Media Nations

UK 2025

Published 30 July 2025

Contents

Section

Overview

Ofcom's annual Media Nations report is for industry, policymakers, academics and consumers. Our main objectives are to capture 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.

As with previous editions, this UK-wide report is accompanied by an interactive report containing an extensive range of data which is 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).

TV AND VIDEO CONSUMPTION

Growth in viewing to broadcasters' online video services has not offset a decline in linear TV viewing – but broadcaster content still accounts for the majority of in-home viewing

- Individuals (aged 4+) spent on average 4 hours 30 minutes per day watching video content at home in 2024, only one minute less than in 2023. The TV set remains central to video viewing in the home; in 2024 84% of in-home video viewing was through the TV set.
- Broadcast TV viewing continued its long-term decline in 2024, especially among young adults. On average, individuals (aged 4+) spent 4% less time watching broadcast TV on TV sets than in 2023, with their average viewing dropping to 2 hours 24 minutes per day. Just as in 2023, a decline was seen across all age groups except adults aged 75+. However, the decrease across all age groups, except for adults aged 25-34, was smaller than in the previous year.
- In 2024, the average weekly reach of broadcast TV declined across all age groups, although at a slower pace than the previous year: 73.8% of individuals watched broadcast TV each week on TV sets, a 1.7 percentage point (pp) year-on-year decrease, less than the 3.8pp drop between 2022 and 2023. Weekly reach was highest among those aged 65+ (94%) and lowest among 16-24s (45%).
- The average weekly reach of the commercial public service broadcasters (PSBs), as well as the broader multichannel sector, continued to decline in 2024. However, the reach of BBC channels across all age groups remained stable year on year, and time spent viewing BBC iPlayer led to a slight increase in overall BBC video viewing.
- Despite the decline in linear TV viewing, broadcaster content continues to make up the majority of Barb-measured in-home video viewing, at 56% in 2024 (57% in 2023) helped by growth in broadcaster video-on-demand (BVoD) consumption. A quarter of 16-34s' viewing is now to broadcaster content, versus 90% for those aged 75 and over.
- The amount of time spent watching BVoD overall (25 minutes per person per day) was for the first time higher than the average time spent watching recorded playback of live channels (23 minutes per person per day).

- *Gavin & Stacey, Wallace & Gromit: Vengeance Most Fowl* and *Mr Bates vs The Post Office were* the most-watched TV programmes/films of 2024. Broadcasters accounted for half of the top ten most-viewed titles in 2024, taking the top three positions. *Gavin & Stacey: The Finale* was the most-watched programme of the year, averaging 18.6 million viewers across BBC One and BBC iPlayer on TV sets.

Audiences continue to say they are satisfied with public service broadcasters overall

- According to Ofcom's Public Service Media Tracker 2024, about seven in ten (68%) PSB viewers say they are satisfied with them overall, in line with previous years.
- Overall, viewers consider PSBs are broadly delivering 'well' across a range of attributes. These include *'programmes made for UK audiences'* (67%), *'a wide range of different types of programmes, such as drama, comedy, entertainment or sport'* (67%) and programmes that *'appeal(s) to a wide range of different audiences'* (63%), broadly consistent with previous years.
- A majority of UK audiences (71%) said it is important that PSBs provide catch-up, on-demand or streaming services, in line with 2023 (71%); those in socio-economic groups ABC1 were more likely than those in C2DE groups to say this is important (78% vs 64%).

Although take-up of SVoD services has plateaued, many, especially younger audiences, turn to these services when first switching on the TV

- The proportion of UK households receiving any subscription video-on-demand (SVoD) service in Q1 2025 continues to plateau, and was at the same level as it was (at 68%) in 2021. Two-thirds of UK households subscribe to at least one of Netflix, Amazon Prime Video or Disney+. Netflix remains the most subscribed-to service, present in almost six in ten UK households and it accounted for nearly half of total SVoD viewing in 2024.
- Ofcom's TV Viewer Journeys analysis looked at the first destination viewers go to after switching on the TV. SVoD is the platform children and young adults are most likely to select first when turning on the TV. Twenty-seven per cent of children aged 4-15 choose SVoD as a first TV destination, compared to 26% who select a linear channel and 20% who choose a video-sharing service (mainly YouTube). An SVoD service is also the jointly most popular first destination for adults aged 16-34, although the same proportion (30%) select a linear channel as their first destination.

TV AND VIDEO INDUSTRY

The UK's overall TV market grew in 2024, driven by online video

- The UK commercial TV and online video sector recorded modest growth in 2024, with revenues reaching £17.1bn, up 3.3% from £16.5bn in 2023. While this marks a more substantial recovery than the previous year's marginal 1.1% growth, it conceals significant divergences between digital platforms and traditional broadcasting services.
- Commercial PSBs stabilised revenues at £1.96bn after facing considerable declines in 2023. Digital multichannels experienced contraction, with revenues down 3.2% at £1.96bn. In contrast, the online video segment continued to drive growth, with SVoD revenues reaching £4.37bn, up 10% year on year. However, growth rates have decelerated significantly due to market maturation and slowing subscriber uptake. In response to this, SVoD platforms have increased their focus on advertising-supported tiers. BVoD revenues rose by 15% year on year, reaching £1.1bn in 2024, exceeding the £1bn mark for the first time. BVoD now accounts for a quarter of total broadcaster advertising revenues, underlining the growing importance of BVoD as a driver of commercial sustainability for UK broadcasters.

As YouTube viewing on TV sets continues to grow, broadcasters are seeking to leverage its reach

- Total in-home use of YouTube as measured by Barb grew from an average of 35 minutes per individual per day at the beginning of 2023 to 39 minutes by December 2024, up by 13%. The proportion of time spent watching YouTube in the home via a TV set increased year on year, from an average of 34% in 2023 to 41% in 2024.

- According to Enders Analysis, half of YouTube's top trending videos now resemble traditional TV, with the rise of long-form content creating new advertising opportunities. This shift places YouTube in direct competition with broadcasters' ad-funded services. At the same time, the platform offers broadcasters, including the PSBs, access to a larger audience, many of whom have disengaged from traditional broadcast content. ITV and Channel 4 have agreements with YouTube to publish selected full programmes on their YouTube channels, while maintaining control over the advertising inventory.

RADIO AND AUDIO

Traditional radio revenues decreased in 2024, although consumer expenditure on music continued to grow

- Total commercial radio relevant turnover (i.e. revenue associated with broadcasting) was £651m in 2024, 2% lower than in 2023. Growth in national spot advertising was unable to offset declines in other areas. This reflects structural changes in the market, including a shift towards IP-delivered audio and advertising, and economic uncertainty among small advertisers in particular.

- Consumer expenditure on recorded music in the UK continued its steady growth in 2024, rising by 5.7% year on year to reach £2.36bn. This reflects the ongoing strength of subscription streaming, modest gains in physical formats (mainly vinyl LPs), and a continued decline in digital music download revenues.

Live radio listening continues to be resilient, despite the range of other audio content UK audiences are listening to

- According to Ofcom's latest Audio Survey, more than nine in ten UK adults (93%) listen to some form of audio content each week, increasing to 98% of 16-34-year-olds. Music radio and online music services are the most popular source of audio, used by six in ten UK adults each week (62% and 61% respectively).

- Our analysis of IPA TouchPoints data shows that streamed music and other forms of online audio are increasing their share of our audio diets. This increase is more pronounced in younger people aged 15-34, who now spend over half of their weekly listening time with streamed music and podcasts (58%, up from 40% in 2019), almost double the amount for the average listener (30%).

- However, despite the availability of other forms of audio, reach of live radio remains high. According to RAJAR, which uses a focused radio survey, almost nine in ten UK adults aged 15 and over (87%) tuned into the radio for an average of 20.5 hours per week in Q1 2025.

The amount of radio listening via smart speakers continues to grow, but DAB remains the largest radio platform by share

- Broadcasters have continued to launch new services on DAB, taking advantage of the increased capacity released by moving transmissions to the more efficient DAB+ standard. The roll-out of small-scale DAB is also empowering community broadcasters to launch new DAB services, simulcasts of existing analogue community radio services as well as digital-only stations.

- According to RAJAR, the most-used platform for radio is DAB, accounting for 42% of listening hours, followed by AM/FM at 27%. Listening through smart speakers has been increasing gradually and now accounts for 18% of live radio listening hours.

Media in context

Introduction

In this section we provide an overview of key trends and audience behaviours in the UK media sector as a whole, putting the video and audio sectors in context. Understanding the broader media environment is important for a number of reasons.

Firstly, video and audio media formats both interact and compete with other formats for people's attention. Different media formats meet different needs: people read a news website or watch TV news for information, while if they want entertainment and relaxation, they may watch a film or entertainment show on TV or video-on demand (VoD), or play a video game. Thinking about fictional narratives, other formats such as books (both printed and audiobooks), podcasts and radio, film and TV come to mind first. Certain videogame franchises have also been praised by critics for the strength of their storytelling and some of these, such as Sony's *The Last of Us*, have formed the basis of drama series on TV or film. Gaming platforms such as Roblox can be used by users to create their own interactive experiences, allowing for emergent narratives where the user determines the narrative by their actions within the system, rather than the storyline being pre-determined by the content creator.

The same tools, facilities and processes are used to create different formats of audio-visual content, such as TV productions and films. Although this in itself is not new,[1] the increasing budgets, scale and use of digital effects, as seen in some high-end productions commissioned by broadcasters and VoD platforms, are examples of traditionally different media formats starting to converge. This is especially the case with films that are commissioned with the intention of a primary first-run release on broadcast TV or on a streaming service with a limited release.

Media formats are also converging in podcasting. Originally generally referring to audio files distributed via RSS and downloaded to devices, the term 'podcast' now includes video podcasts: video content streamed from video-sharing platforms (VSPs) such as YouTube. Major UK-based publishers of podcasts include not just radio broadcasters but TV broadcasters, newspaper publishers (news brands), and 'native' podcast publishers which focus solely on this format.

Content funding is another area where we continue to see convergence, as advertisers seek to maximise their return on investment, and technology platforms encourage users to stay within their own ecosystems. Historically, advertising budgets and advertising buyers have been structured around media-specific teams: TV, radio and online have been separate from each other. Although this continues to often be the case, we are also seeing the emergence of budgets and sales crossing over between radio and digital audio formats, influencer marketing and television.

We are also seeing examples of cross-media subscription services. News publishers such as The Economist bundle print and online access with exclusive podcasts. And Amazon Prime subscriptions offer advertising-supported subscription VoD (SVoD) alongside music streaming and games; Netflix offers games to subscribers alongside SVoD; and Apple One offers music, games, newspapers/magazines and SVoD.

[1] For example, the use of cinematic techniques in TV dramas shot on film rather than on videotape.

Audiences

Three of the top five media activities by monthly reach are predominantly online – the others are listening to the radio on a set and watching live TV on a TV set

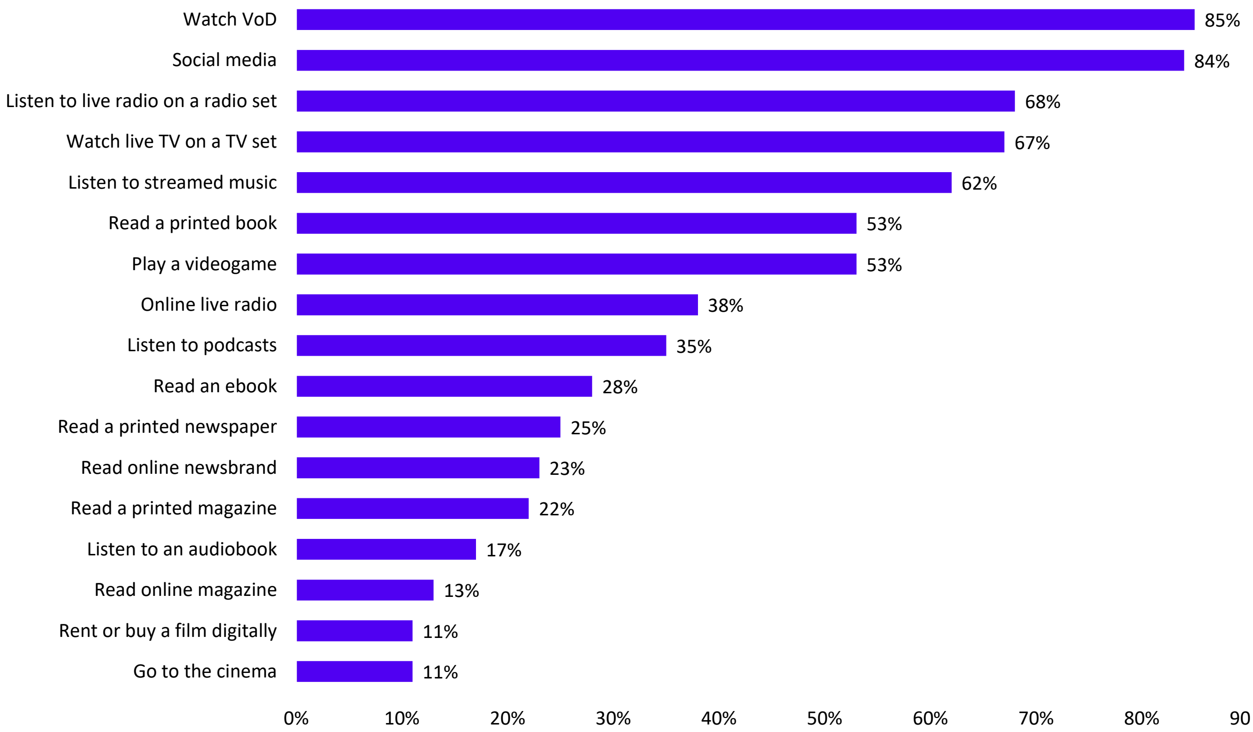
Each year, we report on TV, VoD, radio and audio behaviours, and how they are evolving. In this section we compare them with a wider range of media activities, and look at how they are performing offline as well as digitally. In terms of overall monthly use, the proportion of adults watching VoD services (85%) is on a par with using social media[2] (84%).

Despite the competition for our attention from VoD services and social media, watching TV and listening to radio in the traditional ways (live through a TV or radio set), are still important; more than two-thirds of adults engage with these media this way each month (68% and 67% respectively).[3] Interestingly, printed books seem to be holding firm compared to their digital counterparts, ebooks and audiobooks.

And while printed newspapers are now neck-and-neck with their digital outlets ('online newsbrands'), printed magazines are used by more people each month than their online versions. This difference could be because printed newspapers quickly become out of date, while their online versions can respond to changes in rolling stories. Also, while some publishers have established paywalls around their online content, accessing content online may still be cheaper (or free) than purchasing a printed paper. Magazines tend to include more long-lasting content that will not go out of date as quickly, and some readers may prefer the experience of reading a physical printed magazine rather than its digital counterpart.

[2] Social media (excluding YouTube).
[3] A monthly reach figure is reported here from the IPA Touchpoints survey to enable comparison between different media, and 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).

Figure 1: Monthly reach of online vs offline selected media activities



Source: IPA TouchPoints 2025 (wave 2 2024 & wave 1 2025).

Figure 2 shows that patterns of behaviour vary considerably when comparing the youngest age group with the oldest. For example, social media is by far the most popular activity among the younger age group: 94% of 15-24s use these services each month, while less than half watch or listen to TV and radio in the more traditional ways. In contrast, those aged 75+ are much more reliant on traditional media, although two-thirds (64%) use VoD and over half (54%) say they use social media each month. Print media are also important to this age group.

Figure 2: Top ten monthly media activities: adults 15-24 vs adults 75+: 2024

	15-24		75+
Social media (exc. YouTube)	94%	TV on a TV set	84%
VoD	87%	Radio on a radio set	77%
Streamed music	85%	Printed book	64%
Gaming	67%	VoD	64%
Printed book	53%	Social media (exc. YouTube)	54%
TV on a TV set	49%	Printed newspaper	54%
Radio on a radio set	48%	Printed magazine	42%
Podcasts	43%	Gaming	31%
ebook	27%	ebook	28%
Online magazine / online newspaper	23%	Streamed music	21%

Source: IPA TouchPoints 2025 (wave 2 2024 & wave 1 2025).

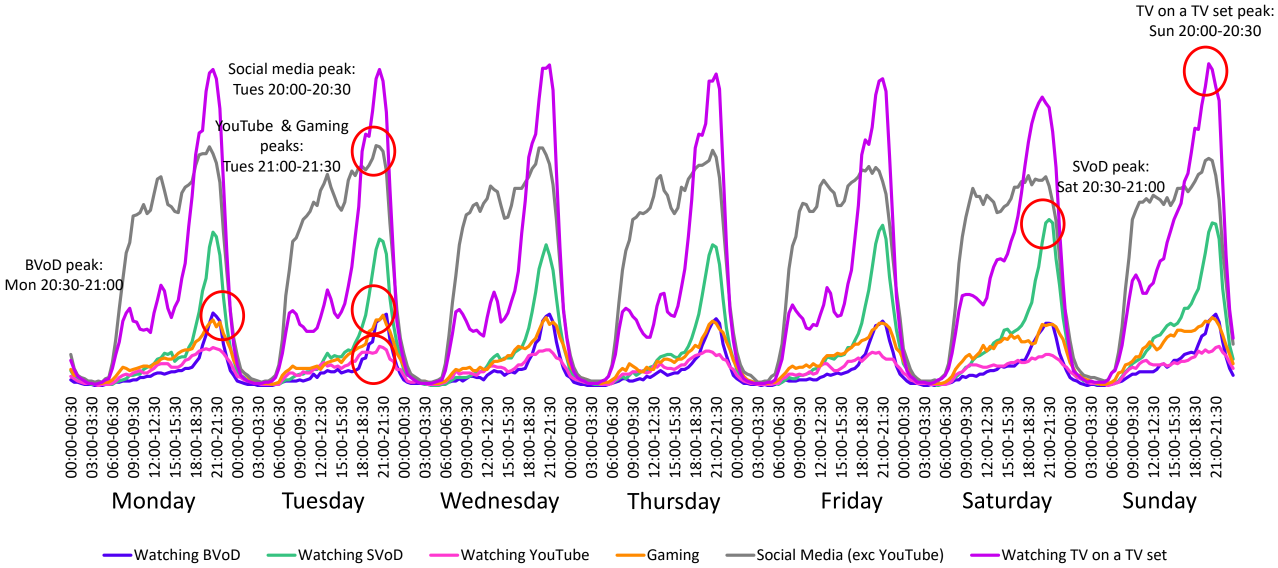
Media use varies throughout the day

How people use media varies throughout the day; different media meet audiences' differing needs throughout their daily routines. For linear TV and radio, these patterns of use also reflect scheduling decisions: certain types of content are primarily broadcast at times of the day when audiences are highest. The two charts below show that despite the shifts from offline to online, the patterns – showing a traditional peak of radio listening in the morning and live TV on a TV set in the evenings - still endure, at least for adults overall. Watching TV on a TV set is the key activity in the evenings. In contrast, SVoD viewing peaks on a Saturday, when people are potentially looking for something different to pique their interest. Then on Monday, people may be catching up on viewing via broadcaster VoD (BVoD) services. Apart from these peaks for the main types of video viewing, figure

3 also shows that Tuesday evening is when non-TV viewing peaks, including for social media, YouTube viewing and playing videogames.

However, the pattern is very different for 15-24-year-olds. Social media activity is by far the main focus for this age group, whatever day of the week, although there is a marginal peak on Monday evenings. SVoD viewing is their next most important media activity, with TV on a TV set, gaming and YouTube clustered together across the week. The peak time for watching TV on a TV set for this age group is Wednesday evenings.

Figure 3: Pattern of use of selected TV, video and gaming activities throughout the day, by adults: 2025



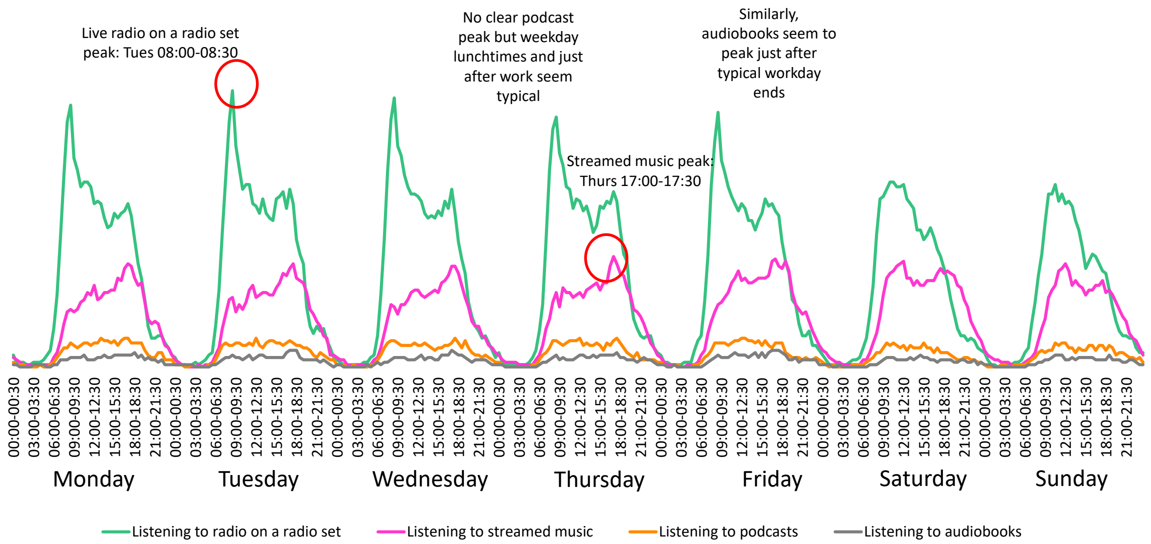
Source: IPA TouchPoints 2025 (wave 2 2024 & wave 1 2025).

We have focused on audio activities separately in figure 4. This shows the importance of a radio station's weekday breakfast show, as the peak listening time is 08:00-08:30, with a gradual decline across the day. Streamed music is the next most popular audio activity; it builds up across the daytime during the week, and the peak listening time is at 17:00-17:30 on a Thursday. There are no clear peaks for podcast listening or audio books, although they seem to come to the fore at lunchtimes or after work.

While not shown in the charts, the consumption of printed newspapers is highest on Saturday mornings between 11:30-12:00, reflecting the consumption of Saturday titles, which often come with a range of supplements. Reading online newspapers tends to peak in the morning, before the printed newspapers.

Cinema attendance peaks on Thursday evenings. Other periods with high numbers of attendees include Friday evening and Saturday afternoons and evenings.

Figure 4: Patterns of use of audio media throughout a typical week, by adults: 2025

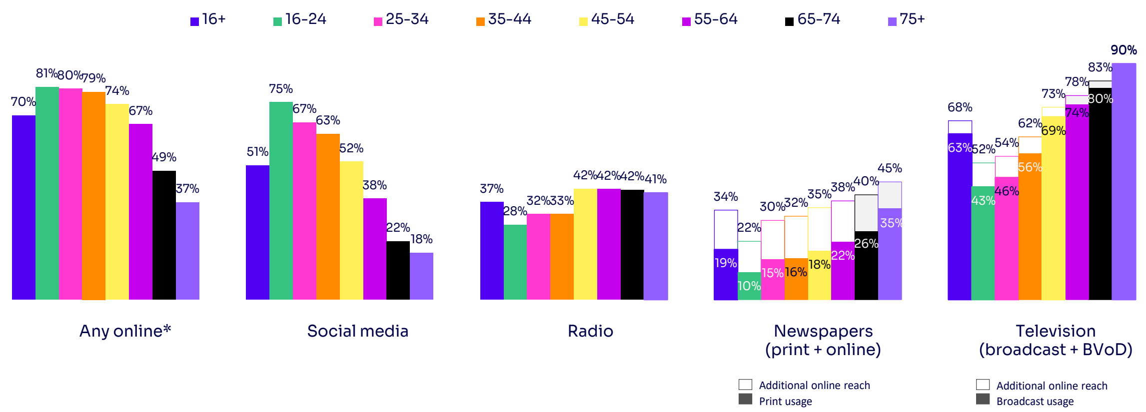


Source: IPA TouchPoints 2025 (wave 2 2024 & wave 1 2025).

More people consume online than through any other platform for news

While online news consumption (70%) is on a par with watching news on TV, including on-demand (68%), it is significantly higher than linear broadcast TV channels (63%). Social media is a significant element of online news consumption and half of UK adults (51%) now use it as a source of news. Television (including on-demand) as a source of news skews towards an older demographic, with 90% of those aged 75 and over using it, compared to 52% of young people aged 16-24. The reverse is seen in the use of online for news – 81% of 16-24s are using online services, compared to only 37% of adults aged 75 and over. Just under four in ten people use the radio for news, and about one in five adults say they get news from a printed newspaper. In both cases, this is highest among older age groups.

Figure 5: Platforms used for news 'nowadays', by age: 2025



*Source: Ofcom News Consumption Survey 2025 Question: C1. Which of the following platforms do you use for news nowadays? Base: All Adults 16+ 2025 – All adults 16+=4573, 16-24=585, 25-34=770, 35-44=787, 45-54=741, 55-64=587, 65-74=628, 75+=472 *'Online' includes social media, podcasts, other websites/apps.*

When asked about trustworthiness, 68% of those who use TV for news, and 67% of those who use radio for news, rated these highly for trustworthiness. In contrast 44% of those who use social media for news rated social media highly for trustworthiness.[4] For further detail on how people in the UK access and consume news, please see our recently-published News Consumption in the UK report.

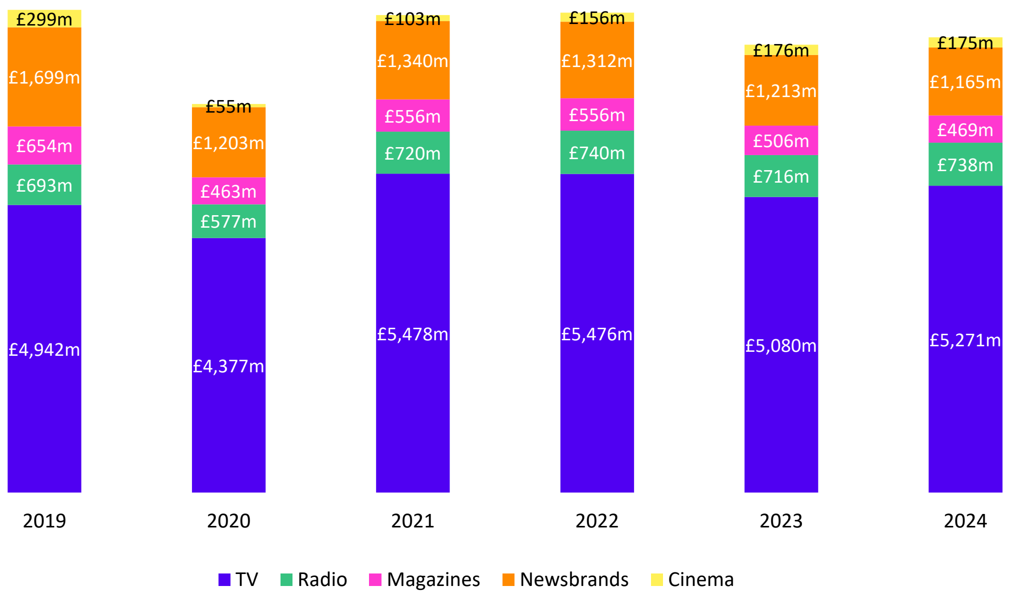
Advertising

Total expenditure on radio and TV advertising has been more resilient than that on magazines and newsbrands

Broadcast TV and VoD advertising and sponsorship spend grew by 3.8% to £5.3bn in 2024, as growth in VoD expenditure more than made up for a decline in traditional broadcast advertising expenditure. Radio advertising and sponsorship grew by 3.2% to £738m, demonstrating growth in both traditional broadcast and digital advertising. In contrast, total advertising expenditure on news publishers' (newsbrands) publications (such as printed newspapers, websites and apps) and the magazine sector fell by 4.0% and 7.2% respectively to £1,165m and £469m. Traditional print formats continued to contract, with newspaper advertising dropping to £570m and magazine print revenues declining to £210m. In both these sectors, online advertising has not offset declines in expenditure on print advertising. The UK's largest commercial radio groups are among several large players in the out-of-home advertising market in Europe. UK out-of-home advertising expenditure (not shown in the chart) grew by 7.7% to £1.4bn in 2024, with digital revenues accounting for £927m, up 10.2% year on year, benefiting from improved targeting technologies and increased urban foot traffic.

We examine TV and video, and radio and audio advertising in further detail in TV and video industry trends and radio and audio trends sections of this report.

