to, or none. Base size: All respondents (3,050).

Figure 36: Proportion of online adults associating a particular service with the content descriptions

Statement	BBC	ITV	Channel 4	Channel 5	Netflix	YouTube	Amazon Prime Video	NOW	Disney+
High quality	**50%**	**41%**	33%	25%	**57%**	28%	36%	14%	31%
Offers creative content	**38%**	34%	35%	24%	**46%**	**40%**	28%	10%	23%
Innovative (introduces new ideas, programmes or formats)	**33%**	31%	**34%**	25%	**44%**	28%	26%	10%	19%
Offers a different point of view from my own	**35%**	**26%**	**30%**	21%	24%	23%	14%	7%	11%
Offers a range of points of view	**43%**	**35%**	**34%**	23%	27%	27%	16%	8%	11%
Is impartial (not favouring one side over another)	**33%**	**27%**	**25%**	16%	**27%**	20%	17%	8%	13%
Content that is relevant to me	**48%**	**43%**	37%	27%	**53%**	39%	33%	11%	26%
Takes risks with content	**24%**	18%	**35%**	21%	**32%**	**24%**	16%	7%	10%
Offers a wide range of different types of content	**45%**	**42%**	38%	29%	**57%**	40%	39%	17%	28%
Offers something unique that I can't find elsewhere	**27%**	22%	22%	16%	**45%**	**29%**	**27%**	9%	21%
Trustworthy	**45%**	**40%**	**33%**	25%	**40%**	28%	27%	12%	22%
Inspires me to try new activities, hobbies or interests	**25%**	20%	20%	14%	**23%**	**33%**	13%	6%	10%

First place
Second place
Third place

Source: Ofcom Adults' PSM Tracker 2025/6. Supplementary Survey. Question C1A. For each description, please select the logos of the broadcasters and services that you think each description applies to. Base size: All respondents (3,050).

While we didn't ask the same question in the children's tracker, we did ask children (aged 3-16) to rate SVoDs overall on a range of features. When thinking about SVoDs overall, most children agreed that they deliver across a range of features. This includes providing *'high quality programmes they enjoy'* (89%), *'a wide range of programmes they enjoy'* (88%) and *'programmes for children their age'* (88%). However, children were less likely to say that SVoDs overall provide *'programmes that show children that live in the same part of the country as them'* (64%) and *'news and information that help them to understand what is going on in the UK and the world'* (61%).

Video-sharing platforms

YouTube represents most of the viewing of VSPs in the home

Total in-home viewing[44] to all VSPs combined was unchanged year on year, with individuals watching an average of 51 minutes per day in 2025. However, total in-home viewing of all VSPs has grown from an average of 43 minutes per individual per day in 2022 to 51 minutes in 2025 across all devices, up by 18%.

Much of the in-home viewing of VSPs can be attributed to YouTube, which accounted for 80% of viewing of all VSPs in 2025. As shown in Figure 39, average viewing of YouTube across all devices in the home stood at 41 minutes per individual per day in 2025, up 24% from 33 minutes in 2022 and 18% year on year (39 minutes in 2024). As YouTube is an aggregator platform, content comes from a wide range of providers (including broadcasters), and we do not know what content this increase can be attributed to.

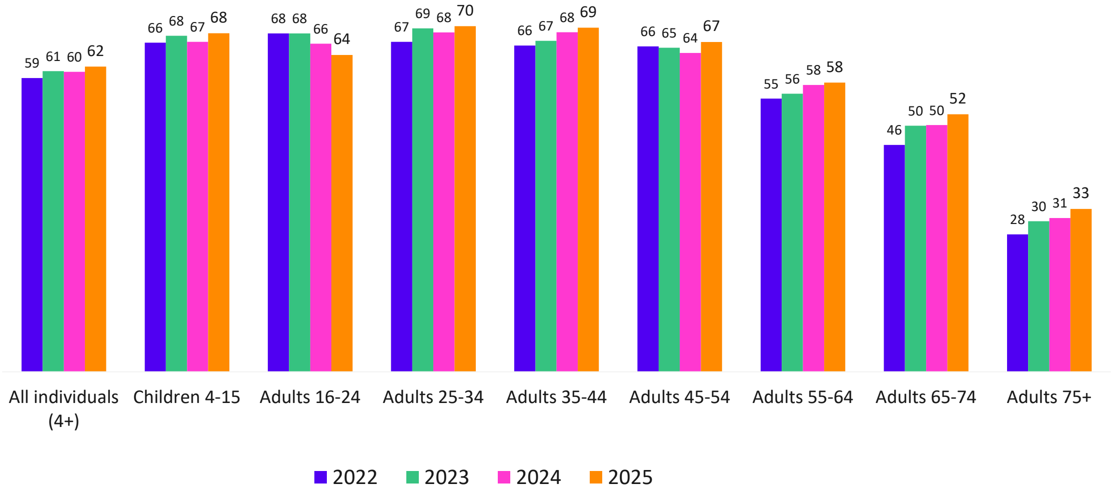
YouTube is now reaching a higher proportion of older adults in the home

YouTube has seen an increase in the proportion of individuals using its platform in the home, with 62% of all individuals watching three or more minutes of YouTube per week in-home, compared to 59% in 2022. YouTube's weekly reach is highest among adults aged 25-34, with 70% watching three or more minutes in 2025, followed by adults aged 35-44 (69%) and children (68%). Adults 16-24 were the only demographic to experience a decline in reach, for the second year running.

Although weekly reach is typically higher among younger audiences, the proportion of older people watching YouTube in the home has increased since 2022. Over half (52%) of adults aged 55-64 watched 3 or more minutes of YouTube in the home in 2025 per week, up from 46% in 2022. Adults aged 75 or over have also seen an increase in weekly reach, from 28% in 2022 to 33% in 2025.

[44] Barb as-viewed data captures YouTube consumption via the home's WiFi network; any viewing outside the home or viewing via mobile network is not included.

Figure 37: Weekly reach (%) of YouTube by age: 2022-2025



Source: Barb as-viewed, all devices connected to the home WiFi, reach 3+ consecutive minutes. The reach criteria used here (3+ minutes) is different to the criteria for broadcast and SVoD earlier in the report (15+ minutes) because the most popular type of content watched on YouTube is short form. Therefore, these figures for YouTube are not comparable to the earlier reach figures.

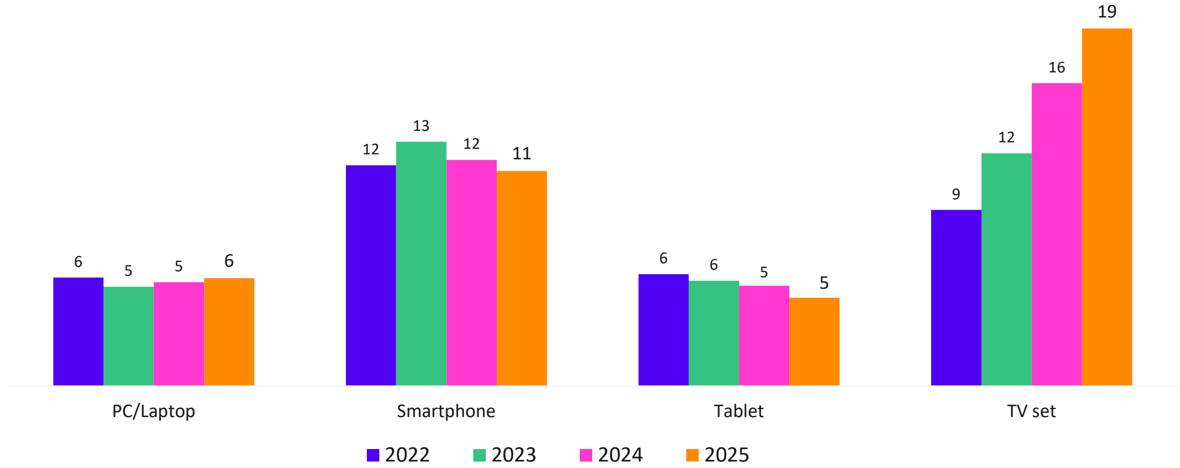
Barb data captures YouTube consumption via the home's WiFi network; any viewing outside the home or viewing via mobile networks is not included. Ofcom's VoD Survey asks audiences about their viewing habits both in and outside the home. When asked about where they watched YouTube, only 6% of viewers claimed to do so 'always or almost always at another location/not at home'.

Watching YouTube on the TV set continues to grow

Much of the growth of in-home viewing of YouTube since 2022 can be attributed to an increase in watching via the TV set, with the average time per day spent viewing YouTube on TV increasing by 111%, from 9 minutes in 2022 to 19 minutes in 2025. Over this period, the increase in viewing YouTube via a TV set among 16-34year-olds was significantly higher at 320% (from 5 minutes a day in 2022 to 21 minutes in 2025).

Across the whole of 2025, among all individuals, 46% of in-home YouTube viewing was via a TV set, up from 27% in 2022. The proportion of in-home viewing on the TV among 16-34 year-olds increased from 29% to 35% over the same timeframe, although children aged 4-15 are the age group skewing most towards the TV set for their YouTube consumption, at 54% in 2025, up from 35% in 2022. In contrast, in-home viewing of YouTube on a PC, smartphone or tablet has either declined or remained unchanged since 2022.

Figure 38: Average daily minutes of YouTube in-home viewing, by device, all individuals aged 4+: 2022-2025



Source: Barb as-viewed, all individuals 4+.

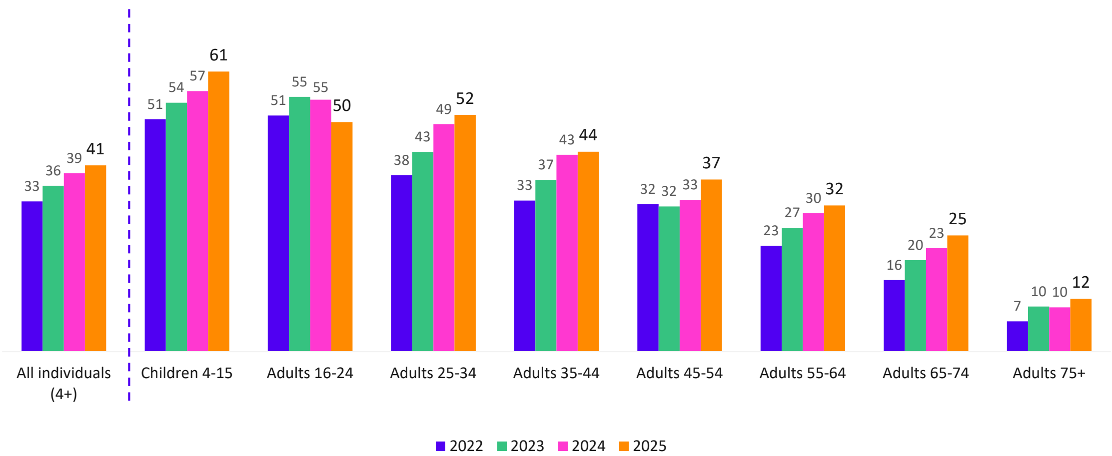
Children watch the most YouTube content

Total in-home use of YouTube grew from an average of 33 minutes per individual per day in 2022 to 41 minutes in 2025, up by 24%.

Children aged 4-15 watch the most YouTube in the home across all devices, averaging 61 minutes per day, followed by adults aged 25-34 (52 minutes) and adults aged 16-24 (50 minutes).

The average daily time spent viewing YouTube on all devices in the home for adults aged 55-64 grew from an average of 23 minutes per individual in 2022 to 32 minutes in 2025, up by 39%, while viewing among adults aged 65-75 has increased by 56%, from 16 minutes in 2022 to 25 minutes in 2025.

Figure 39: Average daily in-home viewing minutes per person to YouTube by age: 2022-25



Source: Barb as-viewed, all devices connected to the home WiFi.

A quarter of YouTube's audience account for 89% of its viewing on a TV set

As outlined in Figure 38 above, YouTube has seen significant growth in viewing on a TV set. However, when YouTube's TV audience is broken down into quarters, the first 75% make up only 11% of total viewing minutes. This illustrates that most of YouTube's TV audience only watch a small amount. Conversely, the remaining 25% of YouTube's audience make up 89% of all viewing of

YouTube on a TV set. However, it should be noted that this viewing pattern, where a small proportion of heavy viewers skews overall viewing, is not unique to YouTube and is also seen with broadcasters, albeit to a lesser extent. For example, as a comparison, the top 25% of viewers across all PSBs channels account for 73% of total viewing minutes.

How people are using YouTube

While we can draw on industry data sources for viewing figures of different forms and types of content on broadcast and video-on-demand services, the same granular information is not available for YouTube viewing. Therefore, we rely on reported viewing preferences from our own market research.

For adults and teens aged 13+, YouTube videos up to 15 minutes long continue to have the highest consumption followed by YouTube Shorts.[45] YouTube Shorts are most used by the 13-17 age group with seven in ten (70%) saying they have viewed YouTube Shorts in the past three months. YouTube videos longer than 15 minutes were viewed by just over two-thirds (67%) of 18-24-year-olds, as well as nearly six in ten (58%) 25-34-year-olds and half of 13-17s (50%), indicating that it is not only shorter content that young viewers are seeking.

Music is the most common type of content that people say they view on YouTube, with 49% of adults having viewed this in the past three months. *'How to*' videos were the second most popular (45%) and *'Funny videos'* were third (36%), with little change from last year. However, among 13-17-year-olds, the largest proportion claim to watch '*Funny videos'* (63%), with music coming second (59%), higher than last year by ten percentage points. *'Videos about video games or other people playing video games'* was the third most popular for this age group (39%) but was lower than last year by ten percentage points.[46]

Most adults and children who use YouTube are satisfied with the service

According to Ofcom's Adults' PSM Tracker, around nine in ten (89%) viewers of YouTube in the past six months say they are satisfied with the service, with no variation by age. Similarly, Ofcom's Children's PSM Tracker found that just over nine in ten (93%) children who use YouTube (including YouTube Kids) say that they like the service; again, there is no difference according to age of the child.

In the Adults' PSM Tracker we also asked all respondents to choose which broadcasters or streaming services they think are most closely associated with various features, and YouTube was most likely to be selected for *'it inspires me to try new activities, hobbies or interests'* (33%). YouTube was also widely chosen for *'offer[ing] creative content'* (40%, behind Netflix at 46%) and *'offers something unique that I can't find elsewhere'* (29%, behind Netflix at 45%).

[45] YouTube Shorts are short-form vertical or square videos up to three minutes long.
[46] Ofcom VoD Survey 2026.

TV and video industry trends

Introduction

The UK TV and video industry – including traditional broadcasters, pay-TV providers and online video services - continues to undergo significant change. The growth of streaming has fragmented viewing across services and platforms, while broadcasters face the challenge of maintaining content availability across platforms, while continuing to support traditional broadcast distribution. At the same time, the online video market continues to expand, shaped by broadcasters' digital strategies, the move by global SVoD platforms towards hybrid monetisation models, and the growing influence of VSPs and creator-led content.

This section quantifies the revenue generated across different sectors of the TV and online video market, and examines some of the underlying industry trends, across advertising, broadcasting (PSB in particular) and online video.

How we present financial data

Financial data quoted in this report is presented in nominal terms, meaning that historical data has not been adjusted to account for inflation.

For those who wish to see how inflation has historically affected the value of the industry, our interactive report enables financial data to be viewed in either nominal or 'real' (CPI-adjusted) terms, with users easily able to switch between the two.

Industry revenues

The UK commercial TV and online video market exceeded £18bn in 2025, driven by online segments

The UK commercial TV and online video sector grew again in 2025, with total revenues increasing to £18.4bn, up from £17.1bn in 2024 (+7%). However, this headline growth masks substantial variation across different parts of the market, with online segments driving expansion while broadcast revenues remain under pressure.

Combined commercial broadcaster revenue – largely comprising the advertising income from commercial PSB channels, the wider multichannel sector and broadcaster VoD – declined in 2025, falling from £4.98bn to £4.83bn. This reflects ongoing structural pressures on the linear advertising market, including shifts in audiovisual advertising spend and increasing audience fragmentation, alongside wider economic conditions affecting advertising budgets.

Against this backdrop, BVoD revenues continued to grow, partially offsetting declines in linear advertising. Revenues increased by 9% year on year to £1.15bn, indicating sustained advertiser demand for broadcaster-owned streaming environments and the ongoing development of BVoD advertising propositions.

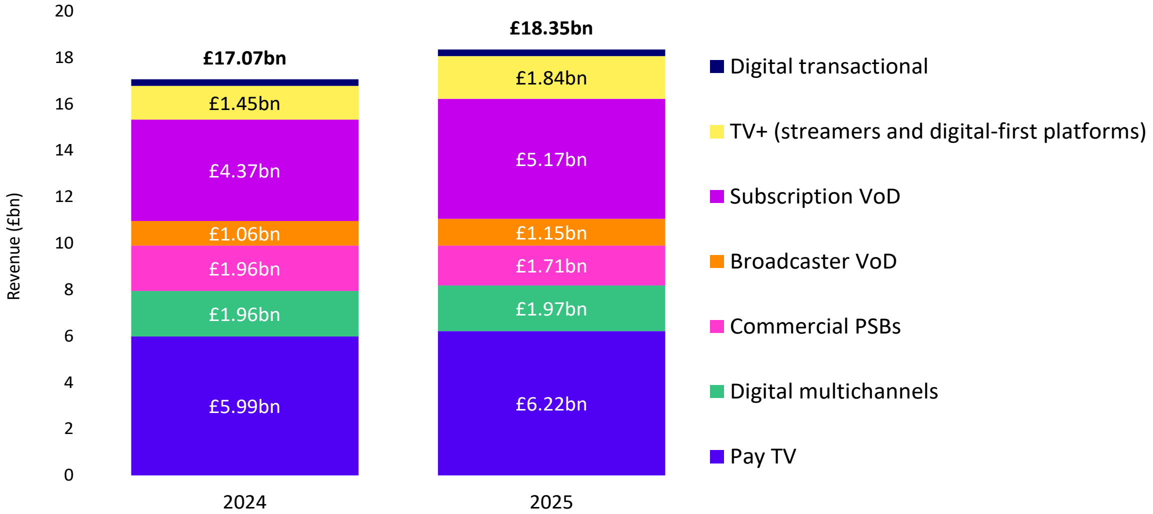
Pay TV, which includes the subscription revenues of TV providers such as Sky and Virgin Media, remained the largest single component of the market, with revenues rising from £5.99bn to £6.22bn. This growth suggests some stabilisation following earlier declines, supported by price increases and bundled offerings. However, underlying subscriber trends remain challenging, with traditional pay-TV household penetration declining by three percentage points year on year to 30% in Q1 2026.[47]

The largest contribution to overall market growth came from online video. SVoD revenues increased from £4.37bn to £5.17bn (+18%). This growth was driven primarily by subscription price increases rather than by subscriber growth.

Advertising on streaming services and digital-first platforms (TV+) continues to expand, with revenues rising from £1.45bn to £1.84bn (+27%). This sustained growth reflects stronger demand for targeted, measurable VoD environments, the continued scaling of ad-supported tiers by international SVoD platforms, and a widening pool of inventory across smart TVs, streaming platforms and free ad-supported TV (FAST) services.[48]

These shifts underline the continued rebalancing of the sector towards online revenues. Growth in SVoD and streaming advertising more than offset declines in linear broadcasting, further increasing the relative importance of online video in the UK audiovisual market.

Figure 40: Commercial TV broadcast and online revenue: 2024-2025



Source: Ofcom/broadcasters (broadcast data), Ampere Analysis (online subscription and transactional data), IAB UK PwC Digital Adspend Study(TV+ data). Figs presented in nominal terms and replace previous Ofcom revenue data for the TV and online video industry, owing to restatements and improvements in methodologies. Pay TV includes estimates of pay TV revenues.'Commercial PSB channels': ITV, STV, ITV Breakfast, Channel 4, Channel 5 and S4C (and t+1 channels). 'Digital multichannels' includes non-PSB channels and commercial PSB portfolio channels. 2025 data for digital multichannels is not directly comparable to previous years due to a change in method of calculating multichannel TV advertising, and a change in reporting method for TV shopping revenue by one licensee. From 2025, broadcaster VoD includes revenue generated from PSB

[47] Barb Establishment Survey Q1 2026, traditional pay TV includes households with a Sky or Virgin subscription.
[48] FAST services are free streaming channels that deliver scheduled (linear) programming, often alongside on-demand content, over the internet without requiring a subscription.

programming viewed on YouTube, 'TV+' comprises advertising expenditure on subscription and ad-supported streaming services, alongside digital-first platforms such as YouTube and FAST channels.

Beyond the commercial TV market, an estimated £2.75bn of TV licence fee income[49] was allocated to television services in 2025. The BBC reported total TV Licence fee income of £3,879m in its 2025/26 financial year. The number of TV licences held has continued to decline, with 539,000 fewer licences at 31 March 2026 than a year earlier.

BVoD now accounts for 29% of broadcaster advertising revenue amid a structural shift in TV advertising

The share of BVoD advertising within commercial broadcasters' advertising revenues continued to rise in 2025, reaching 29%, up from 25% in 2024. This reflects a combination of continued growth in BVoD revenues and a sharper decline in linear TV advertising, following modest recovery in 2024.

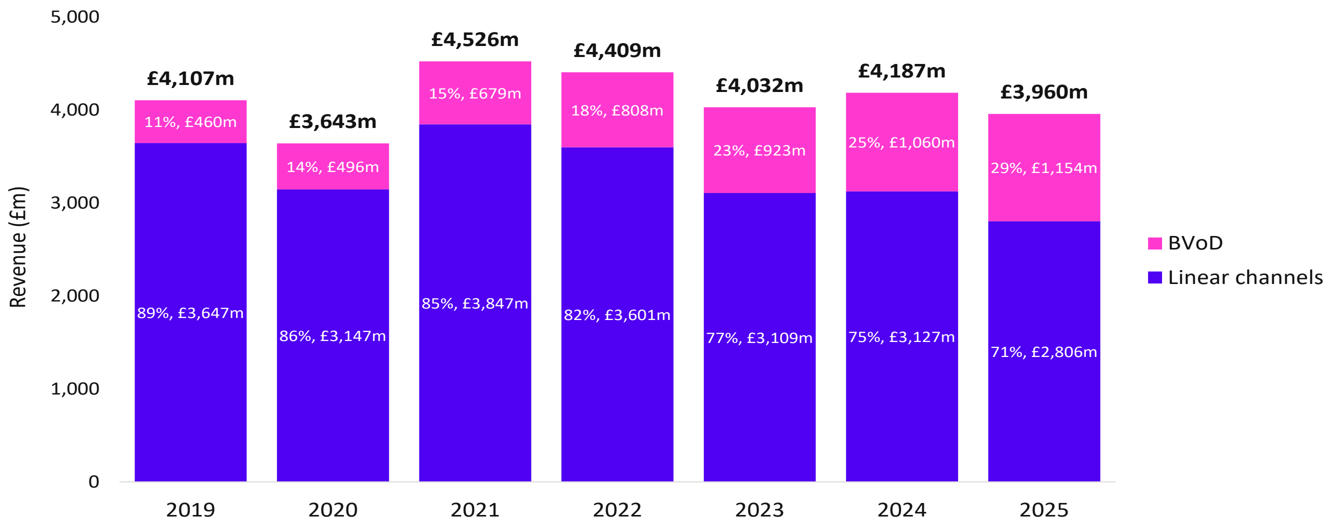
BVoD revenues increased to £1.15bn in 2025 (up 9% year on year). While this represents a slowdown on the double-digit growth seen in previous years, it highlights broadcasters' improving ability to monetise content through their streaming services. Growth has been supported by the development of more sophisticated advertising propositions, including increased SME participation via targeted advertising capabilities and the introduction of new ad formats.

In contrast, linear TV advertising revenues declined from £3.13bn to £2.81bn (down by 10%), underlining the continued pressure on advertising budgets amid broader economic conditions, alongside the shift in spend towards the on-demand environment. The weaker performance in 2025 was also influenced by cyclical factors, with fewer major sporting events, which are typically concentrated in even-numbered years, dampening advertiser demand. As a result, total broadcaster advertising revenues declined year on year, despite continued gains in BVoD.

These trends underline the increasing importance of BVoD to commercial broadcasters' advertising strategies. However, while digital growth continues to offset some linear declines, it has not stabilised overall broadcaster advertising revenues.

[49] TV Licence fee revenue allocated to TV services based on Ofcom analysis of BBC data. Calendar year.

Figure 41: TV and BVoD advertising revenue for commercial broadcasters (£m): 2019-2025



Source: Ofcom/broadcasters; BVoD revenue is primarily derived from advertising on owned and operated services and YouTube, with a small proportion from other sources such as subscriptions. These figures represent net revenues (i.e. income received by broadcasters) and are not directly comparable to AA/WARC VoD advertising figures, which are reported on a gross expenditure basis.

Subscription revenues boomed to £11bn, driven by SVoD, while pay TV showed signs of stabilisation

Total subscription revenues (pay TV and SVoD combined) increased further in 2025, up by over £1bn to £11.4bn. Growth continues to be driven primarily by SVoD, which accounted for 45% of total TV subscription revenues.

SVoD revenues grew to £5.17bn in 2025 (up 18% year on year), representing a marked acceleration since 2024. This growth has been driven by price increases rather than subscriber additions, as well as the continued expansion of hybrid monetisation models, including advertising-supported tiers and bundled offerings.

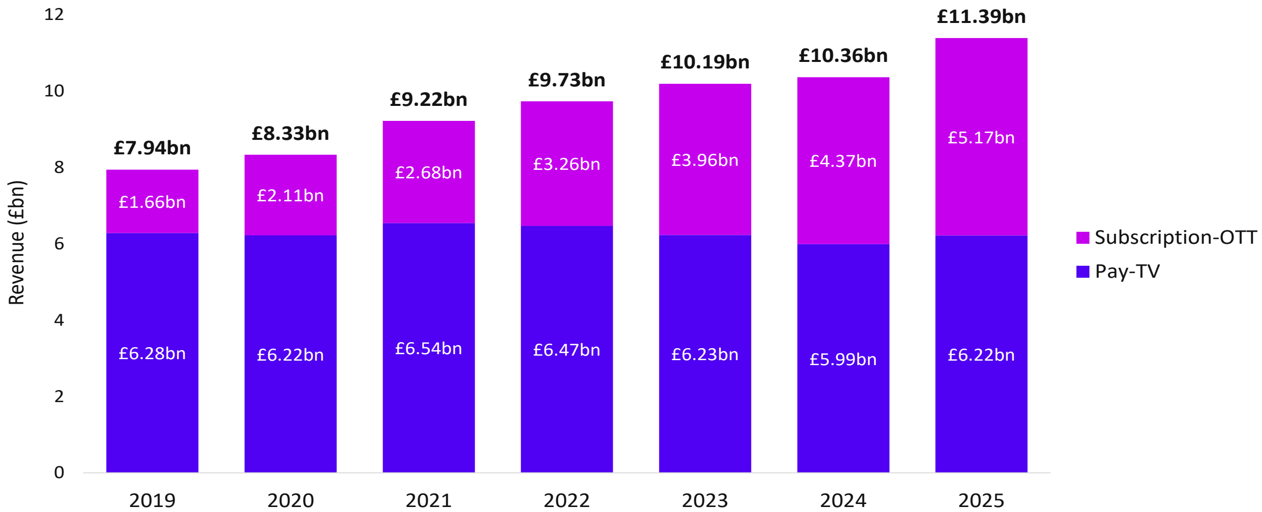
Pay-TV revenues grew to £6.22bn from £5.99bn in 2024. This suggests some short-term stabilisation following several years of decline, probably supported by pricing strategies, product repositioning (such as IP-delivered services), and continued bundling with third-party streaming platforms.

In particular, the subscription market continues to be shaped by aggregation; service bundling is becoming more prominent as platforms respond to consumer demand for simpler access to multiple services. Sky has expanded its bundled offering to bring together several streaming services, including Netflix, Disney+, HBO Max and Hayu, within a single subscription, positioning SVoD aggregation as a central part of its proposition. This sits alongside lower entry price points and tiered offerings, with subscription services balancing price sensitivity, flexibility and convenience.

Amazon is pursuing a similar objective through a different model. Rather than bundling services into a single package, Prime Video operates as an aggregation marketplace, allowing third-party services such as Apple TV+ and ITVX Premium to be subscribed to and billed through Amazon. This 'channels' model makes Prime Video a central access point for multiple streaming services within a single user experience.

These trends highlight the extent to which the boundary between pay TV and streaming is increasingly blurred, with aggregation, bundling and platform partnerships playing a central role in both segments' strategies. Platforms are competing on distinct value propositions, including exclusive content (such as live sport and premium originals), user experience and discovery (e.g. interface design and recommendation systems), and pricing strategies across standalone, bundled and ad-supported tiers.

Figure 42: Pay-TV and subscription-OTT revenues (£m): 2019-2025



Source: Ofcom/broadcasters (pay-TV data), Ampere Analysis (SVoD data).

Broadcasters' output and spend

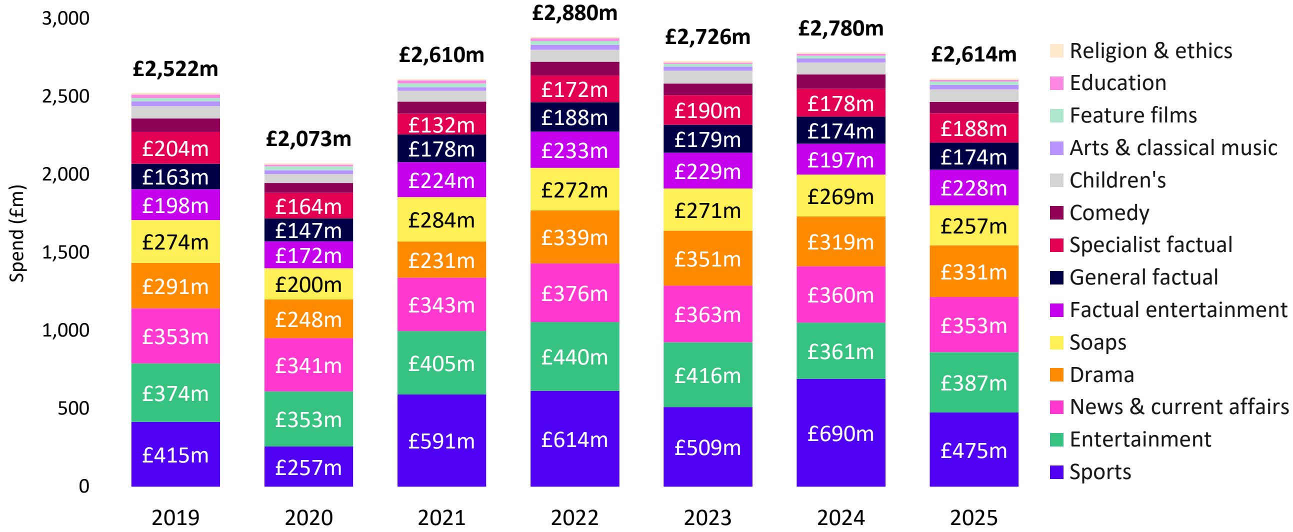
PSB spending showed signs of stabilisation in 2025

PSB investment in first-run UK-originated programming showed signs of stabilisation in 2025, following recent volatility. While headline spend fell to around £2.6bn (from £2.8bn in 2024), this follows a marginal uplift in 2024 driven by the men's UEFA European Football Championship and the Paris Olympics, rather than indicating a broad-based reduction in underlying investment. Excluding sports, first-run UK-originated spend increased by 2%, suggesting relative stability in investment across other genres despite a challenging economic environment.

Although sports spend fell sharply from £690m in 2024 to about £475m in 2025, several non-sport genres saw relative increases in both spend and share. General factual and factual entertainment remained among the largest areas of investment, with combined spend broadly stable year on year. News and current affairs spending was also stable at about £350m, remaining an important component of PSB output. Drama spend showed a partial recovery following declines in 2024, increasing to around £330m. While this represents a year-on-year increase, spending remains below its 2023 peak.

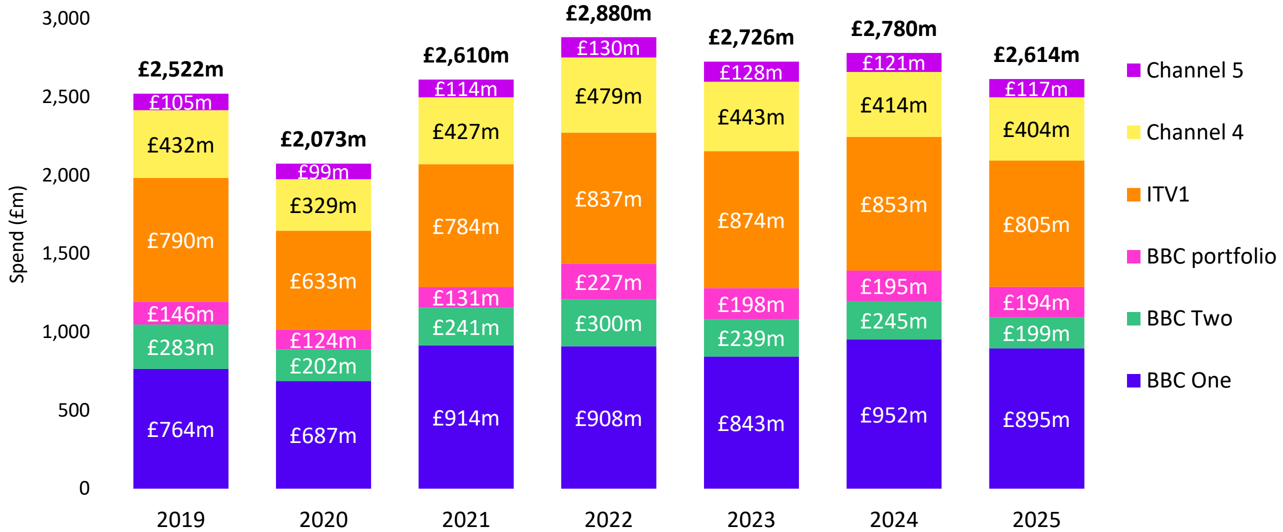
Total PSB first-run UK-originated spend across all genres remained above 2019 levels (Figure 43), before the Covid-19 pandemic disruption and the subsequent market correction. This pattern is also evident at a channel level (Figure 44). Although all PSB channels recorded year-on-year reductions in spending, investment has remained comparatively robust despite ongoing pressures on broadcaster revenues.

Figure 43: PSB first-run UK-originated spend, by genre: 2019-2025



Source: Ofcom/broadcasters. Figures are presented in nominal terms.

Figure 44: PSB first-run UK-originated spend, by channel: 2019-2025



Source: Ofcom/broadcasters. Figures are presented in nominal terms.

First-run UK-originated hours remained steady in 2025, with PSBs balancing output volumes and content costs

Total first-run UK-originated hours increased in 2025, rising to just over 31,400 hours (up by about 3% year on year). This marks a stabilisation following two consecutive years of declining output, although volumes remain below pre-pandemic levels.

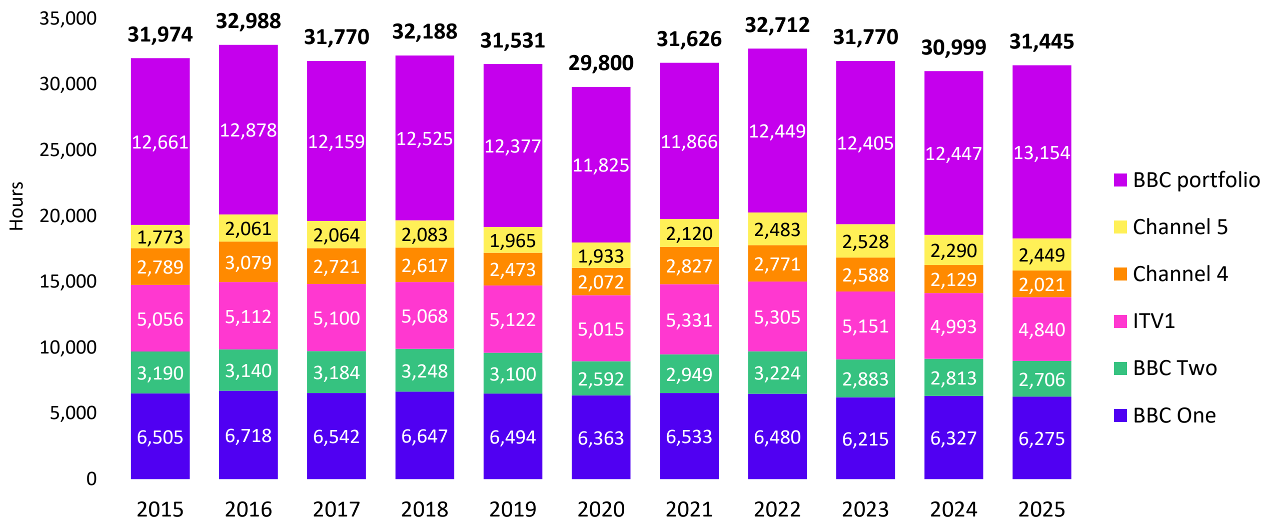
At a channel level, trends were mixed. BBC One, ITV and Channel 4 recorded slight declines in output hours. BBC portfolio channels and Channel 5 contributed to the overall increase in hours. While viewing is fragmented across broadcast and online services, most PSB-originated output is still commissioned for and first shown on linear PSB channels.

By genre, news and current affairs continued to account for the largest share of PSB first-run UK-originated hours, with total hours increasing by 3% in 2025. Factual programming (including general factual and factual entertainment) also maintained a significant share of output, while entertainment hours declined modestly.

Shifts in genre mix reflect both cyclical factors and structural trends, including a continued focus on balancing a mix of lower-cost, high-volume genres such as factual programming, and higher-cost, lower-volume genres such as drama.

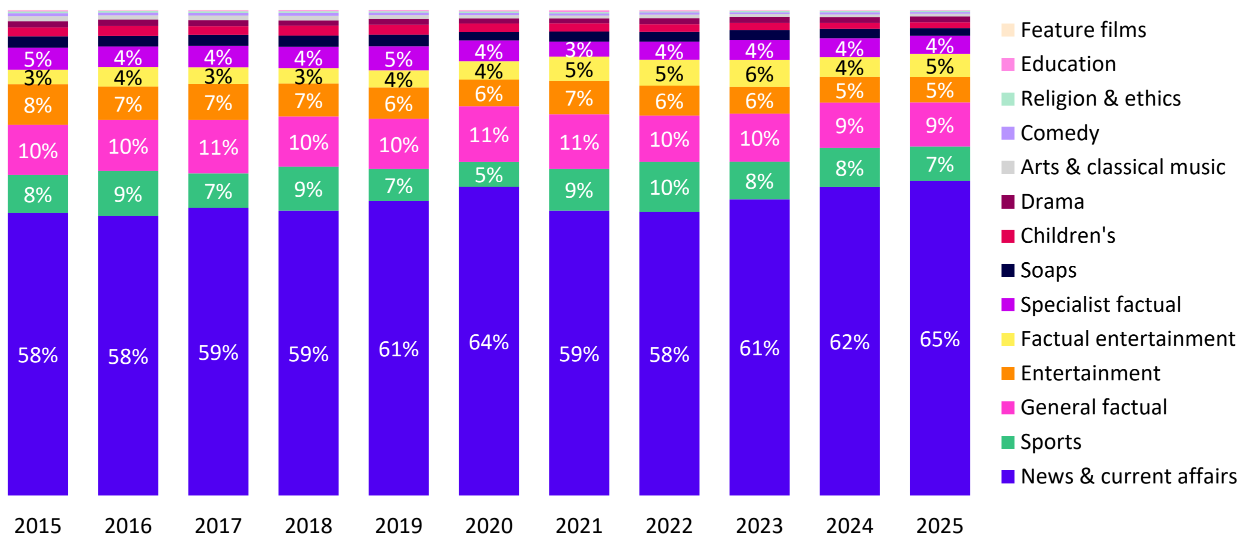
These trends should also be considered in the context of long commissioning and production cycles, particularly for higher-cost genres such as drama. As a result, changes in commissioning priorities and broadcaster strategies take time to feed through into hours and spend. This means that the current picture of relative stability across output may evolve as these strategic shifts increasingly shape both content budgets and the mix of programming available across PSB services.

Figure 45: PSB first-run UK-originated hours, by channel: 2015-2025



Source: Ofcom/broadcasters. Figures exclude BBC ALBA and programming for the nations and regions.

Figure 46: Genre mix of PSB first-run UK-originated hours: 2015-2025



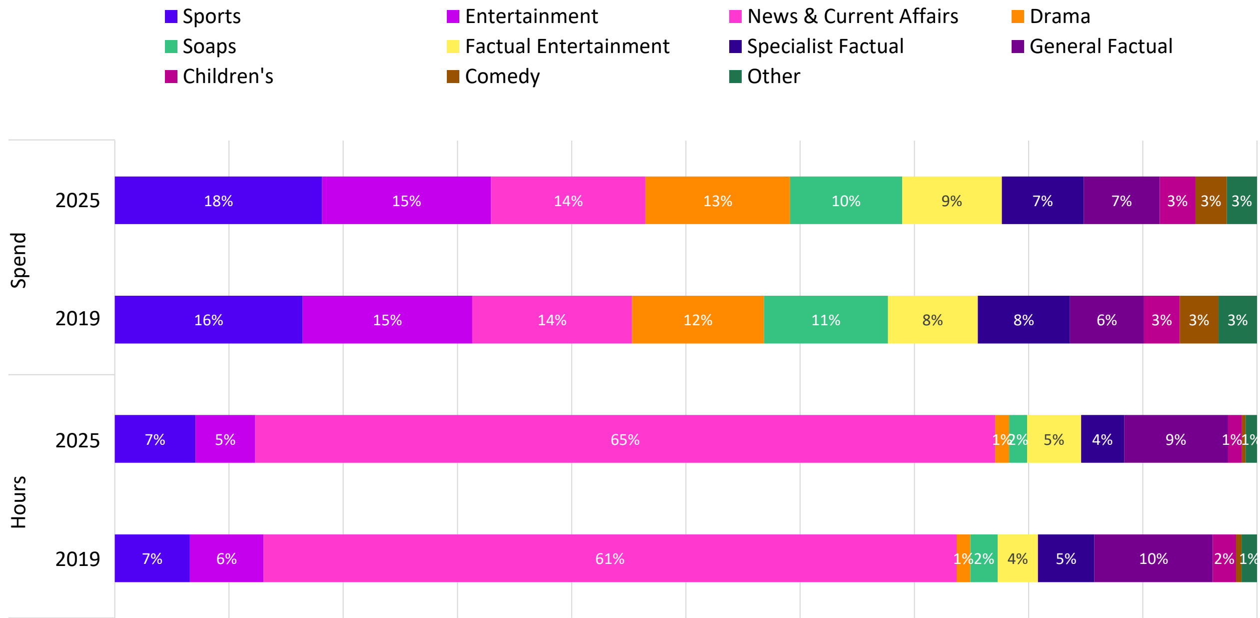
Source: Ofcom/broadcasters.

Despite recent fluctuations, the composition of output and the spend across genres has remained broadly consistent since 2019

The share of hours and spend across genres in 2025 remained broadly similar to 2019 (Figure 47), a useful benchmark as the last pre-pandemic year, and like 2025, one without the influence of major sporting events. Despite recent volatility and disruption, PSBs have not materially shifted how they allocate resources across their portfolios.