Figure 6: Total advertising expenditure on selected media



Source: AA/Warc Expenditure Report. Traditional media categories include online elements. The 2023 and 2024 TV figures now include the advertising revenue generated by SVoD services such as Netflix, Amazon and

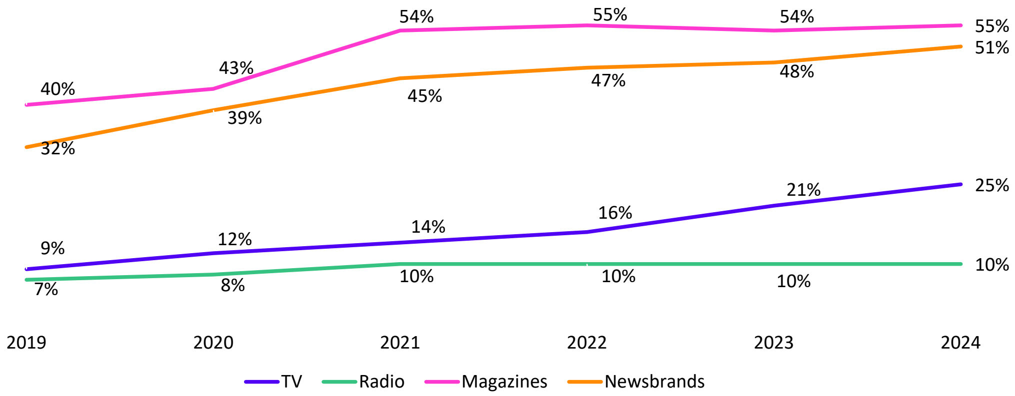
[4] Ofcom News Consumption Survey 2025. Scoring between 7-10 out of 10.

Disney+. Before 2023, all VoD data is BVoD data, covering advertising expenditure on the VoD services of TV broadcasters (e.g. ITVX, Channel 4 streaming and 5). In 2025, AA/WARC restated the 2018-2023 TV, newspapers and magazines figures, so the figures in this report may not match those in previous versions published by Ofcom.

The majority of radio and TV advertising expenditure continues to be in non-online advertising formats

Growing over time, the proportion of advertising expenditure which relates to online advertising formats[5] continues to vary by media sector. In 2024, online expenditure accounted for 10% of reported radio sector advertising expenditure, compared to over half of expenditure for newsbrands and magazines. VoD accounted for a quarter of overall TV advertising expenditure.

Figure 7: Online share of select media advertising expenditure: 2019-2024



Source: AA/WARC Expenditure Report. VoD included as digital ad format for TV total. The 2023 and 2024 TV figures now include the advertising revenue generated by SVoD services such as Netflix, Amazon and Disney+. Before 2023, all VoD data is BVoD data, covering advertising expenditure on the VoD services of TV broadcasters (e.g. ITVX, Channel 4 streaming and 5). In 2025, AA/WARC restated the 2018-2023 TV, newspapers and magazines figures, so the figures in this report may not match those in previous versions published by Ofcom.

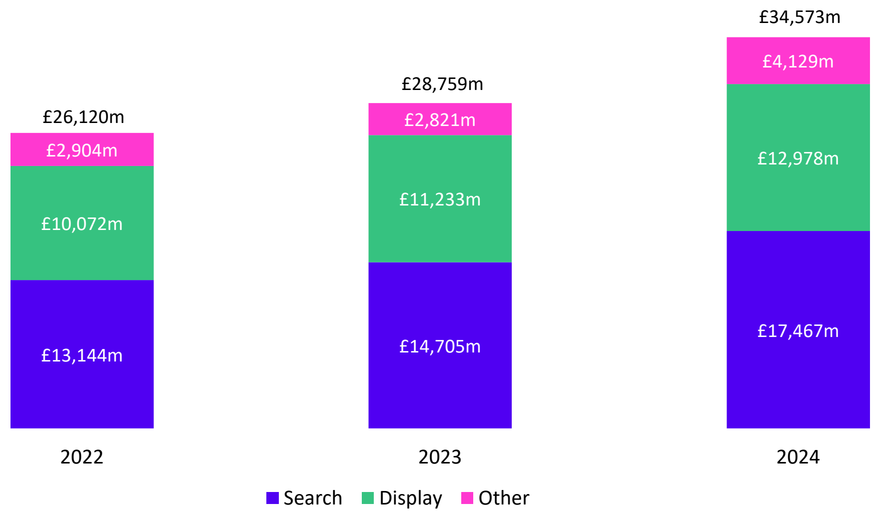
Overall online advertising, as defined by the IAB UK (but excluding digital out-of-home), grew by 20.2% to reach £34.6bn in 2024. Digital display advertising[6] (which includes AVoD/BVoD as well as other digital video formats, branded and native content, tenancies and standard display formats, grew by 15.5% to £13.0bn.

Although a relatively small overall component of total expenditure on digital advertising, IAB UK figures show that advertising in and around video games grew by 9% year on year to reach a total of £1.1bn, with formats including virtual billboards, embedded video and brand sponsorships.

---

[5] Such as advertising on websites, in apps and games, and in online video and audio streams such as VoD and music streaming services.
[6] Defined by the IAB to include standard display, native advertising, paid sponsored, content display, ads on email, tenancies online video (publisher, outstream and AVoD), social video, broadcast video on demand (BVoD), video other display, other.

Figure 8: UK online advertising expenditure, by format: 2022-2024



Source: IAB UK, Ofcom calculations. 'Online' is total internet as defined by IAB UK, including online elements of traditional media (such as TV, radio and news). Digital out-of-home has been excluded from total as published by IAB UK.

Consumer expenditure on media

Along with advertising, direct consumer expenditure, whether via subscriptions, rentals or one-off purchases of content, is the main driver of funding for the media sector as a whole.

In 2024, consumer expenditure reached almost £19bn across TV, digital video and cinema, recorded music and videogame software. Almost £12bn of this total related to expenditure on pay TV, SVoD, digital video retail and the cinema box office. In some cases, there are examples of these being bundled together; for example, pay-TV operators offering SVoD subscriptions or even cinema tickets as part of a pay-TV subscription. We examine pay-TV and VoD revenues in more detail in our TV and Video Industry section.

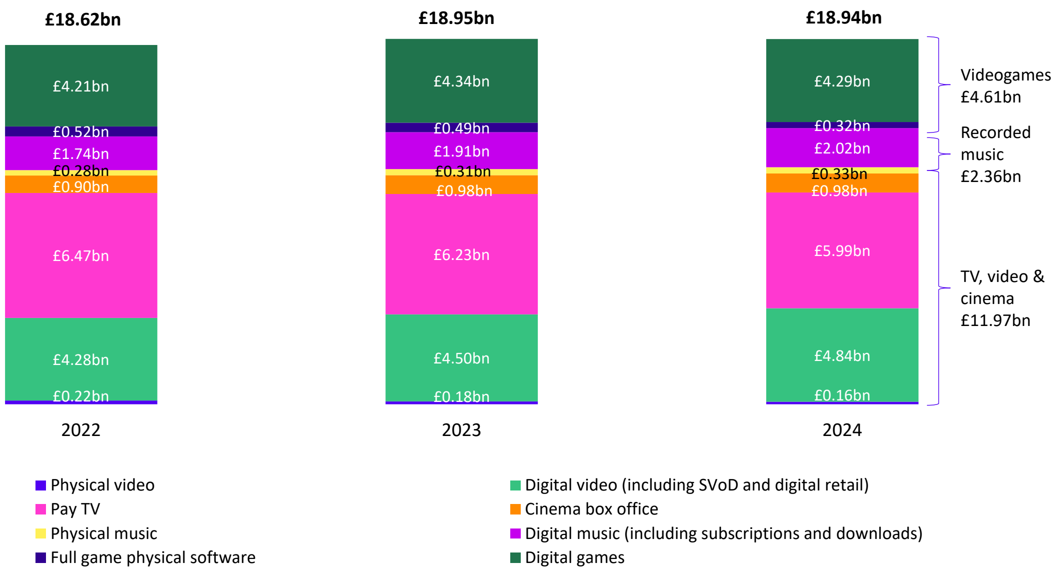
At £2.4bn, recorded music continued to form the smallest component of expenditure on entertainment media in 2024. We look at recorded music expenditure in more detail in the Radio and Audio section.

Expenditure on video games declined by 4.4% to £4.6bn, driven by declines in expenditure on full games across digital and physical formats. Expenditure on full games on consoles and PCs is linked to the release schedules of high-profile titles, of which there were relatively few in 2024 compared to 2023, when there were new titles from the Zelda, Final Fantasy and Forza franchises, among others. In contrast, revenue from microtransactions and subscriptions revenue grew year on year, but not enough to offset the overall decline.

Putting this expenditure in context, data from the ONS reported consumer expenditure on books in the UK at £3.7bn,[7] with expenditure on newspapers/periodicals at £3.4bn.

[7] Source: ONS Consumer trends October to December 2024.

Figure 9: Expenditure on audiovisual media, recorded music and videogame software



Source: ERA Yearbook 2025 / BFI / BPI / Broadcaster returns to Ofcom, Ofcom calculations

We examine consumer expenditure on audio and video in more detail in the respective sections.

TV and video audience trends

Introduction

This section draws on data from research agencies measuring audience viewing, as well as Ofcom's own audience research and other third-party research. This is to provide evidence of, and commentary on, the continuing shifts in audiences' TV and video viewing habits and preferences.

Total video viewing

Where our data comes from

Our total video viewing analysis refers to audiovisual content viewed inside the home, whether on TV sets or other devices connected to a home's WiFi network. It does not include viewing outside the home or any viewing over a cellular network.[8] It uses data from Barb Audiences Ltd (Barb) – see the Annex for more detail about Barb's methodology. Unless otherwise stated, viewing figures in this section are reported for all UK individuals aged 4+.

In a change from last year's report, unless otherwise stated, most of this year's data is based on 'as-viewed,' where viewing is not tied back to a linear transmission and includes non-linear programming on broadcaster video-on-demand services (BVoD), and measured subscription video-on-demand/advertising-based video-on-demand (SVoD/AVoD) services and video-sharing platforms (VSPs). This allows viewing to be de-duplicated and time spent to be calculated by device. Where stated, to show longer-term trends, we still include 'as-broadcast' 28-day consolidated viewing, which includes viewing of programmes at the time they were broadcast (live viewing) as well as from recordings on devices such as digital video recorders (DVRs) and catch-up through online BVoD services (e.g. BBC iPlayer, ITVX and Sky Go/Sky TV On Demand) up to 28 days after the first broadcast (time-shifted). This viewing is for TV sets only.

While total video consumption was stable in 2024, broadcaster video-on-demand was unable to offset the decline in broadcast TV

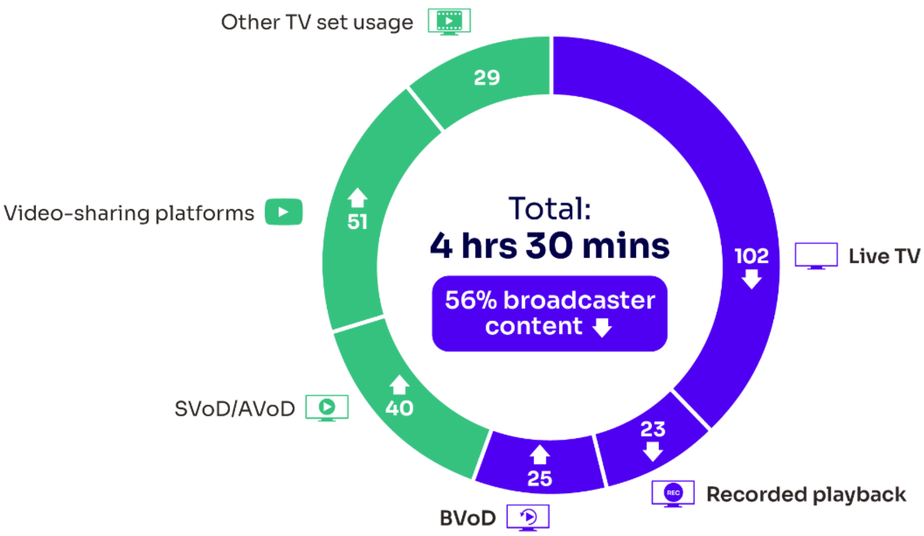
Individuals (aged 4+) spent on average 4 hours 30 minutes per day watching video content at home across all devices in 2024, only one minute less than in 2023. There was a decline in watching live and recorded playback of linear broadcast TV, falling by 9 minutes year on year. Broadcaster video-on-demand (BVoD) viewing increased by 5 minutes, but this did not compensate for the larger decline in broadcast viewing; average viewing to broadcasters' content (live, recorded and BVoD) fell by 5 minutes (3%) to 2 hours 30 minutes. Despite this, broadcaster content continues to make up the majority of Barb-measured in-home video viewing, at 56% in 2024 (57% in 2023).

[8] Barb's Out of Home Viewing Tracker from July 2024, showed that 6% of those who use YouTube while at home claimed to never connect to the home WiFi to watch YouTube.

For subscription video-on-demand (SVoD) and advertising-supported video-on-demand (AVoD), growth slowed, increasing by 4%, from 38 minutes to 40 minutes in 2024, accounting for 15% of total in-home video viewing.

Viewing to video-sharing platforms (VSPs) continued to increase, but at a slower rate than in previous years, up by 5% to 51 minutes in 2024, compared to a 12% increase in 2023. However, among minority ethnic audiences VSPs were viewed for 1 hour 22 minutes (a 9% increase on 2023), ahead of broadcast TV (1 hour 18 minutes; down 11%) and SVoD/AVoD (37 minutes; level with 2023). While SVoD/AVoD viewing among minority ethnic audiences was broadly in line with all audiences, broadcast content was watched for 1 hour 11 minutes less, and VSPs were watched for 31 minutes more, highlighting the broader choice, more specialist programming and better representation available on VSPs.

Figure 10: Average daily minutes of in-home video viewing across all devices, all individuals: 2024



Source: Barb as-viewed on TV sets and other devices using the home's WiFi network. Arrows indicate whether viewing time for that category has changed since 2023.[9]

While figure 10 shows average in-home video viewing across all devices, most in-home video viewing (84%) continues to be through the TV set. The proportion of time spent watching YouTube in the home via a TV set increased year on year, from 34% to 41% in 2024, while the proportion of SVoD/AVoD watched via TV sets was up from 85% to 88%.

[9] 'Broadcaster content' includes live TV, recorded playback and BVoD. Viewing to 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 usage' includes viewing to some SVoD/AVoD/VSP that cannot be definitively measured, 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). Data is based on in-home viewing via WiFi network.

Less than a quarter of 16-24-year-olds' in-home viewing is now to content from broadcasters, compared to 90% for those aged 75+

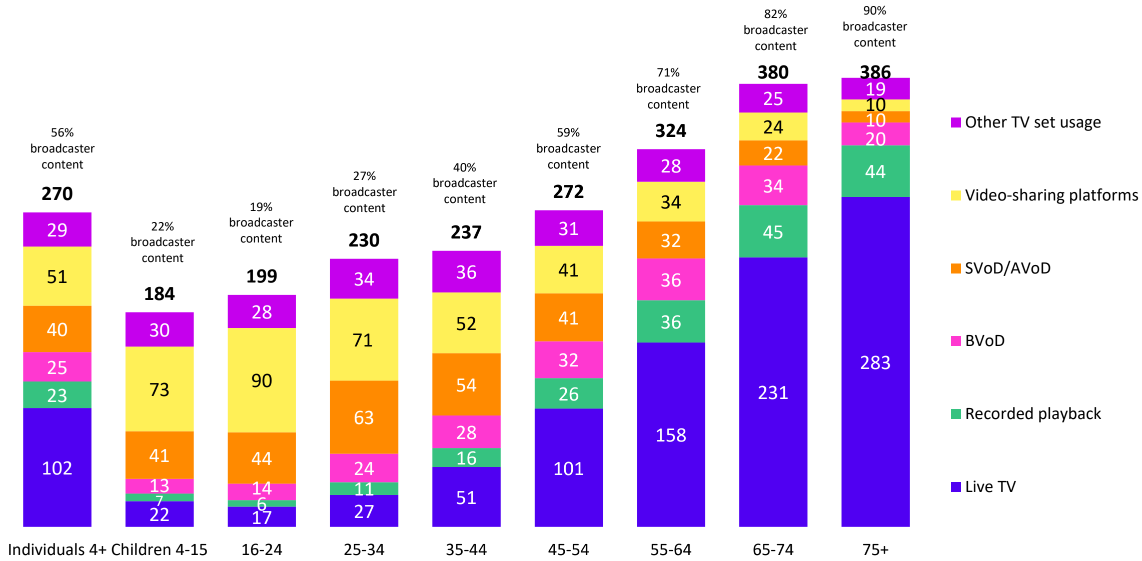
TV viewing habits are increasingly divided by age, with under-35s spending more time watching SVoD/AVoD content in the home than broadcast TV, and over-35s watching video in a more traditional way, primarily to broadcaster services.

Young adults' (aged 16-24) average video viewing in the home declined by 4 minutes in 2024, to 3 hours 19 minutes per day. While SVoD/AVoD and VSPs account for two-thirds of total in-home video viewing by this age group, the former had a marginal increase of 2% while the latter decreased by 4% in 2024, compared to a 7% increase the previous year.

VSPs continue to account for less than 10% of total in-home video viewing for over-64s, while those aged 35-44 accounted for the largest increase, spending an average 52 minutes a day, a 6-minute increase on 2023.

The largest increase in in-home video viewing was among adults aged 75+, who spent on average 6 hours 26 minutes per day watching video content at home, up 13 minutes year on year. Live TV accounted for about three-quarters of over-74s' video consumption, and over three-fifths for 65-74s. Broadcaster content (live, recorded playback and BVoD) made up 90% of video consumption for over-75s, and 82% for 65-74s. The largest increase in BVoD viewing was among over-74s, up by 67% from 12 minutes in 2023 to an average of 20 minutes a day in 2024.

Figure 11: Average daily minutes of in-home video viewing, by age: 2024



Source: Barb as-viewed on TV sets and other devices using the home's WiFi network. See notes from Figure 10 for detail about the categories.

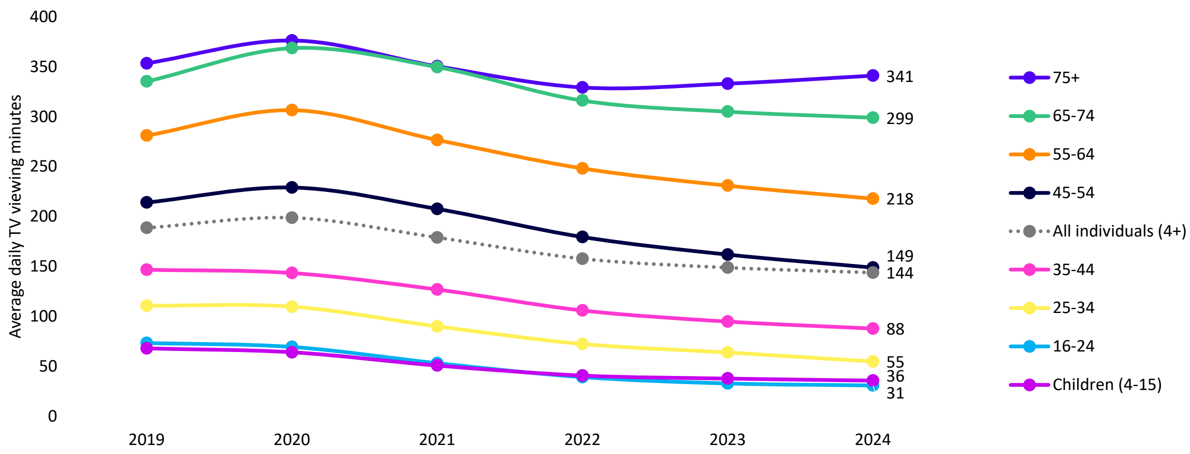
Broadcast TV and BVoD viewing

Broadcast TV viewing continued its long-term decline in 2024, with young adults having the sharpest decline

On average in 2024, individuals (aged 4+) spent 4% less time watching broadcast TV on TV sets than in 2023; their average viewing dropped to 2 hours 24 minutes per day. As in 2023, a decline was seen across all age groups in 2024, except for adults aged 75+. However, the decrease across all age groups, except for adults aged 25-34, was smaller than the decline seen in the previous year.

Adults aged 75 and older watched an average of 5 hours 41 minutes of broadcaster television a day in 2024, up 3% since 2023, and following a 1% rise between 2022 and 2023. The sharpest decline in 2024 was among adults aged 25-34, who watched 14% minutes less than in 2023 (down to 55 minutes in 2024), a steeper drop than the 12% decrease the previous year.

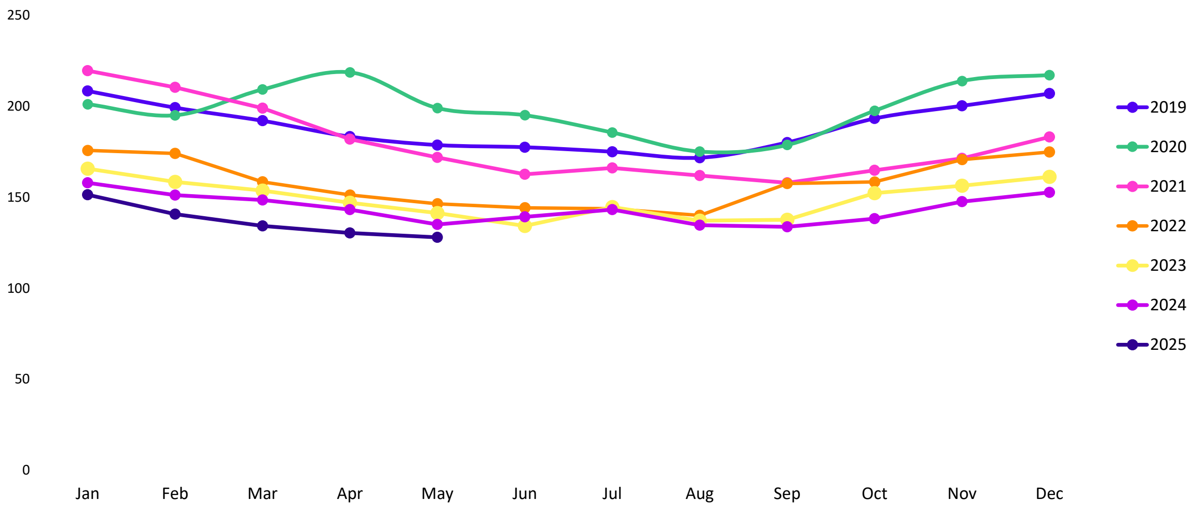
Figure 12: Average daily minutes of broadcast TV viewing, by age: 2019-2024



Source: Barb 28-day consolidated (TV sets only: live viewing plus recorded playback and catch-up BVoD up to 28-days after the live broadcast), individuals 4+.

In 2024, while the overall trend showed a decline in the average daily minutes of broadcast TV watched, there was a noticeable uplift during June and July. This slight increase contrasts with a consistent decline compared to 2023 observed throughout the rest of the year and highlights a temporary rise in viewing during the summer, which can be attributed to coverage of major sporting events like the men's UEFA European Football Championship and the Olympics. We explore this in more detail later in this section. The decline in viewing continued in 2025, with broadcast TV viewing lower in each of the first five months of the year than in the corresponding months in 2024.

Figure 13: Average daily minutes of broadcast TV viewing, by month: 2019-2025

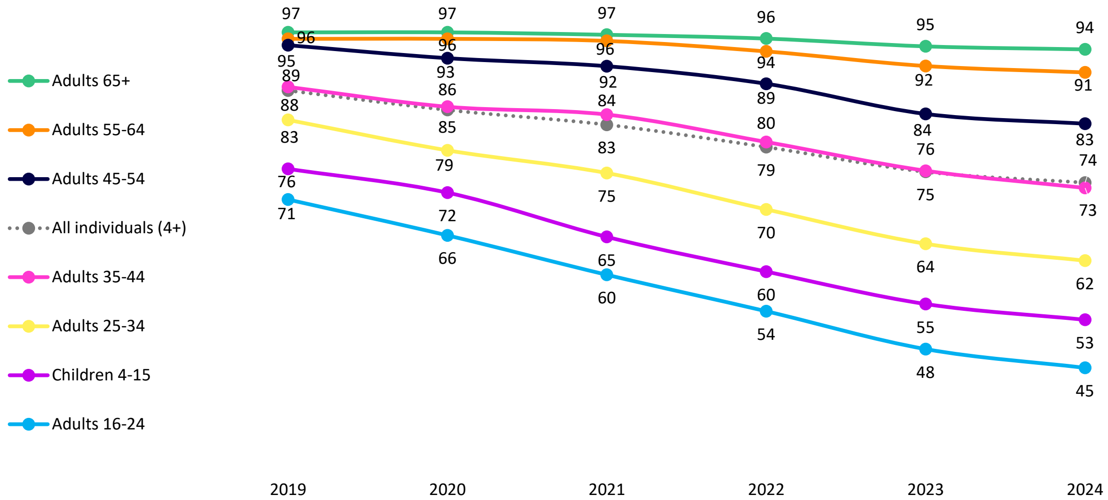


Source: Barb 28-day consolidated (TV sets only: live viewing plus recorded playback and catch-up BVoD up to 28-days after the live broadcast), individuals aged 4+.

Rate of decline for weekly reach slowed for all age groups in 2024 versus 2023

In 2024, average weekly reach continued its year-on-year decline across all age groups, although at a slower pace than in the previous year. A total of 73.8% of individuals watched broadcast TV on average each week in 2024, marking a 1.7 percentage point (pp) decrease since 2023, compared to a 3.8pp drop between 2022 and 2023.

Figure 14: Average weekly reach of broadcast TV, by age: 2019-2024

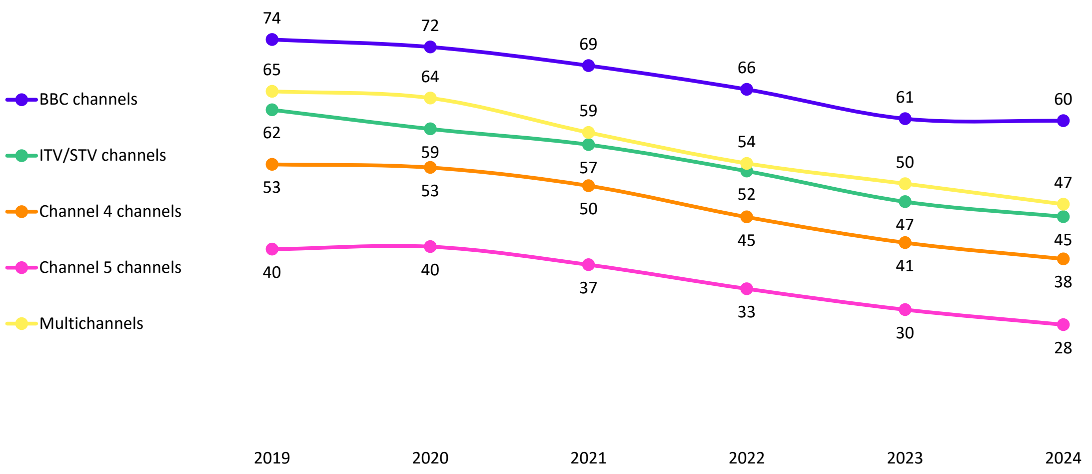


Source: Barb 28-day consolidated (TV sets only: live viewing plus recorded playback and catch-up BVoD up to 28-days after the live broadcast), individuals 4+. Weekly reach is defined as the percentage of all individuals 4+ watching 15 consecutive minutes or more in an average week.

The reach of BBC channels was stable, in contrast to declines for other broadcasters

The average weekly reach of the commercial public service broadcasters (PSBs) [10], as well as the broader multichannel sector (all other channels besides the PSBs' channels), continued to decline in 2024. However, BBC channels' reach remained stable between 2023 and 2024, compared to a five-percentage point decrease the previous year. This stability in reach was seen among all age groups, including children and young adults.

Figure 15: UK Average weekly reach %: 2019-2024



Source: Barb 28-day consolidated (TV sets only: live viewing plus recorded playback and catch-up BVoD up to 28-days after the live broadcast). Reach criteria: 15+ consecutive minutes.

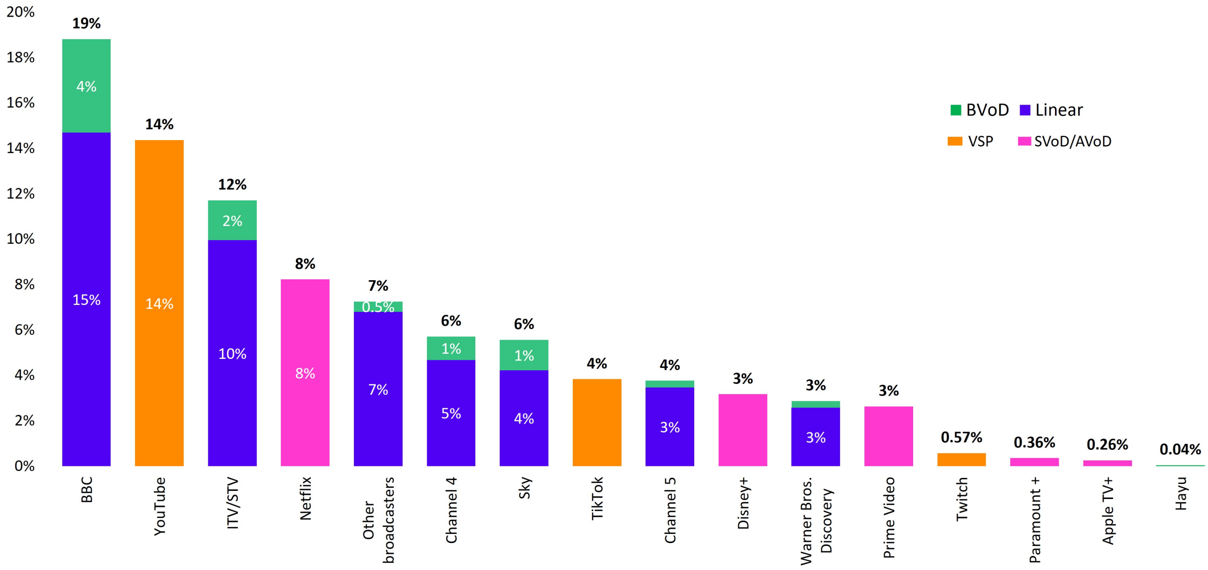
In 2024, time spent viewing BBC iPlayer drove a slight increase to viewing BBC video overall, while linear viewing remained stable (see Figure 17 below). Children spent more time watching BBC broadcast television than in 2023, despite an overall decline in total TV minutes viewed across all children's age groups. As with all individuals, this increase was driven by increased viewing to sports, due to the men's UEFA European Football Championship and the Olympics. The most growth was observed among older children, with 10-12-year-olds' viewing minutes increasing by 18%.