Although some increases in news, sports and factual entertainment were more than offset by declines in other genres, the overall balance between higher-volume factual programming and more investment-intensive scripted content has largely been maintained. This suggests that PSBs have continued to invest across a wide range of genres, supporting the breadth of programming available to audiences.

Figure 47: Genre composition of PSB first-run UK-originated hours and spend (% of PSB total): 2019 vs 2025



Source: Ofcom/broadcasters. Figures exclude BBC ALBA and programming for the nations and regions.

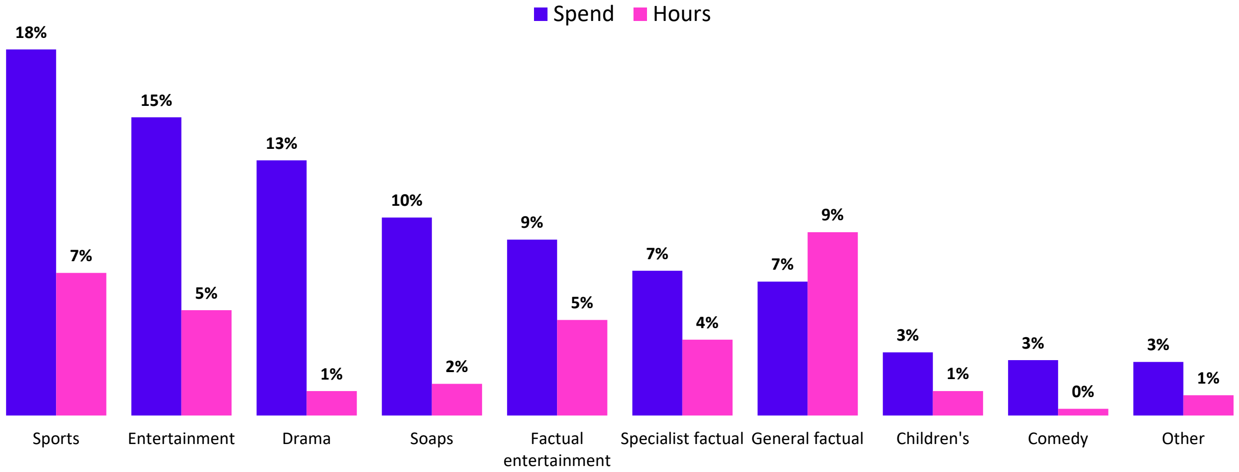
Within this broadly stable mix, cost per hour varies markedly across genres, indicating differences in commissioning strategies, production requirements and the relative balance between output volume and investment. Drama stands out as the clearest example of the 'fewer, bigger, better' approach pursued by PSBs.[50] Although it accounts for a relatively small share of first-run hours compared with other genres, it represents a large share of spend, highlighting its position as one of the most resource-intensive areas of PSB output.

This difference between hours and spend is shown in Figure 48, where factual genres contribute more evenly to both volume and expenditure, while drama and soaps sit firmly at the 'high spend,

[50] Broadcasters have indicated moves towards more targeted approaches to content spending. Channel 4's digital-first Fast Forward Strategy outlines its intention to *"cut-through with fewer, stronger new titles to generate more scale and impact, and to underscore [its] commitment to being the home of new talent and ideas"*. Similarly, the BBC is prioritising *"fewer, bigger, better"* productions designed to attract viewers to BVoD.

low volume' end of the spectrum. This illustrates that unlike higher-volume genres, investment in scripted programming is concentrated into fewer, more expensive productions, often reflecting higher production values, talent costs, shorter run times and longer production cycles. A similar, although less pronounced, pattern can also be seen in sport and entertainment, where expenditure is comparatively high relative to output volumes, reflecting the costs of premium rights, live events and large-scale productions.

Figure 48: PSB first-run UK-originated hours vs spend by genre, (% of PSB total, excludes news and current affairs from display*): 2025



*Source: Ofcom/broadcasters. *News & current affairs excluded from chart display (represents 14% of spend and 65% of hours).*

Third-party contributions increased in 2025, but remain concentrated and ad-hoc

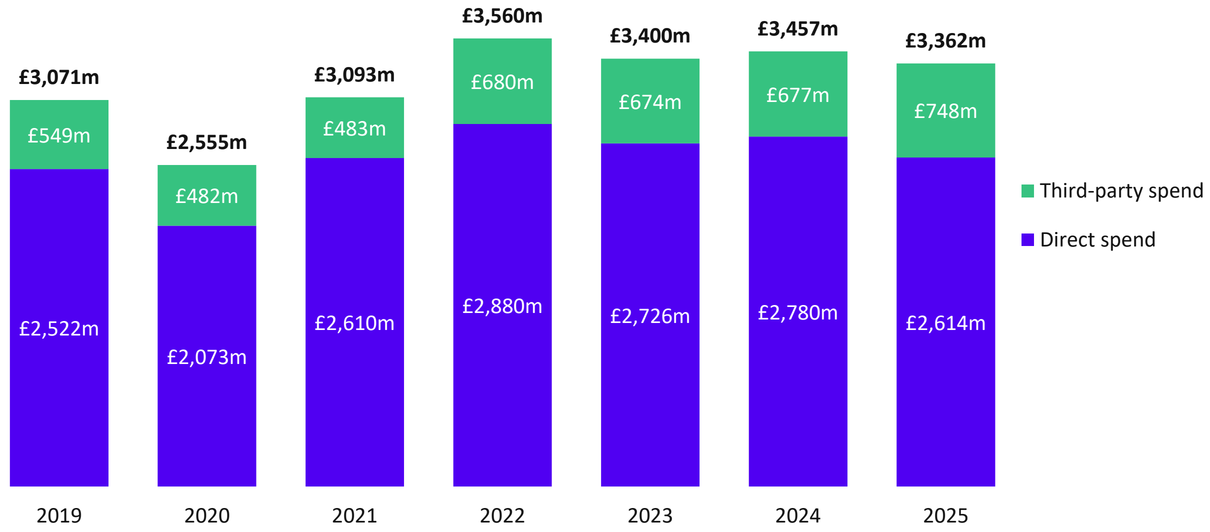
Third-party contributions to PSB originations (from co-productions, tax credits and external funding) increased in 2025, rising from £677m in 2024 to £748m. This partially offset the decline in direct broadcaster spend, with total PSB first-run origination spend standing at £3.4bn in 2025.

The overall reliance on third-party contributions remains uneven across genres, with investment continuing to be concentrated in higher-value productions.

Drama remains the primary recipient of third-party funding, accounting for two-thirds of the total, although its share has moderated slightly as contributions across other genres have increased. In particular, there is some evidence of broader diversification, with greater use of external funding across factual and children's programming.

Despite the increase in total contributions, there are still challenges in securing third-party financing. The global streaming market continues to prioritise projects with international appeal and full rights ownership, limiting opportunities for traditional co-production models. At the same time, tighter commissioning budgets among broadcasters and streamers, and higher financing costs for producers and investors, continue to constrain the availability of external capital.

Figure 49: PSB spend on first-run originations, by direct spend and third-party contributions: 2019-2025



Source: Ofcom/broadcasters. Third-party spend includes funding from sources such as co-productions, high-end TV tax credits and distributor advances. Figures are presented in nominal terms. Spend figures exclude BBC ALBA and programming for the nations and regions.

Programming spend from the multichannel sector stabilised in 2025, driven primarily by sport, while most other genres continued to face pressure

Multichannel programming spend (across key genres) showed signs of stabilisation in 2025, increasing slightly from £4.6bn in 2024 to about £4.8bn. This followed a decline in 2024 and suggests some recovery in investment, although overall spending remains below pre-2020 levels.

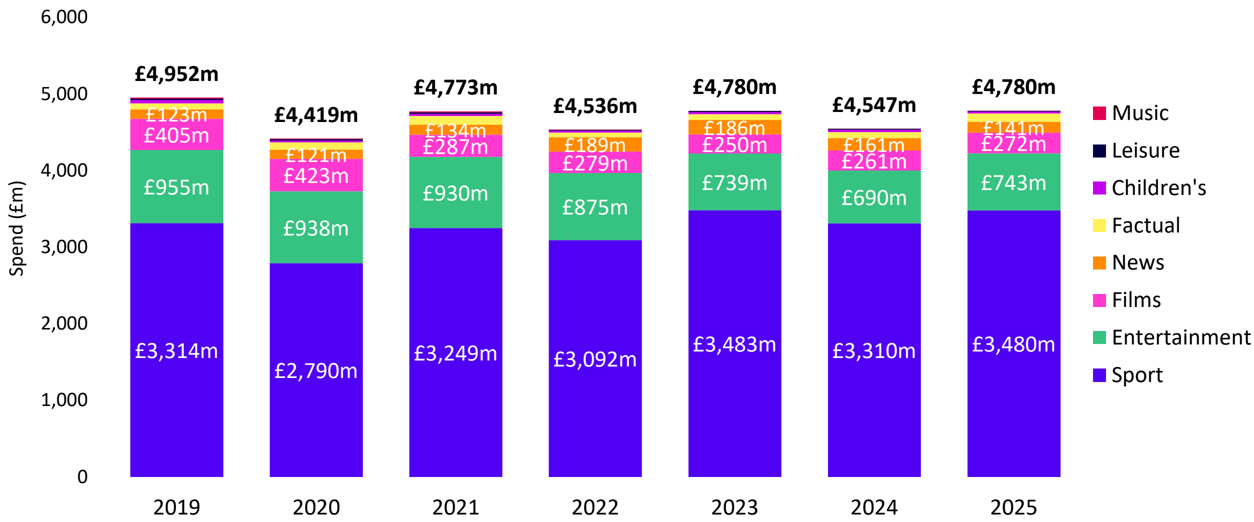
Sport remained by far the largest genre by spend, accounting for roughly three-quarters of total multichannel investment. Spend on sports increased to £3.48bn in 2025 (up 5% year on year), reinforcing the central role of premium sports rights, particularly the English Premier League, in underpinning pay-TV value propositions. The uplift reflects continued investment ahead of the new rights cycle beginning in the 2025/26 season.

Other than sports, most genres remain under pressure. Entertainment spend increased by 8%, from £690m to £743m, in 2025, a partial recovery following declines in recent years. Despite this, spending remains below earlier peaks, reflecting the longer-term shift in audience viewing towards on-demand and streaming platforms.

Investment in news channels continued to decline. Spend fell further in 2025, continuing a multi-year downward trend. Children’s, film and other smaller genres remained relatively stable in terms of programming expenditure in 2025 compared to 2024, but have declined consistently in recent years. Investment in these genres has typically focused on maintaining core channel offerings rather than on expansion.

This points to the increasingly polarised nature of multichannel investment. While sport continues to attract the majority of spend and remains critical to multichannel businesses, non-sport genres face ongoing structural challenges linked to audience fragmentation and competition from streaming services.

Figure 50: Multichannel programming spend for selected key genres: 2019-2025



Source: Ofcom/broadcasters. Figures are presented in nominal terms.

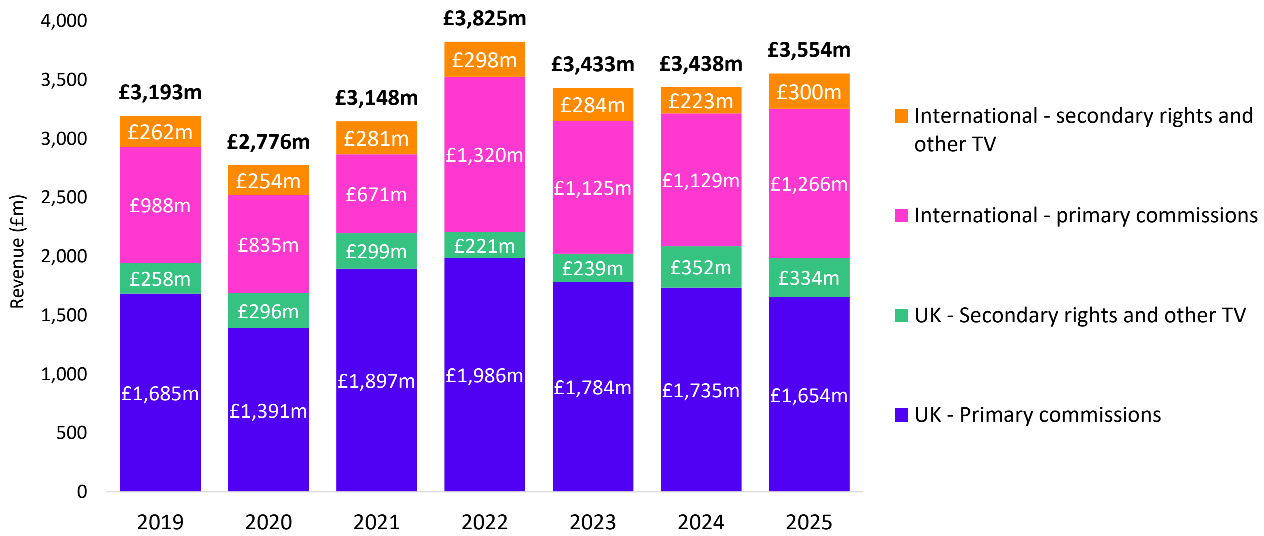
Production sector trends

Production revenues stabilised in 2025, with modest overall growth

UK TV production revenues showed further signs of stabilisation in 2025, following the disruption of the Covid-19 pandemic and the rebound in 2021/2022. Total revenues increased slightly year on year to £3.55bn, indicating a degree of recovery after the sharper declines earlier in the period. Levels remain below the peak reached in 2022 which was inflated by pandemic-related production delays.

Income from UK primary commissions declined further in 2025, falling to £1.65bn, and pointing to continued pressure on domestic commissioning budgets. However, this was offset by stronger performance in other areas. Revenue from international primary commissions increased to £1.27bn, suggesting a continued steady stream of demand from global commissioners, while international secondary rights increased to £300m. UK secondary rights declined to £334m in 2025, but continued to provide an important supplementary revenue stream.

Figure 51: Total producer TV-related revenues, by income source: 2019-2025



Source: Pact UK Television Production Census, Oliver & Ohlbaum analysis.

Beyond broadcast: market developments

As the UK VoD market matures, the focus is shifting from subscriber growth to monetisation, cost efficiency and effective distribution. Growth in subscriptions is slowing, placing greater emphasis on pricing strategies and the expansion of advertising tiers as services look to sustain revenue. At the same time, the industry is evolving beyond standalone platforms, with increased use of partnerships, aggregation and cross-platform distribution to extend reach and improve discoverability. Alongside these changes, the range of video content available to UK audiences continues to expand, with creator-led content increasingly operating alongside, and interacting with, traditional broadcaster and streaming services. This section explores monetisation, content strategies and the distribution of streaming services in the UK, and notes changes in the VSP market.

Video-on-demand monetisation and pricing

Monetisation strategies are evolving as the VoD market matures, with platforms balancing subscription pricing, tiering and the expansion of advertising to sustain revenue growth in a more competitive environment.

Subscription pricing growth may be becoming harder to sustain as services compete for fixed household budgets

Subscription revenue growth is increasingly driven by price increases rather than subscriber expansion. With SVoD household penetration already high (roughly 70% of UK households[51]), there is limited scope for further growth through new users. Although SVoD prices have continued to rise steadily, increasing by 35% on average since 2016, recent patterns may raise questions about how much further services can push pricing before consumer behaviour begins to change.

For some service tiers, price increases appear to be becoming less frequent and more incremental, with longer periods of stability (Figure 52). This may reflect growing sensitivity to further headline price rises rather than a clear slowdown in pricing growth. Some services have maintained unchanged pricing for extended periods. For example, NOW's Entertainment tier has not increased

[51] Barb Establishment Survey, Q4 2025.

in price since early 2023, and Netflix's 2025 increase to its standard tier pricing followed a period of stability since 2022. This suggests that there may be less scope for further headline price increases, particularly on standard and entry-level tiers.

There are also indications that pricing is being shaped by wider household spending constraints. UK households that use SVoD services already subscribe to more than two services on average[52], and broader evidence points to increased sensitivity to discretionary spending. In this context, further price increases may be more likely to result in changes in behaviour, such as cancelling services, downgrading to lower-cost tiers, or switching between platforms, rather than increasing overall spend.

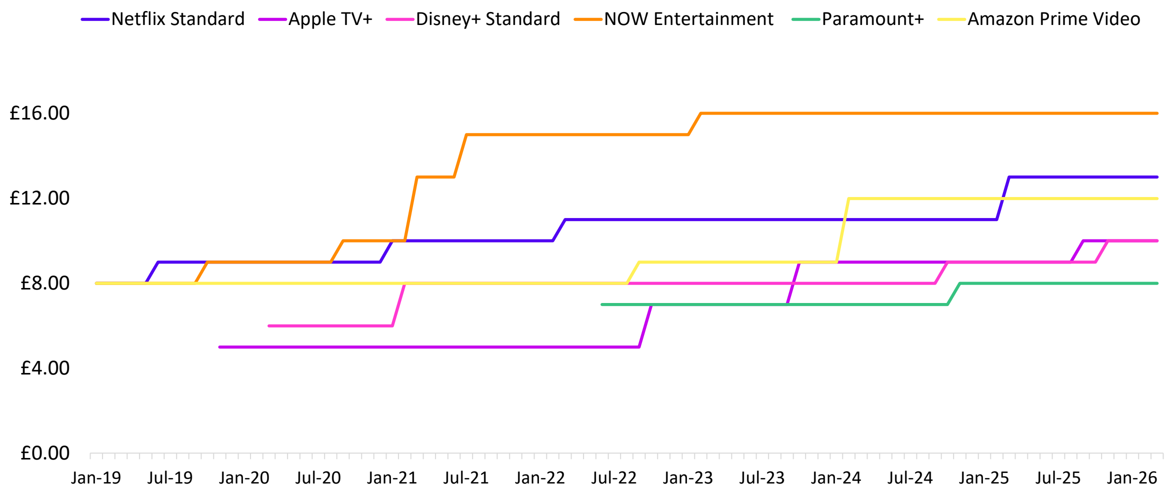
However, Ofcom's VoD survey suggests that there may still be some headroom for price increases. Only 18% of respondents agreed with the statement "*I spend too much money subscribing to video on demand services*". At the same time, cost remains the most commonly-cited reason for cancelling an SVoD subscription. Among those who cancelled in the past three months, 22% of former Netflix users and 35% of former Amazon Prime Video users said this was because the service was too expensive.

Some SVoD subscribers appear to be responding to price increases by moving between tiers rather than cancelling services altogether. Ofcom's VoD survey found that 13% of Netflix subscribers reported downgrading their subscription during the previous year with nearly two-thirds (62%) switching to the cheaper ad-supported tier. The growth of ad-supported tiers alongside relatively stable subscriber numbers suggests that price-sensitive consumers are increasingly managing costs through downgrading, rather than exiting services entirely.

The SVoD market is also continuing to attract new entrants. The launch of new premium services, including HBO Max in March 2026, increases the breadth of offerings against a backdrop of slower market growth and more constrained consumer spending. HBO Max is forecast to reach 6m subscribers in the UK by the end of 2026, driven primarily through distribution partnerships, notably via Sky and TNT Sports, rather than pure direct-to-consumer acquisition. Reflecting this early momentum, HBO Max accounted for 2.1% of in-home SVoD viewing in May 2026, making it the fifth-largest service by viewing share, marginally behind Paramount+ (2.6%) and ahead of Apple TV (1.4%).[53]

[52] Ampere Analysis, Markets – Operators.
[53] Barb, as viewed.

Figure 52: Monthly pricing for selected 'standard' tiers for SVoD services

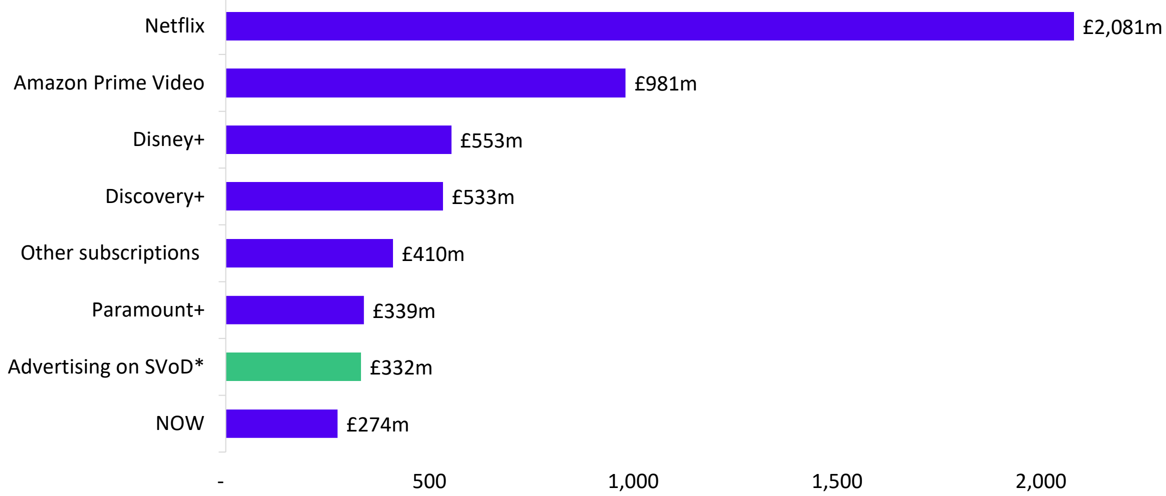


Source: Ofcom, platforms. Standard tiers refer to entry-level subscriptions without advertising.

Advertising is becoming the new streaming battleground in a maturing VoD market, but remains small

Despite hundreds of VoD services operating in the UK, the majority of revenue is claimed by a small group of established platforms**.** Netflix continues to account for over 40% of subscription revenues, while the four largest services (Netflix, Prime Video, Disney+, Discovery+) collectively represent around 80% of the market.