BBC broadcast channels also maintained a strong presence among younger children, with a 44% share of broadcast TV minutes watched by children aged 4-6 on TV sets – the highest share recorded for any single children's age group in the past decade. However, children are still watching YouTube and Netflix more than the BBC.

The BBC was still the most-watched broadcaster/service in 2024 among all individuals, accounting for 19% of all in-home video viewing. YouTube was the second-most-watched service, ahead of ITV. Among young adults 16-34 and children 4-15 YouTube was the most-watched service, accounting for 22% of video viewing for the former and 28% for the latter. Netflix was the next most-watched service for both age groups, accounting for 13% of video viewing. While TikTok ranked number three among 16-34s (9%), BBC was third among children (8%).

[10] Public service broadcaster (PSBs) refers to all BBC, ITV/STV, Channel 4 and Channel 5 channels, as well as S4C. The commercial PSBs refers to all of them except the BBC.

Figure 16: Share of total video viewing for individual services: 2024



Source: Barb as-viewed on TV sets and other devices using the home's WiFi network, individuals 4+. 'Linear' includes broadcast content watched live or via recorded playback.

A small proportion of audiences (7%) did not watch any PSB content on TV sets in Q1 2025. They tended to be younger and less likely than the average population to have traditional TV platforms like Freeview (through an aerial), cable or satellite, opting for TV delivered over the internet. They watched significantly less broadcast content and any video in the home overall, mainly viewing YouTube and other VSPs (78% of their total in-home video viewing). SVoD/AVoD viewing took up the next largest proportion of their viewing (17%). Netflix was their most viewed SVoD/AVoD but they watched less of it than the non-PSB viewers group in Q1 2023.[11]

In Q1 2025, the lightest viewers of PSB (the quartile of viewers who watched the least amount of PSB content on linear channels or BVoD services) watched on average nearly six minutes a day of PSB content. This group of people watched very little content from any linear broadcasters (less than 14 minutes a day of linear or BVoD) mainly choosing YouTube (1 hour 2 minutes) and Netflix (27 minutes).[12]

BVoD continued to grow and overtook recorded playback for the first time

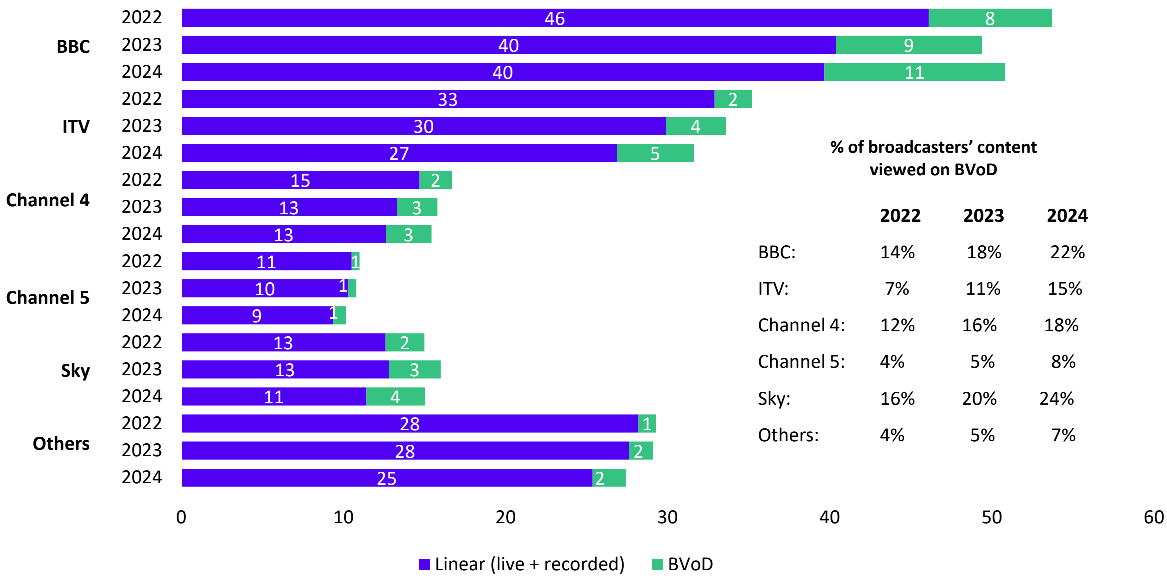
The amount of time spent watching BVoD in 2024 overall (25 minutes per person per day) was for the first time higher than the average time spent watching recorded playback of live channels (23 minutes per person per day). While linear minutes viewed on the main broadcast channels continued to decrease year on year, BVoD minutes for these broadcasters increased since 2023, although by a smaller amount than in previous years. This resulted in a decrease in the daily minutes viewed of broadcast TV and BVoD combined for all the main broadcasters except the BBC, with a particularly sharp decrease in minutes viewed on ITV channels from 2023 to 2024 (down by 10%).

[11] Barb as-viewed. The non-PSB viewers are those who did not watch any content from PSB content on TV sets in Q1 2025 (live, recorded or BVoD). This group was only possible to create from TV set viewing, but their viewing habits were looked at across all devices. On average these audiences watched just over an hour and a half of video per day in the home compared to the average of over four and a half hours.

[12] Barb as-viewed.

An increased amount of broadcasters' content was watched on BVoD, across all broadcasters, in 2024; nearly a quarter of Sky's viewing came from its streaming services, while 22% of the BBC's viewing was via BBC iPlayer. Looking specifically at young adults aged 16-24, 50% of their viewing of BBC content was via BBC iPlayer, the highest proportion of BVoD among all broadcasters.

Figure 17: Average daily minutes viewed of linear* and BVoD, by broadcaster: 2022-2024



*Source: Barb as-viewed on TV sets and other devices using the home's WiFi network, individuals 4+. *'Linear' refers to viewing across all the broadcast channels provided by each broadcaster (whether watched live or recorded playback). 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 to Sky's content on its SVoD service, NOW, because Barb's measurement is unable to separate this from Sky Go/Sky TV On Demand.*

In 2024, live viewing[13] on BVoD platforms increased compared to 2023, but it did not grow as quickly as total BVoD viewing, leading to a decline in its overall proportion. Throughout 2024, 9.4% of BVoD viewing time was dedicated to live content, with variations across broadcasters.

In 2024, BVoD viewing, watched live across all broadcasters, rose on average by 26% year on year. All PSBs (except Channel 5) experienced an increase in live BVoD viewing, with ITV growing by 17% and the BBC by 15%. Channel 5 declined by 12%, in contrast to the overall upward trend.

Entertainment and drama are key genres for PSBs' VoD services

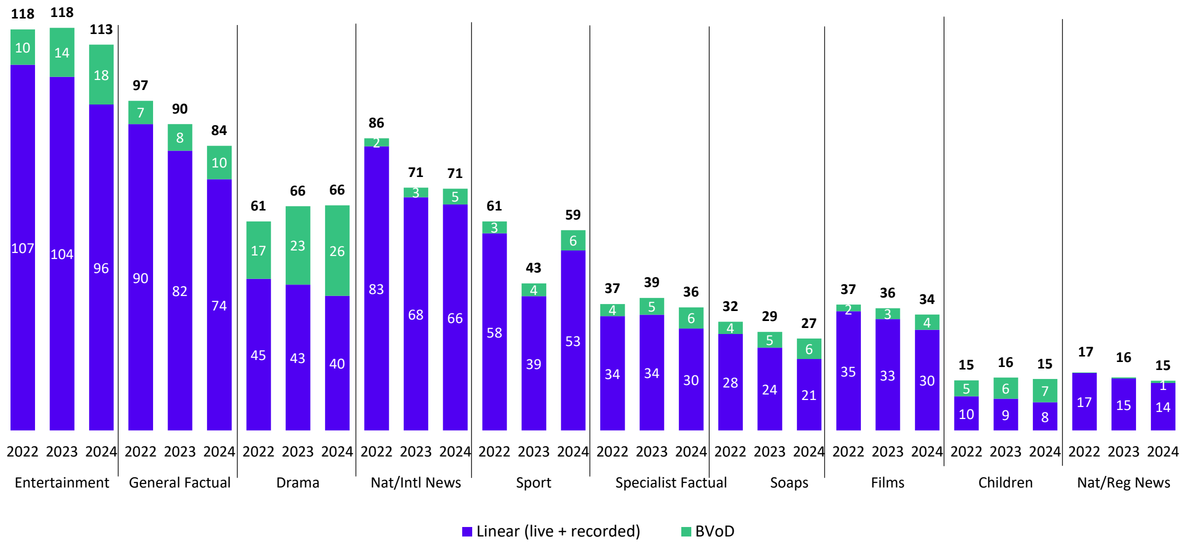
As viewing habits continue to change, some genres are shifting away from linear TV viewing towards BVoD services. Total hours of entertainment viewed per person on PSBs' linear TV channels was eight hours lower in 2024 than in 2023, while drama declined by three hours. However, these declines were offset by increases in BVoD viewing – particularly for drama, where a three-hour increase meant overall viewing remained flat year on year. Viewing of children's programming on BVoD increased by an hour, resulting in a nearly equal split with linear.

General factual had the largest decline in viewing, with linear viewing falling by 8 hours year on year, while BVoD increased by 2 hours, resulting in an overall decline of 6 hours.

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

National/regional news, films, soaps and specialist factual saw the smallest increases in BVoD viewing, indicating a preference for linear viewing for these genres.

Figure 18: Total PSB hours viewed per person per year, by genre, individuals 4+: 2022-2024



Source: Barb as-viewed on TV sets and other devices using the home's WiFi network, individuals 4+. 'PSB' refers to all BBC, ITV, STV, Channel 4 and Channel 5 channels as well as S4C. 'Linear' refers to viewing across all the broadcast channels owned by each PSB (whether watched live or via recorded playback). 'BVoD' includes all the PSBs' content watched via the on-demand services provided by each broadcaster, including non-linear programming and other on-demand services such as Sky Go/Now and Virgin Media Catch-up. Year on year changes in viewing of sport are influenced by the sporting events in each year.

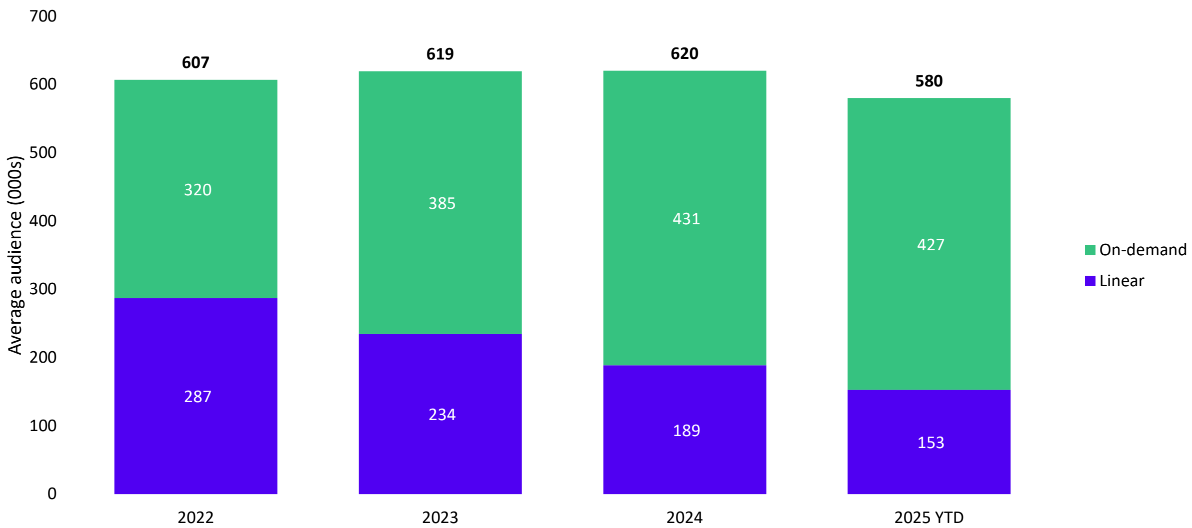
For many years, total sports viewing in the UK has shown a pattern of higher viewing in even-numbered years, driven by large international events in these years; 2024 was no exception to this rule. This higher level of sports viewing undoubtedly helped to strengthen broadcast viewing compared to 2023, although the extent to which this happened is not possible to calculate, as in many cases viewers would have watched sports as an alternative to other broadcast viewing, while at other times, and with other groups of people, it would be additional viewing.

Although football is always the number one sport in terms of weight of viewing, the amount it contributes to total sports viewing varies. In 2024 it contributed 44% to sports viewing on the PSBs, driven by the men's UEFA European Football Championship coverage, compared to 2023 when football contributed 38%. The Olympics and Paralympics were the other significant large events in 2024 contributing 23% of total sports viewing over the year (see below for more). Tennis was in third place (7%) as it has been for the past three years, and although it is relatively more popular with older people (representing a greater proportion of their sports viewing), Wimbledon draws in significant audiences over a two-week period in the summer. But there were some notable events in 2023 which did not occur in 2024: the men's Rugby World Cup in 2023 more than doubled rugby viewing compared to both 2022 and 2024. Although the audience for women's sport and events such as the summer and winter Paralympics are not as large as for men's sport or the Olympics, both the coverage and appeal has grown in recent years. [As reported by ITV,](#) the Women's Euro 2025 semi-final on 22 July averaged 8 million viewers across all devices, giving the channel its biggest overnight audience of 2025 for all individuals and adults 16-34. The match also gave ITVX its biggest day of the year with 17.2m streams.

In 2024 viewing of sports programming via the PSBs increased, driven by the Olympics (BBC) and the men's UEFA European Football Championship (BBC/ITV), which jointly accounted for 42% of the time spent viewing sports. Coverage of the Olympics was shared between Warner Bros. Discovery (shown on Eurosport channels and the Discovery+ streaming service) and BBC services. Most (96%) of the total viewing to the Olympics was via the BBC, and 91% of it was watched on linear channels rather than on-demand services. Eighty-two per cent of it was watched live, at the time the events or highlights packages were being broadcast, either on linear channels or on-demand services. While none of the individual programmes of the Olympics appeared in the most-watched titles of the year (see Figure 29), across the whole period of the games, and for a month after they finished, 63% of individuals watched Olympics programming at least once.[14]

The BBC soap, *EastEnders*, celebrated its 40th anniversary in February 2025. The occasion was marked by a week of special episodes, including an hour-long episode on Wednesday 19 February, and a live episode on Thursday 20 February. For the first time, viewers voted on the outcome of a storyline, with the results revealed during the live episode. The live episode had an average audience of just under 4 million viewers watching on the day, on TV sets. When taking into account the audiences who watched it on other connected devices in the home, and the viewing that took place after the broadcast date, the audience size increased to 5.4 million.[15] This made it the most-watched *EastEnders* episode of 2025 so far, but still slightly lower than the 5.7 million who watched part 2 of 2024's Christmas day special. Sixteen per cent of the total audience to the 2025 live episode were aged 16-34, on a par with the average 16-34 viewer profile in 2022-2024. In 2025 so far, the 16-34 profile has fallen very slightly to 14%, but despite the downward trend of young people watching TV from broadcasters, the 16-34 *EastEnders* audience has remained at about 600,000 per episode for this audience. Broadcast viewing to the soap has steadily decreased, but viewing via BBC iPlayer viewing has compensated for the decreases in linear, accounting for 74% of the 16-34 audience in 2025 so far. This is up from 53% in 2022.

Figure 19: Eastenders, average audience per episode (000s) for 16-34s: 2022 – 6 June 2025



Source: Barb as-viewed, TV sets and other devices connected to the home WiFi. 'Linear' refers to viewing that took place live at the time episodes were broadcast on BBC One and playback of recordings from BBC One,

[14] Barb as-viewed. Reach criteria 3+ consecutive minutes at least once across the whole period.

[15] This is the cumulative audience size (average for any minute of the programme) across all channels, repeats, on-demand, recorded playback etc., up until 6 June 2025.

across the whole period. 'On-demand viewing' includes viewing to episodes live and catch-up via BBC iPlayer or other catch-up services like Sky Go/NOW or Virgin Media Catch-up across the whole period.

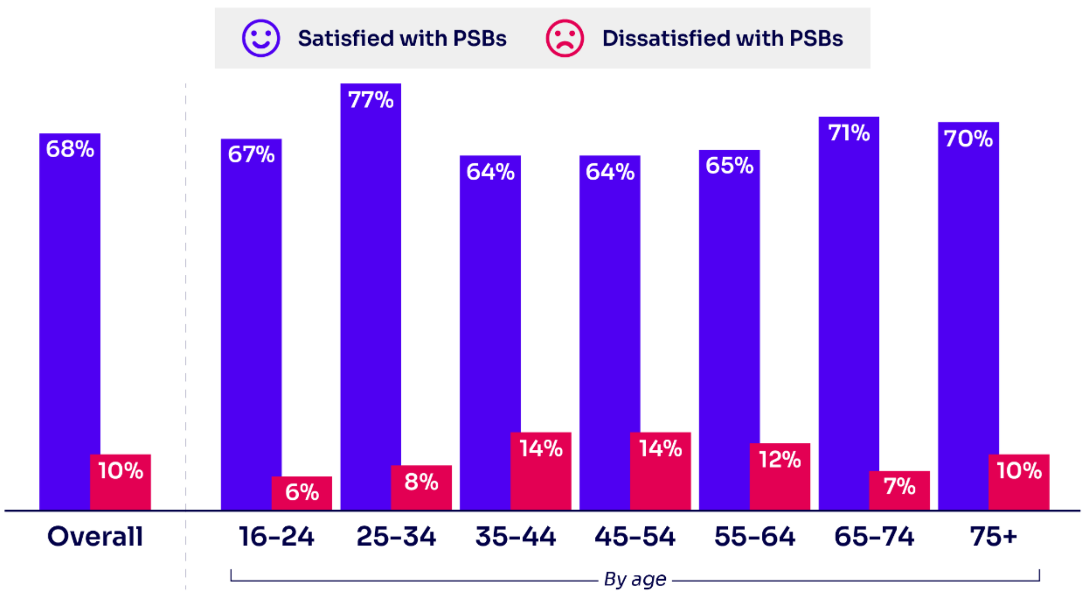
Audience attitudes and sentiments towards PSBs and BVoD services

Overall, a majority of PSB viewers say they are satisfied with public service broadcasting

According to Ofcom's Public Service Media Tracker 2024, about seven in ten (68%) PSB viewers[16] said they were satisfied with them overall, in line with previous years. In 2024, there was a decrease in dissatisfaction (10%, down from 12% in 2023), returning to the 2022 level (10%).

When looking at demographic differences, those in socio-economic groups ABC1 were more likely than those in C2DE groups (72% vs 63%) to be satisfied with PSBs overall, similar to previous years. There has been an increase over time in satisfaction among 25-34-year-olds (66% in 2021 compared to 77% in 2024) and they are now more likely than the UK average to be satisfied (68%). It should be noted that the reach of broadcast TV among 25-34s fell over this period (2021: 75%; 2024: 62%; see figure 14), so it is possible that a contributor to this increase in satisfaction is that those who remain PSB viewers are more likely to have a positive view.

Figure 20: Satisfaction with PSBs overall and by age: 2024



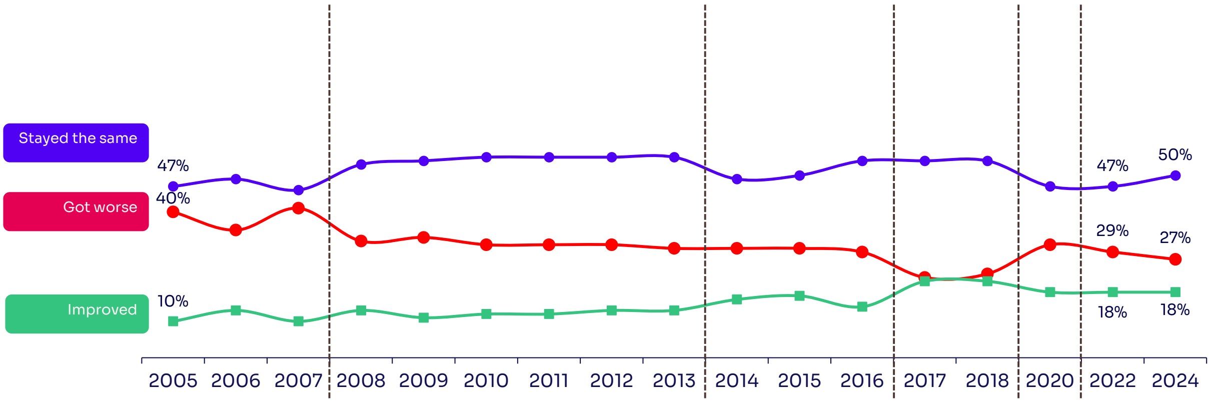
Source: Ofcom's Public Service Media Tracker 2024. Question 28: And now, if you think about ALL the public service broadcaster channels combined, how satisfied are you that combined they provide the different elements asked about in the previous question? Base: All who have watched PSB channel/service in past six months: UK total (2,840), 16-24 (265), 25-34 (401), 35-44 (444), 45-54 (443), 55-64 (523), 65-74 (425), 75+ (339).

[16] 'PSB viewers' are defined as those who have watched a PSB channel/service in the past six months.

Looking at individual PSB channels, among viewers of each channel, about three-quarters say they are satisfied with Channel 4 (77%), BBC One (76%) or ITV1 (75%). About seven in ten say the same for Channel 5 (71%) or BBC Two (70%).

Our Cross Platform Media Tracker 2024 showed that when asked if they felt that TV programmes had improved, got worse or stayed the same in the last 12 months, half (50%) of viewers said they had stayed the same, about a quarter (27%) said they had got worse and 18% said they had improved, consistent with recent years.[17]

Figure 21: Viewers attitudes towards broadcast TV programmes over the past 12 months: historical view



Source: Ofcom's Cross Platform Media Tracker 2024 – Adults survey. Question B1: Do you feel that over the past year television programmes have improved, got worse or stayed about the same? Base: Those aged 16+ who have watched any live broadcast TV in the last 12 months 2022 (2,219) and 2024 (1,866). Note: Base 2015-2020, all with working TV sets. Base prior to 2014: All with TV, but excluding those never watching. Dashed line to show when survey methodology changed.

Public service broadcasters continue to deliver a wide range of programmes, made for UK audiences

Overall, most viewers of PSBs consider they are broadly delivering 'well'[18] across a range of attributes, although there is some variation between them. These include *'programmes made for UK audiences'* (67%), *'a wide range of different types of programmes, such as drama, comedy, entertainment or sport'* (67%) and programmes that *'appeal(s) to a wide range of different audiences'* (63%). These findings are broadly consistent with previous years.

When looking at the delivery of attributes by individual PSBs, 2024 survey respondent ratings on most statements have remained stable for ITV and Channel 4 TV channels, following declines in 2023. For Channel 5 TV channels there have been increases in the number of viewers who say it delivers certain attributes well, in most cases returning to 2021 levels. These include *'programmes that are relevant to me'*[19] and *'programmes that I can watch and talk about with people I know'.*[20]

[17] Ofcom Cross Platform Media Tracker 2024 – Adults' survey.
[18] The Ofcom Public Service Media Tracker uses questions asking respondents to say how 'well' or 'badly' different attributes 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, this is NET of scores 7 to 10.
[19] 2021 43%; 2022 45%; 2023 40%; 2024 44%.
[20] 2021 40%; 2022 43%; 2023 37%; 2024 42%.

Figure 22: Proportion of PSB viewers who rated the delivery of different attributes of PSB TV channels 'well' (NET 7-10): 2024

	BBC	ITV	Channel 4	Channel 5
Programmes made for UK audiences	66%	62%	57%	51%
A wide range of different types of programmes, such as drama, comedy, sport or entertainment	65%	60%	54%	46%
Programmes that help me to understand what is going on in the world today	62%	52%	50%	41%
Trusted and accurate UK news	61%	56%	50%	41%
Broadcast events that bring the nation together for a shared viewing experience	61%	52%	42%	36%

Source: Ofcom Public Service Media Tracker 2024. Question 24. Thinking about each broadcaster individually on a scale of 1 to 10, where 1 means extremely badly and 10 means extremely well, how well or badly does it provide…?" Base: All who have watched… in last six months: BBC TV channels (2,661), ITV1/ITV Cymru Wales/STV/UTV and ITV channels (2,568), Channel 4 TV channels (2,557) and Channel 5 TV channels (2,212). Please note, this is a selection of attributes, rather than the top-rated attributes for each PSB.

Viewers in the UK continue to be satisfied with BVoD services

A majority of UK audiences (71%) said it was important that PSBs provided catch-up, on-demand or streaming services, in line with 2023 (71%). Those in socio-economic groups ABC1 were more likely than those in C2DE groups to say this was important (78% vs 64%).

When asked about levels of satisfaction with different BVoD services, about four in five (79%) viewers of BBC iPlayer in the past six months said they were satisfied, followed by more than seven in ten (72%) viewers of Channel 4 or the Channel 4+ streaming service. Slightly lower proportions of viewers said the same for ITVX or ITVX Premium (67%) or My5[21] (66%).

According to survey respondents' ratings, some of the highest-performing statements across BVoD services included *'provides services that are easy to find my way around'*, *'programmes made for UK audiences'* and *'a wide range of different types of programmes, such as, comedy, entertainment or sport'*. However, there were some differences between services.

[21] At the time of the PSM Tracker's 2024 fieldwork, Channel 5's BVoD service was named My5. This was rebranded to Channel 5's streaming service in March 2025.

Figure 23: Proportion of BVoD viewers who rated the delivery of different attributes of BVoD services 'well' (NET 7-10): 2024

	BBC iPLAYER	itvX	4	My5
Provides services that are easy to find my way around	73%	60%	63%	61%
Programmes made for UK audiences	72%	64%	65%	63%
A wide range of different types of programmes, such as drama, comedy, entertainment or sport	71%	65%	65%	59%
Appeals to a wide range of different audiences	69%	62%	62%	62%
Programmes that are relevant to me	66%	57%	60%	60%

Source: Ofcom Public Service Media Tracker 2024. Question 35. Thinking about each broadcaster TV catch-up, on-demand or streaming service individually on a scale of 1 to 10, where 1 means extremely badly and 10 means extremely well, how well or badly does it provide…? Base: All who have watched … in last six months: BBC iPlayer (2,343), ITVX or ITVX Premium (1,796), Channel 4 or Channel 4+ streaming service (1,599), My5 (1,201). Please note, this is a selection of attributes, rather than the top-rated attributes for each BVoD service.

Many of the attributes of individual BVoD services remained stable in 2024; however, My5 has seen some steady increases in approval over time. For example, for *'broadcast events that bring the nation together for a shared viewing experience'* (41% in 2021 to 49% in 2024) and '*programmes that are different in their approach to other providers'* (48% in 2021 to 56% in 2024).

The most common reason given by BVoD viewers for using services was *'to catch up on programmes that I have missed on TV'* (60%), followed by *'I can watch what I want, when I want'* (50%) and *'to watch specific programmes or boxsets'* (41%).