Figure 53: Subscription video-on-demand revenue, 2025



*Source: Ampere Analysis. *Advertising on SVoD includes Amazon Prime Video, Netflix, Discovery+ and Disney+ only. Figures are presented in nominal terms. Amazon Prime Video revenue is estimated based on users of the service – revenue is not ascribed to Amazon Prime customers who do not claim to use Prime Video (e.g. subscribe only for the unlimited express shipping). Includes historic restatements.*

Non-broadcaster VoD advertising is increasing from a relatively low base. Ampere Analysis estimates that SVoD ad-tier revenues exceeded £300m in 2025. Following the introduction of ad-supported tiers by services including Netflix, Amazon, Disney+ and Discovery+, platforms are now focused on scaling their advertising businesses.

Take-up of ad-supported SVoD tiers has been relatively strong, ranging from 27% of Disney+ subscribers to 43% of Netflix subscribers and 90% of Amazon Prime Video subscribers choosing ad-supported options (further SVoD take-up details are available in the TV and video audience chapter).[54] However, revenue growth has taken time to develop, reflecting the early stage of these offerings and the need to build both audience scale and advertiser demand. While still at an early stage, advertising on SVoD services is beginning to generate meaningful revenues. Advertising was 7% of UK revenue for major international SVoD services in 2025, and this is forecast to reach 17% by 2030.[55] The launch of ad-supported tiers by Netflix, Amazon Prime Video, Disney+, Paramount+ and Discovery+ marks a third phase of revenue growth for subscription services, following earlier growth driven first by subscriber acquisition and then by price increases.

Pure-play AVoD and free ad-supported streaming television (FAST) services represent a relatively small share of online video advertising but contribute to the expansion of available advertising inventory within the market. Services such as Tubi and Pluto TV offer fully ad-funded environments, often with large volumes of content and linear-style FAST channels, enabling advertisers to access incremental reach beyond subscription-based and broadcaster platforms.

In response, UK broadcasters are exploring greater collaboration. Sky, ITV and Channel 4 have launched a shared premium video advertising marketplace, intended to simplify access to on-demand inventory and improve scale for advertisers, including smaller and local advertising, and supporting wider adoption among SMEs. In May 2026, ITV launched its live broadcast addressable advertising product, offering addressable advertising to its live linear broadcast channels for the first time.

Advertising product development is influenced by competition within the wider digital advertising market, including platforms such as YouTube, TikTok and Meta, as well as advertiser demand for high-quality, brand-safe environments. As a result, broadcasters and VoD services are investing in enhanced targeting, measurement and self-service tools.

There is also growing use of automation and artificial intelligence within TV and video advertising. Channel 4 has announced the introduction of AI-enabled tools to support ad creation and campaign deployment on its streaming service, aimed at lowering barriers to entry for advertisers, including SMEs. More broadly, developments across the sector include the use of AI for audience targeting, personalisation and optimisation of campaign performance.

Video-on-demand content strategies

Content strategies are increasingly focusing on balancing scale and distinctiveness

VoD content strategies are shaped by two core considerations: scale and distinctiveness. Larger, broader catalogues support reach and retention, while high-value originals, UK-originated content and exclusive windows are used to differentiate services where audiences have a vast range of content options.

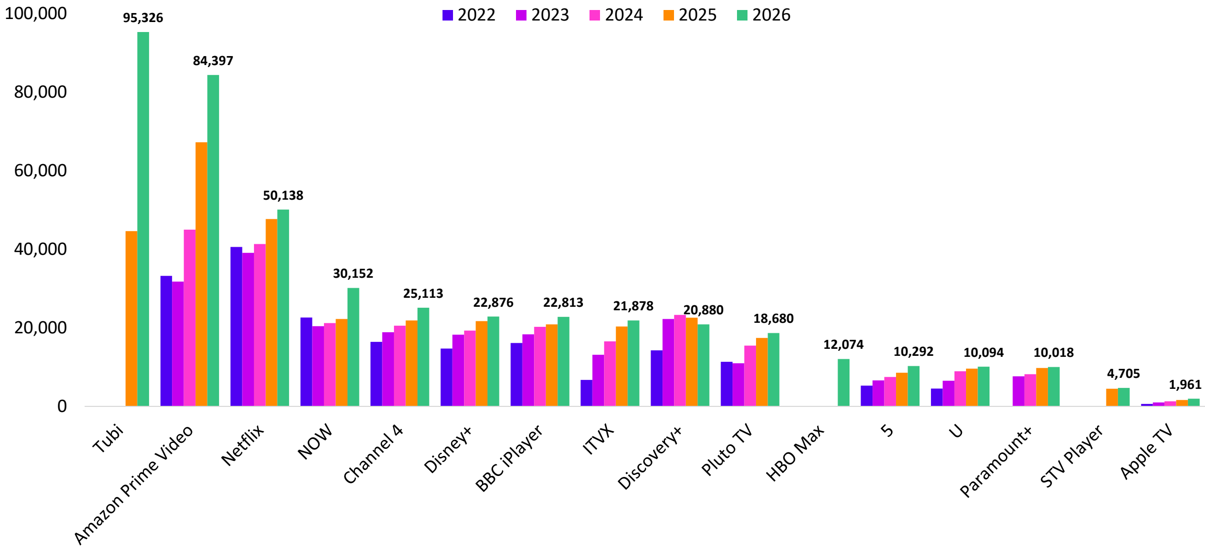
Catalogue growth in 2026 has largely been concentrated among services that are built around scale, particularly global SVoD aggregators and free ad-supported platforms (Figure 54). Amazon Prime Video and Fox-owned AVoD service Tubi lead by volume, ahead of Netflix and a second tier of ~20–30k hour catalogues across other global SVoD services (Disney+, Discovery+) and UK services (NOW,

[54] Barb Establishment Survey.
[55] Ampere Analysis Markets – Operators, includes Amazon Prime Video, Apple TV, Discovery+, Disney+, Netflix, Paramount+.

BBC iPlayer, Channel 4, ITVX). Tubi, launched in the UK in July 2025, recorded the largest increase in catalogue hours, becoming the largest library in the UK ahead of Prime Video, driven primarily by older catalogue films across genres such as horror, sci-fi and fantasy. Prime Video's growth has similarly been driven by the increased licensing of older US-originated films.

PSB BVoD libraries have expanded steadily, supported by a consistent flow of new originals, alongside targeted use of acquisitions and content-sharing, to complement rather than dilute their original core offering.

Figure 54: UK VoD catalogue hours: 2022-2026



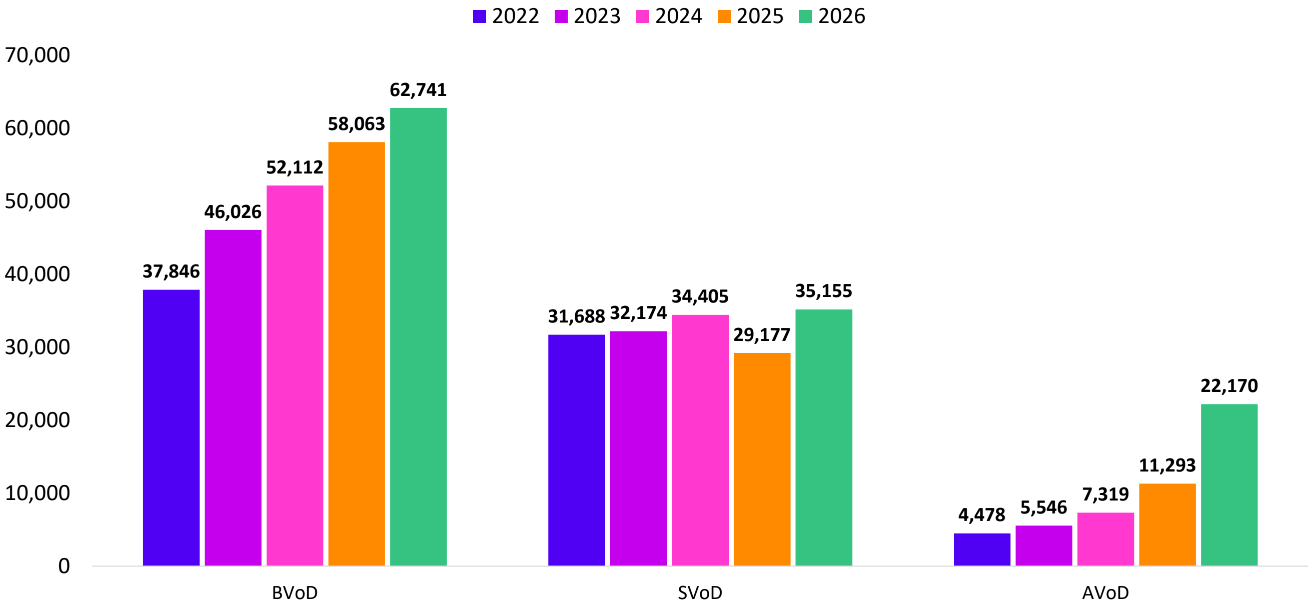
Source: Ampere Analysis – Analytics (April-2022 –April-2026). ITVX catalogue hours are free-to-view only.

UK-originated content remains a defining feature of BVoD services, with more than 60,000 hours available to viewers

Broadcaster-owned VoD services continue to be differentiated by their extensive offering of UK-originated content within their catalogues. BVoD services offer extensive libraries of UK programming, with more than 60,000 hours available to audiences in April 2026.

The volume of UK-originated content available on PSB VoD services has grown steadily, reflecting both ongoing commissioning activity and the expansion of box-set and archive offerings. Although UK content availability has increased across the wider VoD market, including on newer services such as Tubi and HBO Max, BVoD services continue to offer substantially larger catalogues of UK-originated programming than SVoD and AVoD services.

Figure 55: Volume of UK originated content hours in VoD catalogues, by platform type: 2022-2026

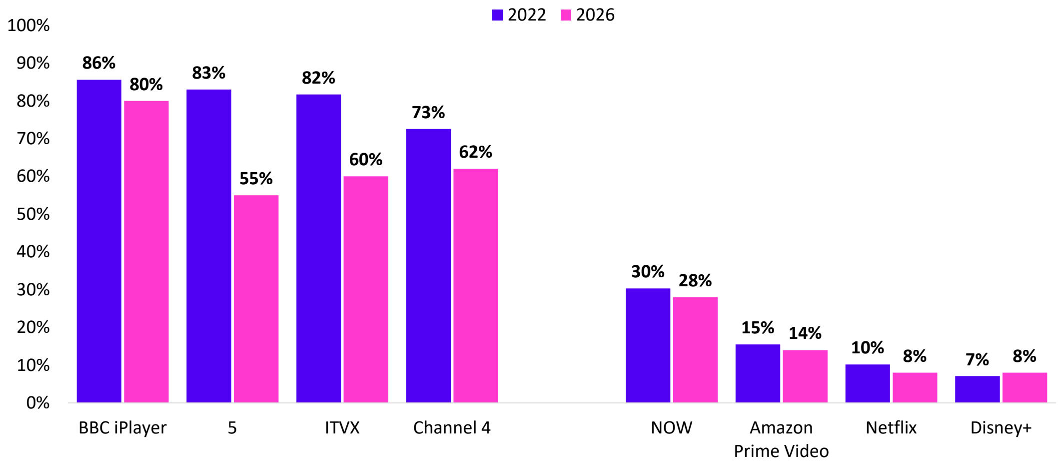


Source: Ampere Analysis – Analytics (April-2022 –April-2026). ITVX catalogue hours are free-to-view only.

PSB VoD services continue to have the highest share of UK-originated content. In 2026, BBC iPlayer (80%), Channel 4 (62%), ITVX (60%) and Channel 5 (55%) hold a larger share of catalogue hours sourced from the UK than SVoD catalogues (Figure 56).

However, the share of UK content within PSB VoD catalogues has declined; ITVX and Channel 4 have both had notable reductions since 2021, reflecting their increased use of acquisitions and licensing to expand catalogue breadth. Despite this relative decline in share, the absolute volume of UK-originated content on PSB VoD services has continued to grow. The increased use of acquired content reflects a balancing act between distinctiveness and scale. While UK-originated programming remains central to PSB identity and public service objectives, international acquisitions are being used to improve catalogue depth, retention and perceived value.

Figure 56: Share of VoD catalogue hours sourced from UK (% of catalogue hours)



Source: Ampere Analysis – Analytics (Apr-2022- Apr-2026).

For SVoD platforms, the impact and return on investment of new UK originals is prioritised over scale, with volumes declining

The volume of newly released UK-originated SVoD content declined from 475 hours in 2022 to 422 hours in 2025, indicating a shift away from peak commissioning levels towards more selective investment from major SVoD platforms (Figure 57). Although UK originals remain important, commissioning may be more selective, with greater emphasis on titles that can deliver international reach and engagement. Nonetheless, SVoD providers continue to allocate a substantial share of their budgets to UK productions, with the UK remaining an important hub for content production.

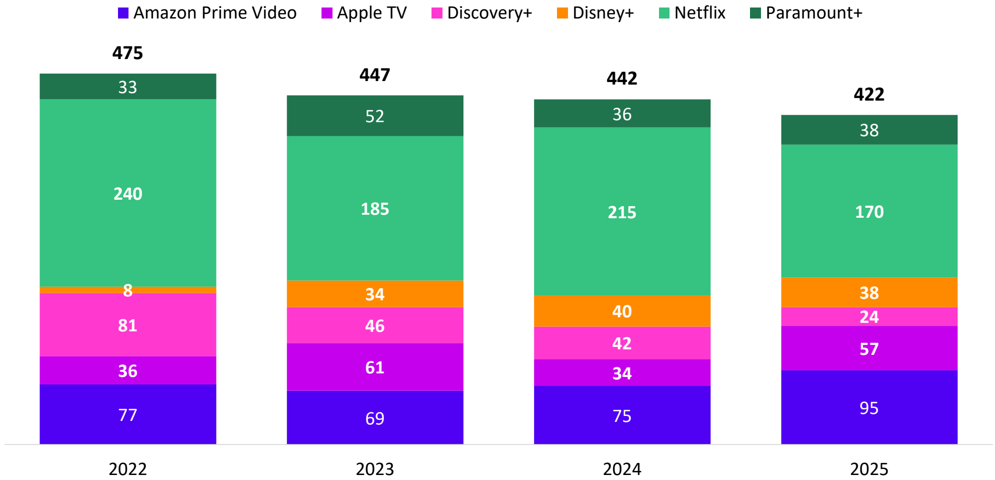
Netflix is the largest commissioner of UK-originated SVoD content by volume, although its output has reduced over time (Figure 57). Other platforms, including Amazon Prime Video and Disney+, show more variable and generally lower levels of new UK release volumes.

Genre trends indicate a continued focus on factual and drama content, although both have declined in volume since 2022. This suggests a shift towards fewer, higher-value productions, particularly in scripted genres where costs are higher but the potential returns are greater.

Despite continued investment, the reduction in UK volumes reflects this wider industry cost pressure, with providers seeking savings and efficiencies in a move towards profitability and a return on investment across global streaming businesses. Global content investment is forecast to reach $255bn (£170bn) in 2026 (+2% year on year). Streaming services continue to drive growth, increasing investment by 6% to $101bn (£77bn), about 40% of the global total. However, this expansion is accompanied by longer production cycles, with the average gap between seasons of major SVoD originals increasing from 12 months in 2020 to 21 months in 2025.[56]

For SVoD platforms, locally sourced content plays a strategic role in their global catalogues, contributing to localisation strategies and regulatory requirements, but representing a relatively small share of overall content compared with US programming. This approach contrasts with PSB strategies, where UK-originated content is core to the proposition and in attaining PSB objectives.

Figure 57: SVoD newly released UK-produced original content hours, by platform: 2022-2025



Source: Ampere Analysis. Includes Netflix, Amazon Prime Video, Disney+, Apple TV, Discovery+, and Paramount+ – data represents titles where the UK is the primary country of production and original to platform; excludes sports content.

[56] Ampere Analytics – SVoD, Commissioning.

Exclusivity varies across platforms, with platforms increasingly sharing content across catalogues

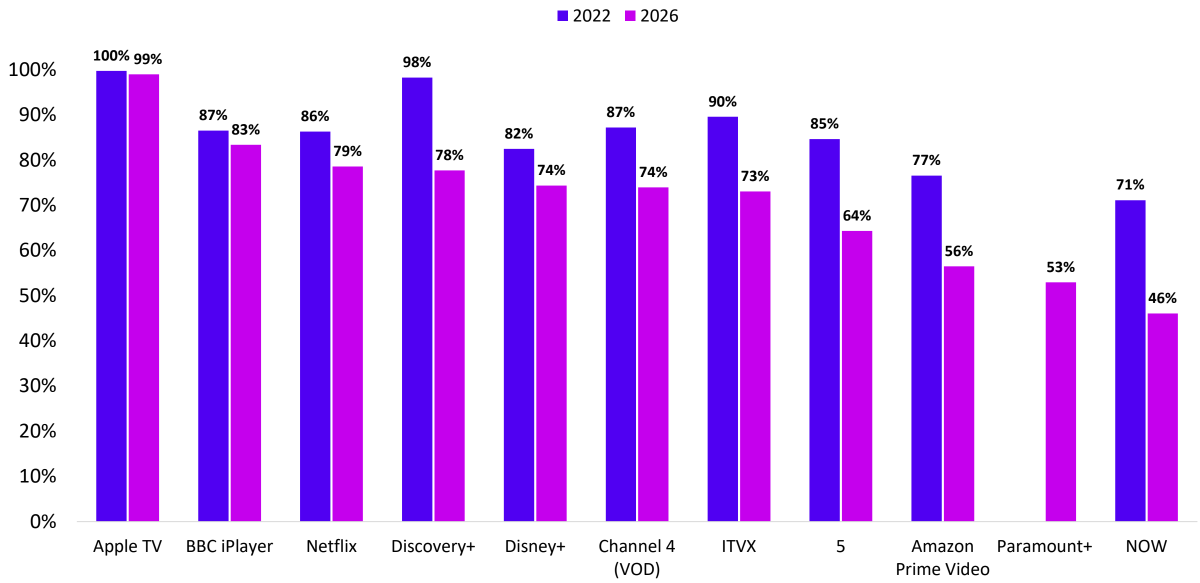
Exclusivity of content within catalogue varies significantly across UK VoD services. Apple TV+ (99%) had the highest share of catalogue content not available on other UK platforms in 2025, followed by BBC iPlayer (83%), Netflix (79%), and Discovery+ (78%). In contrast, services such as NOW and Paramount+ had greater levels of shared content, while ITV and Disney+ now overlap across a growing volume of their titles. Larger catalogue services, such as Prime Video, tend to host a higher proportion of lower-value, non-exclusive content that is licensed across multiple platforms.

Some services prioritise ownership and control through original commissions, franchise IP and long-term rights agreements, supporting brand differentiation and subscriber retention. Others rely more on windowing and licensing strategies, securing temporary exclusivity for existing titles without long-term ownership.

As discussed later in this chapter, content-sharing and carriage agreements are becoming more prominent, influencing levels of exclusivity across the market. Partnerships such as ITV's agreement with Disney and Channel 4's integration of UKTV content are expanding catalogue breadth but also increasing the degree of overlap between services.

This shift towards reciprocal licensing, bundling, and cross-platform distribution reflects a move away from fully closed 'walled garden' catalogues. This may indicate that such approaches are becoming less sustainable for some businesses, as content licensing can open up additional revenue opportunities, and platforms increasingly consider the benefits of wider reach and discoverability. From an audience perspective, the number of services and subscriptions required to access desired content remains a key issue. Aggregation therefore plays an important role, with consumers making use of aggregators such as Amazon Channels, Sky's SVoD bundling strategy, and the shop-window functions of connected TV devices, to navigate access to content.

Figure 58: Proportion of catalogue hours that are exclusive to a platform: 2022 vs 2026



Source: Ampere Analysis – Analytics, April each year. ITVX catalogue hours are free-to-view only. Britbox and STV Player catalogue hours excluded from analysis due to high levels of content-sharing.

Live sport continues to shape competition across TV and streaming services

Live sport remains a key genre across broadcasters and streaming services, given its ability to deliver large, real-time audiences and support both subscription and advertising models. Streaming platforms have increasingly invested in sports rights globally in recent years. Global investment in sports rights by streamers continued to grow in 2025, from $11.3bn (£8.9bn) in 2024 up to $13.2bn (£10.4bn).

International SVoD platforms including Amazon, Netflix, Warner Bros. Discovery and Apple have all expanded their involvement in sport, primarily in larger markets such as the US. Strategies vary, ranging from the acquisition of headline rights packages through to complementary sports-adjacent content and selective event programming. Netflix has begun moving into live sport and event-style programming, including a ten-year, $5bn (£3.8bn) deal for WWE Raw and related content. Amazon has acquired exclusive rights to NFL Thursday Night Football, in a deal reportedly worth about $1bn per year (£760m), and is expanding into additional rights including NBA. Apple has taken a more global, direct-to-consumer approach through its ten-year agreement with Major League Soccer.

In the UK, streaming services' participation has been limited, focusing on specific rights packages or complementary content, while established broadcasters continue to hold the majority of premium sports rights. Established rights-holders such as Sky and TNT Sports account for the majority of sports rights spending, with the multichannel sector spending over £3bn on sports channels in 2025.[57]

That said, SVoD platforms are also making moves. Paramount has secured a four-year deal to broadcast the majority of UEFA Champions League matches in the UK from 2027 via Paramount+. Amazon Prime Video holds rights to a more limited package of UEFA Champions League matches, while Warner Bros. Discovery distributes a broad portfolio of sports rights via TNT Sports across linear channels and its streaming services, including discovery+ and HBO Max.

YouTube has suggested that it does not plan to bid directly for major UK sports rights, unlike in some international markets. Instead, the platform is being used as a fan acquisition and engagement platform, particularly for younger audiences. This approach includes partnerships that blend rights and creator-led distribution. For example, the Bundesliga has made selected UK rights available via YouTube creators such as That's Football and The Overlap. More broadly, YouTube's deal with FIFA during the 2026 World Cup saw official broadcasters stream the opening ten minutes of each match on the platform, alongside creator-produced behind-the-scenes content.

Distribution and partnerships

Distribution strategies continue to develop, with platforms increasingly using partnerships, aggregation and cross-platform distribution to extend reach, improve discoverability and maximise the value of content.

Distribution is becoming more interconnected, with partnerships and aggregation becoming more prominent

The TV and VoD market is moving towards greater collaboration between services, as fully standalone platform strategies become harder to sustain. Partnerships are being used to address common challenges around discovery, affordability and distribution scale, with a growing number of services opting to work together rather than compete in isolation. This is reflected in the rise of

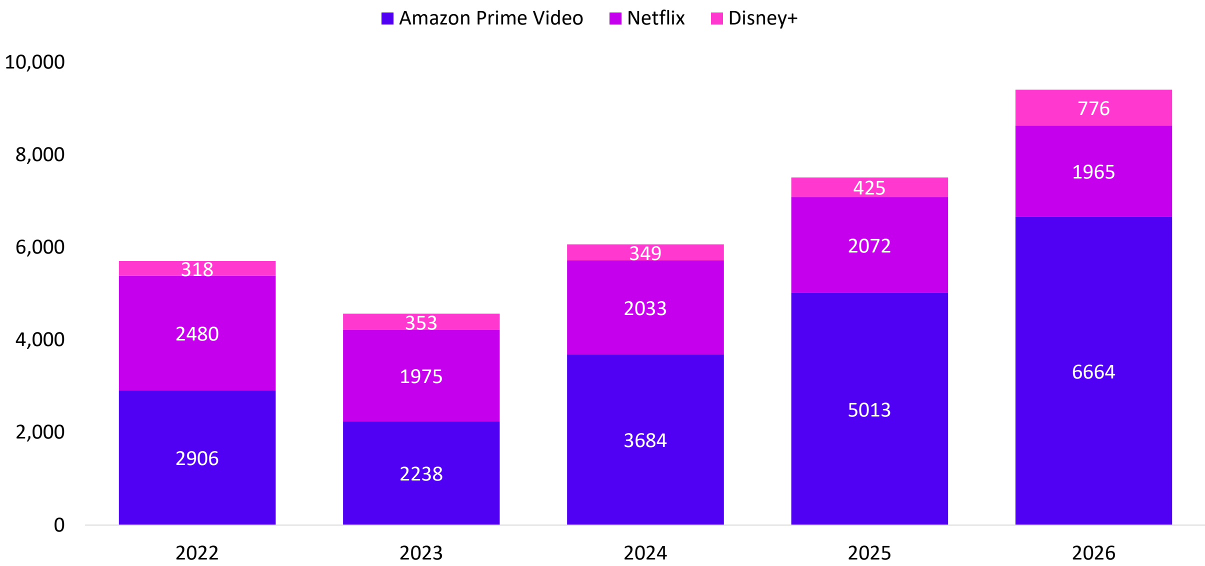
[57] Ofcom, broadcasters.

content-sharing agreements and broader distribution deals, which aim to extend reach and make content easier to find across platforms.

Content-sharing arrangements are becoming more common. ITV and Disney launched a reciprocal deal in 2025, sharing curated content across ITVX and Disney+, with the stated aim of extending reach and improving discoverability. This has since expanded into linear broadcast, with Hulu-originated content scheduled on ITV1, indicating a more integrated cross-platform approach.

UK PSBs initially responded to the growth of SVoD by restricting third party licensing and prioritising their own streaming services, including BritBox. More recently, broadcasters have adopted a more flexible approach, increasingly licensing content to global platforms, particularly Amazon Prime Video and Netflix, to maximise reach and value across multiple distribution windows (Figure 59).

Figure 59: Hours of programming first aired on UK PSB group services available on selected SVoD services: 2022-2026



Source: Ampere Analysis. April each year. Includes programming first made available via selected BBC, ITV, Channel 4 and Channel 5 channels (BBC One, BBC Two, BBC Three, BBC Four, CBBC, CBeebies, ITV, ITV2, ITV3, ITV4, Channel 4, Channel 5).

Broadcaster-to-broadcaster collaboration is also increasing. Channel 4 and UKTV agreed a multi-year carriage deal in 2025, bringing UKTV's U service and archive content onto Channel 4's streaming platform. S4C content already features on BBC iPlayer, and the Welsh broadcaster has recently entered into a new streaming partnership with the BBC to provide greater prominence for S4C content.

Alongside these developments, broadcasters are increasingly incorporating YouTube into their distribution strategies. Channel 4 and ITV have both established partnerships that enable full-length content to be distributed on the platform, alongside tailored commercial arrangements that retain greater control over advertising. This marks a shift from using YouTube primarily for promotion to treating it as part of a broader distribution portfolio. The BBC has taken a similar approach, expanding its YouTube strategy through platform-first commissions and a stronger channel presence, particularly aimed at reaching younger audiences. S4C has also expanded its YouTube presence, announcing a partnership in April 2026 to bring more Welsh-language programming to YouTube, including YouTube-first commissions, live streams and news, and short-form news and current affairs. YouTube offers access to viewers who may not engage with linear or broadcaster VoD services, while also creating additional monetisation opportunities for content beyond its initial release window. Similar approaches are emerging among producers, with ITV's partnership with Banijay extending its YouTube advertising sales capability to third-party content.

Collaboration is also extending across media types, as video and audio platforms converge. Channel 4's deal to bring video content to Spotify reflects a wider trend towards cross-platform distribution, while the growing popularity of video podcasts is beginning to influence both TV and audio strategies. Streaming services are increasingly integrating podcast content into their video ecosystems. In October 2025, Netflix and Spotify announced a deal to bring selected video podcasts to Netflix, launching in the US in early 2026 with plans to expand internationally.

Internationally, more integrated distribution models are emerging. The partnership between Netflix and TF1 in France, under which the broadcaster's linear channels and on-demand services are available on Netflix, has been widely seen as a significant step towards deeper platform integration.

These developments point to a gradual shift towards more connected and aggregated distribution models. As the market matures, services are increasingly focusing on improving discoverability, extending reach and maximising the value of content across multiple platforms, rather than relying on standalone distribution strategies.

Video-sharing platforms and the creator economy

The supply of video content has long expanded beyond traditional commissioning models

The supply of video content has continued to expand beyond traditional commissioning models, with video-sharing platforms now a core part of the wider TV and online video ecosystem. The creator economy operates at scale, with platforms such as YouTube and TikTok hosting a large and increasingly professionalised base of creators producing content across a wide range of genres.

Creator-led content is typically characterised by lower production costs, faster turn-round times and more direct forms of audience engagement. This has enabled the development of an alternative content pipeline operating alongside, and in some cases competing with, traditional commissioning. While much of this content is short-form, video-sharing platforms also host a growing volume of longer-form, TV-like programming. This includes digital-native creators producing episodic formats, documentaries and factual entertainment, as well as established organisations such as news publishers (The Guardian, The Telegraph…), cultural institutions (The British Museum, Tate, National Theatre…) and production companies (Banijay UK, All3Media…) distributing long-form video directly to audiences.

A wide range of organisations are now using platforms such as YouTube as a primary or complementary route to market. UK cultural institutions, including museums, are publishing documentary-style and live streamed content; news brands are developing regular long-form video output; and production companies are increasingly using platforms to monetise archive content directly, reducing reliance on traditional broadcast distribution. At the same time, digital-native creators are building large audiences with structured, repeatable formats that in some cases resemble traditional TV genres, from factual storytelling to competition-based entertainment.

Broadcasters and streaming services are increasingly engaging with this ecosystem through talent partnerships, commissioning strategies and multi-platform distribution, particularly as a means of reaching younger audiences who spend a significant share of their viewing time on social and video-sharing platforms. This is contributing to a more porous boundary between professionally produced and creator-led content, with formats, talent and intellectual property moving more fluidly between the two.

Ofcom's Online Nation report, due later this year, will provide further analysis of how audiences are served by online content providers and platforms, including video-sharing platforms.

Vertical video comes into focus

Broadcasters and streamers alike are exploring the use of vertical video (content produced in a portrait format, optimised for mobile viewing) and short-form formats to drive content discovery and audience engagement. The BBC is expanding its use of short-form video with new features across its news and sport apps, while Channel 4 has commissioned short-form shows as part of its digital strategy, and is producing vertical video content optimised for mobile viewing on social video platforms. Global streamers have also taken note of the competition with YouTube and TikTok for vertical short-form engagement, with Netflix rolling out its 'Clips' function on its mobile app, a new vertical video feed to promote short clips and behind-the-scenes extras from its content. Disney+ is following a similar strategy, and Amazon Prime Video is also developing its vertical-video proposition, both having announced plans to add vertical video to their mobile apps.

Alongside this, new formats are beginning to emerge. Short-form scripted content, including 'microdramas', has gained traction in some international markets, particularly in mobile-first viewing environments. These productions are typically lower-cost, structured around short episodic arcs, and optimised for platform algorithms and vertical viewing. While still relatively limited in the UK and European markets, they point to a broader shift towards more flexible, platform-native formats alongside traditional long-form programming.

Consolidation and structural change

Consolidation continues across the global TV and streaming sector, as companies respond to evolving market conditions. Strategic priorities have increasingly centred on profitability, content investment and distribution, with mergers and acquisitions forming part of wider efforts to adjust business models and positioning.

One of the most significant recent developments is Paramount's proposed acquisition of Warner Bros. Discovery, announced as an all cash offer, and aiming for completion in 2026, subject to regulatory approval. This transaction would further consolidate two major global content groups and reflects a broader trend towards vertical and horizontal integration within the sector.

The UK has also seen notable activity. On 6 July 2026, Sky and ITV plc announced agreed terms for Sky's acquisition of ITV's Media & Entertainment (M&E) division (its broadcasting and streaming business) for a total value of up to £1.6bn.

Elsewhere, consolidation activity continues across both production and distribution. Disney completed the acquisition of Comcast's remaining stake in Hulu, while the recently completed merger between Banijay and All3Media combined two large independent production groups. Elsewhere, RTL's acquisition of Sky Deutschland highlights ongoing consolidation activity across European markets.

Recent transactions reflect ongoing changes in the structure of media markets, as companies adapt to evolving audience behaviour, distribution models and commercial pressures. These changes are likely to shape how content is bundled, distributed and surfaced to audiences, with implications for choice, pricing and access over time.

Radio and audio

Audience trends

This section provides insight and commentary on audience listening behaviours. It contains data on listening and attitudes to different types of audio, particularly live radio, but also streamed music and podcasts, and is complemented by our recent report: Audio Listening in the UK.

Where our data comes from

Our figures for reach of audio services come from our Audio Survey, whose participants are aged 16 and above. Figures on share of listening to different audio types come from IPA TouchPoints, and figures on live radio listening come from RAJAR, which use participants aged 16+ and 15+ respectively. We have used the term 'adults' here when referring to each source. See the Annex for more detail on data sources and methodology.

Overall audio listening

93% of adults listen to some type of audio each week

According to Ofcom's latest Audio Survey, more than nine in ten UK adults (93%) listen to some form of audio each week. From the nine types of audio we asked about (see Figure 60), on average, adults listen to 3.6 different types of audio each week, peaking at 5.0 different types for those aged 25-34 and falling to 2.2 for those aged 65 and older.[58] Music is the key driver: 90% listen to some type of music audio, compared to 53% who listen to speech audio.

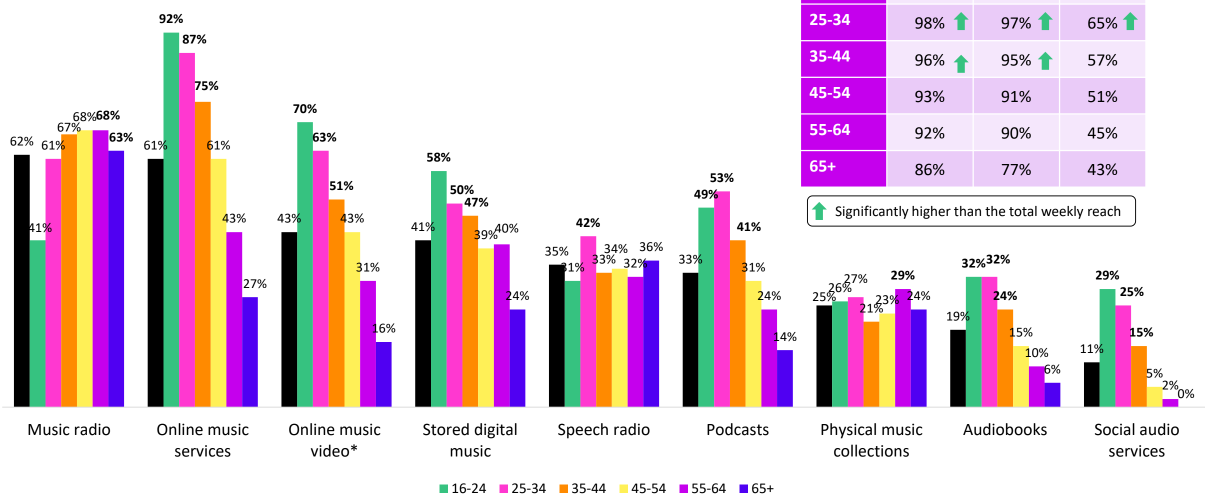
Audio behaviours vary significantly between age groups. Weekly use of online music streaming services peaks at 92% among those aged 16-24 and falls by age, with reach lowest among those aged 65 and over, at only 27%. In contrast, only 41% of those aged 16-24 listen to music radio each week, compared to 62% of the population as a whole. Overall, the 25-34s rank highly for speech-based content, with the highest reach across speech radio, podcasts and audiobooks.

[58] Ofcom Audio Survey 2026. Note: these mean figures differ from those reported in our annual Audio report as we have used different sources.

Figure 60: Weekly reach of different types of audio, by age group: 2026

	Any audio	Music audio	Speech audio
16+	93%	90%	53%
16-24	98% ⬆	98% ⬆	60% ⬆
25-34	98% ⬆	97% ⬆	65% ⬆
35-44	96% ⬆	95% ⬆	57%
45-54	93%	91%	51%
55-64	92%	90%	45%
65+	86%	77%	43%

⬆ Significantly higher than the total weekly reach

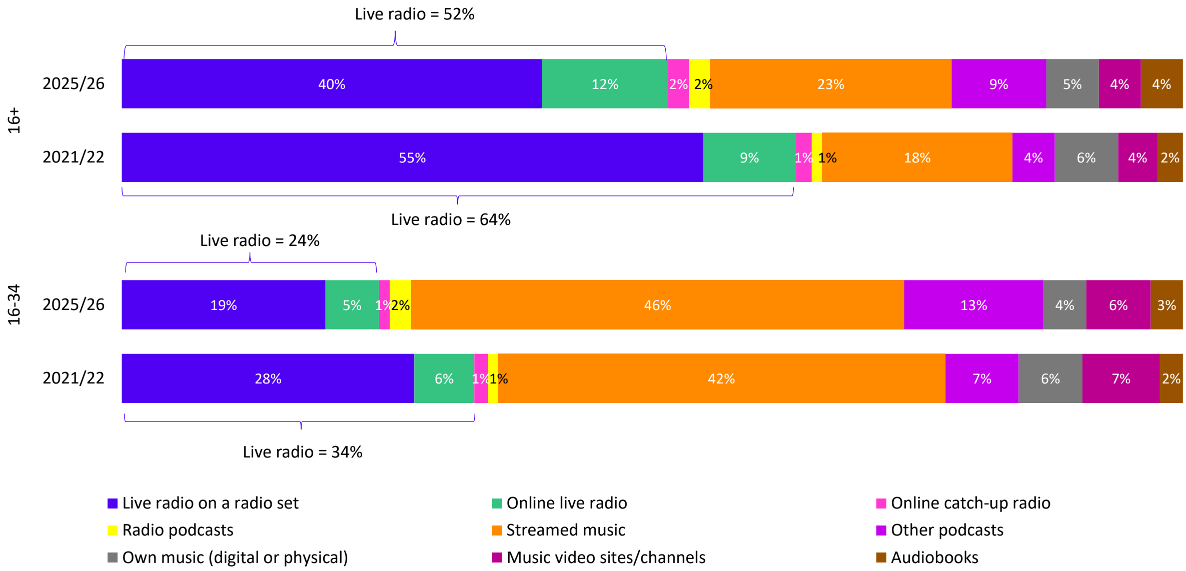


*Source: Ofcom Audio Survey 2026. Q1. How often, if at all, do you listen to any of the following? Base: All respondents aged 16+ (3,469).*For background listening only.*

Weekly audio habits continue to shift, with people spending their time across a range of audio types. Live radio listening (online or through a radio set) now accounts for 52% of weekly audio time compared to 64% four years ago. In contrast, other online audio types have all seen increases across the same period; in particular, podcasts (11% of time compared to 5% in 2021/22) and streamed music (23% compared to 18%).

The shift for 16-34-year-olds hasn't been as steep over the past four years, though online music was already a key feature of their audio diets. This audio type now accounts for 46% of time, almost double that of live radio (24%), while podcast listening now accounts for 15% of time compared to 8% four years ago.

Figure 61: Share of time spent listening to audio each week: adults aged 16+ vs adults aged 16-34



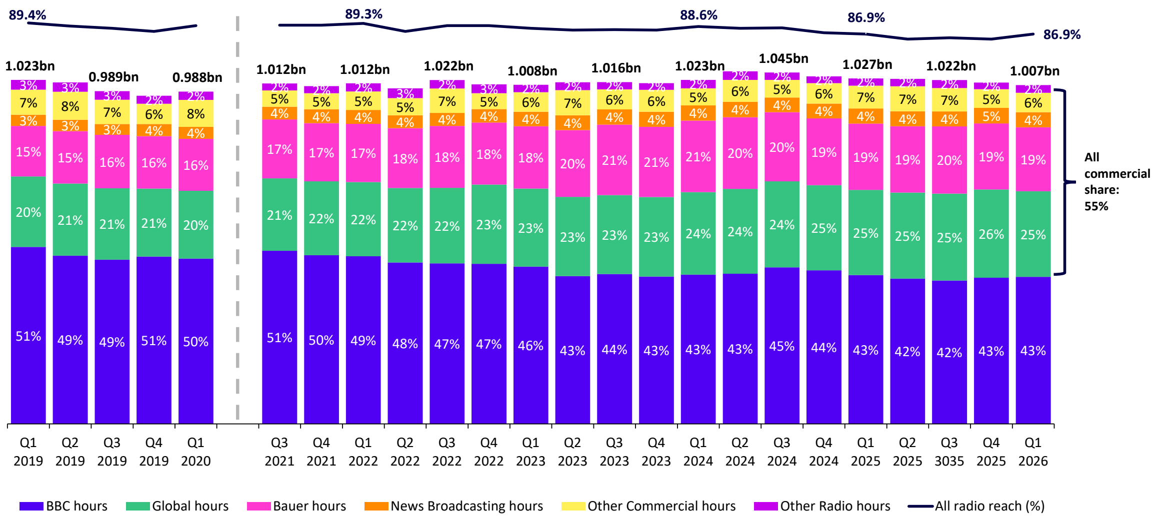
Source: IPA TouchPoints SuperHub.

Live radio listening

Just under nine in ten adults in the UK tune in to live radio each week

The weekly reach of radio (as measured by RAJAR) continues to be resilient, with 86.9% adults aged 15+ listening to the radio each week in Q1 2026, the same as a year previously, despite a fall of 2.4 percentage points since Q1 2022. Of the 1.007 billion minutes of listening in Q1 2026, 55% was to commercial radio, also unchanged on the previous year. Global continues to be consistently the largest commercial broadcaster by share of listening, growing from 21% overall listening in Q3 2021 to 25% in Q1 2026.

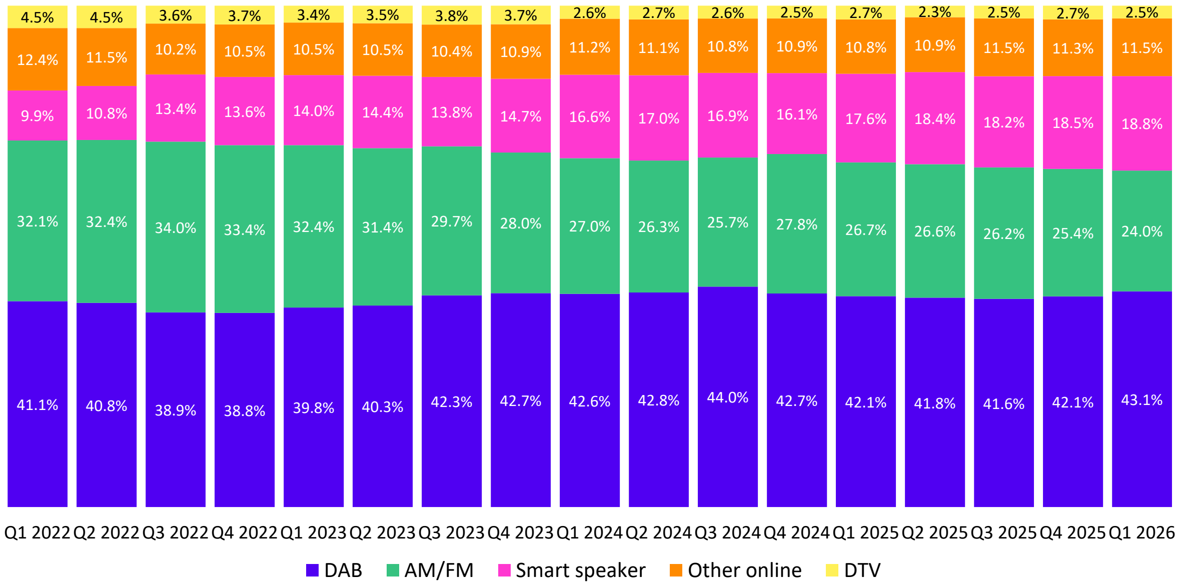
Figure 62: Total radio reach and weekly listening, by broadcaster group: Q1 2019 – Q1 2026



Source: RAJAR. Note: dotted line indicates suspension of fieldwork from the end of Q1 2020 until Q3 2021 due to the Covid-19 lockdowns. This led to subsequent changes in methodology, so comparison with previous quarters should be made with caution.