About three-quarters (74%) of adults aged 16+ said they were aware that they could watch channels or programmes live at the time they are broadcast on online video and streaming services. There has also been an increase in viewers claiming to watch channels or programmes live on BVoD services.[22]

Across all PSB VoD services, among those who had not watched them in the past six months, the main reasons given for not using the services continued to be preferring to watch other services and not being interested in the content available on them. For example, for Channel 4 or Channel 4+

[22] For example, Channel 4 or Channel 4+ streaming service has increased steadily over the past three years (2022 33%; 2023 37%; 2024 46%). My5 has increased from 2023 (31%) to 2024 (36%) and BBC iPlayer has increased from 2022 (55%) to 2024 (60%).

streaming, a quarter (25%) said *'I prefer to watch other services such as Netflix, Amazon Prime Video, Disney+ etc'*, followed by *'I'm not interested in the programmes available'* (22%).[23]

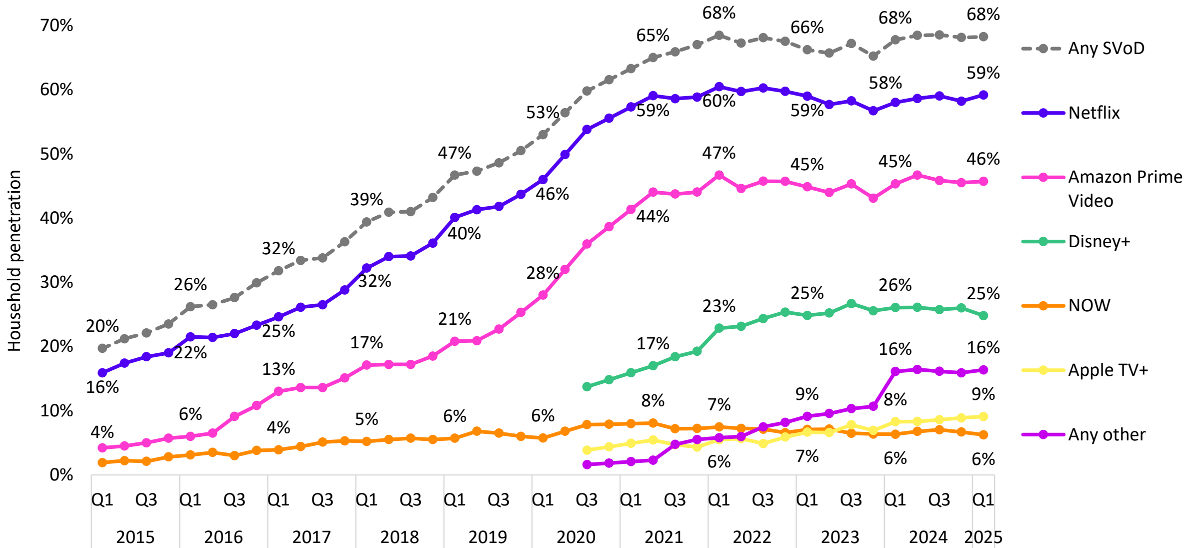
Subscription video-on-demand services

Take-up of the major SVoD services has plateaued in recent years

The proportion of UK households receiving any SVoD service in Q1 2025 has continued to plateau and was at about the same level (68%) as it was in 2021. Take-up of the top three SVoD services has not changed significantly over the past year, a continuation of the previous year's trend. Netflix remains the most-subscribed-to service, present in 17.4 million (59%) UK households, followed by Amazon Prime Video in 13.4 million (46%) households and Disney+ in 7.3 million (25%). Two-thirds (67%) of UK households subscribe to at least one of Netflix, Amazon Prime Video or Disney+, and 19% to all three. UK viewers now have many different on-demand services to choose from, with the arrival of smaller, more niche services over the years. Ofcom's VoD Survey shows claimed reach figures to a long list of online video services that are not all asked about in the Barb Establishment Survey.[24]

The proportion of Netflix subscribers using its 'Standard with Ads' subscription tier increased sharply to 28% in Q1 2025, compared to 13% in Q1 2024. Disney+ subscribers taking up its ad-supported tier also increased significantly, to 23% of subscribers in Q1 2025 versus just 7% in Q1 2024.

Figure 24: SVoD penetration of UK households, by provider: Q1 2015 to Q1 2025



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 due to the Covid-19 pandemic. 'Any other' includes Hayu, Discovery+, Paramount+ and BritBox.

[23] Ofcom Public Service Media Tracker 2024.
[24] The longer list of VoD services from the Ofcom VoD Survey can be found in Ofcom's interactive *Communications Market Report 2025*, in the TV and video section.

The most common reasons reported for unsubscribing, or downgrading SVoD subscriptions, are to do with cost

In Ofcom's 2025 VoD Survey the main reasons adults gave for why their household took out a subscription to Netflix included '*watching content not available elsewhere*' (36%), to *'watch something different to what is on broadcast TV'* (35%), to *'watch multiple episodes in a row/boxsets'* (33%), and to '*watch a specific programme/series*' (30%). For Amazon Prime, the main reason was to '*get free delivery from Amazon*' (50%). For Disney+ the main reasons were to *'watch content not available elsewhere'* (34%) and to '*watch a specific programme/series*' (33%).

Some viewers reported unsubscribing from SVoD services in the past three months (Amazon Prime: 6%, Netflix: 4%, Disney+: 4%). Of those who had unsubscribed, the most common reasons related to cost. For Netflix, 24% claimed that they *'didn't use it enough to justify the cost'*; 23% stated the increased subscription price as a reason, while 22% said that it was '*too expensive'.* In terms of the tiers that households subscribe to, there was an increase in those who reported having the ad-tier (49% in 2025, more than twice the 2024 figure, 22%), and a decrease in the those with the premium tier (11% in 2025, down from 16% in 2024). For Amazon Prime, the top reasons for unsubscribing were that they '*didn't use it enough to justify the expense*' (35%), and because it was '*too expensive*' (35%). For Disney+ it was primarily because it was '*too expensive*' (37%).

Fourteen per cent of households reported having downgraded their household Netflix subscription in the past year. While this is not significantly different to 2024, the number of people who reported having upgraded was significantly less than in 2024 (7% in 2025 compared to 14% in 2024). This means that for the first time since we started the survey, in 2022, more people downgraded than upgraded.[25]

Netflix accounts for over half of all SVoD viewing

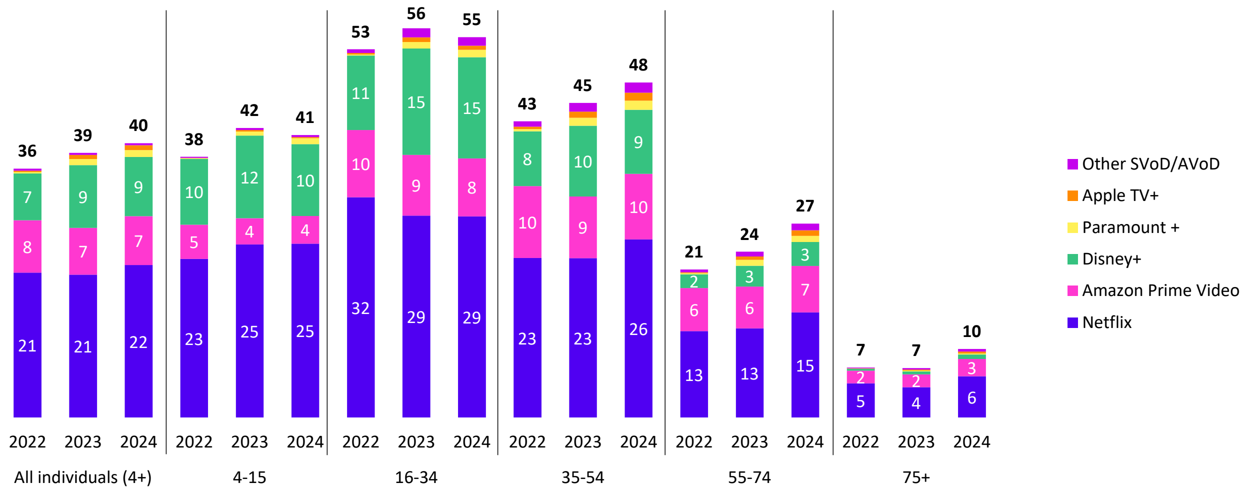
Netflix remains the most-watched SVoD service, averaging 22 minutes per individual (aged 4+) per day in 2024 and accounting for more than half of total SVoD/AVoD viewing time for all age groups. Disney+, while in third place in terms of household penetration of these services, ranked second in terms of daily viewing (9 minutes), slightly ahead of Amazon Prime Video (7 minutes).

Viewers aged 16-34 continue to watch the most SVoD content, compared to other age groups, averaging 55 minutes per day across 2024, with Netflix accounting for over half (29 minutes) of this viewing. However, viewers aged 55-74 have provided the strongest growth in SVoD viewing in recent years, from 21 minutes in 2022 to 27 minutes in 2024.

Unsurprisingly, by virtue of its brand and the content on its platform, Disney+ skews younger, accounting for 24% of children's SVoD/AVoD viewing time, but only 6% for over-74s.

[25] Ofcom VoD Survey 2025.

Figure 25: Average daily minutes of SVoD/AVoD viewing, by age: 2022-2024



Source: Barb as-viewed on TV sets and other devices using the home's WiFi network, individuals 4+. 'Other SVoD/AVoD' does not include NOW because Barb's measurement is unable to separate this from Sky Go/Sky On Demand.

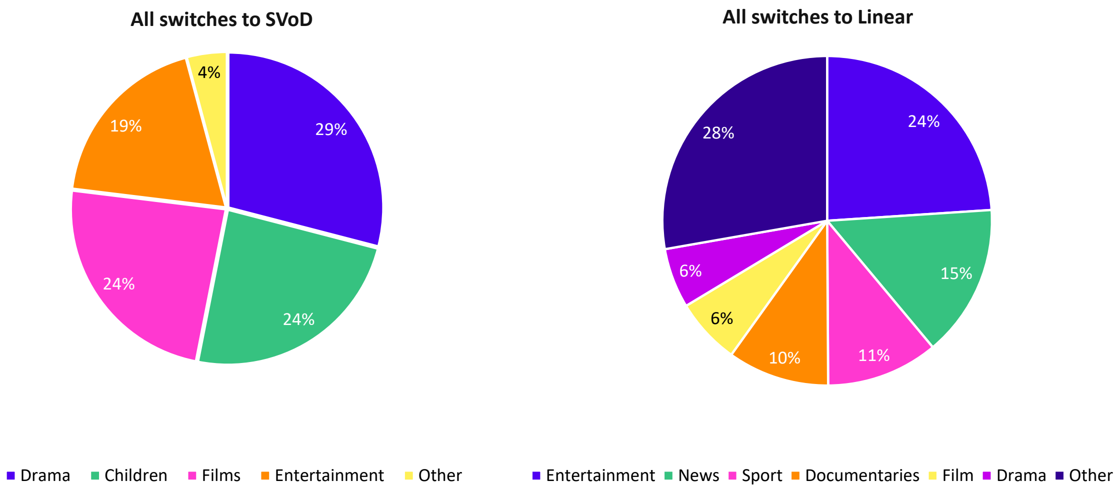
TV viewer journey analysis shows the narrower range of content viewed on SVoD services compared to broadcast TV

Audience behaviour each time the TV set is used for viewing can be seen as a sequence of content or a viewing journey, from when people turn on the TV with an initial piece of content, possibly followed by another one, ending in a final one when they turn the TV off. They make switches between services and channels to find what they want to watch. The analysis that follows makes use of switching patterns between services and channels to infer what viewers choose as part of their viewer journeys.

Ofcom's analysis of TV viewer journeys found that viewers switch to SVoD from other platforms to watch fewer genres compared to when they switch to broadcast linear TV. Just four genres (drama, films, entertainment and children's programming) made up 96% of all switches to SVoD, with drama the largest of these (representing 29% of all switches to SVoD). In contrast, viewers switch to broadcast linear TV to watch a wider range or genres. In addition to drama, film and entertainment, viewers switch to broadcast TV to watch genres such as news (15% of all switches), sport (11%) and documentaries (6%).[26]

[26] Ofcom/TRP TV Viewer Journeys. Ofcom commissioned TRP Research to carry out bespoke analysis of the Barb database to provide quantitative insight into these different TV viewer journeys during November 2024. In total we analysed approximately 670,000 viewing sessions on the TV set, containing a total of 7 million 'switch' events.

Figure 26: Proportion of all TV switches by genre, SVoD vs linear: 2024



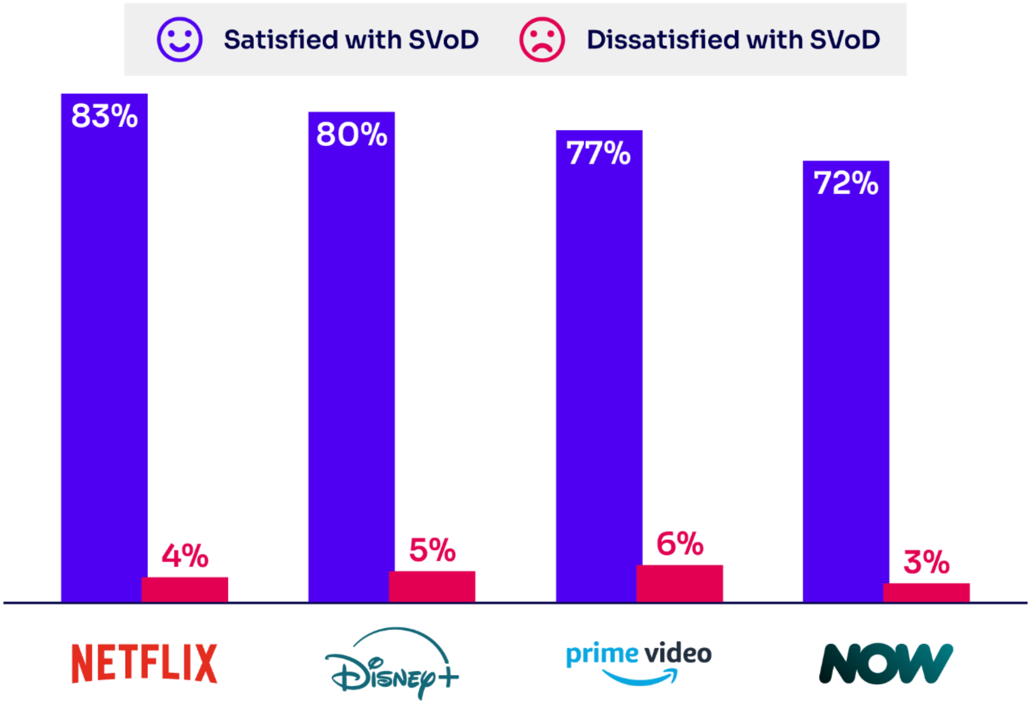
Source: Ofcom TV Viewer Journeys. Barb as-viewed on TV sets and other devices using the home's WiFi network, November 2024 SVoD/AVoD does not include NOW because Barb's measurement is unable to separate this from Sky Go/Sky On-Demand.

Overall, audiences continue to say they are satisfied with SVoD services

A majority of viewers (83%) in the past six months said they were satisfied with Netflix, although this has declined over time (86% in 2021). In 2024, 16-24-year-olds (79%) were less likely than the UK average to be satisfied with Netflix, while those aged 25-34 (87%) were more likely. About four in five viewers said they were satisfied with Disney+ (80%), followed by about three-quarters for Amazon Prime Video (77%). A slightly lower proportion were satisfied with NOW (72%).[27]

[27] Ofcom Public Service Media Tracker 2024.

Figure 27: Satisfaction with SVoD services: 2024



Source: Ofcom Public Service Media Tracker 2024. Question 39. Overall, how satisfied or dissatisfied are you with these TV catch-up, on-demand or streaming services? Base: All who have watched … in past six months: Netflix (2,085), Disney+ (1,317), Amazon Prime Video (1,889), NOW (652).

While audiences overall are satisfied with individual SVoD services' provision, some viewers express dissatisfaction with elements of the current VoD landscape. Ofcom's VoD survey found that more than two in five adults and teens (43%) agreed with the statement: *'there are too many video-on-demand services'* and 38% agreed with *'I find the amount of content available on video-on-demand services overwhelming'*. Nearly a quarter (23%) agreed that they *'spend too much money subscribing to video-on-demand services'*. However, most (65%) said '*they would miss video-on-demand services if they were no longer available'*. Audiences' reluctance to give up these services, despite the cost, may explain the plateauing of subscriptions to SVoD services, reported earlier.[28]

For many adults and teens, SVoD platforms are their first choice of service

Ofcom's TV Viewer Journeys analysis found that SVoD is the platform children and young adults are most likely to select first when turning on the TV. Twenty-seven per cent of children aged 4-15 choose SVoD as a first TV destination, compared to 26% who select a linear channel and 20% who choose a video-sharing service (mainly YouTube). An SVoD service is also the most popular first destination for adults aged 16-34, although the same proportion (30%) select a linear channel as their first destination. In comparison, only 4% of adults aged 55+ select SVoD as a first destination, with the majority (83%) choosing to start their TV journey with a linear channel.[29]

[28] Ofcom VoD Survey 2025.
[29] Ofcom/TRP TV Viewer Journeys.

Further, Ofcom's 2025 VoD survey found that when UK adults and teens want to watch something, but do not have anything specific in mind, 43% of them claim to go to an SVoD service first (up from 39% in 2024), while 28% say they go to TV channels first (down from 33% in 2024). Comparing individual services, 29% say they go to Netflix first, which puts the service in line with TV channels for the first time. Fourteen per cent claim to go to YouTube first, while 7% visit BBC iPlayer first.

This varies considerably by age. Only 7% of 13-24s say they go to TV channels first, with Netflix their most popular choice (35%), followed by YouTube (31%). The proportion who go to TV channels first is higher for older age groups, with 65% of over-74s claiming to go to them first (down from 72% in 2024). For this older group in 2024, BBC iPlayer and Netflix were similar, but in 2025, BBC iPlayer decreased by two percentage points to 7% while Netflix increased by three percentage points to 11%. Despite this, both are still more popular than YouTube, which 5% of this age group claimed as their first choice (up from 1% in 2024).

'Having specific shows to watch regularly on the platform', and '*browsing/scrolling until something catches [their] eye*', were the most common options picked by adults and teens in choosing what to watch on traditional TV channels (40% and 36% respectively). The browsing/scrolling option has decreased from 40% in 2024, but none of the other options changed significantly. For Netflix it was '*browsing/scrolling until something catches [their] eye*' (55%), followed by '*recommendations from friends or family*' (44%). For BBC iPlayer, it was about '*catching up on shows they had missed'* (43%, a decrease from 54% in 2024) or '*watching specific programmes on the platform'* (35%). More than half of adults and teens (51%) agreed with the statement: '*video-on-demand services are the main way I watch programmes and films'*.[30]

SVoD services continue to appeal to a wide range of audiences and provide services that are easy to use

Overall, viewers of different SVoD services continue to say they delivered 'well' across a range of attributes, although there is some variation. For example, viewers said Netflix delivered well for *'provid[ing] services that are easy to find my way around'* (80%) and *'appeal[ing] to a wide range of different audiences'* (80%).[31] Our VoD survey found that Netflix scored highest for '*exclusive content only available through that platform (*78%).[32]

In 2024, most attributes have remained fairly stable across different SVoD services, following some declines in 2023 for Netflix, Amazon Prime Video and NOW. Disney+ continues to remain stable year on year. However, across several different SVoD services there have been increases in the proportion of viewers who say they provide *'programmes that feature my region/country'* well; for example, NOW (42% in 2021 vs 48% in 2024), Netflix (31% in 2021 vs 38% in 2024) and Amazon Prime Video (30% in 2021 vs 36% in 2024).[33]

[30] Ofcom VoD Survey 2025.
[31] Ofcom Public Service Media Tracker 2024.
[32] Ofcom VoD Survey 2025.
[33] Ofcom Public Service Media Tracker 2024.

Figure 28: Proportion of SVoD viewers who rated the delivery of different attributes of SVoD services 'well' (NET 7-10): 2024

	NETFLIX	Disney+	prime video	NOW
Provides services that are easy to find my way around	80%	77%	73%	70%
Appeals to a wide range of different audiences	80%	74%	73%	66%
Easy to find something I want to watch	77%	73%	70%	67%
A wide range of different types of programmes, such as drama, comedy, entertainment or sport	76%	66%	71%	66%
Programmes that I can watch and talk about with people I know	76%	69%	68%	61%

Source: Ofcom Public Service Media Tracker 2024. Question 38. Thinking about each broadcaster TV catch-up, on-demand or streaming service individually on a scale of 1 to 10, where 1 means extremely badly and 10 means extremely well, how well or badly does it provide…? Base: All who have watched … in past six months: Netflix (2,085), Disney+ (1,317), Amazon Prime Video (1,889), NOW (652).

Most-watched programmes and events

Half of the most-watched TV programmes/films of 2024 were on streaming services

Broadcasters accounted for half of the top ten performing titles in 2024[34], taking the top three positions. *Gavin & Stacey: The Finale* was the most-watched programme of the year, averaging 18.6 million viewers across BBC One and iPlayer on TV sets[35]. BBC's children's animated film *Wallace & Gromit: Vengeance Most Fowl* took the next spot, averaging 16.9 million, followed by the fact-based drama *Mr Bates vs The Post Office,* which averaged 14.7 million across ITV/STV (including on-demand). The top two most-watched programmes both aired first on Christmas Day, with a higher

[34] The top programmes looked at in this section are based on the highest occurring episode of each title, and figures are for the cumulative average viewing across the whole year. This means that content which was available to audiences from the beginning of the year had more time to accumulate viewers than content which only became available later in the year.

[35] We have used TV set figures only, so as to compare content from the broadcasters fairly with that from the SVoDs/AVoDs, as their programme figures are only available for TV sets. For reference, the Gavin & Stacey finale had another 700,000 viewers across other devices in home in 2024.

proportion of *Gavin & Stacey's* audience viewing on the day of broadcast (67%; 57% for *Wallace & Gromit).*[36]

The *Spain v England Euro 2024 final* was the most-watched single live sports event of the year across the BBC, ITV and STV, with a combined audience on the day of 19.8 million viewers watching on home TV sets. Most of that viewing (80%) was to the BBC.[37] The semi-final between England and the Netherlands was the second most-watched live sports event of the year, drawing an average 12.9 million viewers across ITV and STV services. The table below shows this placed above the final, because we have looked at the highest occurring episode for each title by channel.

Drama and family content proved an important driver for SVoD viewing. While popular dramas such as *Fool Me Once* and *Baby Reindeer* performed particularly well for Netflix, family films also do well for streaming services. This highlights the value SVoD platforms place on family-friendly content as a key driver of subscriber retention, particularly as households with children are less likely to cancel their subscriptions than those without.

Figure 29: Top ten most-watched programmes/films (highest-performing episode per title): 2024

Rank	Title	Genre	Broadcaster/service	Episode	Audience (millions)
1	Gavin & Stacey	Entertainment	BBC	The Finale (2024)	18.6
2	Wallace & Gromit: Vengeance Most Fowl	Films	BBC	Film (2024)	16.9
3	Mr Bates vs The Post Office	Drama	ITV/STV	Series 1, Episode 4	14.7
4	Minions: The Rise Of Gru	Films	Netflix	Film (2022)	13.7
5	Fool Me Once	Drama	Netflix	Series 1, Episode 1	12.9
6	UEFA European Football Championship	Sport	ITV/STV	Netherlands v England	12.9
7	Euro 2024	Sport	BBC	Spain v England	12.5
8	Baby Reindeer	Drama	Netflix	Series 1, Episode 1	11.6
9	Moana Sing Along	Films	Disney+	Film (2016)	11.5

[36] On the day of broadcast Gavin & Stacey averaged 12.5 million viewers and *Wallace & Gromit: Vengeance Most Fowl* averaged 9.6 million viewers across BBC channels and iPlayer.
[37] These figures are for on the day of the event only. The figures in the top ten table are the cumulative average audience across all of 2024.

Rank	Title	Genre	Broadcaster/service	Episode	Audience (millions)
10	The Gentlemen	Drama	Netflix	Series 1, Episode 1	11.4

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

Adolescence ranked as the most-watched TV event of Q1 2025

UK Netflix drama *Adolescence* was watched by 12.2 million viewers until the end of March, making it the most-watched show of the first quarter of 2025; it was also the first time an SVoD title has topped Barb's weekly ratings. Exploring themes such as toxic masculinity and online radicalisation, the fictional show sparked significant public debate, including being made available by Netflix to all secondary schools in the UK. This has led to comparisons with the ITV drama *Mr Bates vs The Post Office* (the most-watched drama of 2024), which highlighted what has been referred to as one of the 'biggest miscarriage(s) of justice in British history', and is thought to have served as a catalyst to new legislation, along with a criminal investigation. While historically these kinds of UK dramas have been commissioned by PSBs, streaming services like Netflix entering this space has implications for the PSBs, both positive and negative, such as difficulty competing with the streaming services' budgets, but also boosting the global reach of UK talent and stories.

Figure 30: Top ten most-watched programmes/films (highest performing episode per title): Q1 2025

Rank	Title	Genre	Broadcaster/ service	Episode	Audience (millions)
1	Adolescence	Drama	Netflix	Series 1, Episode 1	12.2
2	The Traitors	Entertainment	BBC	Series 3, Episode 1	10.5
3	Gavin & Stacey: A Fond Farewell	Documentary	BBC	Series 2025	8.5
4	Unforgotten	Drama	ITV/STV	Series 6, Episode 1	8.2
5	Call the Midwife	Drama	BBC	Series 14, Episode 1	8.1
6	Harlen Coben's Missing You	Drama	Netflix	Series 1, Episode 1	8.0
7	Playing Nice	Drama	ITV/STV	Series 1, Episode 1	7.8
8	Silent Witness	Drama	BBC	Series 28, Episode 1	7.8

Rank	Title	Genre	Broadcaster/ service	Episode	Audience (millions)
9	Death in Paradise	Drama	BBC	Series 14, Episode 1	7.6
10	Britain's Got Talent	Entertainment	ITV/STV	Series 18, Episode 1	7.4

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.

YouTube

The TV screen is increasingly important for YouTube, outpacing growth on other devices in the home

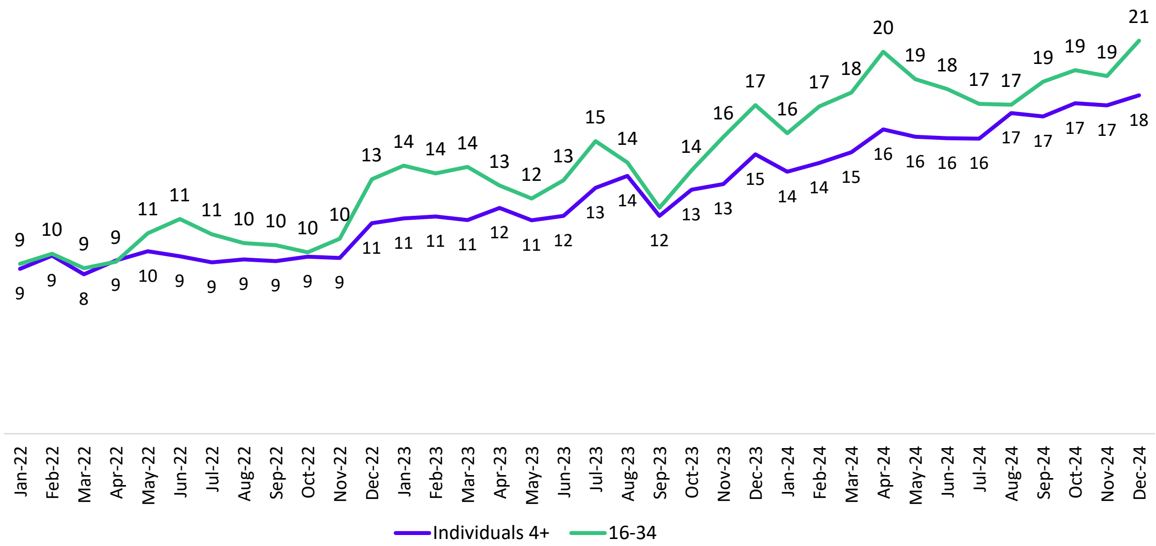
Total in-home use[38] of YouTube grew from an average of 35 minutes per individual per day at the beginning of 2023 to 39 minutes by December 2024, up by 13%. Over this period the average time spent viewing YouTube on a TV set increased by 57%, from 11 minutes to 18 minutes per day, while viewing by 16-34s on TV sets increased by 47% (14 minutes to 21 minutes).

Across the whole of 2024, among all individuals, 41% of in-home YouTube viewing was via a TV set, up from 34% in 2023. The proportion of in-home viewing on the TV among 16-34s 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 50% in 2024, up from 45% in 2023.

However, growth in viewing YouTube videos on the TV is not restricted to younger audiences. The average daily time spent viewing YouTube on the TV for adults aged 55+ grew from an average of 6 minutes per individual at the beginning of 2023 to 11 minutes by December 2024, up by 97%. The proportion of all in-home viewing of YouTube via the TV set for adults aged 55+ increased from 33% in 2023 to 42% in 2024.

[38] Barb as-viewed data captures YouTube consumption via the home's WiFi network; any viewing outside the home or viewing via mobile networks is not included. Barb's Out of Home Viewing Tracker from July 2024, showed that 6% of those who use YouTube while at home claimed to never connect to the home WiFi to watch YouTube.

Figure 31: Average daily minutes of YouTube viewing on TV sets: 2022-2024



Source: Barb as-viewed on TV sets only, individuals 4+ and 16-34s.

YouTube is the most popular first destination for children when they switch on the TV set

Ofcom's TV Viewer Journeys analysis looked at the first destination[39] viewers go to after switching on the TV. YouTube was the most popular first destination by individual service or channel for children aged 4-15, with 20% of all TV journeys among this age group starting with YouTube, followed closely by Netflix at 18%. YouTube and Netflix were also the top two most popular first destinations among adults aged 16-34, with Netflix representing 18% or all first destinations, followed by YouTube at 13%.

BBC One is the only broadcast linear channel to feature in the top five first destinations across all age groups, although the extent to which it is selected as a first destination varies significantly according to age. For audiences aged 55+, 18% of TV journeys start with BBC One; for children aged 4-15 this figure drops to 5%. Children aged 4-15 are equally likely to start their TV journey with BBC iPlayer as they are to start with BBC One.

[39] The first destination is the first channel a viewer watches for one minute or more.

Figure 32: Top-five first TV destinations, by individual channel and service

Ages 4-15	%	Ages 16-34	%	Ages 35-54	%	Ages 55+	%	All individuals aged 4+	%
Top 1st destinations by channel (% of 1st destinations)									
YouTube	20.4%	NETFLIX	18.2%	BBC ONE	12.4%	BBC ONE	28.3%	BBC ONE	18.2%
NETFLIX	18.5%	YouTube	13.4%	NETFLIX	10.2%	itv1	12%	itv1	9.4%
BBC iPLAYER	5.8%	Disney+	5.9%	itv1	9.2%	BBC TWO	5.7%	NETFLIX	8.5%
Disney+	5.2%	BBC ONE	5.0%	YouTube	7.3%	4	3.4%	YouTube	7.1%
BBC ONE	5.0%	itv1	4.9%	BBC iPLAYER	5.0%	BBC iPLAYER	3.1%	BBC iPLAYER	4.1%

Source: Ofcom/TRP TV Viewer Journeys.

While YouTube is the most popular first destination by individual channel or service for those aged 4-15, broadcast linear TV and SVoDs are more likely to be selected as a first destination by this age group when comparing different TV platforms as a whole. Twenty seven percent of those aged 4-15 start their TV journey with an SVoD service, while 26% start with a linear channel and 20% choose YouTube as a first destination. Among adults 55+, the overwhelming majority (83%) start their TV journey with linear TV, while 6% start with BVoD, 4% with an SVOD service and 2% with YouTube.

Short videos are the most popular type of content watched on YouTube

According to Ofcom's VoD Survey, the popularity of YouTube is driven by the free service, with a small minority reporting using the paid service, YouTube Premium.[40] Videos up to 15 minutes long (excluding *YouTube Shorts*) were the most popular form of content on YouTube (59%), followed by YouTube Shorts (42%). Both options have declined in popularity since 2024 (from 62% and 47% respectively). In terms of the type of content watched, this varied greatly by age. '*Funny videos, jokes, pranks, challenges'* and '*videos about video games or other people playing video games*' were the most popular types of content watched by those aged 13-17 (picked by 66% and 50% respectively). For adults (aged 18+), '*music'* and *'how to content - e.g. recipes, DIY'* were the most popular choices (49% and 47% respectively). People reported using YouTube more frequently than the other on-demand services featured in our survey: 33% of users claimed to use YouTube several times a day, rising to 45% for the those who used YouTube Premium, whereas 14% of adults and teens claimed to have used Netflix several times a day, and 5% for BBC iPlayer.[41]

As part of Ofcom's recent Public Service Media Review, we analysed the types of content UK audiences are watching on YouTube. Given limited public data, we carried out a detailed indicative analysis using UK viewing time and manual channel classification. This suggests that around two-thirds of viewing goes to 'digital native' creators, including influencers, podcasters, and digital studios producing formats like gameplay, tutorials, and reaction videos. The remainder includes content from a wide range of organisations including: TV broadcasters, studios and distributors;

[40] Only 10% of all YouTube users claimed to have used the paid service in the previous three months.
[41] Ofcom VoD Survey 2025.

music labels; and non-media organisations (e.g. universities publishing lectures online, or consumer product brands publishing promotional material or product instructions). Broadcasters as a group seem to account for a minority of this, and for only a small fraction of all YouTube viewing. These findings are explored in more detail in the review annex: PSBs in a platform era: A YouTube case study.

Most audiences continue to say they are satisfied with YouTube

According to Ofcom's PSM Tracker 2024, about seven in ten (73%) viewers in the past six months were satisfied with YouTube (including YouTube Premium); this figure remained stable after declining in 2023 (72%, down from 75% in 2022), now in line with 2021 (74%).

Among its viewers, about three-quarters (77%) said that YouTube *'appeals to a wide range of different audiences'* well. Viewers also said that YouTube delivered well for *'provid[ing] services that are easy to find my way around'* (70%), *'easy to find something I want to watch'* (69%), *'programmes which feature people from different backgrounds'* (69%) and *'programmes that are relevant to me'* (69%).[42]

[42] Ofcom Public Service Media Tracker 2024.

TV and video industry trends

The UK TV and video industry (which includes traditional broadcasters, pay-TV providers and online video services) continues to experience significant change, driven by the growth of streaming services. Broadcasters face ongoing pressures, managing digital transition while sustaining content availability and traditional broadcast models. The online video market continues to grow, shaped by the digital strategies of broadcasters, the shift by global SVoD platforms into hybrid monetisation models, and the increasing influence of VSPs.

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 overall TV market grew modestly in 2024 amid continued structural changes

The UK commercial TV and online video sector recorded modest growth in 2024, with revenues reaching £17.1bn, up 3.3% from £16.5bn in 2023. While this marks a more substantial recovery compared to the previous year's marginal 1.1% growth, it conceals significant divergences between platforms and traditional broadcasting services.

Commercial public service broadcasters' revenues, largely driven by linear TV advertising, stabilised revenues at £2bn after facing declines in 2023. Although this marks a slight rebound in the TV advertising market, overall growth remained constrained by ongoing macroeconomic uncertainty and increasingly fragmented viewing habits. Digital multichannels experienced contraction, with revenues down 3.2% to £2bn.[43] BVoD revenues – generated by the VoD services operated by the commercial PSBs and multichannel broadcasters – continue to stand out as a key area of growth. They rose by 15% year on year to reach £1.1bn in 2024, highlighting their increasing importance as a driver of commercial sustainability for UK broadcasters.

Pay-TV platform operators, such as Sky, Virgin Media and BT, still make up the largest single sector in the audiovisual market, but continue to experience structural challenges, seeing revenues dip

[43] 'Digital multichannels' include non-PSB channels and commercial PSB portfolio channels.

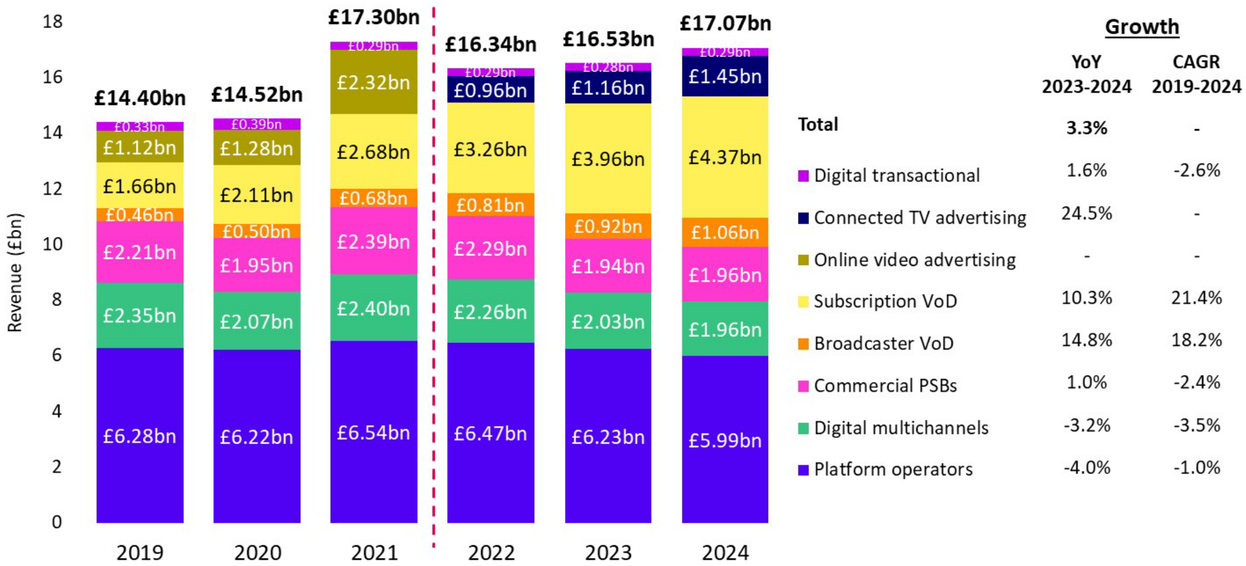
slightly to £6bn. This was largely driven by persistent subscriber attrition, despite attempts to offset losses through price increases.

In contrast, the online video segment continues to drive growth, with SVoD revenues reaching £4.4bn, up 10% year on year.[44] However, growth rates have decelerated significantly due to market maturation and slowing subscriber take-up. Price increases and the expansion of advertising-supported tiers provided the main impetus for subscription revenue growth in 2024.

Connected TV advertising is also a key growth area in the sector, with revenues increasing by 25% year on year to £1.5bn.[45] This includes targeted advertising delivered via connected TV devices such as smart TVs, streaming sticks and games consoles.[46]

These market shifts illustrate a substantial rebalancing in industry revenues, with online sectors including SVoD, BVoD, connected TV advertising, and transactional online video collectively accounting for 42% of overall sector revenue, significantly up from 33% in 2022.

Figure 33: Commercial TV broadcast and online revenue: 2019-2024



Source: Ofcom/broadcasters (broadcast data), Ampere Analysis and IAB UK PwC Digital Adspend Study (online data). Figures are presented in nominal terms and replace previous Ofcom revenue data for the TV and online video industry, owing to restatements and improvements in methodologies. Values for 'platform operators' include Ofcom's estimates of pay-TV revenues. This does not include NOW, which is within subscription VoD. 'Digital multichannels' includes non-PSB channels and commercial PSB portfolio channels. 'Commercial PSB channels' comprises the following: ITV, STV, ITV Breakfast, Channel 4, Channel 5 and S4C. Before 2022, online video advertising does not include 'outstream' video advertising delivered on non-video services; from 2022, we began including connected TV video advertising, as defined by the IAB UK. Connected TV video ad spend is spend accrued on TVs that are connected to the internet and can access web-based content, either through

[44] Excludes SVoD advertising revenue from advertising subscription tiers.

[45] Since 2022, instead of reporting total online video advertising in our industry revenue figures, we are including only the most 'TV-like' online video advertising, which is 'connected TV video advertising', as defined by the IAB UK. Connected TV video ad spend is spend accrued on TVs that are connected to the internet and can access web-based content, either through inbuilt capabilities or through peripheral devices like streaming sticks and games consoles.

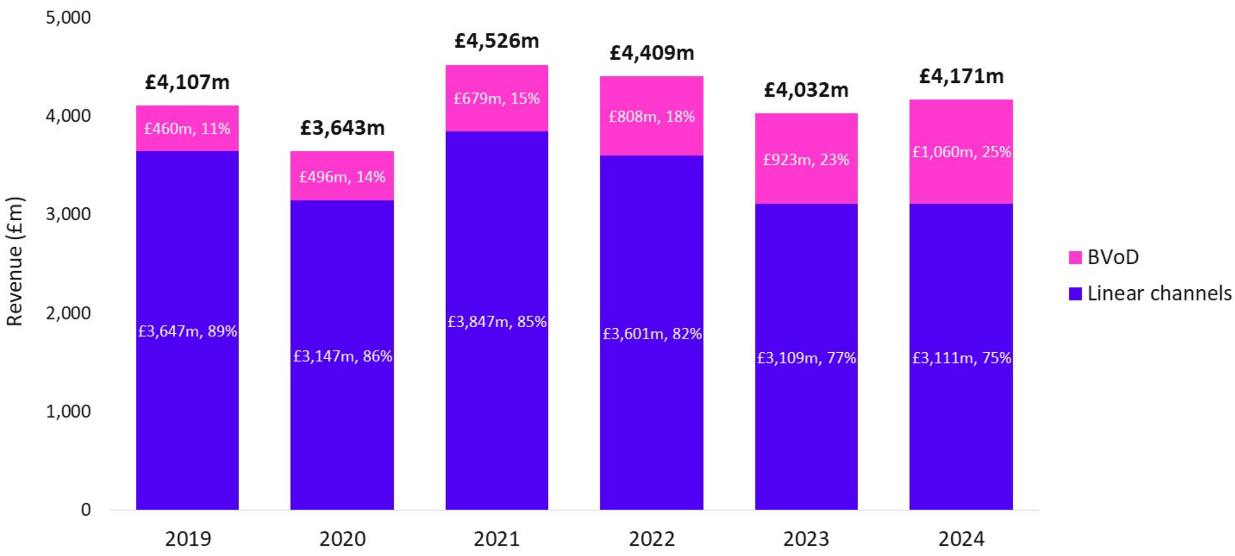
[46] Traditional linear advertising by commercial broadcasters is reported separately within commercial PSBs and digital multichannels.

inbuilt capabilities or through peripheral devices like streaming sticks and games consoles. Totals may not equal the sum of the components due to rounding notes.

BVoD now accounts for a quarter of broadcaster advertising revenues, exceeding £1bn

BVoD accounted for 25% of commercial broadcasters' advertising revenues in 2024, indicating broadcasters' continued adaptation to evolving viewer habits (see Figure 34 below). Despite ongoing pressure on the linear TV advertising market, which saw only a marginal rebound from 2023, 2024 offered a measure of optimism: BVoD advertising revenues grew by 15% year on year, exceeding £1bn for the first time and helping to offset the challenges of an otherwise muted linear TV advertising market. Digital transformation continues to be central to PSBs' strategies, supported by investment in digital infrastructure, the user experience, expanded content libraries, and advanced advertising solutions, collectively designed to attract audiences to BVoD platforms and effectively monetise their viewing.

Figure 34: TV and BVoD advertising revenue for commercial broadcasters (£m): 2019-2024



Source: Ofcom/broadcasters; BVoD revenue is primarily derived from advertising, 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.

Traditional pay-TV declines as SVoD drives growth in subscription revenues

The shift from traditional pay-TV to streaming services continued in 2024, highlighted by persistent subscriber declines. Although the pay-TV segment is fairly stable, the long-term trend of cord-cutting (households cancelling traditional pay-TV subscriptions in favour of internet-based streaming alternatives) is clear. Pay-TV penetration peaked at 54% of UK households in 2016, but by Q4 2024, it had fallen to 37%, down from 40% the previous year.[47] Price increases have helped to cushion revenue losses, but the overall decline in revenues indicates that these adjustments have not fully

[47] Barb Establishment Survey, Q4 2024.

compensated for subscriber base reductions. In line with this trend, pay-TV revenue fell to £5.99bn in 2024, the first time it has dipped below £6bn since 2014.

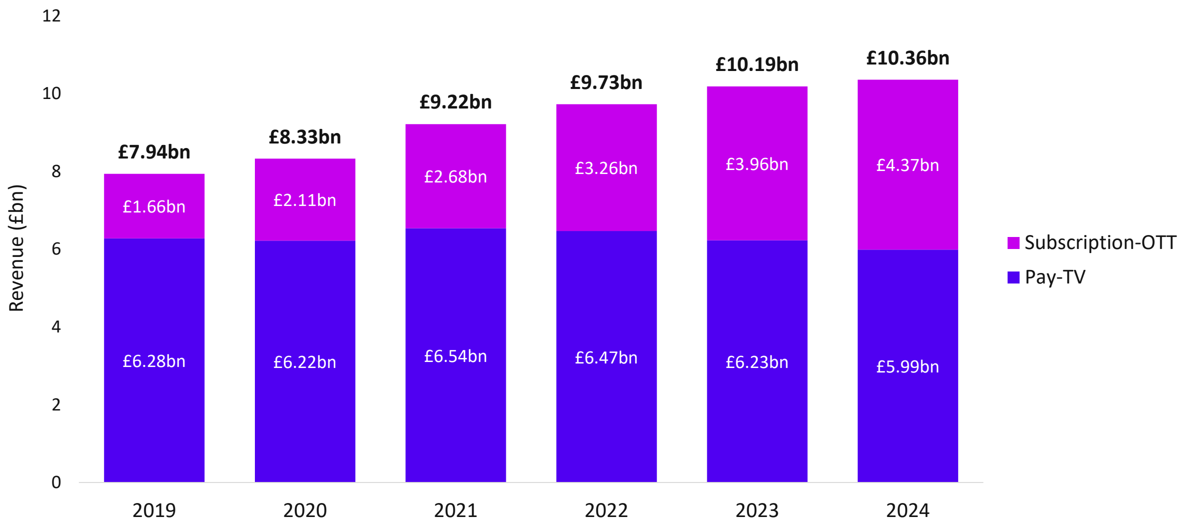
Although pay-TV and SVoD platforms were once seen as direct competitors, the relationship has become increasingly interdependent. Many SVoD providers now rely on established pay-TV platforms to expand their reach and distribution, particularly as they roll out advertising tiers to monetise beyond subscriptions, combining both subscriber and advertising revenues. A recent example is the December 2024 deal between Sky and Warner Bros. Discovery, which will see the Max streaming carried on Sky's platforms from its UK launch in early 2026, reflecting how SVoD services still value pay-TV aggregators for scale and access to audiences.

For UK pay-TV operators, these deals are a response to audience consumption trends – embedding major third-party SVoD platforms, such as Netflix, Disney+ and Apple TV+, within pay-TV user-interfaces simplifies access and billing for consumers. Sky, for example, has continued to evolve its Sky Glass and Sky Stream products, bundling premium SVoD content alongside Sky-branded channels and programming, all delivered via the internet, as opposed to using Sky's traditional satellite distribution. Sky's standalone streaming platform, NOW, also plays a strategic role in bridging pay-TV and streaming audiences. The operator has also launched lower-cost entry-level bundles, such as its Essential TV package (£15 a month), combining Sky content with Netflix and Discovery+, aimed at strengthening retention and attracting price-sensitive customers.

Beyond Sky, Virgin Media has also expanded its streaming integrations, and BT has continued to offer flexible packages incorporating Netflix, Discovery+, and Amazon Prime Video. Amazon itself, through Amazon Channels, has gained traction as an aggregation platform, offering customers access to a range of third-party streaming services through a single interface and billing structure, further blurring the boundaries between distribution models.

The SVoD market continues to be shaped by the presence of US-studio and Big Tech-backed SVoD platforms, accounting for the vast majority of revenues. The expansion of the SVoD market has been fuelled by new entrants, incremental price increases, and a concerted push by the leading platforms into hybrid monetisation models (combining subscription fees and advertising revenues), particularly as subscriber growth has levelled off. These developments reflect a maturing streaming market, in which consolidation, bundling, and cross-platform partnerships are becoming central to long-term strategies on both sides of the pay-TV/SVoD divide.

Figure 35: Pay-TV and subscription-OTT revenues (£m): 2019-2024



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

Advertising market trends

Online and social video drive advertising growth, as traditional TV continues to decline

Linear TV advertising continued its downward trend, with expenditure dropping by 2% to £3.94bn from the previous year's £4.02bn, and now significantly below 2019. Conversely, VoD advertising saw strong growth, increasing 26% year on year to £1.33bn, supported by the transition of broadcast audiences to BVoD, as well as the expanded roll-out of ad-supported tiers on major streaming platforms including Netflix, Amazon Prime Video and Disney+.

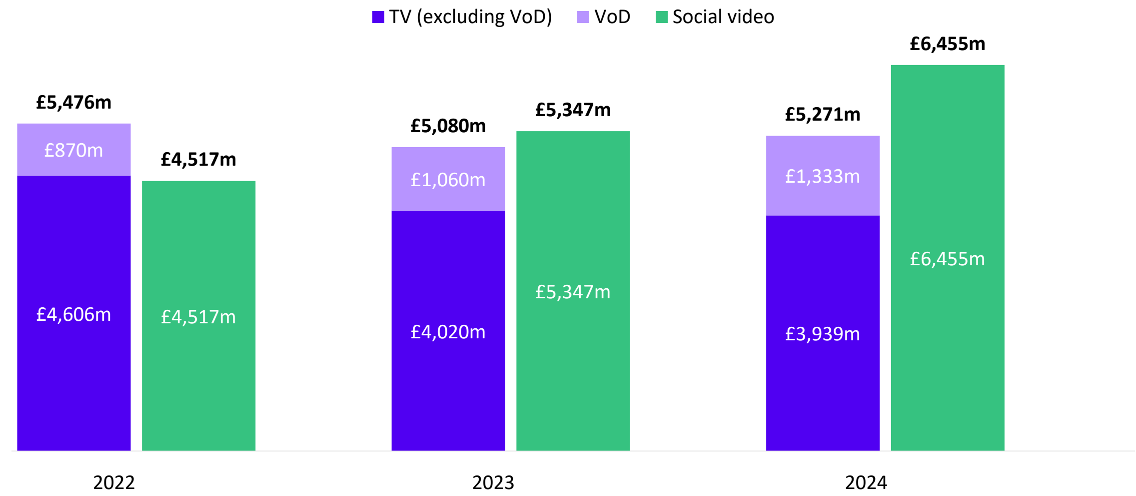
The 2024 advertising market illustrates the ongoing shift towards online video formats leading growth, while traditional media segments experience further gradual contraction. Social video advertising, particularly via YouTube, Facebook, and TikTok, overtook the combined total for linear television and VoD in 2023 (figure 36), and this trend strengthened in 2024.

These platforms have captured a growing share of advertising spend due to their targeting and measurement capabilities. YouTube has leveraged its extensive reach, expanding its long-form offerings and increasing viewing on TV sets to consolidate its appeal for both audiences and advertisers. Meanwhile, Facebook and TikTok have significantly expanded their advertising bases, benefiting from the popularity of short-form video, strong user engagement, and advances in measurement and attribution.

VoD advertising expenditure continued to grow in 2024 as broadcasters continued to build scale and enhance their digital offerings. This includes advertising tiers within subscription services (SVoD), further expanding available inventory.

More broadly, the online video and social advertising market has become increasingly competitive. The traditional distinction between premium and social video has blurred, with platforms and broadcasters alike seeking to evolve their advertising products and expand their offerings.

Figure 36: UK TV and social video advertising expenditure: 2022-2024



Source: AA/WARC Expenditure Report; IAB UK PwC Digital Adspend Study. Figures are presented in nominal terms. The 2023 and 2024 TV VoD figures now include the advertising revenue generated by SVoD services such as Netflix, Amazon and Disney+. Before 2023, all VoD data is BVoD data, covering advertising expenditure on the VoD services of TV broadcasters (e.g. ITVX, Channel 4 streaming and 5). In 2025, AA/WARC restated the 2018-2023 TV, newspapers and magazines figures, due to historical reporting errors, so the figures in this report may not match those in previous versions published by Ofcom. Social video advertising includes spend generated from video consumed on a social media platform, and includes both long-form and short-form video content which runs across Connected TV devices (e.g. smart TVs, streaming sticks, game consoles) mobile, desktop and tablet. Examples of 'social' include Instagram, TikTok and YouTube.

Broadcasters' output and spend

PSB spend edged upwards in 2024, driven by increases by the BBC, as total hours saw a marginal decline

First-run UK-originated programming spend by public service broadcasters increased marginally in 2024. After a decline in 2023, total spend rose by 2% to £2.8bn. This growth was largely driven by the return of high-profile sporting events, such as UEFA European Football Championship 2024 and the Olympics, which boosted spending for BBC One. BBC One recorded its highest-ever first-run spend in nominal terms at £952m, accounting for a £109m (13%) year-on-year increase. BBC Two also increased its investment slightly (+£5m, 2%), helping to offset declines in spending across other PSB channels.

In contrast, first-run spend by ITV, Channel 4 and Channel 5 collectively fell by £57m (4%), reflecting a cautious approach to commissioning amid a challenging advertising market. Channel 4 recorded first-run spend of £414m, its lowest since the Covid-19-impacted year of 2020. Despite some decreases among individual portfolio services, total BBC spending, including all portfolio channels, increased by £111m (9%), with boosts from BBC Four, BBC Three and CBBC.

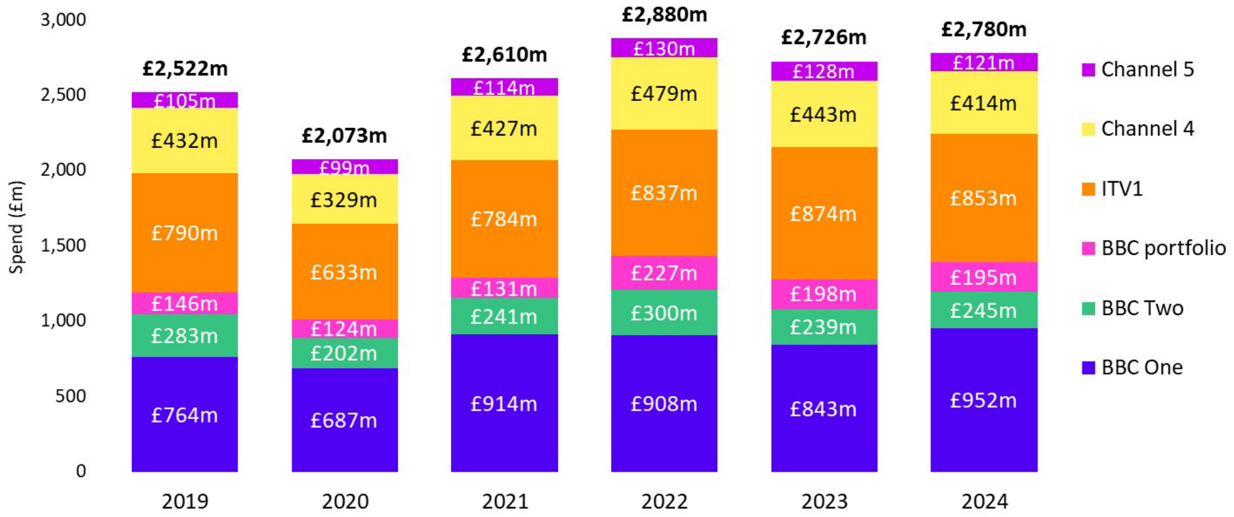
The moderate increase in spend was accompanied by a marginal decline in output: PSB first-run originated hours declined by 2% to 30,999 in 2024, continuing the decline observed over the past two years. This indicates a broader strategic shift among most broadcasters towards commissioning fewer, higher-impact programmes, focusing on quality and audience reach rather than volume. This shift has been influenced not only by PSBs' digital strategies, which prioritise distinctiveness and impact over volume in a competitive on-demand environment, but also by inflationary pressures driving up production costs.

But some channels bucked this trend: BBC One and the BBC portfolio channels recorded modest increases in output, BBC One increased by 112 hours (up 2% year on year), and the BBC portfolio channels increased by 42 hours. Conversely, Channel 4 (down 459 hours, 18%), Channel 5 (down 238 hours, 9%), ITV (down 158 hours, 3%) and BBC Two (down 70 hours, 2%) all broadcast fewer hours of first-run content in 2024. In total, first-run hours from ITV, Channel 4 and Channel 5 fell by 855 hours (8%).

Overall, first-run PSB hours for 2024 were below pre-pandemic levels. The steepest percentage drop in output came from CBeebies, which was down 18% in first-run hours. The increase in output for BBC portfolio channels was driven by BBC News and BBC Four.

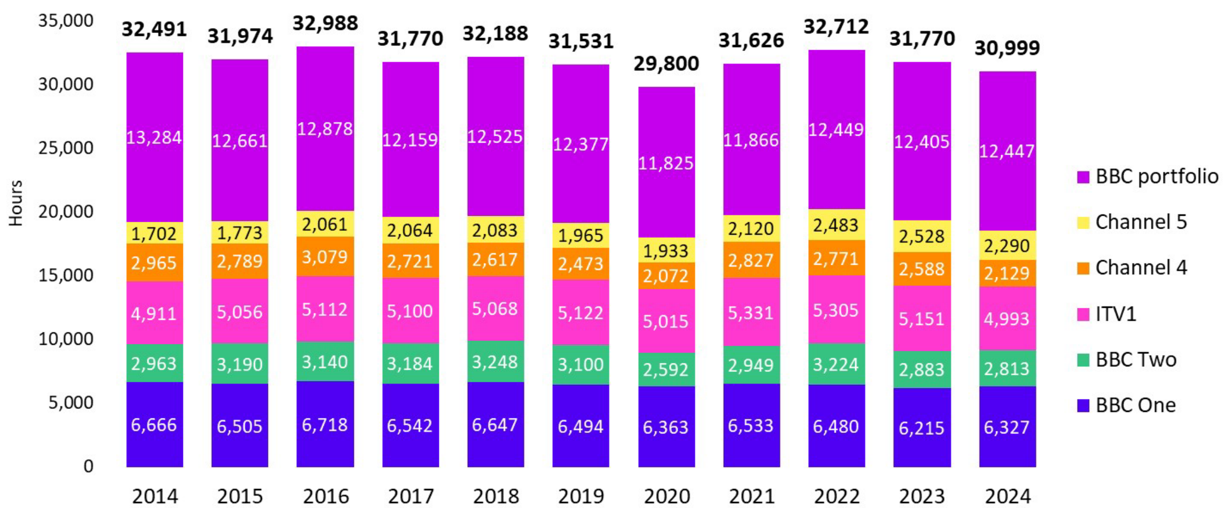
ITV, Channel 4 and Channel 5 all reduced their spending on first-run UK-originated programming in 2024, alongside declines in total output hours. This decline reflects the lingering impact of the 2023 advertising downturn and ongoing efforts to rationalise content costs.