How people listen to radio has changed considerably, even over the past four years since smart speakers were added to the RAJAR survey. In Q1 2022, over two-fifths (41.1%) of listening was through a DAB set, considerably higher than listening through AM/FM radio (32.1%), and 22.3% was online, including smart speakers. By Q1 2026, analogue radio's share of listening had fallen to 24.0%, considerably lower than online listening (30.3%).

Figure 63: Share by platform over time: Q1 2022 - Q1 2026



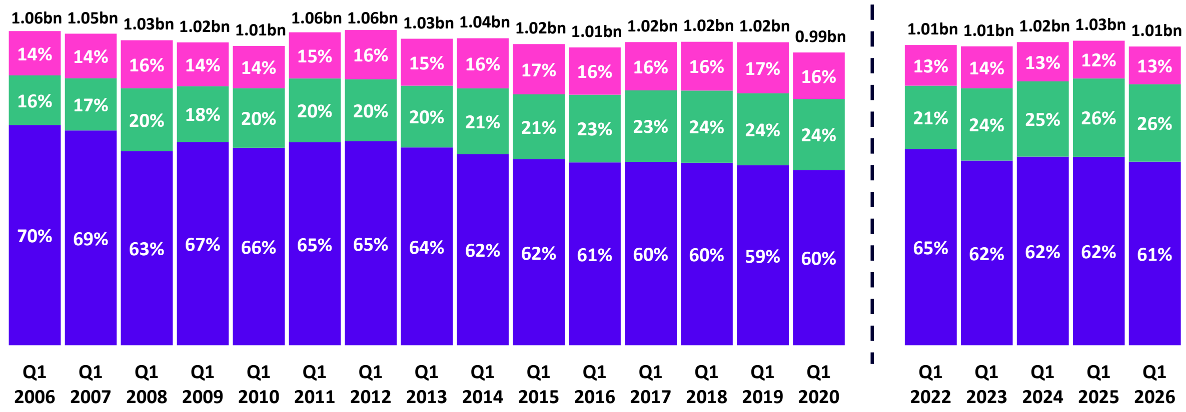
Source: RAJAR.

The majority of listening is at home, but in-car is growing

The majority of radio listening time continues to be at home, accounting for 61% of all weekly hours. However, listening to the radio in a car or other vehicle has increased over the same period, now accounting for over a quarter of listening hours. Just under a quarter (23%) of radio listeners *only* listen to the radio in a vehicle; in Q1 2020 this figure was 16%, demonstrating the importance of in-car listening to the radio industry.

However, as people become more accustomed to accessing audio in other ways in their cars, this could shift over time. In our latest Audio Survey, we asked people if they had used a voice assistant in the past three months, and 52% of adults said they had. Among those who had used voice assistants, 12% said they had used it to listen to radio through their smartphone in the car, increasing to 17% of those aged under 35. However, 15% said they has listened to other audio content using a voice assistant on their smartphone in the car, increasing to 23% of those aged under 35.

Figure 64: Weekly radio listening (hours) and share by location over time: Q1 2006 – Q1 2026



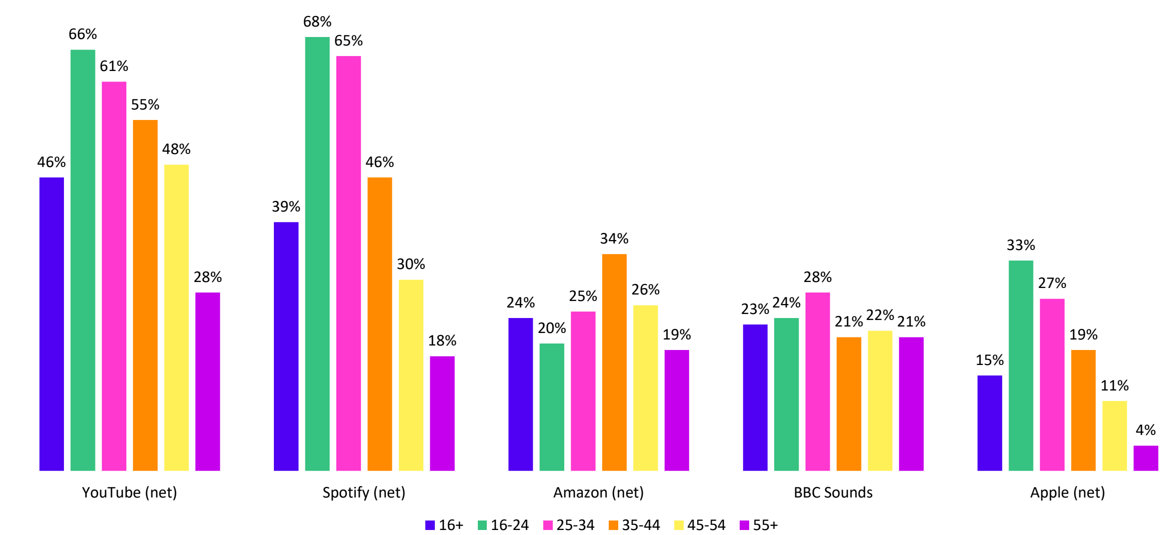
Source: RAJAR. Note: dotted line indicates suspension of fieldwork from the end of Q1 2020 until Q3 2021 due to the Covid-19 lockdowns. This led to subsequent changes in methodology, so comparison with previous quarters should be made with caution. Note: listening in locations 'Not stated' for each quarter rounds to 0% and labels have been removed from the chart.

Online audio

YouTube is the most-used platform for streaming any audio type

YouTube is the most-used platform for any audio content (when used for background listening), used by 46% of adults. Audio streaming platforms vary in terms of the type of audio they provide and the range of content they have available within each type. Our Audio Report this year provides detail on which services are used more for which audio type: Spotify is generally the most-used for music streaming and podcasts, BBC Sounds is the most-used for online radio, Audible for audiobooks and YouTube for online videos for background listening.

Figure 65: Weekly reach of streaming platforms for *any* audio content

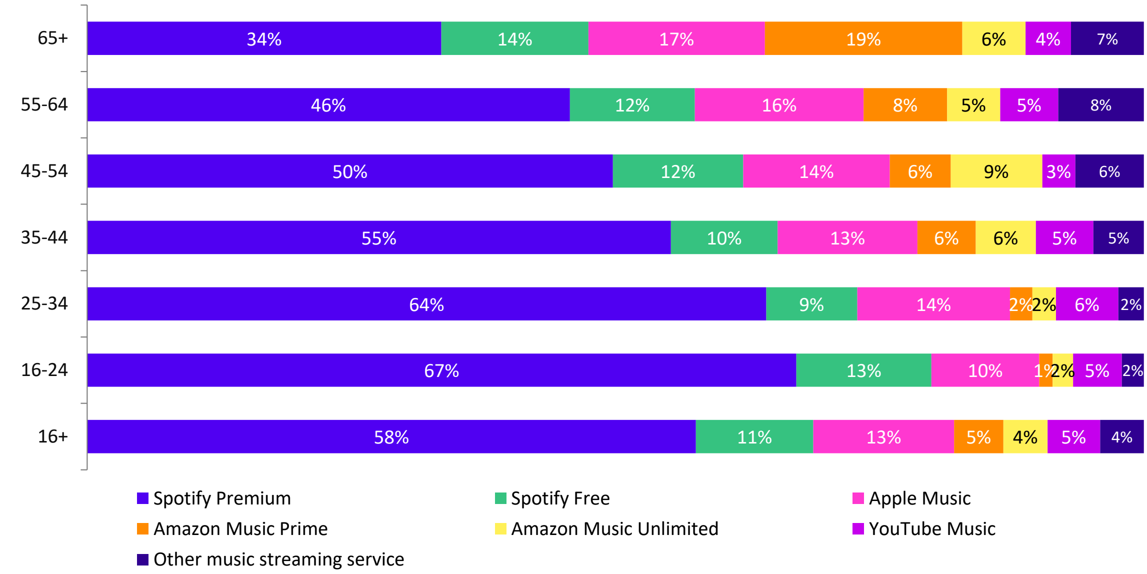


Source: Ofcom Audio Survey 2026. Q11d/Q11f/Q11h/Q11j. Combined frequency of use (at least weekly Spotify includes free and premium; YouTube (for background listening) includes YouTube Music, YouTube, YouTube Premium; Amazon includes Audible and free and premium Amazon Music; Apple includes Apple Music and Apple iTunes/Podcasts. Note: we specify 'for background listening' to make it more comparable with audio-only formats.

Most time spent streaming music is through Spotify

Over two-thirds (69%) of time spent listening to online music is through Spotify, primarily the Premium version. Use of the other music streaming services follows a relatively similarly pattern across age groups, although music streamers aged 65+ are more likely than any other age group to use Amazon Music (Prime or Unlimited) with a quarter of their time spent streaming music this way, compared to 9% for all adults.

Figure 66: Share of time spent music streaming by platform each week, by age group: 2026



Source: IPA TouchPoints SuperHub 2026.

Satisfaction with streaming services is generally high

Overall satisfaction with ease of use of the main streaming platforms is high: almost nine in ten users of each of the platforms are satisfied with their ease of use; and for the platforms shown in Figure 67 below, between 80% and 88% users described the range of content as good. In contrast, satisfaction with other aspects of services is more varied, for example, the proportion of users who rate exclusive content (available only through that platform) as good varies from 44% for Amazon Music to 69% for BBC Sounds.

Figure 67: Positive user ratings of features by audio services: 2026

	Amazon	Apple	BBC Sounds	Spotify	YouTube
Ease of use	85	87	86	89	88
Ease of navigation	81	86	84	87	86
Range of content	81	85	85	88	88
Discover new music	67	79	65	81	73
Multi-device use	72	78	76	81	77
Discover new content	68	77	76	80	78
Free from adverts	53	77	80	58	29
Personalisation	65	74	51	78	70
Different providers	59	72	59	72	74
All audio types in one place	66	69	76	76	67
Cost	59	66	74	60	60
Exclusive content	44	62	69	56	51
Friends/family use	35	58	40	59	46
Ethics & morals	34	51	64	42	35
Social interaction	28	51	32	44	28
Parental controls	29	46	32	31	30

Key:
80%+
50-79%
Below 50%

Source: Ofcom Audio Survey 2026. Q22. You said you use [SERVICE]. How good or bad, are they on each of the following?. NET Good. YouTube for background listening only.

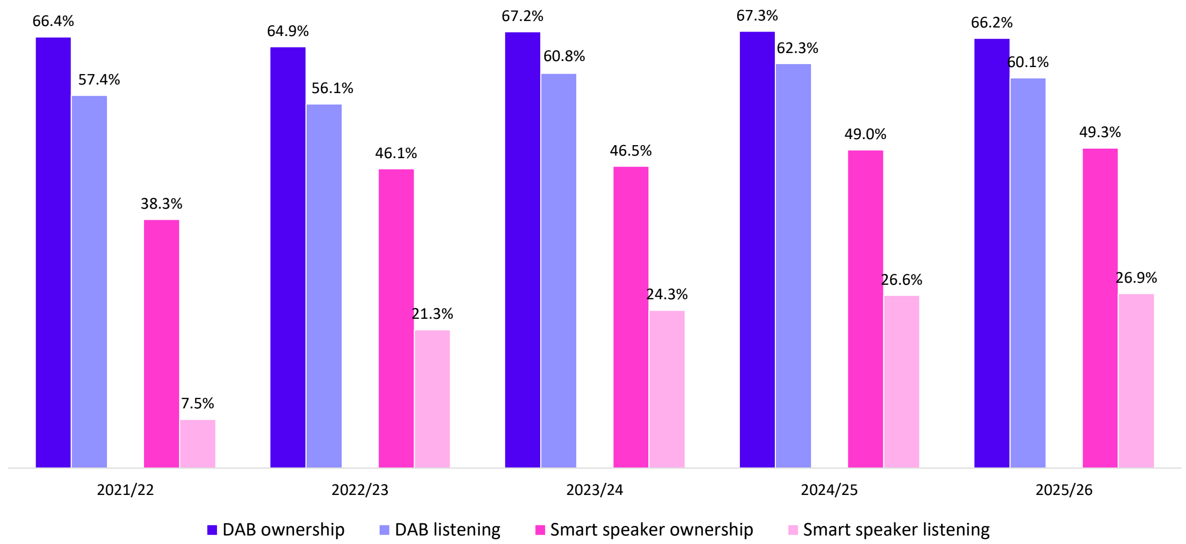
Smart speakers

Smart speakers are closing the gap on DAB for radio listening, but the trend seems to have stalled

We will publish data on take-up and use of smart speakers in our forthcoming Technology Tracker survey. In this year's report, we have looked at data collected by RAJAR, comparing DAB and smart speaker ownership over the past few years and looked at how listening behaviours are changing.

The chart below shows that while DAB ownership has remained level over the past four years, with two-thirds of adults claiming to own a DAB set, listening to the radio via a smart speaker has continued to increase incrementally. RAJAR began tracking listening to the radio through smart speakers after resuming fieldwork post-Covid, and the chart shows increases in ownership for the first couple of years but then plateauing, with about 49% of adults now claiming to own a voice-activated speaker. Patterns of listening to the radio this way are comparable to ownership trends; the proportion of adults listening this way is around 27%. RAJAR also indicates that in 2025/26, 68% of smart speaker owners said they listened to *any* audio this way (live radio, music, podcasts or audiobooks).

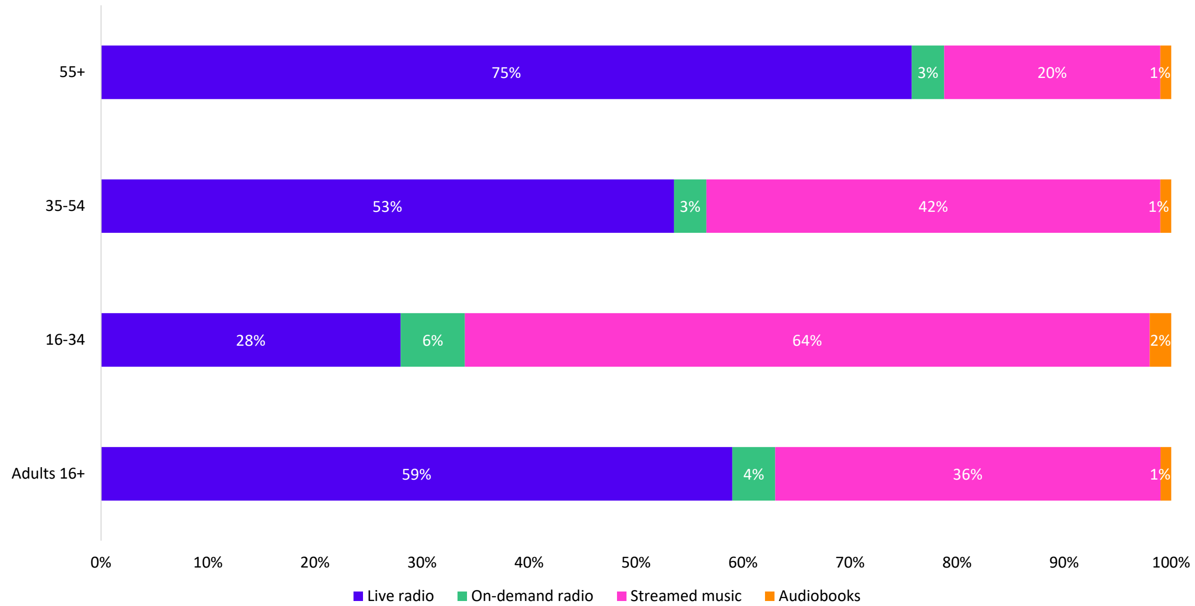
Figure 68: DAB and smart speaker ownership and radio listening: 2021/22 – 2025/26



Source: RAJAR. Q1 with 12-month weighting.

How smart speakers are used for different audio types varies by age group. Figure 69 shows that for all adults, radio is the dominant audio type, accounting for 63% of listening to the audio types shown. Similar to the pattern of 'any audio' shown in Figure 65, younger audiences are more likely than older age groups to listen to music streaming services on smart speakers.

Figure 69: Proportion of time spent listening to different audio types through a smart speaker, by age: 2026



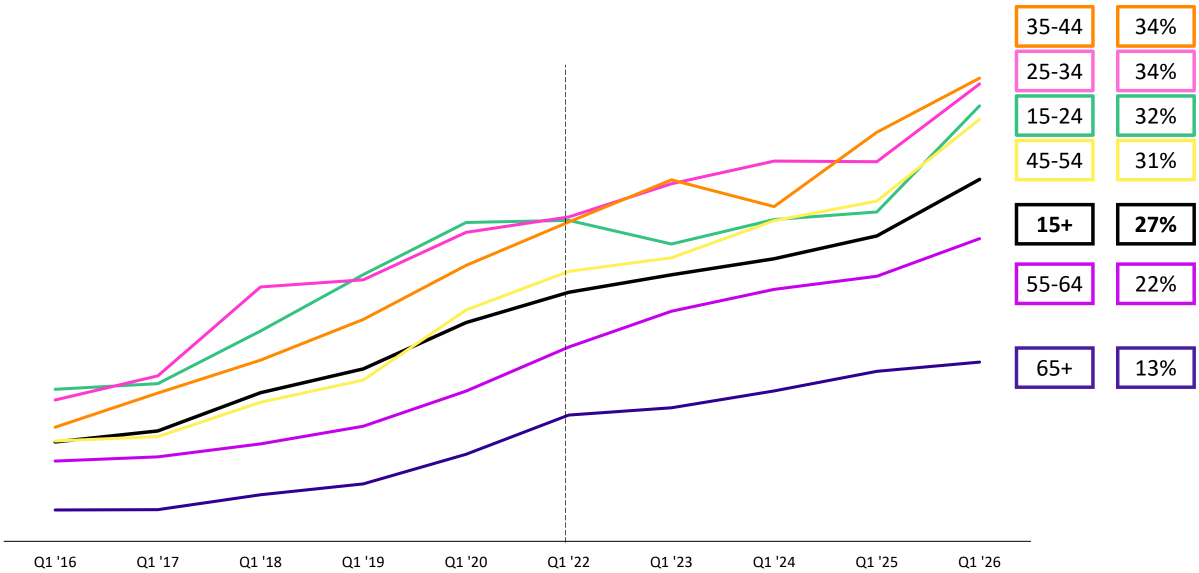
Source: IPA TouchPoints SuperHub 2026.

Podcasts

The weekly reach of podcasts continues to climb

Over a quarter of adults now listen to a podcast each week. According to RAJAR, 27% of UK adults aged 15 and above listen to podcasts at least weekly, up from 7% a decade ago. Early adopters in 2016 were mainly under the age of 35, but 45-54s now have a higher-than-average reach. Reach to podcast listeners aged 65+ is now 13%, from a negligible amount in 2016. There is a slight difference between reach of podcasts to men and women, with 29% and 24% listening weekly respectively.

Figure 70: Weekly reach of podcasts over time and in selected demographic groups: Q1 2026



Source: RAJAR. Dotted line indicates change in method following the lockdown periods.

Podcast genre preferences vary significantly by age

Across all those who listened to podcasts at least weekly in 2026, news and current affairs was the genre most frequently listened to (47% of weekly listeners), followed by entertainment (44%), comedy (41%) and discussions and talk shows (40%). However, there are clear differences between age groups. Entertainment and comedy genres were most popular among 18-34 year-olds, while those aged 55 and over were more likely to listen to podcasts about news, current affairs and politics.

Some genres have strong gender skews. For example, football podcasts are listened to by 31% of weekly podcast listeners, but this rises to 45% among men and just 14% among women.

Figure 71: Top ten types of podcasts listened to at least weekly, by age group: 2026

	18-34		35-54		55+	
1	Entertainment	54%	News and current affairs	44%	News and current affairs	56%
2	Comedy	49%	Entertainment	43%	Politics	44%
3	Discussion and talk Shows / news and current affairs	45%=	Comedy	40%	Discussion and talk shows	32%
4	Music	43%	Discussion and talk shows	38%	Comedy	30%
5	Health and wellbeing	41%	Health and wellbeing / politics	35%=	Entertainment	26%
6	TV and film	39%	Football	32%	Music	25%
7	Politics	38%	Music / society & culture	31%=	Health and wellbeing / society & culture	24%=
8	Hobbies	37%	TV and film	28%	Fiction/ drama	23%
9	Food / science & Technology / society & culture	36%=	True crime	26%	Football	22%
10	True crime	35%	Hobbies / science & technology	25%	Hobbies / science & technology	19%

Source: Ofcom Podcast Survey 2026 Q10. How often, if at all, do you listen to these different types of podcasts? Base: Base: All regular podcast listeners (1502).

In the period Q2 2025-Q1 2026, four podcasts, measured by Edison, reported average weekly audiences in the UK of over a million. These were *The Joe Rogan Experience* (2.2 million audience, equivalent to 10.0% weekly podcaster listeners) followed by *The Diary of a CEO* with Steven Bartlett (1.5 million – 6.9% listener reach), and Goalhanger's *The Rest Is Politics* (1.4 million, 6.1%) and *The Rest Is History* (1.1 million, 4.7%). Among incumbent broadcasters, both the BBC and Global each had one podcast in the top ten (*Newscast* and *The News Agents* respectively) – both of which are in the news category (as defined by Apple Podcasts).

People value podcasts for convenience and choice

Overall, 35% of weekly podcast listeners say that they would be happy to pay to subscribe to their favourite podcasts – a proportion which has remained relatively constant over the past few years.

However, this differs significantly by age, with almost half (48%) those aged 16-34 saying this, compared to only 16% of those aged 55 and over.

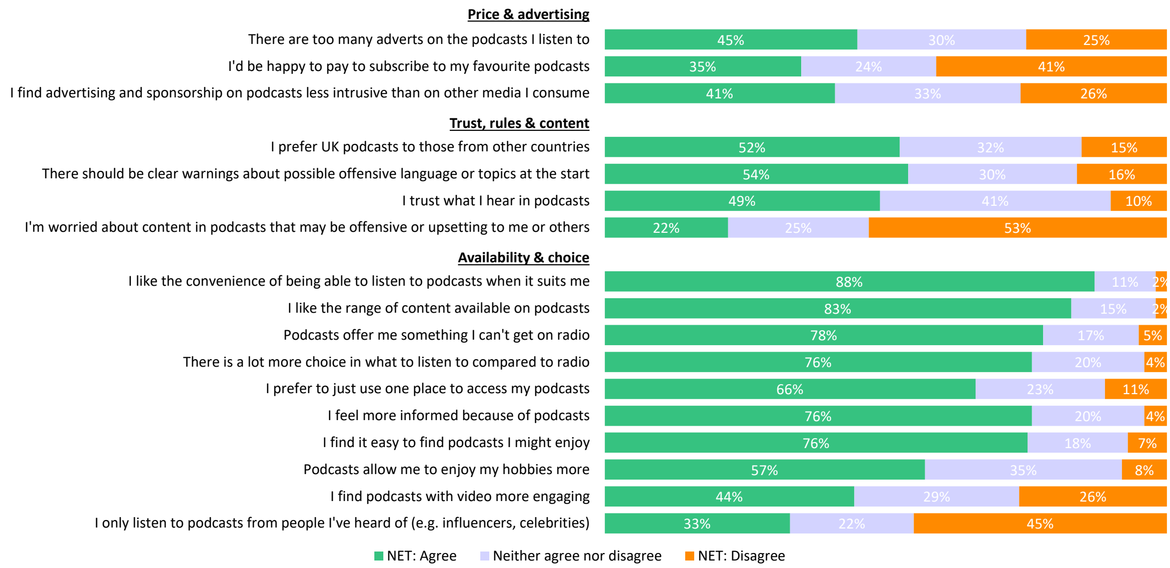
A large minority (45%) of weekly podcast listeners say that there are too many adverts on the podcasts they listen to – a figure which has grown over the past five years. Those aged 16-34 (48%) and those aged 35-54 (also 48%) are more likely to say this than those aged 55 and over (35%), possibly reflecting differences both in the podcasts consumed as well as the platforms used.

Attitudes towards trust, rules and content are divided. Just over half (54%) agree that there should be clear warnings about possible offensive language or topics at the start of podcasts, but 30% say they neither agreed nor disagreed with this. Women were more likely than men to say there should be clear warnings (60% vs 49%) along with those aged 15-34 (61%).

Overall, 49% of regular podcast listers said that they trusted what they heard in podcasts. Again, a large minority (41%) say they neither agreed nor disagreed with this. Those aged 16-34 and 35-54 are more likely than those aged 55+ to say they trusted what they heard on podcasts.

Podcasts are valued for their convenience and choice, with 88% in 2026 liking the convenience of being able to listen to podcasts when it suits them, and 83% liking the range of content available.

Figure 72: Attitudes towards podcasts



Source: Ofcom Podcast Survey 2026. Q15. To what extent, do you agree or disagree with the following statements about podcasts... Base: All regular podcast listeners (1502).

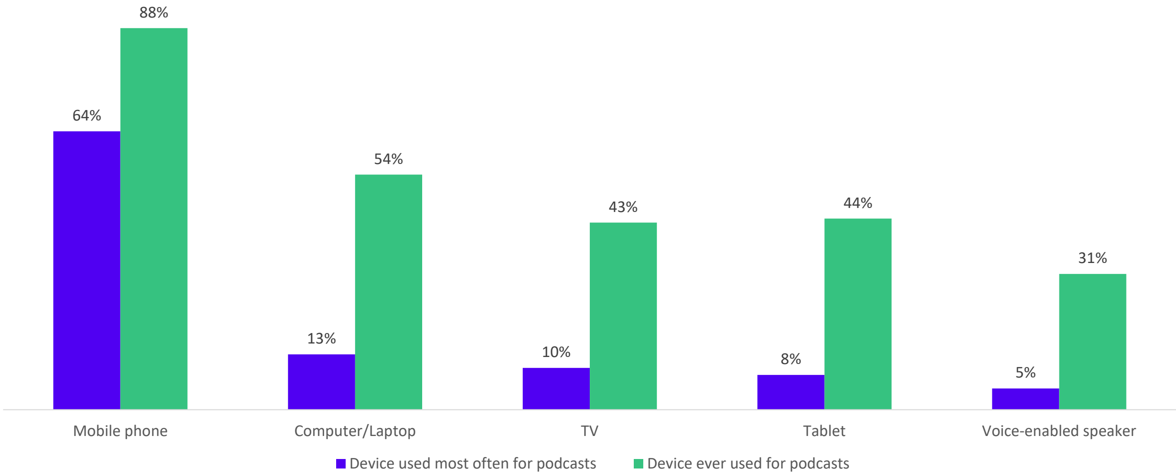
Podcasts increasingly straddle the line between audio and video

As we have already noted in the Media in Context chapter, historic distinctions between content types and device functionalities have become increasingly converged, with podcasts increasingly offering a visual option, though not necessarily replacing the audio format for audiences. Take-up of connected devices which can be used to listen and/or watch podcasts is high. Over two-thirds of weekly podcast listeners ever listen to podcasts that also have videos (68%), highest among the 16-34 age group (79%).

A large minority (44%) say they found podcasts with videos more engaging [Figure 72: above]. Those aged 16-34 were more likely to say this (71%, compared to 29% of those aged 55+).

Research from Edison shows that mobile phones are the devices most commonly used by UK podcast listeners, with 64% in Q2 2025- Q1 2026 saying that this is the device they use most often to listen to podcasts. Just 10% say they use a TV *most often* for podcasts, while more than four times this number (43%) say that they *ever* use TVs to watch a podcast. Among those who watch podcasts on TV, the figure rises to 54% (even though 61% of this group still say that they use their phone most often for podcasts).

Figure 73: Devices used for podcasts



Source: Edison Research Q2 2025-Q1 2026. Based: Weekly podcast listeners aged 15-74 (8327).

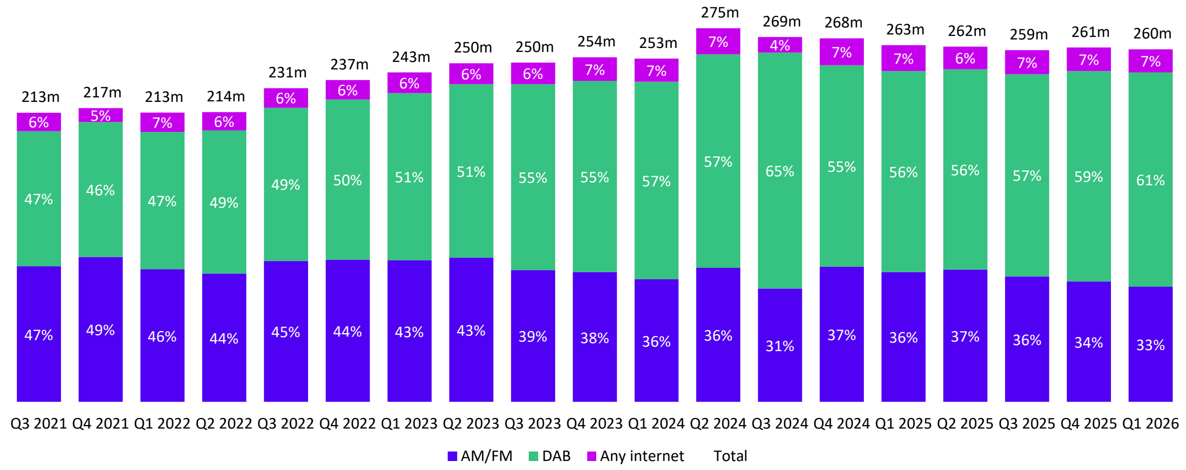
In-car listening

DAB's share of in-car listening continues to grow

As noted earlier, listening while travelling in a car/van continues to be a key driver of radio listening. Around 260 million hours of radio are listened to in cars/vans each week (26% of all listening, as shown in Figure 74). As more new cars are bought, this in turn increases the likelihood for adults in the UK to have access to DAB in the car. Figure 74 shows that DAB now accounts for 61% of all listening that takes place here. However, analogue radio still has an important role, and not all cars currently on the road have DAB. A third of in-car listening continues to be through an AM/FM radio set.

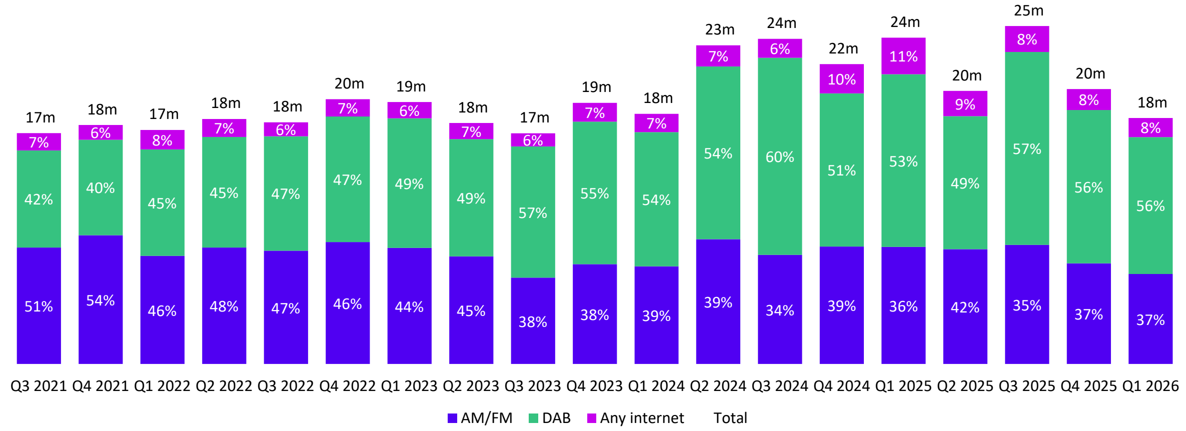
These in-car behaviours are driven not by age but apparently by the platform availability/ convenience in the car. Figure 75 shows the share of in-car platform listening among 15-24-year-olds. Their move to in-car DAB is slower; 37% continues to be through analogue radio.

Figure 74: Platform used for in-car radio listening: adults aged 15+



Source: RAJAR. Note: 'Any internet' includes radio listening recorded as either 'internet' or 'smart speaker'. For all quarters apart from Q4 2021, where it rounds to 1%, in-car smart speaker listening rounds to 0%.

Figure 75: Platform used for in-car radio listening: adults aged 15-24

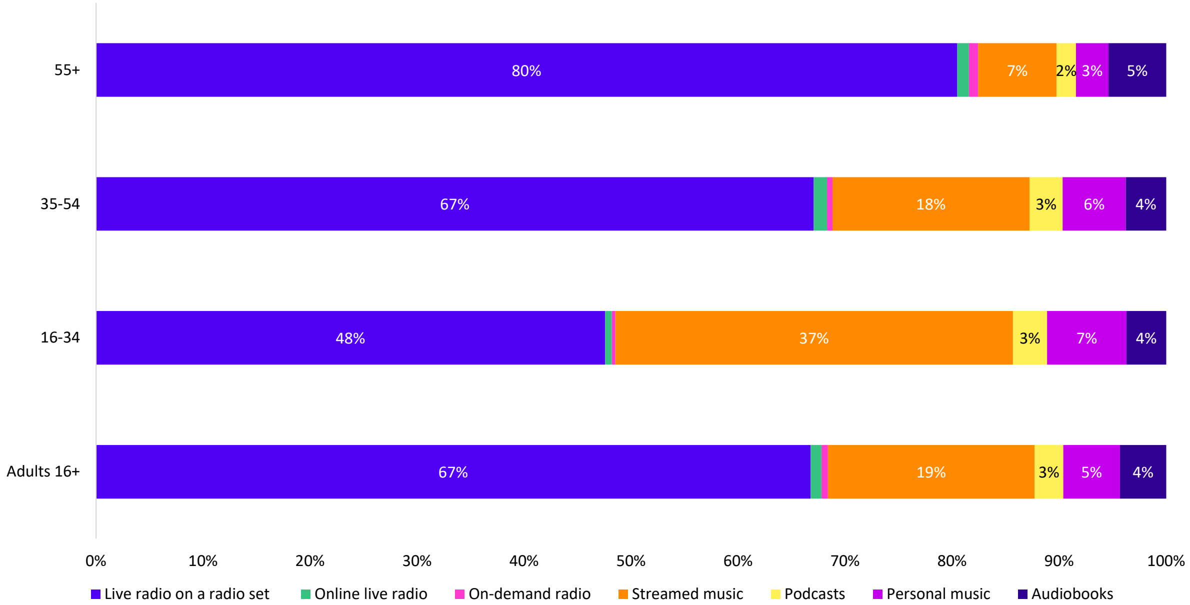


Source: RAJAR. Note: 'Any internet' includes radio listening recorded as either 'internet' or 'smart speaker'. For all quarters apart from Q4 2021, where it rounds to 1%, in-car smart speaker listening rounds to 0%.

The radio continues to be the key audio type for in-car listening

Despite the access to multiple audio types in cars, either through infotainment screens or connecting to smartphones, across all adults aged 16+, 69% of their time spent listening to audio while in a vehicle is to live radio (including online). This is to be expected; as we reported in our annual Audio Report earlier this year, car owners are more likely than those who don't own a car to say they would miss the radio if it wasn't there.

Figure 76: Share of audio time in-car, by age group: 2026



Source: IPA TouchPoints SuperHub 2026.

Industry trends

This section provides insight and commentary on key trends across the radio and audio sectors. It contains data on advertising, revenues and spend, and the availability of radio services, as well as notable developments across the audio market, including streaming, podcasts and recorded music.

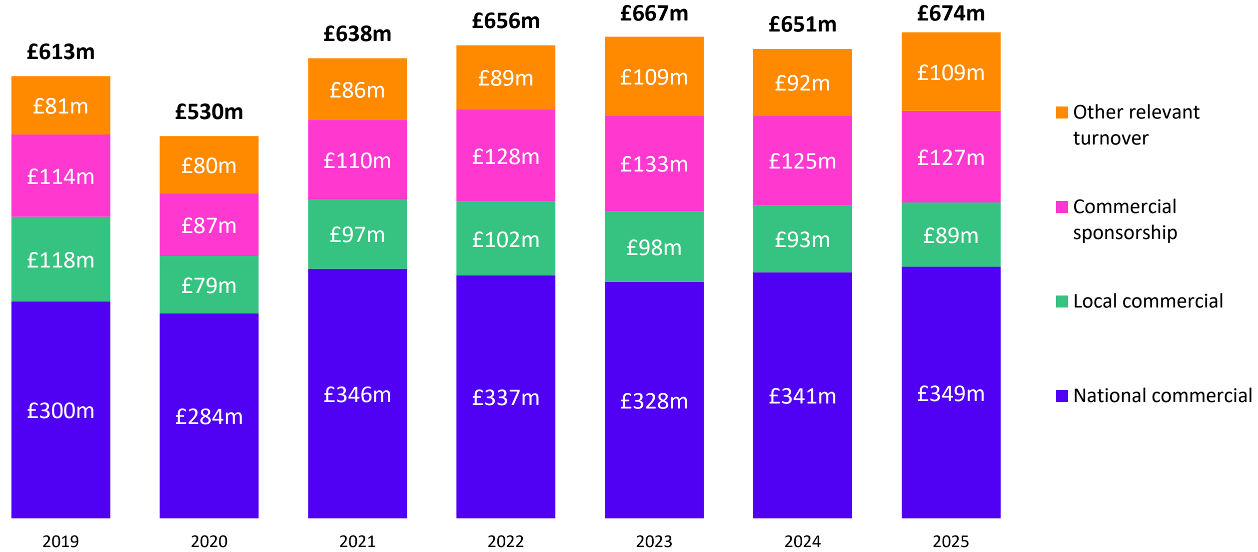
Revenues and spend

Radio revenues increased marginally in 2025

In 2025, the radio market maintained its value. Commercial radio revenues increased in 2025 to £674m, up from £651m in 2024. This modest growth points to the relative resilience of the radio sector despite ongoing economic uncertainty. National advertising revenues continued to outperform local, extending a longer-term structural shift in the market. This trend reflects both advertiser preferences for larger-scale, nationally packaged campaigns, and the continued centralisation of programming and sales across national networks by major groups such as Bauer and Global.

Alongside these shifts, the radio market continues to be influenced by shorter-term and more flexible revenue streams. Spot advertising (national and local) remains relatively reactive, with campaigns typically booked closer to transmission than in previous years and compared to other media. This allows radio to respond quickly to changes in advertiser demand but also means revenues can be more sensitive to fluctuations in economic conditions. Non-spot revenues, including competitions, sponsorship and branded content, also support the sector, offering more integrated opportunities for advertisers.

Figure 77: Commercial radio revenues: 2019-2025



Source: Broadcaster returns. Figures in chart rounded to the nearest million.

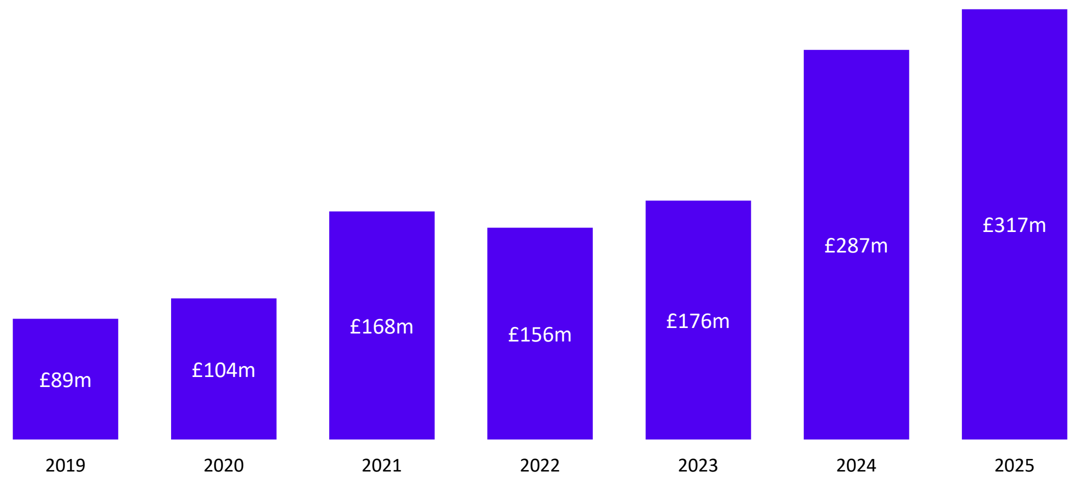
Digital audio advertising spend increased in 2025

Digital audio advertising expenditure (the placement of ads within audio content streamed over the internet) increased in 2025, underlining the importance of digital distribution within the audio market. Spend reached £287m in 2024, before rising further to £317m in 2025, a year-on-year increase of about 10% (Figure 78).

This growth reflects the continued expansion of digital audio revenues from a relatively low base, drawing in part on wider online advertising budgets. Within this, podcasts remain a key driver of growth, while streaming services continue to be primarily subscription-led, with advertising playing a smaller but increasing role.

While still developing, digital audio is becoming a more established part of the wider audio market, supporting efforts by broadcasters and publishers to diversify revenues beyond linear advertising.

Figure 78: Digital audio advertising expenditure: 2019-2025



Source: IAB UK Digital Adspend Study. Different method used prior to 2024.

Music streaming leads consumer spending on recorded music, while vinyl and fan-driven purchasing boost value

Music is a fundamental part of the audio sector. It is a key source of content for radio services and a significant driver of listening. Changes in music consumption have often shaped developments across the wider audio sector, including the growth of internet-delivered audio services. Consumer spending on recorded music continued to grow in 2025, reaching £2.45bn, up 4% year on year. Growth was again led by subscription streaming, which rose to over £2.0bn (+3%) and remains the clear driver of market value. However, the latest increase also reflects a more diversified pattern of growth than in earlier years.