Figure 37: PSB first-run UK-originated spend, by channel: 2019-2024



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

Figure 38: PSB first-run UK-originated hours, by channel: 2014-2024



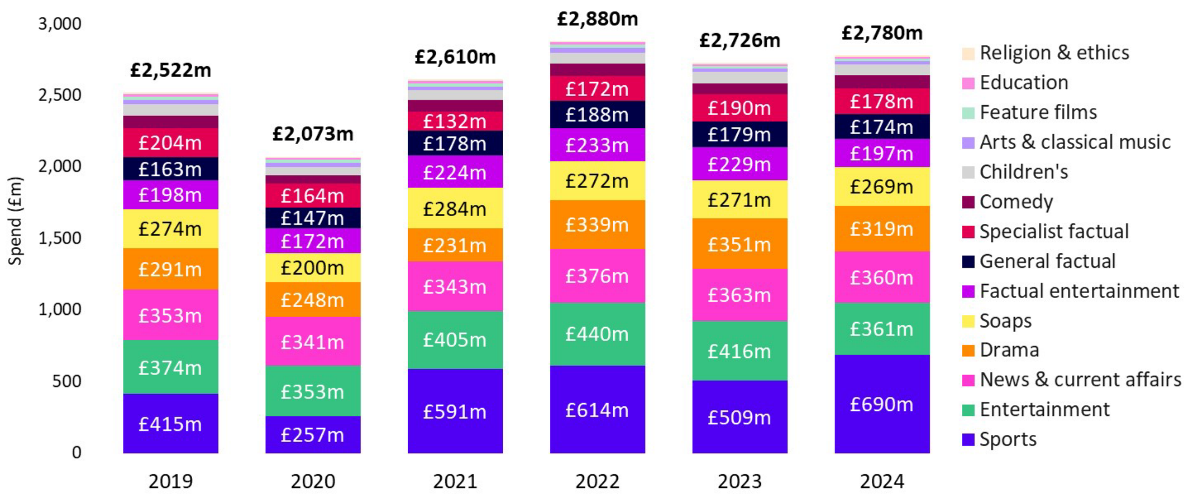
Source: Ofcom/broadcasters. Figures exclude BBC ALBA and programming for the nations and regions.

Major sporting events supported growth in spend, while entertainment and drama declined

Following a dip in 2023, investment in sports programming rebounded significantly, reaching £690m, accounting for 25% of total first-run original PSB spend. This represents a 36% year-on-year increase, driven by the return of major international events including the UEFA European Football Championship and the Olympic Games. These events helped to re-establish the traditional sports cycle – in which even years typically see more major events that drive spikes in both spend and output – which was disrupted by the Covid-19 pandemic. In total, PSBs broadcast 2,500 hours of first-run sports content in 2024, providing an important source of appointment-to-view programming.

Excluding sports, PSB programme spend declined by 6% year on year. Entertainment remained the second-largest genre by spend in 2024, but continued to face downward pressure, dropping by more than all other genres. Investment in first-run entertainment programming fell to £361m, extending a decline since 2022 and contributing to a 7% decline in total first-run entertainment hours.

Figure 39: PSB first-run UK-originated spend, by genre: 2019-2024

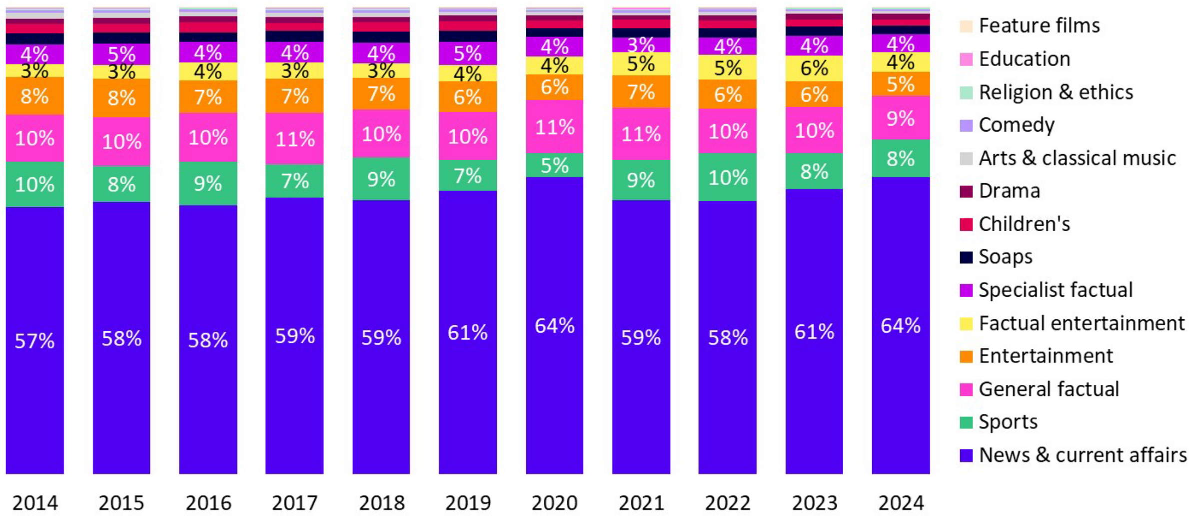


Source: Ofcom/broadcasters. Figures are presented in nominal terms.

Despite considerable growth in recent years, drama also declined slightly in 2024. First-run drama hours fell by 6% year on year, alongside a 9% drop in spend to £319m. That said, drama spending remains above pre-2022 levels.

News and current affairs output increased slightly in 2024, with total first-run hours rising by 2% year on year to 19,689 hours, boosted in part by coverage of the UK General Election and the US Presidential Election, which resulted in increased output across PSBs. Despite this increase in volume, total spending on the news and current affairs remained flat at £360m, following a decline in 2023 from the post-Covid-19 pandemic high of £376m in 2022.

Figure 40: Genre mix of PSB first-run UK-originated hours: 2014-2024



Source: Ofcom/broadcasters.

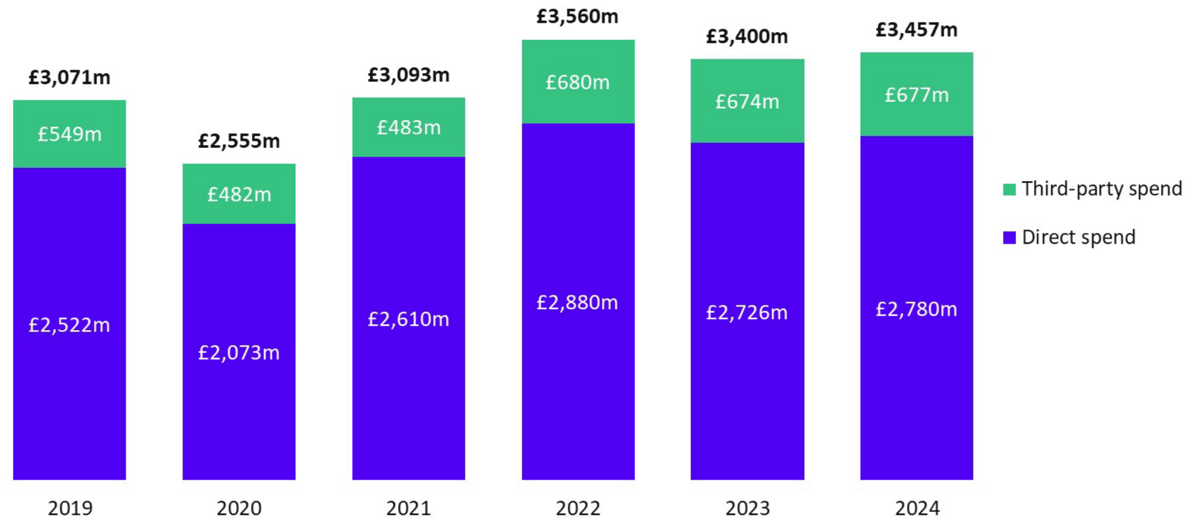
Third-party contributions to PSB content were stable, largely focused on high-end drama productions

Third-party contributions (from co-productions, tax credits and external funding) remained an important component of PSB originations in 2024, accounting for roughly one-fifth of total PSB investment. In absolute terms, third-party funding for PSB content rose slightly, by 0.4% to £677m. This is just below the peak of £680m in 2022.

Drama remains the largest recipient of third-party investment, attracting £438m in 2024 (65% of the total), although this was down 12% year on year. Third-party investment in comedy, children’s and film content grew in 2024 – combined funding for these genres rose by 79%, to account for 26% of total third-party spend. This diversification reflects evolving funding partnerships, although third-party financing remains unpredictable and PSBs face challenges in securing multiple financing partners.

Broadcasters are facing growing challenges in securing external funding for content production. Several factors are contributing to this pressure: global SVoD platforms’ commissioning strategies skew toward globally appealing content with broad rights access, reducing opportunities for UK-focused co-productions; international broadcasters are contending with more constrained market conditions, leading to a reduced appetite for co-financing; and high interest rates are increasing the overall cost of financing production, making third-party investment less accessible across the board.

Figure 41: PSB spend on first-run originations, by direct spend and third-party contributions: 2019-2024



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.

Declines in sports, entertainment, and news content have led to reduced spending by multichannel broadcasters

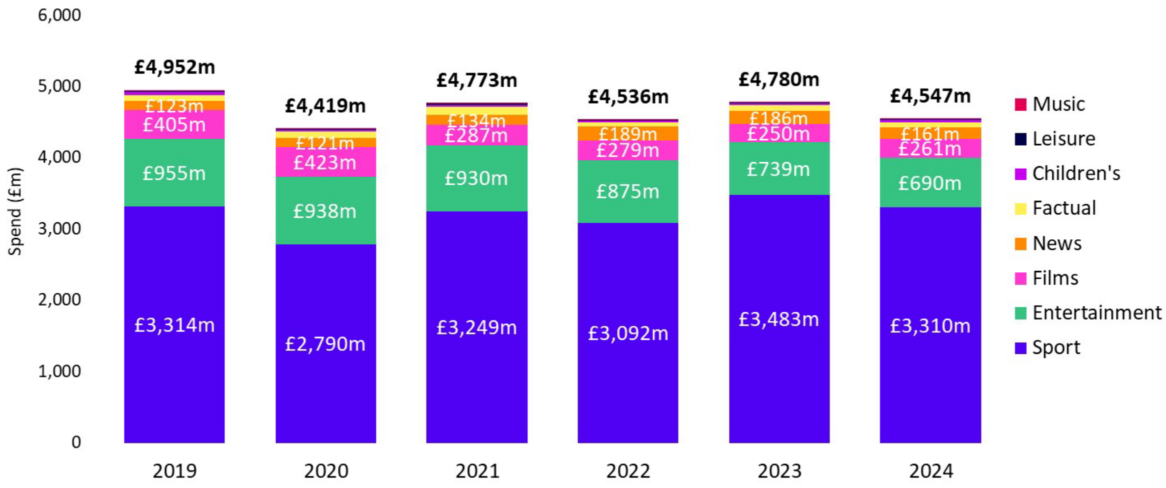
Multichannel broadcasters reduced overall programming expenditure across key channel genres in 2024. Total spend declined by 5% to £4.6bn, following a rise to £4.8bn in 2023. This was largely driven by reductions in investment across sport, entertainment and news channels.

Sport remained by far the largest genre by spend, accounting for over 70% of total multichannel investment, despite a 5% year-on-year decline. The vast majority of this spend was concentrated in rights held by Sky and TNT Sports, including for the high-value English Premier League (EPL), with Sky holding the lion's share of coverage. In late 2023, both broadcasters renewed their EPL rights through to 2029, securing a minimum of 215 matches per season. The latest domestic rights deal, worth £6.7bn over four years from the 2025/26 season, highlights the ongoing importance of premium sports content in driving subscription revenues, even as wider sector spending comes under pressure.

Spending on entertainment channels fell by 7% year on year, from £739m to £690m. This decline goes beyond short-term cost-cutting measures, pointing to a longer-term trend as audiences increasingly turn to SVoD platforms for entertainment content. As viewing habits change, pay-TV subscriptions decline and advertising revenues fragment, overall investment in linear entertainment programming has scaled back across the sector. Investment in factual, children's and film content remained broadly stable, but continues to account for a relatively small proportion of total programming costs.

Although total programming expenditure declined, overall output hours were stable year on year. Reductions were seen in sports, music and news, due in part to the closure of TalkTV's linear TV channel in May 2024. This was counteracted by increases in entertainment and factual output, partly due to the launch of new free advertising-supported streaming television (FAST) channel services by operators such as Paramount, UKTV, Hearst Networks and Virgin Media.

Figure 42: Multichannel programming spend for selected key genres: 2019-2024



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

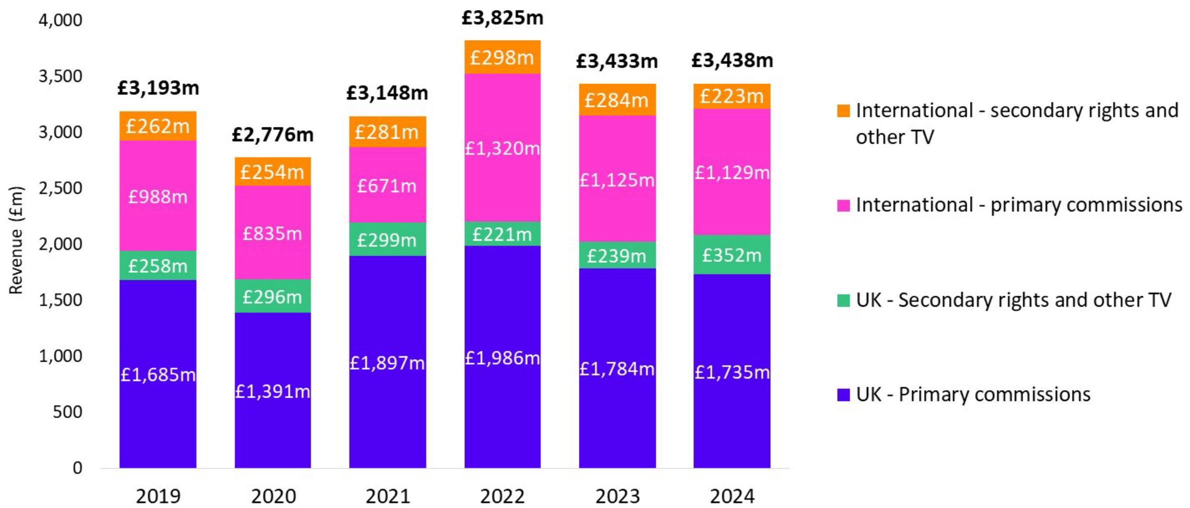
Production sector trends

Production revenues stabilised in 2024 after sharp post-pandemic corrections

After the sharp post-pandemic adjustment of 2023, total UK TV producer revenues steadied at £3.4bn in 2024. This was largely due to resilience in international commissioning and a sharp rise in UK rights income, offsetting a slight drop in domestic commissioning.

Independent producer revenue from UK commissions fell by 2.8% to £1.7bn, reflecting tighter broadcaster budgets and subdued advertising revenues. However, UK rights income rose sharply to £303m, suggesting opportunities to exploit IP across platforms continue to be available. Revenue from international primary commissions remained stable at £1.1bn following the previous year's market correction.

Figure 43: Total producer TV-related revenues, by income source: 2019-2024



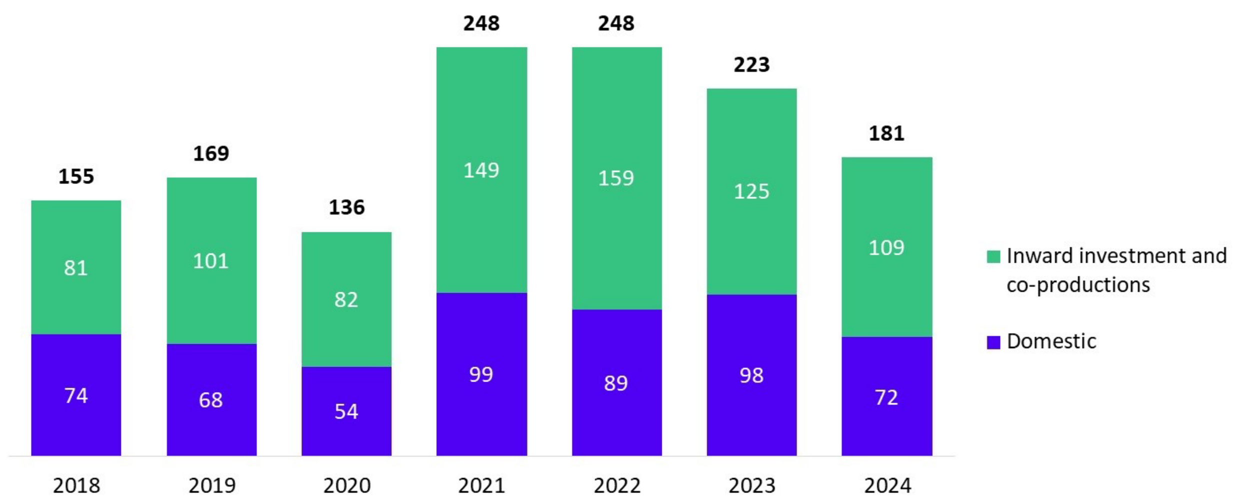
Source: Pact UK Television Production Census 2025, Oliver & Ohlbaum analysis

The number of new high-end TV (HETV) productions, defined as domestically-made drama (including comedy) or documentary series with budgets over £1m per episode, remained well above pre-pandemic levels, although it has declined for the third consecutive year. In 2023, the BFI identified 223 HETV productions that began production in the UK, down from the peaks of 248 in 2022 and 2021. This figure fell further to 181 HETV productions in 2024, though this is still roughly 7% higher than 2019's level of activity (169 productions), indicating that the number of HETV titles in production remains higher than pre-pandemic levels.

The year-on-year decline in production activity in 2024 was largely driven by a drop in big-budget inward investment projects (foreign-financed productions), impacted by the 2023 Hollywood labour disputes, alongside pressure on domestic commissioning activity. That year, both the Writers Guild of America (WGA) and the actors' union SAG-AFTRA staged major strikes, leading to widespread disruption across global film and television production. The number of inward investment HETV titles fell from 159 in 2022 to 125 in 2023, and this slowdown extended into early 2024, with 109 productions in the year.[48] This may have been the result of productions affected by strikes being paused or rescheduled during 2023. However, following the resolution of the strikes in late 2023, production spend recovered sharply.

More generally, while the number of HETV titles decreased, overall spend rose sharply. UK spend on HETV projects grew by 11% year-on-year to £3.4bn. This reflects a trend towards fewer but higher-cost productions, influenced by rising crew and material costs and the growing ambition of inward investment projects. As a result, higher-budget, lower-volume production models have become more prevalent, especially within the international segment of the market.

Figure 44: Number of high-end TV programmes produced in the UK: 2018-2024



Source: BFI. Includes historical restatements to account for newly identified productions. Production numbers reflect programming starting principal photography during 2024 and are updated in each successive BFI report to reflect new films, changed budgets, postponements and cancellations. Inward investment productions are defined as HETV programmes which are substantially financed and controlled from outside the UK, where the production is attracted to the UK because of script requirements, the UK's infrastructure, or UK tax reliefs. BFI classifies the majority of co-productions between PSBs and non-PSBs as inward investment due to their

[48] Includes co-productions.

proportion of overseas funding. As a result, these titles are not counted within the 'domestic' category, even when they premiere on PSB channels and contribute to PSB obligations.

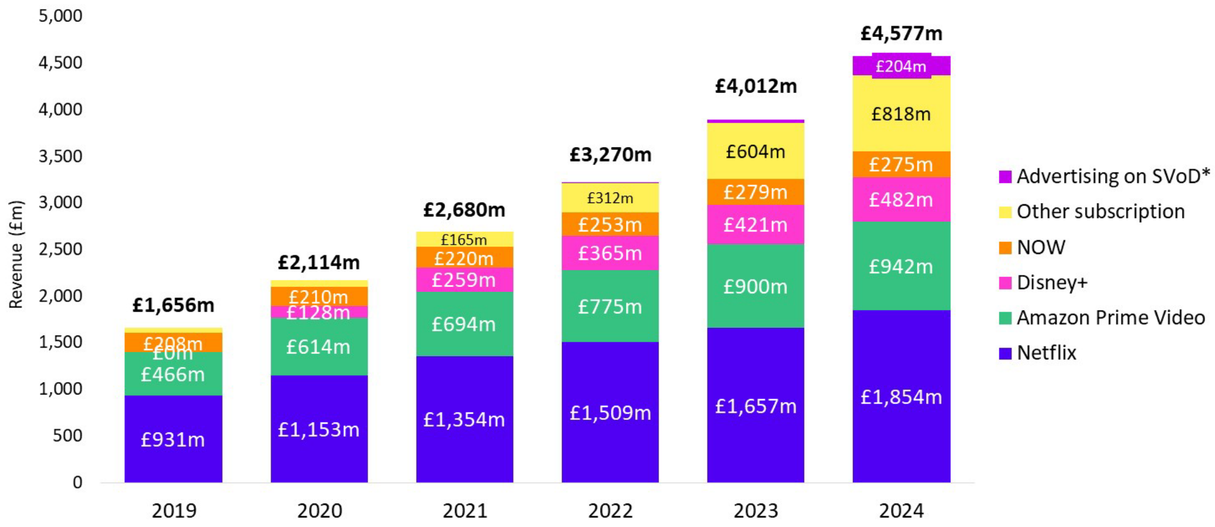
Online video market developments

Video on demand

Facing subscriber saturation, SVoD platforms have shifted focus to ad-supported tiers and price increases to support revenue growth

After rapid expansion in previous years, take-up of the major SVoD services plateaued in 2023, with the trend continuing and settling in 2024. As net subscriber growth plateaus, both in the UK and globally, and the SVoD market enters a new phase of slower growth, providers have a renewed focus on profitability, relying on price increases, bundling and advertising tiers to support revenue growth. UK SVoD revenue (including advertising revenue from SVoD ad-tiers) exceeded £4.5bn in 2024, increasing by 14% year on year.

Figure 45: Subscription video-on-demand revenue: 2019-2024



*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.*

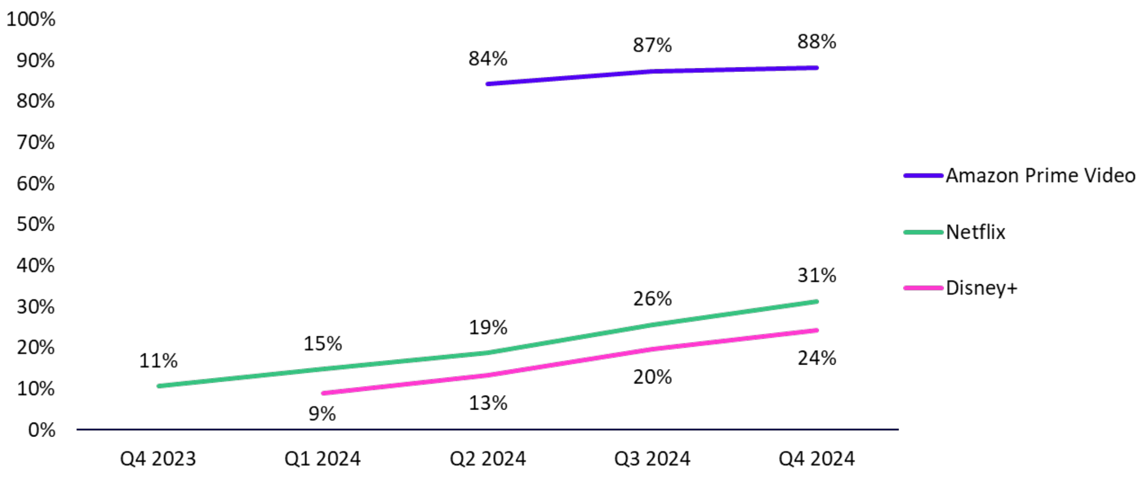
In this context, providers have turned their focus to increasing overall ARPU (average revenue per user) and total monetisation through price increases, password-sharing crackdowns and tiered subscription strategies. Having launched its advertising tier in the UK in 2022, Netflix has now fully integrated an ad-supported tier into its business model. The number of UK homes subscribing to Netflix's ad tier continues to grow, reaching 4.7 million (16% of UK households) in Q4 2024.[49] Disney+ has also seen an increase in ad-tier adoption, with 1.5 million UK households (5.2%) now subscribed, a rise of more than a quarter from 1.2 million (4.1%) in Q3.

[49] Barb Establishment Survey.

Amazon Prime Video introduced advertising as the default experience for its UK users from February 2024. Subscribers who wish to avoid advertising must now pay an additional £2.99 a month. Despite the change, the majority of customers remained on the new ad-supported tier: by Q4, 88% of Prime Video households (11.6 million, or 39% of UK homes) were using the ad-included version, making it the largest ad-supported SVoD audience in the UK by volume.[50]

The volume of advertising on ad-supported SVoD tiers remains low compared to broadcast TV and BVoD platforms. However, Amazon is understood to have increased advertising minutage, which could risk subscriber churn but could also help to boost take-up of the premium tier among less price-sensitive subscribers.

Figure 46: Proportion of UK subscriptions supported by video advertising*: Q4 2023-Q4 2024



*Source: Ofcom/Barb Establishment Survey. Advertising launched on Disney+ during Q4 2023 and on Amazon Prime Video during Q1 2024. *Excludes survey respondents who did not know which package they subscribed to.*

Streamers are still in the early stages of their advertising efforts and are refining their pricing strategies to balance revenue growth with subscriber acquisition and retention. As a result, there has been an increased push towards tiered pricing models, catering to consumer demand for lower-cost ad-supported subscription options.

Netflix offers the biggest discount on its ad-supported tier (see Figure 47 below). The platform has discontinued its £7.99-a-month basic ad-free tier, automatically migrating users to the cheaper ad-supported plan. Despite this, Netflix remains the highest-priced global SVoD service, with monthly pricing ranging from £6.99 to £18.99. However, its entry-level ad-supported tier aligns with similar pricing levels for Paramount+ and Disney+. Netflix raised its monthly prices in February 2025, including a £1 increase for the ad-supported tier, making it the first global SVoD platform in the UK to raise the price of its entry-level advertising subscription tier.

The continued roll-out of tiered pricing models reflects a strategic focus on expanding both revenue streams and audience reach. Services are increasingly offering differentiated plans – ranging from lower-cost, ad-supported options to premium, ad-free tiers – to cater to users with varying levels of price sensitivity. This approach enables platforms to generate revenue from advertising as well as subscriptions, while also attracting users who might not have subscribed at higher price points.

[50] Barb Establishment Survey.

While subscription ARPU may decline as a greater proportion of subscribers opt for lower-cost tiers, this outcome is an expected feature of the model rather than an indication of underperformance, as advertising revenue and broader audience reach contribute to overall ARPU growth. Many users selecting ad-supported plans are likely to be people who would not have subscribed at full price, making their ARPU additive rather than substitutive. Although early indications suggested that ad-supported tiers could yield higher ARPU than standard plans, more recent data indicates that, at scale, the effect has stabilised or become mildly dilutive.[51]

This dynamic is shaping outlooks across the sector. Netflix has already signalled that ARPU growth is likely to remain *"modest"* through 2025, even as it seeks to expand its advertising footprint. The widening gap between entry-level and premium pricing tiers may further accelerate subscriber redistribution towards lower-cost plans, creating longer-term tension between scale-driven ad revenue and per-user income.

As advertising becomes an integral component of SVoD strategies, the sector's next phase of development is likely to be defined by how platforms balance advertising revenue growth with profitability, the shift of content offerings towards advertising-friendly formats such as live events, and how consumers respond to changing value propositions and further price adjustments.

Figure 47: Monthly* cost of SVoD tariffs (GBP)

Source: Ofcom, as of May 2025 Monthly pay-as-you-go price, without promotions or discounts applied.*

In addition to cultivating direct-to-consumer relationships, SVoD platforms are increasingly leveraging bundling partnerships to broaden their reach. This includes integration with pay-TV operators, such as Sky and Virgin Media offering customers the option to add on SVoD subscriptions, and telecom providers bundling services with mobile or broadband plans, like O2's inclusion of Disney+ with selected mobile packages. According to Ofcom's VoD Survey, 30% of Netflix subscribers pay for their subscription as part of their household pay-TV service bill, or as part of a bundle with another service. The equivalent figure was nearly as high for Disney+ subscribers (27%), but lower for Amazon Prime Video subscribers (13%).[52]

[51] Enders Analysis.
[52] Ofcom VoD Survey 2025. Fieldwork took place in February 2025.

This growth in third-party partnerships signals a strategic shift among SVoD providers, which are deepening collaborations with pay-TV and telecom operators to expand their user bases and enhance market penetration. For instance, the basic advertising tier of Paramount+ is offered to Sky Cinema subscribers at no extra cost, under a carriage agreement. These arrangements not only extend the audiences for streaming services but also support the value proposition of pay-TV operators by deepening customer billing relationships and helping to curb subscriber churn.

Amazon Prime Video acts as an aggregator by allowing users to subscribe to additional SVoD services, such as Apple TV+ and Discovery+, directly within the Prime Video ecosystem through its 'Channels' feature, thereby reinforcing its position as a hub for discovering content beyond its own content catalogue.

Broadcasters are sharpening digital strategies to shift linear TV viewers to streaming and to engage new audiences

As highlighted in our recent Review of Public Service Media, one of the most urgent challenges facing PSBs is attracting and retaining audiences in an increasingly crowded and competitive online viewing landscape. In response, digital transformation has become central to PSBs' strategic priorities, with a strong focus on moving audiences from traditional linear viewing to broadcasters' own BVoD platforms. This transition has required substantial investment in digital infrastructure, enhancements to the user experience, and the expansion of content libraries to meet evolving viewer expectations.

A core element of this shift has been the adoption of digital-first strategies. Rather than treating BVoD platforms merely as catch-up services for broadcast TV programming, PSBs are developing them into standalone hubs for content discovery. While much of current BVoD catalogues still align closely with linear output, the strategic emphasis is on increasing broadcasters' digital presence.

To stay competitive in the broader streaming market, PSBs are also expanding and diversifying their on-demand libraries. In parallel, they are experimenting with new release models, such as streaming-first or concurrent premieres, which make content available on BVoD platforms before, or alongside, traditional broadcasts. Full-series box-set drops have also become more common, aligning PSBs more closely with SVoD consumption habits.

Broadcasters are also offering premium, ad-free subscription tiers to enhance the user experience. For example, ITVX Premium offers subscribers an expanded, largely ad-free viewing experience, including access to a wider range of content such as BritBox titles. Similarly, Channel 4+ removes most advertising and offers early access to hit shows.

In April 2024, the PSBs together launched Freely, a new streaming service. Available on compatible smart TVs, Freely offers both live linear channels and VoD libraries, providing a single access point to PSB VoD services.

Broadcasters have prioritised unified, cross-platform branding for their owned and operated platforms. In July 2024, UKTV rebranded its free-to-air channels and streaming service under the 'U' brand, consolidating offerings such as Dave into U&Dave. Similarly, Channel 5 rebranded its streaming service from My5 to '5' in March 2025, expanding content from Paramount brands and launching themed FAST channels. These changes follow Channel 4's earlier rebrand of its digital platform to 'Channel 4' in 2023, leading a wider industry move towards consistent brand identities across broadcast and digital services.

Technological innovation also continues to shape BVoD development. In 2024, the BBC announced plans to use artificial intelligence within BBC iPlayer to enhance personalisation and content recommendations, with the aim of improving user experience and service relevance.

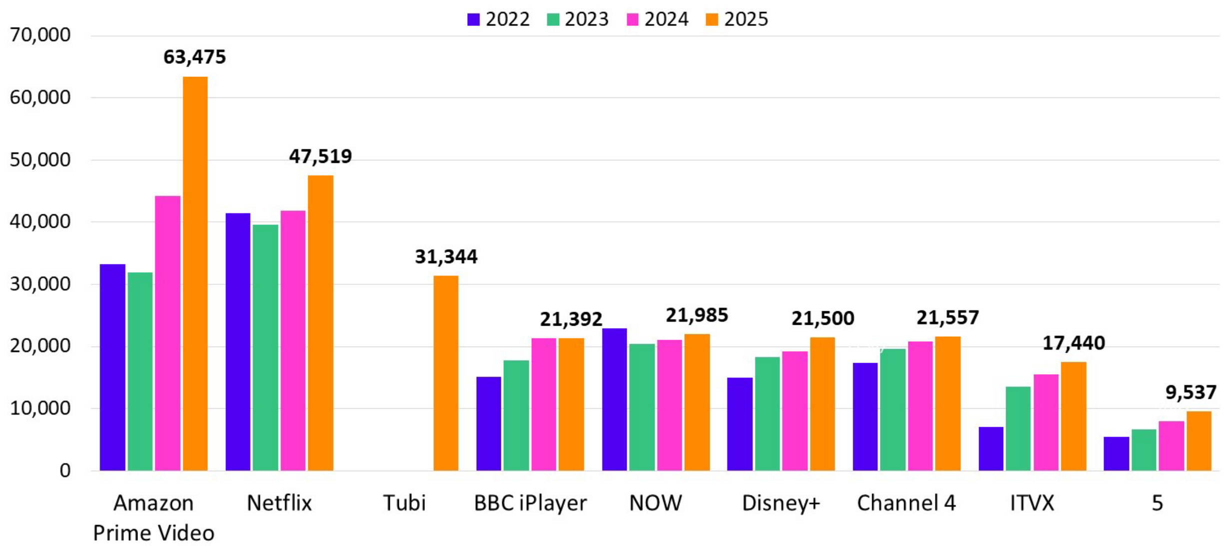
While continuing to develop their own VoD services, PSBs are also making increasing use of VSPs such as YouTube and TikTok as part of their overall strategies. We discuss this further in the context of YouTube later in this section.

The content strategies of SVoD and BVoD platforms continue to be shaped by their respective business models and competitive positioning

For SVoD platforms, another aspect of market maturity is a rationalisation of content spending and adjustments in programming strategy. Over the past several years there has been considerable growth in spending by major international streaming services, but by 2024, there were signs of a more measured approach to SVoD spend. For example, in late 2024 Disney+ reported its first profitable quarter for streaming after years of heavy investment, suggesting a shift towards cost control and strategic content choices, via its core intellectual property and franchises. Similarly, Netflix's stock market success (with its market value increasing by over 400% between the end of 2023 and July 2025) came as it demonstrated an ability to build revenue through price increases and password-sharing crackdowns rather than continued growth in its content budget. However, global investment in streaming content continues to grow and is forecast to increase by 6% to $95bn (c.£75bn) in 2025, supported by subscriber and revenue growth in 2024.

As a result of their deep pockets, major SVoD platforms can operate at scale, with expansive, often globally-curated catalogues that prioritise new scripted content and high-impact original productions. Amazon Prime Video and Netflix lead in volume, each offering more than 40,000 hours of programming, supported by a mix of in-house productions and multi-territory licensing deals that help localise their offerings for international markets (see Figure 48 below).[53]

Figure 48: UK VoD catalogue hours: 2022-2025



Source: Ampere Analysis – Analytics (May-2022 – May-2025). ITVX catalogue hours are free-to-view only.

[53] Ampere Analysis – SVoD Analytics.

Broadcasters' content strategies have been increasingly influenced by their digital-first plans: investing in high-value, high-impact programming that will perform well on VoD. 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.

UK PSBs' VoD libraries have historically served primarily as an extension of their linear offerings, but they have expanded their streaming libraries through the steady addition of box-sets and licensing agreements with US distributors. This has brought PSBs closer to SVoD services in terms of overall content volume, although there are differences in their programming focus and commissioning models.[54]

Viewer demand for original scripted dramas has influenced the composition of VoD catalogues

A key distinction between SVoD and BVoD platforms is their balance between scripted and unscripted content. SVoD platforms, including Netflix, Disney+, and Amazon Prime Video, are heavily skewed toward scripted TV series and films, which comprise over 70% of their catalogues. BVoD services offer a more balanced mix of scripted and unscripted content, with strengths in factual and entertainment programming but a more limited volume of high-end scripted drama.

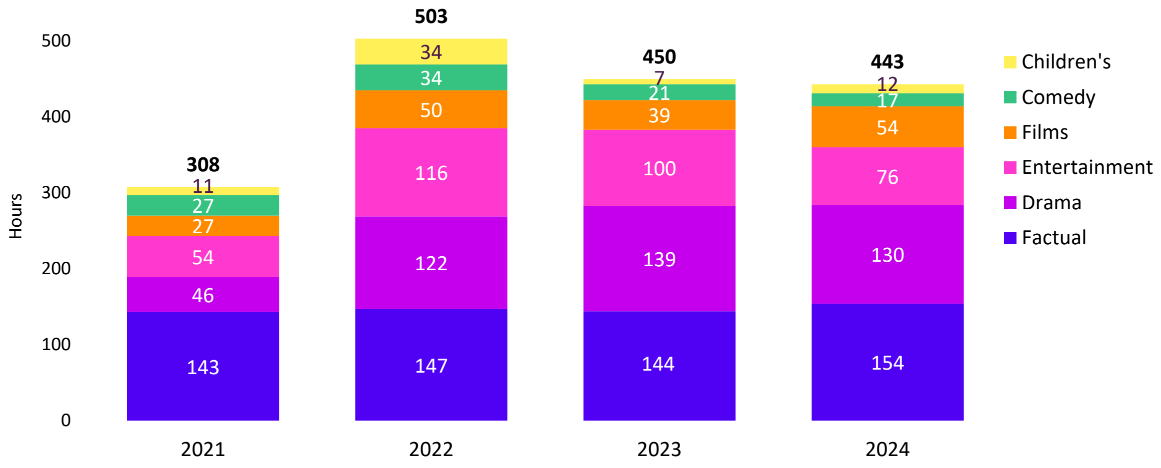
Original content is central to the premium SVoD model, with Netflix leading UK SVoD production investment. By May 2025, Netflix Originals accounted for 39% of its UK catalogue, up from 21% in 2021.[55] Amazon has ramped up its original production following its acquisition of MGM, while Disney+ continues to leverage its IP portfolio.

UK-produced content continues to be an important part of the major SVoD services' international strategies. In its Q1 2025 shareholder letter, Netflix described the UK as *"emblematic"* of its localisation strategy. The company highlighted that it had invested over $6bn in the UK creative sector since 2020, with UK-produced originals serving its global audience. *Adolescence* reportedly reached 124 million views globally within its first release month, and became the first streaming series to top the UK's weekly TV ratings. Other recent successes include *Baby Reindeer* and *Bridgerton*, which have both achieved strong global reach and audience acclaim.

Despite ongoing interest in UK originals, SVoD providers have delivered a relatively modest number of hours of UK original content, primarily in factual, reality and drama. Much of their investment has focused on a selection of high-budget drama titles designed for both UK and global audiences. By prioritising impactful scripted content, supplemented with locally relevant factual and entertainment programming, the growing investment by SVoD services has positioned the UK as an important hub for international production investment.

[54] Ampere Analysis – AVoD & BVoD analytics.
[55] Ampere Analysis – SVoD Analytics.

Figure 49: SVoD newly released UK-produced original content hours, by genre: 2021-2024



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.

Strategic content licensing remains important. US studios have reopened content licensing as a revenue driver, having previously pulled back rights to support their own direct-to-consumer services. Broadcasters, traditionally reliant on in-house and commissioned programming, are striking licensing deals to strengthen their VoD catalogues and improve engagement. This includes ITV's content partnerships with Warner Bros, Discovery and Paramount Global as part of the ITVX relaunch, the BBC's acquisition of US legal drama, *Suits* (Netflix's most-watched title in the US in 2023), and Channel 4's multi-series deal with Disney.

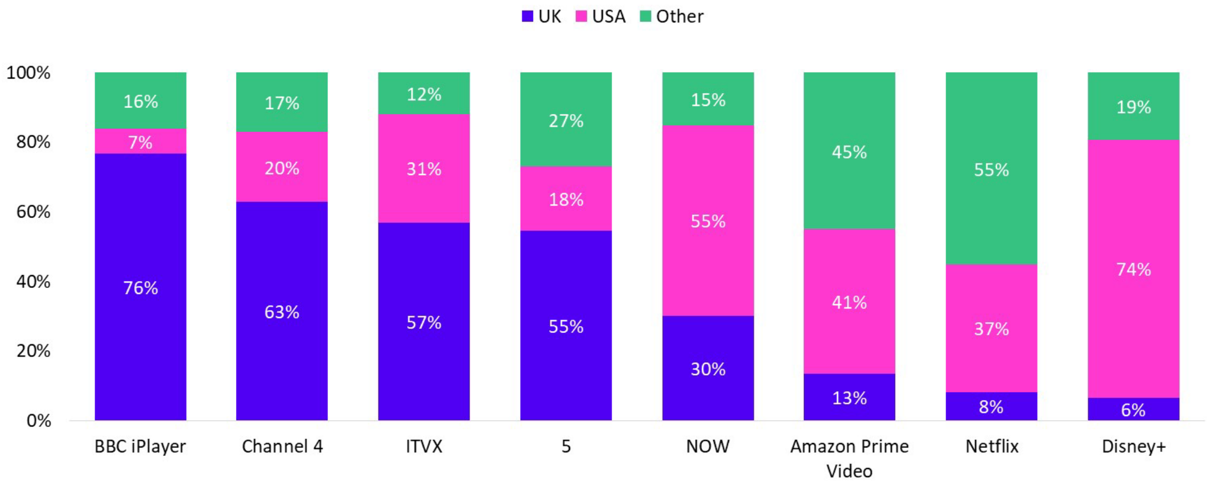
ITV and Disney announced a multi-year strategic partnership in July 2025, going beyond earlier licensing agreements. The deal will bring a range of Disney-owned content, including series such as *The Bear* and *Andor*, to ITVX. In turn, Disney will carry selected ITV Studios productions, across scripted, entertainment and factual genres, on Disney+ in the UK. This type of reciprocal agreement reflects a broader trend of SVoD services and broadcasters collaborating to diversify content supply, strengthen platform differentiation and expand audience reach. A similar development internationally is the Netflix - TF1 deal announced in June 2025, which will bring the French broadcaster's live linear channels, a large catalogue of French on-demand programming, and local advertising inventory to Netflix's platform in France.

ITVX now has the highest proportion of US-sourced content among the UK BVoD platforms, comprising 31% of its total hours, up from 19% in 2020.[56] However, although UK-produced titles have declined as a share of BVoD catalogue hours, the absolute volume of UK-sourced content has increased.

Global SVoD platforms allocate a much smaller share of their catalogues to UK content (See Figure 50 below), with US and international programming making up the majority. Non-English-language content has proved to be a key element of streaming services' international localisation strategies, with major SVoD platforms directing investment to content hubs such as Japan, South Korea, Spain and Germany. For PSBs, the broad availability of UK-produced original content is a distinctive feature of their offerings to UK audiences.

[56] Ampere Analysis – AVoD & BVoD Analytics.

Figure 50: UK VoD catalogue hours, by primary country of production: May 2025



Source: Ampere Analysis – Analytics (May-2025). ITVX catalogue hours are free-to-view only.

Video-sharing platforms

YouTube continues to exert influence across the broader UK audiovisual market

Since its launch in 2005, YouTube has influenced the UK media market, evolving from an ad-supported video-sharing site into a diverse suite of services. In addition to its core platform, YouTube now includes YouTube Kids, YouTube Music, YouTube Movies and TV, YouTube Shorts, and YouTube TV (an SVoD service available in the US). This expansion has strengthened YouTube's presence across the video-sharing and TV landscape, increasingly positioning it as a competitor in traditional TV-like viewing.

Advertising is YouTube's primary revenue source, with global advertising revenues exceeding $36bn in 2024. YouTube's ad revenue alone surpasses the total revenues of Disney+ and Amazon Prime Video, closely rivalling Netflix's total revenue.[57] YouTube operates a revenue-sharing model, distributing advertising proceeds to content creators, thereby reducing the financial risk associated with direct content acquisition and original programming.

Although YouTube does not disclose its UK-specific revenue, it probably commands a substantial share of the estimated £6.5bn spent on social video advertising in the UK.[58] However, it is unclear how much of this is passed on to UK-based creators. Given the international nature of YouTube's audience, a portion of ad revenue generated from UK viewers is directed to overseas creators, just as UK creators can earn revenue from global audiences. Despite this, YouTube has reported that its UK creative ecosystem contributed over £2bn to GDP in 2023, supporting more than 45,000 full-time equivalent jobs.[59]

Although YouTube's advertising revenue-sharing model remains the primary source of income for many creators, additional monetisation opportunities include fan funding (such as channel

[57] Ampere Analysis.
[58] IAB UK PwC Digital Adspend Study.
[59] YouTube, Supporting and Exporting British Culture, 2023.

memberships and donations), sponsorship, merchandise and shopping integrations, ticket sales, and targeted funding initiatives designed to support specific creator communities.

Increasingly, prominent content creators are partnering with SVoD platforms to access new sources of funding, expand cross-promotion and transition into larger-scale productions. Recent examples include The Sidemen's Netflix documentary series and MrBeast's reality competition series with Amazon, These deals indicate a growing trend where SVoD platforms tap into creator-driven fanbases to source fresh talent and diversify content offerings, while creators gain access to production budgets beyond YouTube's ad-based model.

YouTube has also looked towards subscription-based offerings. YouTube Premium, priced at £12.99 a month in the UK, provides ad-free access across YouTube's platforms, including YouTube Music Premium. Globally, YouTube Premium subscribers exceed 125 million, putting it among the largest subscription-based streaming services.

In the US, YouTube has further extended its offering through YouTube TV, a subscription service providing live and on-demand linear television, including major terrestrial and pay-TV channels. With the acquisition of high-profile sports rights such as the NFL Sunday Ticket, YouTube TV is positioning itself as a fully-fledged pay-TV replacement. YouTube has not launched an equivalent service in the UK, although it introduced 'Primetime Channels' in 2023, enabling users to subscribe to third-party streaming services directly through the platform.

YouTube's range of content categories, including children's content, gaming, music, and sports, targets diverse audience demographics, particularly appealing to younger viewers, as set out in the TV and video audience trends section of this report. The migration of advertising expenditure towards platforms like YouTube continues to present challenges to traditional media brands. In addition to user-generated and broadcaster-led content, YouTube has positioned itself as a transactional video-on-demand (TVoD) destination through YouTube Movies and TV. While this offering is better established in the US, it signals YouTube's ambition to compete directly with digital storefronts like Apple TV and Amazon in renting and selling premium content.

As YouTube strengthens its influence on UK audiences, broadcasters are seeking to leverage its reach

For years, PSBs were cautious about embracing YouTube as a distribution platform, beyond its use for promotional clips. This hesitance stemmed from concerns about potential audience cannibalisation, lower ad pricing, limited visibility of user consumption data, and a lack of control over the onward user experience. As a result, engagement with PSB social content by audiences in terms of social views has largely been through other social media platforms such as Facebook and TikTok (see Figure 51 below).

However, with changing viewing habits, particularly among younger audiences, broadcasters have increasingly recognised that VSPs such as YouTube are important for reaching audiences that are no longer engaging with traditional broadcast or BVoD services. What was once treated as a secondary promotional outlet is now viewed as a key distribution channel to reach the widest possible audience in the UK.

PSBs are therefore expanding their YouTube strategies. These range from the release of full-length episodes to bespoke digital-first content and curated clips designed for engagement and shareability. Channel 4 was a first mover in this space, entering a multi-year commercial partnership with YouTube in 2022 as part of its five-year Fast Forward strategy. This allows it to publish full-length programmes while retaining control of its ad inventory, an arrangement more favourable than standard creator terms, where YouTube typically takes a 45% cut.

Under this strategy, Channel 4 has launched several genre-specific YouTube channels, including 4 Comedy, 4 Documentaries, and 4 Reality, each designed to host long-form content and cater to distinct audience interests. These channels not only repurpose broadcast content but help build dedicated digital communities around key programming verticals.

ITV struck a similar deal in December 2024, making hundreds of hours of programming, including news, sport, entertainment and reality TV, available on the platform. ITV has expanded its YouTube footprint with channels such as ITV Entertainment, ITV Retro, and ITV Real Life Stories, which offer full episodes and themed collections. These moves signal a recognition that to remain relevant, broadcasters must make content available to audiences wherever they already consume content.

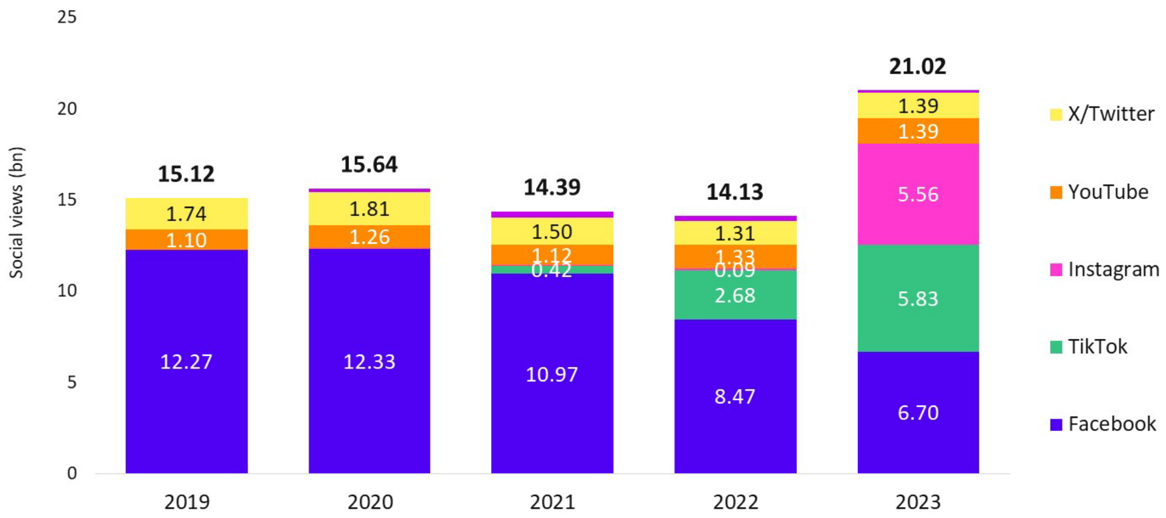
These partnerships reflect a broader trend; PSBs are experimenting with how to distribute and monetise content across YouTube. Although it is still early days, broadcasters have reported some performance metrics. Channel 4 noted 2.3 billion views across its social platforms in 2024, up 5.5% year on year. Importantly, broadcasters have reported that YouTube viewing is complementary to traditional TV and BVoD, rather than cannibalistic. They report that audiences on YouTube are largely incremental, helping to boost brand awareness and even driving viewers back to their own platforms.

As YouTube itself has matured, broadening its appeal beyond younger users and expanding into long-form, premium-style video, its role in the wider media ecosystem has become more complex. According to Enders Analysis, half of its top-trending videos now resemble traditional TV, creating new opportunities for premium advertising.[60] This evolution places YouTube in more direct competition with ad-funded broadcast and BVoD services, although there is little evidence yet to suggest that TV advertising budgets are migrating to YouTube.

Despite YouTube's high global reach and engagement, questions remain about whether social video revenue can meaningfully contribute to VoD business models. PSB YouTube revenues remain very small, as we indicated in the Ofcom's Review of Public Service Media (2019-2023), and are unlikely to grow significantly over the next few years. Still, broadcasters appear increasingly confident in their ability to balance the opportunities YouTube presents with the need to protect the value of their own platforms.

[60] Enders Analysis estimates that, by views, 49% of the UK's Trending videos on YouTube in 2023 can reasonably be mapped across to television content (by views).

Figure 51: PSB content social views, by platform: 2019-2023



Source: Ofcom/broadcasters. Social views data provided to Ofcom comprise a mixture of UK-only and global data; where the data is global, UK audiences are likely to account for most of the views, given that the content is typically designed for UK audiences and is, in some cases, geo-blocked, e.g. sports content. Instagram data is not reported in full in the years before 2023 – the jump that year should not be interpreted as representing sudden, massive growth.

Radio and audio trends

Industry trends

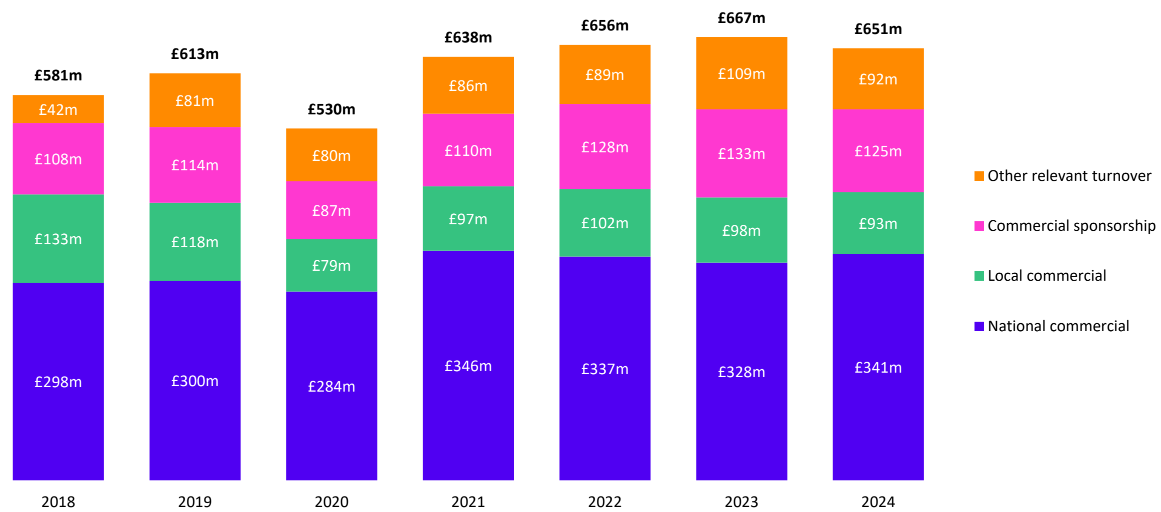
This section provides insight and commentary on key trends across the radio and audio sectors. It contains data on advertising, revenues and spend, and the availability of radio services, as well as notable developments across the audio market, including streaming and podcasts.

Revenues and spend

Radio revenues declined marginally in 2024

After a period of growth, commercial radio revenues dipped slightly in 2024 to £651m, from £667m in 2023. This modest decline reflects a more cautious advertising environment, shaped by ongoing economic uncertainty and shifting media strategies. National advertising increased, helped by a slight improvement in the economy in 2024, while local revenues continued to decline in what is starting to look like structural change in the market. This shift is also probably driven by advertisers favouring national inventory packaging, and by the continued centralisation of programming across national networks by major groups such as Bauer and Global.

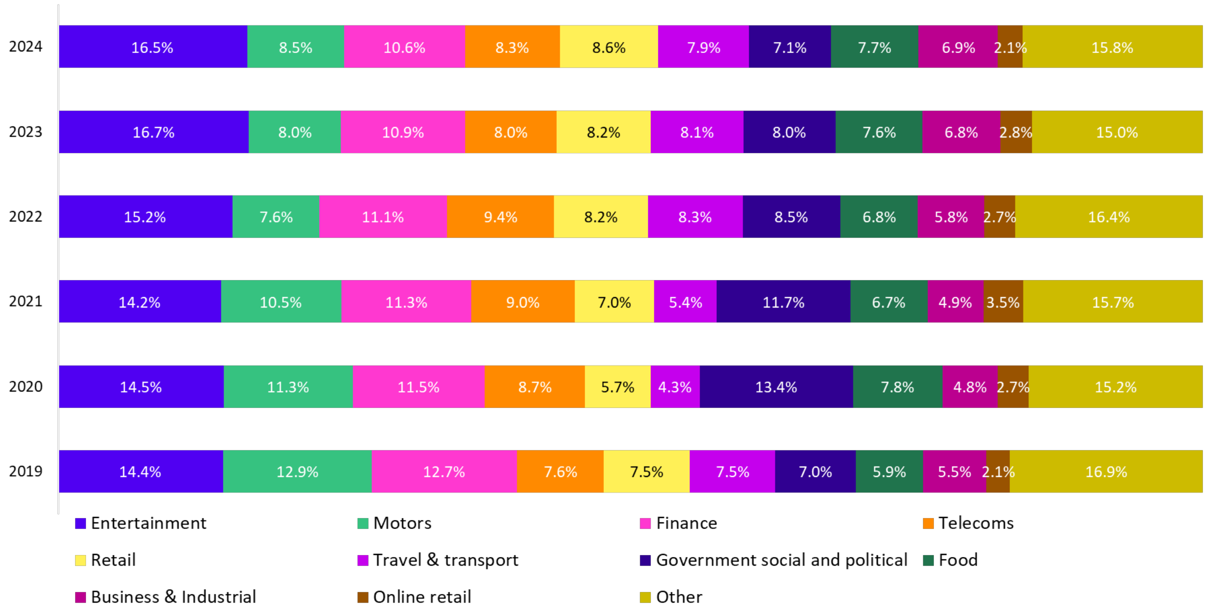
Figure 52: Commercial radio revenues: 2018-2024



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

Entertainment remained the largest advertising expenditure category in 2024, at 16.5% of radio advertising spend, in line with its share last year, with finance the second largest category, accounting for 10.6%. At 8.5% of expenditure, the motors category grew for the second year running. On the other hand, the Government, social and political advertising category continued its decline, dropping to 7.1%, as the pandemic-era public sector advertising expenditure receded.

Figure 53: Share of radio advertising expenditure, by category: 2019-2024



Source: Nielsen, Ofcom analysis.

Digital audio advertising spend declined slightly in 2024 as podcast momentum eased and streaming fell

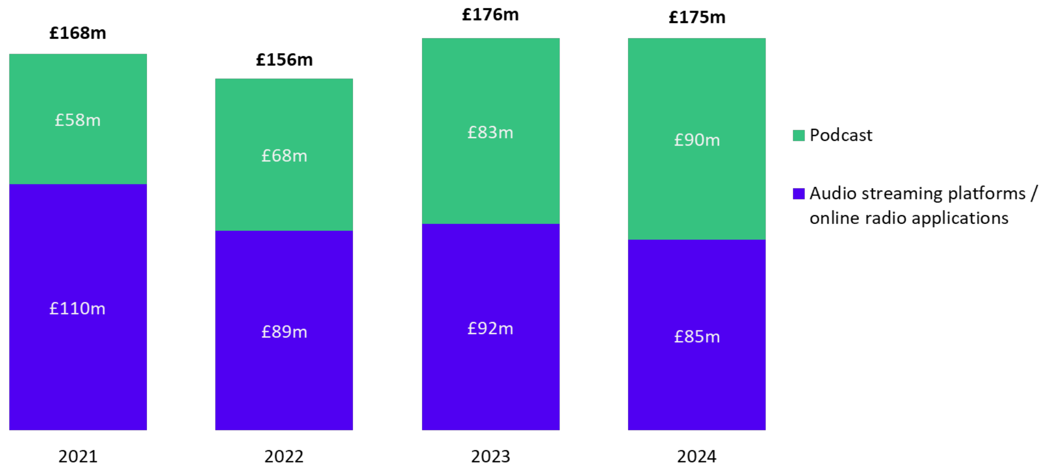
Following growth between 2022 and 2023, total digital audio advertising expenditure (the placement of ads within audio content streamed over the internet) remained flat in 2024 at £175m. This includes podcasts, audio streaming platforms, and online radio applications.