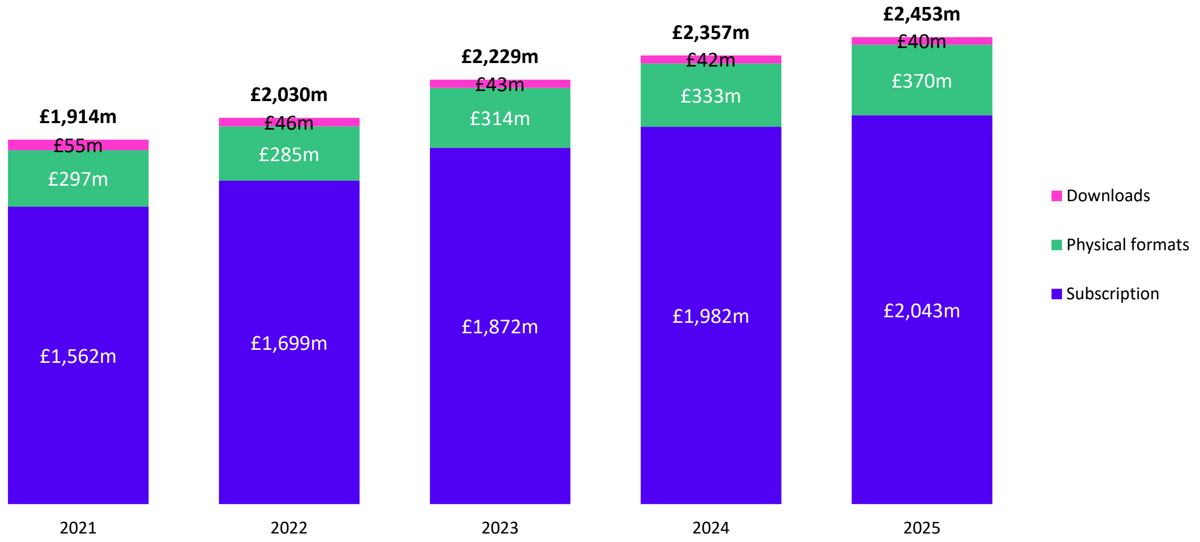
While streaming still accounts for the majority of spend, its rate of expansion has slowed compared to recent years, pointing to a maturing market. This is evidenced by more modest increases in subscription revenues alongside continued growth in overall listening, with UK audio streams reaching a record 210bn in 2025 (up 5% year-on-year).[59] As subscription uptake slows, similar to trends seen in TV streaming subscriptions, future growth appears increasingly tied to pricing, tiering and monetisation of existing users, rather than rapid gains in subscriber numbers.

[59] BPI *All About The Music 2026.*

Spend on physical formats has been growing at a faster rate, with total physical spend rising 11% to £370m. This was driven primarily by vinyl, up 18% to £231m, continuing a long-running trend of growth supported by both higher prices and sustained demand. While still a relatively small share of total spending, physical formats are now contributing a significant proportion of annual growth in cash terms, reflecting the strength of fandom, collectability and premium purchasing behaviour. In contrast, downloads continue to decline, falling 3.7% to £40m, and now represent only a marginal part of consumer spend.

More broadly, these trends reinforce that recorded music consumption sit within a wider music and media ecosystem. Engagement spans multiple formats, with audiences interacting with music across streaming, social platforms and live experiences rather than through passive listening alone. In this context, spending on recorded music is closely linked to wider behaviours, such as live attendance and fan engagement, which in turn help to support and sustain demand for subscriptions, merchandise and physical formats.

Figure 79: Consumer expenditure on recorded music: 2021-2025



Source: Official Charts Company and ERA estimates, BPI 'All About The Music 2026'.

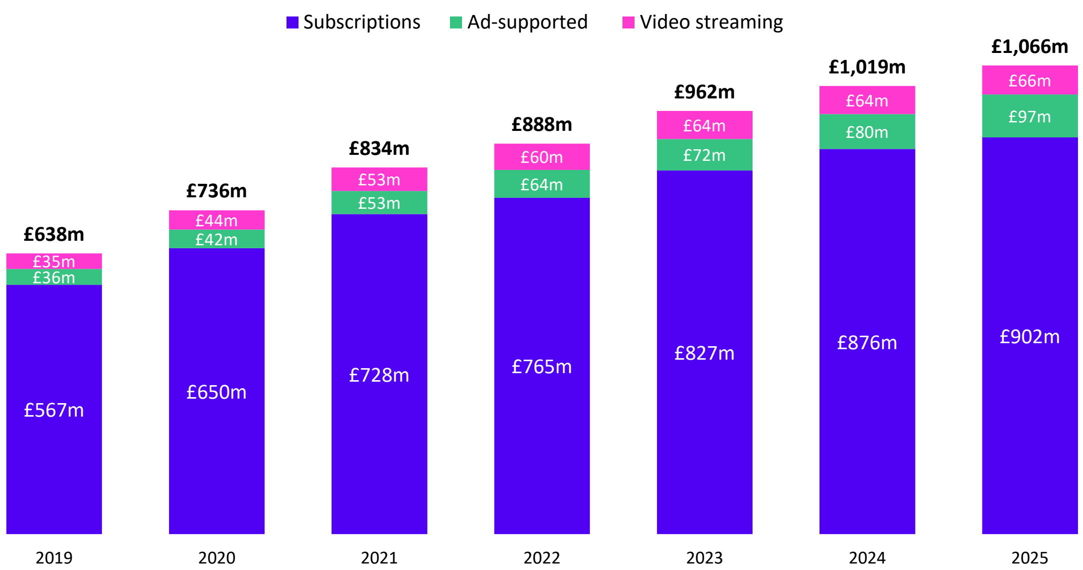
Streaming income growth slows as the market matures and ad-supported revenues gain some momentum

Streaming income continued to grow in 2025, reaching just over £1.06bn, although at a more moderate pace as the market develops. This reflects wider industry developments, with both growth in consumer spending on streaming services and growth in streaming revenues becoming more closely aligned. While subscription streaming remains by far the largest component, rising to over £900m, growth was relatively modest compared to earlier in the decade.

Ad-supported streaming continues to increase its contribution to overall revenues. Income from ad-funded services rose by over a fifth to around £97m in 2025, outpacing subscription growth, albeit from a much smaller base. As subscription markets mature, platforms are placing greater emphasis on monetising free users and expanding advertising-led models, although this still only accounts for 9% of the market.

Beyond streaming, which accounts for about two-thirds of total music recorded industry revenues, other income streams remain comparatively small. Public performance income, generated from the broadcast and use of recorded music in public settings, declined slightly in 2025 to £163m. Synchronisation income, earned when music is used in visual media such as film, TV, games and advertising, also fell, down 10.8% year on year to £39m.

Figure 80: Recorded music industry income from streaming: 2019-2025



Source: BPI Surveys. Figures reflect wholesale values, excluding VAT and accounting for returns on physical formats.

Availability and distribution of radio services

The UK radio distribution landscape continues to shift away from analogue, with further reductions in the number of AM (medium wave) services reflecting both declining listenership and the costs associated with maintaining legacy transmission infrastructure. AM MW transmissions of BBC Radio 5 Live are scheduled to end on 31 July 2026 from sites in Redruth and Folkestone, ahead of a wider closure of AM transmitters in 2027. On 27 June 2026 the BBC ended its broadcasts of BBC Radio 4 on AM 198KHz long wave, the UK being one of the last countries to have continued broadcasting in long wave.

FM remains an important platform, particularly for local and community broadcasting. It supports a wide range of services, including commercial and BBC local stations, and continues to provide reliable coverage. Community radio accounts for a large share of FM licences, underlining the sector's role in enabling local access and supporting plurality.

DAB remains the primary form of digital radio distribution, with most services carried on local multiplexes. The expansion of small-scale DAB, with the number of multiplexes exceeding the 100 mark for the first time, marks a significant structural development, lowering barriers to entry and supporting a more localised and diverse supply of services.

Coverage varies across the UK. DAB availability is generally higher in England, particularly for national multiplexes, while coverage for local and commercial services is more limited in Scotland and Wales. This has implications for the consistency of access to services across the UK.

Figure 81: Analogue AM, MW and FM radio services: March 2026

	AM MW	FM	Total
Local commercial	9	231	240
UK-wide commercial	1	1	2
BBC UK-wide networks	1	4	5
BBC nations'/local	7	46	46
Community	6	291	297

Source: BBC, Ofcom. Excludes R4 MW and LW.

Figure 82: Number of DAB services: March 2026

	BBC UK-wide	UK Commercial – Digital One	UK Commercial – Sound Digital	Local commercial services	Small-scale DAB
Number of multiplexes	1	1	1	58	101
Number of services	14	30	30	726	984

Source: Ofcom, BBC.

Figure 83: DAB coverage: March 2026

		BBC	Commercial			Small-scale
			Digital One	Sound Digital	Local DAB	
UK	Homes	97.4%	91.7%	82.6%	92.0%	52.7%
	Major roads	87.4%	80.2%	72.6%	76.8%	Not Measured
England	Homes	98.4%	94.8%	86.7%	93.4%	55.8%
	Major roads	94.5%	93.9%	89.8%	87.4%	Not Measured
Scotland	Homes	95.3%	81.7%	69.0%	85.4%	40.1%
	Major roads	69.1%	45.5%	33.6%	45.6%	Not Measured
Wales	Homes	92.2%	67.5%	56.9%	83.1%	31.1%[60]
	Major roads	78.1%	53.3%	37.7%	61.9%	Not Measured
Northern Ireland	Homes	87.3%	85.4%	56.8%	87.5%	39.1%
	Major roads	79.3%	86.9%	55.0%	87.8%	Not Measured

Source: Arqiva, BBC, Ofcom. Note: Coverage of SSDAB is measured on a homes basis only.

[60] The figure for small-scale DAB coverage in Wales was incorrectly reported in the Media Nations 2025 report as 35.1%. The correct figure for March 2025 is 30.7%. Although no further multiplexes launched between 1 April 2025 and 31 March 2026, there has been a slight increase in coverage in Wales from multiplexes situated in England.

Market developments

Digital radio broadens through DAB+ conversion and new services

The expansion of digital radio has continued to be driven by audience migration to digital listening, and operator migration from legacy DAB carriage to DAB+. Bauer's decision to switch Absolute Radio, KISS, KISSTORY and Magic Radio to DAB+ in March 2025 was explicitly framed as a way to improve sound quality, while also helping create capacity for further digital services. Bauer also launched four new decade-branded services last year, Hits Radio 90s, Hits Radio 00s, Greatest Hits Radio 70s and Greatest Hits Radio 80s, following the earlier launches of KISS Dance, KISSTORY R&B and Greatest Hits Radio 60s.

Global has likewise used digital distribution to broaden listener choice through a growing range of brand extensions. In September 2024 it launched 12 new stations spanning its Capital, Heart, Smooth, Radio X and Classic FM brands, including Capital Anthems, Smooth 80s and Heart 10s. Global's portfolio now includes a range of targeted digital services alongside its core networks.

The BBC has also moved from online-only extension streams to broadcast digital radio. Ofcom approved the BBC's plans for Radio 1 Dance, Radio 1 Anthems and Radio 3 Unwind in July 2025, while rejecting the proposed Radio 2 spin-off and an extended Radio 5 Sports Extra service on competition grounds. The three approved stations launched on DAB+ in September 2025.

The move to DAB+ is now spreading beyond the largest national groups. Nation Broadcasting's 'Big Switch' programme shows a rolling series of conversions from DAB to DAB+ across Wales, Scotland, Yorkshire, the South of England and the West Country, alongside launches such as Nation Radio Devon and Nation Radio Cornwall on local multiplexes. Nation also states explicitly that DAB+ allows either a wider range of services in an area, or improved sound quality, which underlines the core logic behind the industry's ongoing migration.

News UK has also broadened its digital radio portfolio. In March 2026 it launched Virgin Radio 90s as a permanent station, available in London on DAB digital radio as well as online and via smart speakers. That followed the Virgin Radio Britpop pop-up and reflects the continuing appeal of decade-led digital extensions as a route to incremental listening and sharper audience targeting.

Radio groups continue to develop their online audio strategies, with a growing focus on programmatic advertising and self-service platforms

Dedicated audio advertising platforms such as Global's DAX, Bauer's audioXi and News UK's Octave enable advertisers to access radio, streaming and podcast inventory using first-party data and automated buying technologies. Recent developments, including DAX's integration with Amazon's demand-side platform, Bauer's partnership with Audiomob to extend audioXi into in-app audio environments, and the launch of self-service advertising platforms such as Global's AdPower, reflect a broader shift towards automation, self-service buying and more sophisticated audience targeting in audio advertising, reflect a wider shift towards automation and more sophisticated audience targeting in audio advertising

Alongside developments in advertising technology, broadcasters have continued to invest in owned-and-operated streaming platforms as a means of building direct relationships with audiences. Services such as Global Player and Bauer's Rayo bring together live radio, podcasts, playlists and on-demand content within ad-funded environments, creating additional opportunities for audience engagement, first-party data collection and monetisation. These platforms also enable broadcasters to extend their services across connected devices, including smart speakers, mobile apps and in-car entertainment systems.

Beyond owned-and-operated platforms, UK radio broadcasters have made greater use of third-party platforms such as YouTube to distribute content and generate advertising revenue. In May 2026, Global announced plans to sell video advertising directly around its YouTube content, following a similar approach to UK TV broadcasters.

STV launches new national radio entrant in Scotland

In January 2026, following an announcement in May 2025, Scottish TV broadcaster STV launched a national commercial radio station aimed primarily at adults aged 35-54, based at Pacific Quay in Glasgow and available on DAB and online. The company positioned the station as part of its broader FastFwd to 2030 strategy, combining broadcast, streaming and audio in a new ‘Audience’ division and promising advertisers a multiplatform and hyper-targeted commercial proposition.

Podcasts become cross-platform businesses as studios gain scale

Podcasting in the UK is increasingly evolving beyond its audio roots into a cross-platform, video and audio media model, as both creators and distributors scale output and diversify revenue streams. Video is now a central component of how podcasts are produced, discovered and monetised. Podcast brands are being extended across social media, live events, subscription products and in some cases, television and other audiovisual formats.

These developments are reflected in the emergence of podcast studios operating more like scaled intellectual property businesses. Companies such as Acast are increasingly supporting podcast creators across a range of formats, including audio, video, subscriptions and social media. Investment and expansion strategies increasingly focus on extending podcast brands into adjacent formats, including television, digital video, publishing and live events, signalling a shift towards a studio model rather than standalone production.

Alongside continued growth in podcast listening, video formats have expanded across major video platforms. For many producers, video podcasts represent a low-cost, high-volume content strategy, enabling the creation of frequent full-length episodes and a steady flow of short-form clips. This approach extends the lifespan of content, broadens reach across platforms, and supports audience growth through algorithmic discovery and social sharing.

YouTube has become an increasingly important distribution platform for podcasts, reflecting the growing convergence of audio and video content. Podcast consumption is no longer confined to dedicated audio services, with audiences accessing content across a wider range of platforms and devices, including connected TVs.

As podcasting scales up, revenue models are becoming more diversified. Advertising remains important, but subscription and membership models are growing alongside branded content, merchandise and live events. For example, Goalhanger recently surpassed 200,000 paid subscribers and various podcast brands such as *The Rest Is Politics* and *Off Menu* have hosted live podcast tours across the UK.

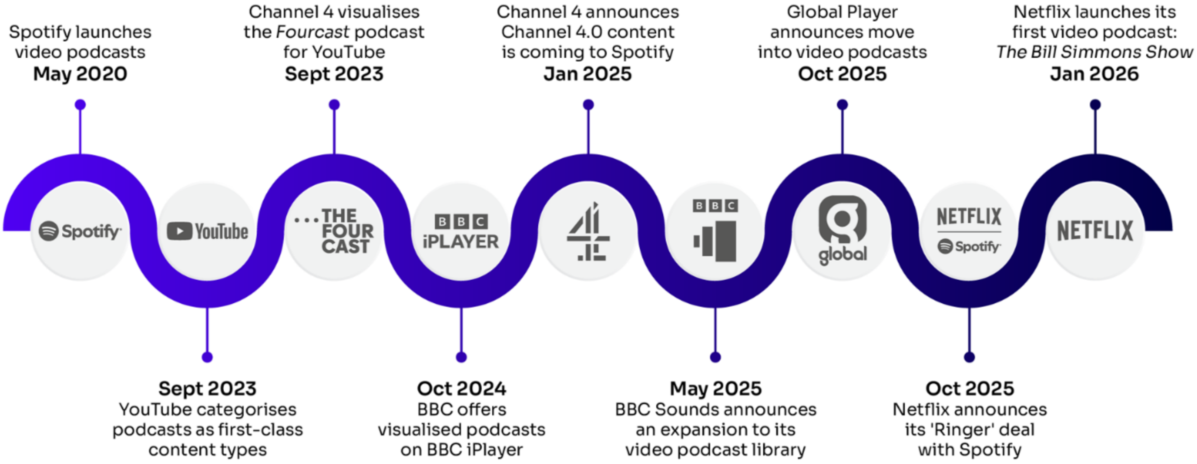
Platforms are also expanding in this space. Spotify has expanded its catalogue of video podcasts while lowering barriers to monetisation, encouraging more creators to produce video content and access advertising and subscription revenues. Apple has moved to make Apple Podcasts more video-capable, announcing HLS video podcasts for Apple Podcasts in February 2026, enabling users to switch between watching and listening, and giving creators more control over video distribution and monetisation. Apple is also introducing a series of video features for TVs and Macs as part of its 2027 software updates.

As mentioned in previous chapters, the growth of video podcasting highlights a broader convergence between audio and audiovisual media. Podcast content is increasingly distributed across a range of platforms, including traditional podcast services, video-sharing platforms and social media, with some podcasts developed simultaneously for both audio and video consumption. As a result, distinctions between podcasting, online video and other creator-led media formats are becoming less clear. The growing popularity of video podcasts has attracted interest from established audiovisual platforms, suggesting that podcast formats are increasingly being viewed as part of the wider video and entertainment ecosystem rather than as a distinct audio medium. Netflix and Spotify's deal to bring selected video podcasts to Netflix from early 2026 illustrates this wider format convergence.

Traditional media brands have also embraced video podcasts. Broadcasters can maximise the value of video-podcast content by repurposing programming across multiple channels. Video podcasts can be broadcast on linear television, repeated on secondary channels, streamed on owned and operated platforms, distributed via partner services and shared widely across social media. Channel 4 was an early adopter, launching its political flagship podcast, *The Fourcast*, in video format in 2023. The BBC has since adapted several of its podcasts into visual versions, broadcasting them on BBC One, BBC Two, and BBC iPlayer. Bauer Media has announced that it will provide video content to Amazon Fire TV Channels, featuring video podcast content from its UK brands.

Radio groups are also using established brands and talent to drive podcast engagement. Global has expanded its podcast portfolio by building shows around its radio presenters and personalities, announcing plans to expand further into video-first podcast brands and sport, supported by the acquisition of new production studios. News UK has extended its audio brands into television, with content from Virgin Radio's *Chris Evans Breakfast Show*, produced with Ginger Media, repurposed as *TFI Friday* episodes for Channel 4. Bauer similarly repurposes popular radio content into podcasts and companion video formats, often fronted by its existing roster of presenters, creating additional touchpoints for audiences beyond linear broadcast.

Figure 84: Timeline displaying selected platforms' expansion into video podcasts



The audio industry is integrating AI across production, distribution and monetisation

Audio providers, radio groups and platforms are increasingly integrating artificial intelligence into their operations, using it to automate production tasks, enable more personalised content and support programmatic advertising models.

In radio, AI is being deployed primarily to improve efficiency in routine production and to enable more responsive output. For example, Bauer Media has introduced AI-generated and AI-voiced travel bulletins across Hits Radio and Greatest Hits Radio, developed in partnership with traffic data provider INRIX. These bulletins are automatically produced from real-time traffic data and delivered using synthetic voices modelled on broadcast journalists, allowing faster updates and opening up the potential for more localised services delivered via internet protocol (IP).

Streaming platforms are also expanding their use of AI, particularly in content discovery and user engagement. Spotify has introduced a range of AI-driven features, including its AI DJ, AI-generated playlists and enhanced recommendation systems designed to personalise listening experiences. Alongside this, the company has moved to develop AI tools in partnership with major music rightsholders; in October 2025 it announced a collaboration with Sony Music, Universal Music Group and Warner Music Group to build 'artist-first' AI products that support discovery while ensuring consent, attribution and compensation.

AI is also being adopted in audio advertising, where it is supporting both the creation and delivery of campaigns. News UK has launched Octave AI, an end-to-end platform that uses artificial intelligence to generate broadcast-quality audio ads using synthetic voices, music and sound effects. The platform enables advertisers to produce campaigns quickly and at lower cost, generating multiple versions of an ad tailored to different audiences and locations.

Global has expanded its use of AI within audio advertising and audience measurement. Through its DAX digital advertising platform, the group has developed AI-enabled tools that analyse listening and device signals to better understand audience behaviour across different devices and environments.

In the music industry, AI is emerging as both a creative tool and a source of disruption. Generative AI systems are now capable of producing original compositions, sound design and fully-realised tracks, and are increasingly being used to support composition, production and mastering workflows. These tools can reduce the time and cost of music production and are enabling growing use in areas such as background music for advertising and other commercial applications. At the same time, their development is raising questions around copyright, attribution and the potential impact on creator revenues, as AI-generated content becomes more prevalent across digital platforms.

Radio providers adapt to app-led in-car listening

The increasing integration of smartphone-based systems such as Apple CarPlay and Android Auto is enabling drivers to access streaming services, podcasts and apps directly from the dashboard. Radio groups are responding to this shift with Bauer Media, Global and BBC Sounds rolling out access to their proprietary apps across automative brands within increasingly app-led listening environments.

Government review into the future of radio underway from early 2026

In February 2026, the Department for Culture, Media and Sport (DCMS), launched a review examining the long-term future of UK radio. The review is examining future scenarios for the consumption of UK radio and audio content and how these impact on current and future distribution strategies and availability of services. Scheduled to conclude in autumn 2026, the review will also make recommendations on the future distribution of radio services and provide advice to government on strengthening the viability of UK radio into the 2040s.

Consultation on designation of radio selection services in summer 2026

Under the Media Act 2024, Ofcom published a report to the Secretary of State in March 2026. Government is now consulting (July 2026) on designating voice assistant services provided by Amazon, Google, and Apple. If designated, these services will be required to comply with the provisions in the Media Act designed to secure that audiences can continue to access online streams of UK broadcast radio on such voice assistant services.