Podcast advertising continued to grow in 2024, increasing by 8% year on year to reach £90m. While this represents continued investment in the format, the rate of growth has slowed compared to the 23% increase recorded between 2022 and 2023. In contrast, streaming audio advertising fell by 8% in 2024, from £92m to £85m.

Growth in digital audio advertising has been somewhat supported by advertisers reallocating spend from traditional broadcast radio, as well as from other digital channels. The availability of self-serve buying options (tools that allow advertisers to plan, purchase, and manage campaigns directly through online platforms without intermediaries such as AudioGo, Spotify Ad Studio and Acast's self-serve platform) has also been cited as a factor enabling greater access for a broader range of advertisers.

Some investment may also be benefiting from adjacent formats like video, which are often captured under digital video advertising budgets, and are increasingly a format used to deliver podcasts. In this context, the reported £90m in podcast spend in 2024 potentially only tells only part of the story, with broader shifts in how and where audio-driven content is monetised.

Figure 54: Digital audio advertising expenditure: 2021-2024



Source: IAB UK PwC Digital Adspend Study 2024.

Recorded music spending continued to climb in 2024, driven by streaming gains and a rise in physical sales, led by continued interest in vinyl

Consumer expenditure on recorded music in the UK continued its steady growth in 2024, rising by 5.7% year on year to reach £2.36bn. This reflects the ongoing strength of subscription streaming, modest gains in physical formats, and a continued decline in downloads.

Subscription streaming remains the primary format for recorded music consumption in the UK, accounting for £1.98bn in 2024, 5.9% higher than in 2023. This segment now constitutes approximately 84% of total consumer spending on recorded music. Price increases by major streaming services, including Spotify, Amazon Music, and YouTube Music, were a key factor in this growth, helping to drive higher revenue even as subscriber growth in mature markets slows.

Spotify increased its prices in multiple markets in 2023 and again in 2024, continuing to support its premium pricing model to maintain margins amid rising licensing costs and investor pressure for profitability. The platform is also expanding its revenue mix by offering audiobooks, podcast monetisation tools, and higher-tier subscription plans (offering enhanced audio quality and other premium features), while tightening restrictions on its free tier.

YouTube Music pricing is broadly comparable to that of other major services, and the platform is investing in AI-driven personalisation, aiming to differentiate itself through YouTube's vast content ecosystem and visual discovery. Both platforms are experimenting with bundled offerings: Spotify via its audiobooks and podcast integration, and YouTube through premium bundles that combine video and music services.

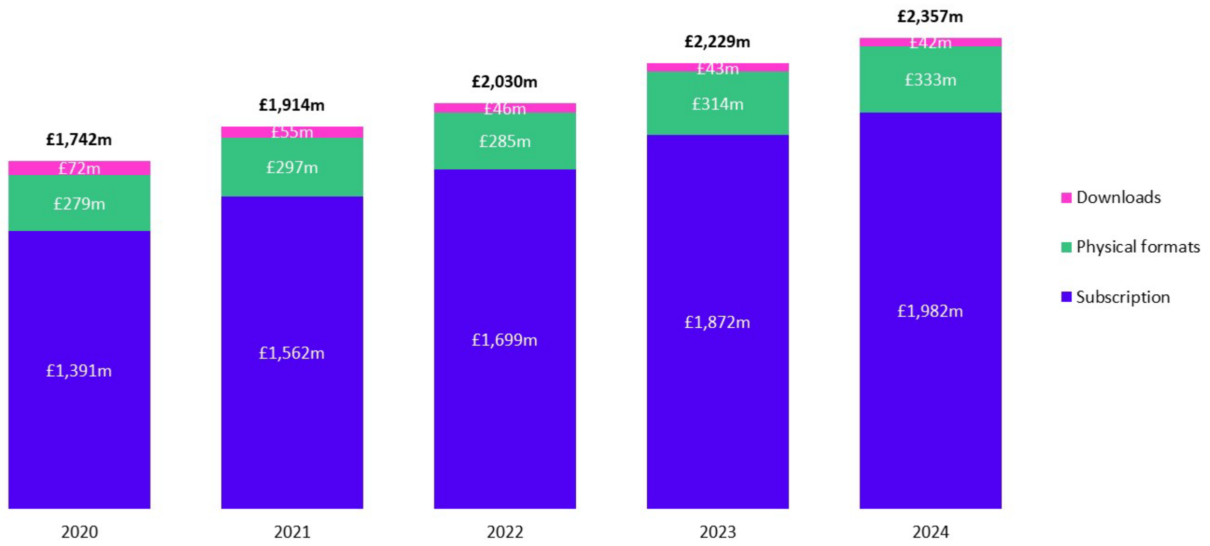
Spotify has entered into multi-year agreements with major music groups, including Warner Music Group and Universal Music Group, to explore new subscription tiers. Spotify has signalled the introduction of 'superfan' subscriptions, offering features such as high-fidelity audio, exclusive content and early access to releases.

Physical music formats defied long-term trends again in 2024, rising by 5.8% to £332.7m. This marks the second consecutive year of growth, driven primarily by the continued resurgence of vinyl LPs, which grew by 10.6% to £195.4m. Vinyl's cultural and collector appeal continues to draw consumers, supported by an increasing number of artists releasing deluxe editions and exclusive pressings.

CD sales remained stable at £127m, holding its ground after several years of decline. This stabilisation reflects both rising average prices per album, and niche but loyal customer bases, particularly among older demographics and collectors. In contrast, cassette sales, once seen as part of the retro revival, continued their decline in 2024, with volumes dropping further from 2023 levels.

Expenditure on music downloads continues its downward trajectory. In 2024, total spending on album and track downloads fell by 2.9% to £41.6m. Track downloads had a slight 1.3% uptick, possibly due to promotional single releases or licensing use, although overall downloads face continued decline.

Figure 55: Consumer expenditure on recorded music: 2020-2024



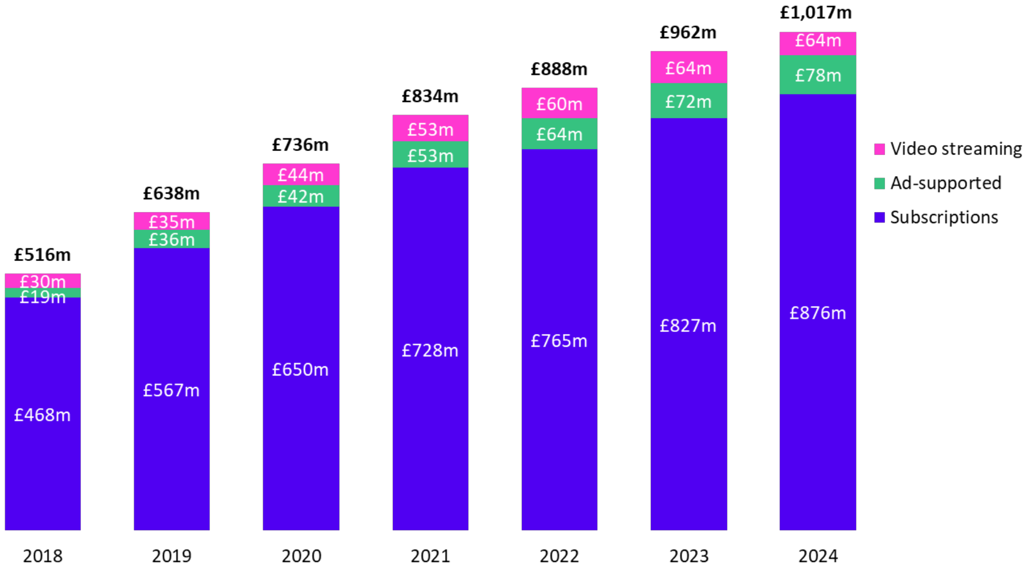
Source: Official Charts Company and ERA estimates, BPI 'All About The Music 2025'.

Music industry streaming revenue exceeded £1bn in 2024

Streaming services continued to be the dominant revenue source for the UK recorded music industry, making up roughly two-thirds of total industry revenues. According to the British Phonographic Industry (BPI), the UK's recorded music trade revenues rose by 4.8% year on year, reaching £1.49bn. Subscription-based streaming services remained the primary driver of revenue within the streaming sector (£876m).

UK artists have seen increases in royalites from Spotify, which reported that total payments to UK artists have more than doubled since 2018, reaching £810m in 2024. However, while this increase reflects growing global consumption (over 75% of these royalties came from listeners outside the UK) it does not necessarily indicate improved earnings for all artists. While more British artists than ever are achieving streaming milestones, some musicians continue to express concern over low per-stream payouts and the concentration of revenues among top-performing artists.

Figure 56: Music industry income from streaming: 2018-2024



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

Availability and distribution of radio services

The number of AM medium wave (MW) stations has fallen further in the past year. This trend reflects the broader shift in listener habits towards digital platforms like DAB and online, and the higher operating costs associated with maintaining the AM transmission infrastructure for diminishing audiences.

While community radio accounts for the largest number of individual FM licences (288 services), this reflects the role FM continues to play in supporting local broadcasting, rather than indicating audience size or reach.

Over 90% of DAB services are carried on local multiplexes. While the total number of services (651 in March 2025) reflects the scale of provision at this level, this figure includes many instances of national or quasi-national brands, such as Heart and Greatest Hits Radio, which broadcast across different local areas.

While England enjoys high levels of DAB coverage for homes and major roads, coverage levels in Wales and Scotland, especially for the Sound Digital and local DAB multiplexes, remain lower, potentially limiting listener choice in certain areas. Small-scale DAB reached over 32% of UK households in March 2025, up from 26% the previous year.

Figure 57: Analogue AM, MW and FM radio services: March 2025

	AM MW	FM	Total
Local commercial	9	234	243
UK-wide commercial	1	1	2
BBC UK-wide networks	1	4	5
BBC nations'/local	9	46	46
Community	20	288	308

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

Figure 58: Number of DAB services as of March 2025

	BBC UK-wide	UK Commercial – Digital One	UK Commercial – Sound Digital	Local commercial services
Number of multiplexes	1	1	1	58
Number of services	11	30	30	651

Source: Ofcom, BBC. Small-scale DAB services have not been included in this dataset to date, as rollout is ongoing. This approach may be reviewed for future publications.

Figure 59: DAB coverage as of March 2025

		BBC	Commercial			Small-scale
			Digital One	Sound Digital	Local DAB	
UK	Homes	97.4%	91.7%	82.6%	92.0%	32.2%
	Major roads	87.4%	80.2%	72.6%	76.8%	NM
England	Homes	98.4%	94.8%	86.7%	93.4%	31.8%
	Major roads	94.5%	93.9%	89.8%	87.4%	NM
Scotland	Homes	95.3%	81.7%	69.0%	85.4%	34.5%
	Major roads	69.1%	45.5%	33.6%	45.6%	NM
Wales	Homes	92.2%	67.5%	56.9%	83.1%	35.1%
	Major roads	78.1%	53.3%	37.7%	61.9%	NM
Northern Ireland	Homes	87.3%	85.4%	56.8%	87.5%	36.1%
	Major roads	79.3%	86.9%	55.0%	87.8%	NM

Source: Arqiva, BBC, Ofcom. Note: Coverage of SSDAB is measured on a homes basis only. 'NM' denotes levels are not measured.

Market developments

Digital radio expands with targeted brand extensions

In September 2024, Global launched 12 new digital stations linked to its major brands, including Heart, Capital, Smooth, Radio X and Classic FM. The new services include decade- and genre-based brand extensions such as Heart 00s, Capital Anthems and Classic FM Calm. Most of these new services are available on DAB+ and online via Global Player. This expansion builds on Global's existing portfolio of digital brand extensions and reflects an ongoing strategy to increase listening hours and add incremental reach by offering more tailored content.

Bauer also launched a new service in September last year, Greatest Hits Radio 60s, followed by four new digital stations across its Hits Radio and Greatest Hits Radio networks in March 2025. These stations were Hits Radio 90s and 00s and Greatest Hits Radio 70s and 80s, with all four services launching on the national Digital One DAB multiplex. Bauer has also continued its migration of services to DAB+, with Absolute Radio, Magic Radio, KISS and KISSTORY switching to DAB+ in March 2025.

The BBC has also expanded its digital audio offering. In November 2024, the BBC launched two new music streams on BBC Sounds – Radio 1 Anthems and Radio 3 Unwind – following Ofcom's conclusion that these were not material changes to its public service activities. Proposals for a separate Radio 2 stream and extending the broadcast hours of BBC 5 Sports Extra were deemed to constitute material changes requiring a public interest test. In July 2025 Ofcom published its Statement announcing that the BBC could launch DAB+ stations for the Radio 1 and Radio 3 extensions, which build on the Sounds-only streams, but could not proceed with proposals to launch a Radio 2 extension on DAB+ or extend the broadcast hours of 5 Sports Extra. Ofcom concluded that the public value of these two services would not be enough to justify the significant impact on fair and effective competition.

Boom Radio, an independent broadcaster which featured in Ofcom's review of the potential impact of the Radio 2 extension, invested in a national marketing campaign and also launched its own extension, Boom Light, available online and on DAB+.

Commercial groups consolidate local brands into national networks

The major commercial groups continued to consolidate local services into national networks. In April 2024, Bauer rebranded 15 local stations in England and Wales under the Hits Radio network, including Metro Radio, Hallam FM and Radio City. While local news and advertising remain, all programming apart from the breakfast slot is now networked from Bauer's Hits Radio studio in London. This followed a similar pattern to Bauer's earlier rebranding of stations in Scotland and Northern Ireland.

In March 2024, Bauer rebranded Wave 105 as Greatest Hits Radio South Coast. By mid-2025, Bauer had announced further centralisation, with plans to network the Hits Radio breakfast show across England from July 2025 and close a number of local studios.

Global made similar changes. In February 2025, it ceased the remaining local and regional programmes on Capital, Heart and Smooth in England. These brands now carry a fully networked feed from London, with local news and advertising inserts.

These changes were, in part, facilitated by reforms under the Media Act 2024, which removed some requirements on local analogue stations relating to locally-made programming and what music they play. The Media Act also puts in place new requirements relating to the provision of local news and information by local commercial analogue stations.

Ofcom has also continued to license new small-scale DAB multiplexes. These licences support a wide range of community and specialist services and have enabled smaller broadcasters to reach digital audiences across the UK. As at end of June 2025, 74 small-scale DAB multiplexes were on air.

STV is set to launch a new commercial radio station for listeners in Scotland

In May 2025, STV announced plans to launch a new Scotland-focused commercial radio station. The station will broadcast mainstream music targeting adults aged 35-54 and will be available on DAB and online platforms. Based at STV's headquarters in Glasgow, the station will be led by former Bauer Media executive Graham Bryce, and is expected to launch later in 2025. STV has expressed an ambition for the new station to be among the top three commercial radio stations in Scotland by 2030. The move is part of STV's broader strategy to strengthen its cross-platform media and advertising offerings.

Audio platforms continue to innovate through advanced advertising tools, AI and automation

Commercial radio groups continued to develop tools to improve audio advertising effectiveness. In early 2025, Bauer exited the Octave Audio joint venture with News UK and launched AudioXi, its in-house digital advertising platform in the UK in July 2025. Already operational in other European markets, AudioXi offers programmatic advertising across Bauer's audio and publishing brands.

Global has continued to develop its DAX platform with DAX ID to support cross-platform ad attribution and targeting across audio and out-of-home inventory.

Spotify has introduced new monetisation options for content creators, including enhanced advertising tools and access to video podcast features, via its Spotify Partnership programme, which launched in November 2024.

Audio publishers continue to experiment with their use of generative AI in content production and distribution. Recent examples of this in the UK include GB News Radio's use of AI to automate the creation of sports news bulletins, and the BBC's trail of Sounds Daily, which uses generative AI to introduce and link to multiple pieces of audio content selected by a recommendation engine, creating personalised streams of audio content for use in the car.

Podcasts expand across platforms and become a source of creative IP

The use of video in podcasting and audio content has continued to grow, with producers and broadcasters investing in video-enabled studios to support simultaneous recording and distribution. Platforms such as YouTube, Spotify, and Global Player now regularly host video versions of UK podcasts, helping creators engage with broader audiences.

The BBC has adapted several podcasts into visual formats for BBC iPlayer, and episodes of *Uncanny* have also been broadcast on BBC Two. Spotify has continued to enhance its video podcast offering, while YouTube plays an increasingly central role in podcast distribution. Netflix is reported to be exploring entry into the video podcast space, signalling future competition in this area.

Podcast content is also being developed into other media formats. Global's true-crime podcast *Filthy Ritual,* for example, has been optioned for a television drama. Meanwhile, Channel 4 has partnered with Spotify to promote select podcast titles across their respective platforms, supporting greater visibility and cross-promotion. Channel 4 also partnered with *The Rest Is Politics* podcast for its 2024 general election night coverage.

Some audio producers are also shifting focus. Goalhanger Podcasts, maker of *The Rest is Politics*, announced the closure of its television production arm to concentrate fully on audio, highlighting the continued strength and creative potential of the podcasting sector.

Spotlight on community radio

The community radio sector, established in 2005, offers not-for-profit stations that typically cover a small geographic area. They are designed in statute to provide tangible benefits to the communities they serve through the provision of social gain, both on- and off-air, outlined in the Key Commitments for all stations. The stations reflect a wide range of cultures and interests, providing a mix of locally-produced content including local news, information, interviews and discussions. The Community Radio Order 2025, implemented by Government on 1st April 2025, provided Ofcom with the powers to further extend analogue community radio licences by 10 years, once they have been broadcasting for 20 years. The first extension will be implemented in October 2025, highlighting that analogue community services will continue into the 2030's, subject to any further legislative changes.

The sector has continued to change, with many community radio stations embracing online streaming and social media to reach audiences beyond their FM or AM broadcast areas. Funding typically comes from a mix of small-scale advertising, sponsorship, grants, and fundraising activities, with many stations relying on volunteers for production and management. Recent Ofcom initiatives, such as the roll-out of small-scale DAB, have also opened up new opportunities for existing community stations to extend their reach while maintaining their focus on local content and social impact. Small-scale DAB has also provided opportunities for new community radio services to broadcast and gain access to the market. Since Small-scale DAB roll-out commenced in 2020, Ofcom has licensed 160 digital community radio licences, extending the provision of social gain to many new communities across the UK.

Measuring social gain

Although social gain is a key part of community radio's purpose, there is currently no standardised approach to measuring or evidencing it, and stations can sometimes struggle to demonstrate the positive impact they have on listeners and communities. Ofcom commissioned research which aimed to understand how community radio stations currently measure social gain, identify the challenges faced, and provide practical guidance for stations around measuring and evidencing their own social gain.

A sector-wide survey of community radio stations conducted as part of this work found that just over half of stations (56%) currently attempt to measure social gain in some form, although only a quarter consider themselves highly experienced. Operational constraints are also a key challenge, as many stations rely heavily on volunteers and operate within tight financial limits; they lack the time, staffing or resources to prioritise measuring social gain.

Drawing on the findings of this research, we shared practical guidance designed to help stations to better understand, capture and communicate the difference they make. These included a set of questions to facilitate surveys for listeners and volunteers, a bespoke case study template to provide real examples of the impact, and a social value calculator.

Financial position

The sector remains under pressure financially. In 2024, total income for community radio stations declined by 9% to £13.0m, while total revenue fell by 1% to £13.7m. This represents a change from 2023, when overall income was sufficient to cover overall expenditure across the sector. The Community Radio Order 2025 removed the funding rules, which have been in force since the sector was established in 2005, for the significant majority of analogue services and all digital community radio services. For analogue services still restricted in the commercial revenue they can generate through on-air advertising and sponsorship (1.6% of analogue services), the limit was increased from £15k per annum to £30k. The intent behind this legislative change was to allow community radio services to monetise their on-air content to support their ongoing sustainability.

To further support the ongoing sustainability of community radio, the Department for Culture, Media and Sport (DCMS) has allocated £900,000 to the Community Radio Fund for the 2025-26 financial year for Ofcom-licensed (across both analogue and digital) community radio stations. For the last 20 years, the allocation of funds through the Community Radio Fund has remained static, with £400,000 being allocated to Ofcom each year to administer (to note, DCMS has, on occasion, provided individual uplifts ranging from £20k to £100K in funding years) despite the number of services eligible to apply increasing year on year. Ofcom has set its intention to run one funding round in 25/26, with the application window set to open in September 2025.

The purpose of the Fund, including the types of grants stations can apply for, will not be amended in this financial year, providing more opportunities for community radio services to be successful in their applications to support their ongoing sustainability. To highlight this point, in financial year 2024/25 Ofcom received 161 applications, requesting a total of £3.39m in funding. Conversely, £467,197.20 was made available for awards and a total of 27 applicants were successful, leaving 134 applicants unsuccessful.

For further data on the community radio sector please see the 2025 Communications Market Report.

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 respondents are aged 16 and older. Figures on share of listening to different audio types come from IPA TouchPoints and figures on live radio listening come from RAJAR, both of which use respondents aged 15+. We have used the term ‘adults’ here when referring to all three sources. See the Annex for more detail on data sources and methodology.

Audio listening

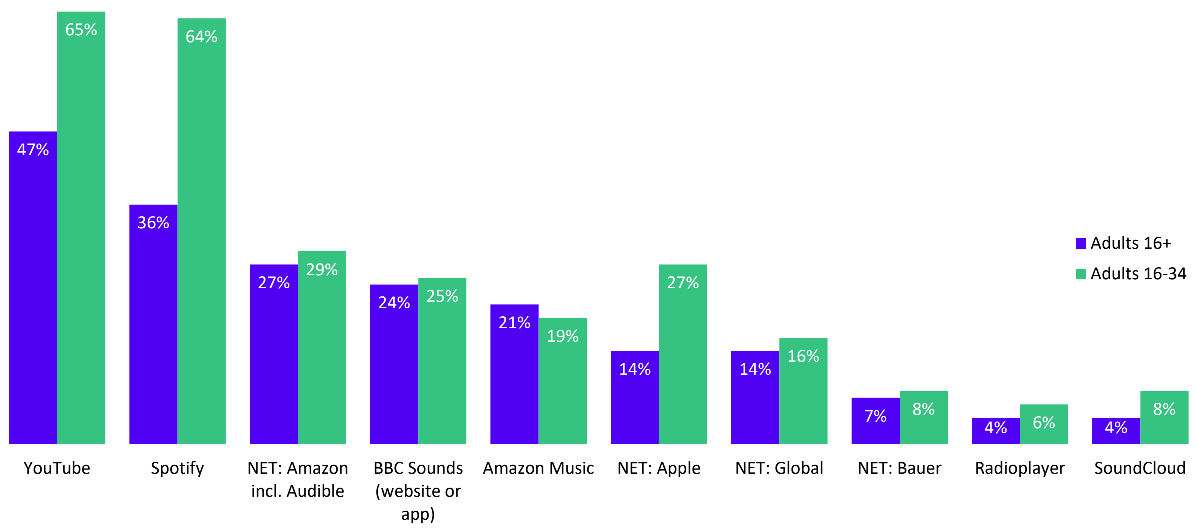
Audio plays an important part in our everyday lives, with over nine in ten of us – and almost all 16-34 year olds – listening to something each week

According to Ofcom's latest Audio Survey, more than nine in ten UK adults (93%) listen to some form of audio content each week, increasing to 98% of 16-34-year-olds. Music radio and online music services are the most popular source of audio, used by six in ten UK adults each week (62% and 61% respectively). These are followed by online music videos used for background listening (46%) and personal music stored on a digital device (41%).

Taking a closer look at the specific online services people are using to listen to audio content, we can see that YouTube and Spotify are the most popular, used by 47% and 36% of UK adults each week respectively. These services have much higher reach among 16-34 year olds, as do Apple's suite of audio services and SoundCloud, while audio services from UK broadcasters have similar levels of reach among younger audiences as they do across the population as a whole.

BBC Sounds is the most popular online audio service from a radio broadcaster, reaching just under a quarter of UK adults each week (24%), a significant increase since last year (21%). Much of this increase has been driven by greater reach among 16-24-year-olds (up from 14% last year to 22%) and 45-54-year-olds (up from 16% to 25%), with weekly reach now relatively consistent across all age groups. Global and Bauer's online offerings reach fewer adults each week compared to BBC Sounds (14% and 7% respectively) but similarly, show consistency in terms of average reach and reach, specifically among listeners aged under 35. This consistency may well be linked to the broadcasters' broad portfolios, with different networks, brands and brand extensions appealing to specific demographic groups. We look at the profile of these brands in more detail in the live radio listening section below.

Figure 60: Weekly reach of audio services, by age group: 2025



Source: Ofcom Audio Survey 2025. Question: Q9b/d/f/h/j. Thinking specifically about listening to [radio online / online music / podcasts / audiobooks / music video websites or apps for background listening], which of these ways do you listen (using websites or apps)? Base: All respondents (3.484) Note: 'NET: Global' includes Global Player and individual Global station websites or apps. 'NET: Amazon' includes Amazon Music, Audible and Kindle. 'NET: Apple' includes Apple Music. Apple Podcasts / iTunes and Apple Books. 'NET: Bauer' includes Rayo / planetradio.co.uk and Bauer station websites or apps. Services displayed on chart are those with greater than

5% weekly reach in either age group. The full list of services and associated data tables are available to download via the Ofcom website.

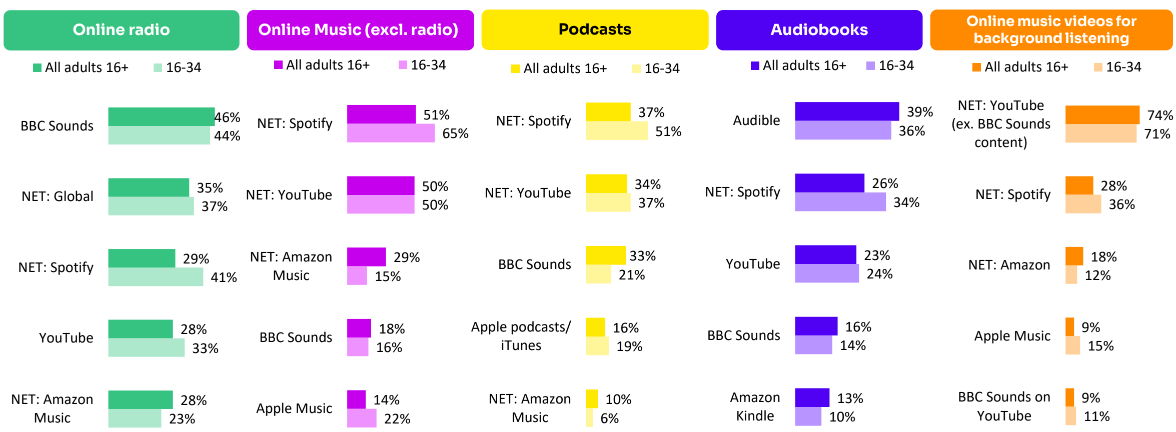
BBC Sounds is the most popular service for listening to online radio, while Spotify and YouTube come out top for online music, podcasts and music videos

While these online services offer listeners access to different types of audio – such as radio, music, podcasts and audiobooks – in one place, our survey reveals that people's use of them varies depending on the type of audio. BBC Sounds is the most popular service for listening to radio online, with 46% of online radio listeners using it each week, and a third of podcast listeners (33%) also report using BBC Sounds for podcasts. Smaller proportions report using it for listening to online music (18%) and audiobooks (16%) while just under one in ten (9%) say they access BBC Sounds content on YouTube (videos from Radio 1's *Live Lounge* or Radio 2's *Piano Room* sets, for example) while doing other things ('background listening').

Spotify and YouTube are the most popular services for listening to online music and podcasts, used by half of online music listeners (51% and 50% respectively) and over a third (37% and 34%) of podcast listeners each week. As noted in previous Media Nations reports, Spotify also appears in our top five services for online radio listening, as respondents in our research considered it a provider of radio-like content via its 'Spotify Radio' feature. In our latest research we asked people's views on whether they think features like this this could replace traditional radio stations in the future, and we spotlight some of these opinions in our live radio listening section below.

YouTube is by far the most popular service for music videos, used by just under three-quarters of listeners for background listening (74%) and just over seven in ten of listeners aged 16-34 (71%) each week. YouTube also appears in the top three services for podcasts, with over a third of podcast listeners reportedly using it each week (34%). As we explored in this year's report on [Audio Listening in the UK](), podcast listeners are increasingly being offered the option of watching a podcast in addition to consuming it as audio-only content. It makes sense therefore that YouTube – as a free-to-access, visual forward platform – is a key player in the podcasting space.

Figure 61: Most used audio services, by audio type and age group: 2025



Source: Ofcom Audio Survey 2025. Base: All respondents who listen to the radio online (1,424), online music (2,466), podcasts (1,593), audiobooks (903), music video websites or apps for background listening (2,100). Note: 'NET: Global' includes Global Player and individual Global station websites or apps. In previous waves of our Audio Survey, respondents added Spotify and Amazon Music under the 'other' option for online radio, *presumably due to their 'radio' and 'stations' functionalities, which is why we now list these as options for this audio type.*

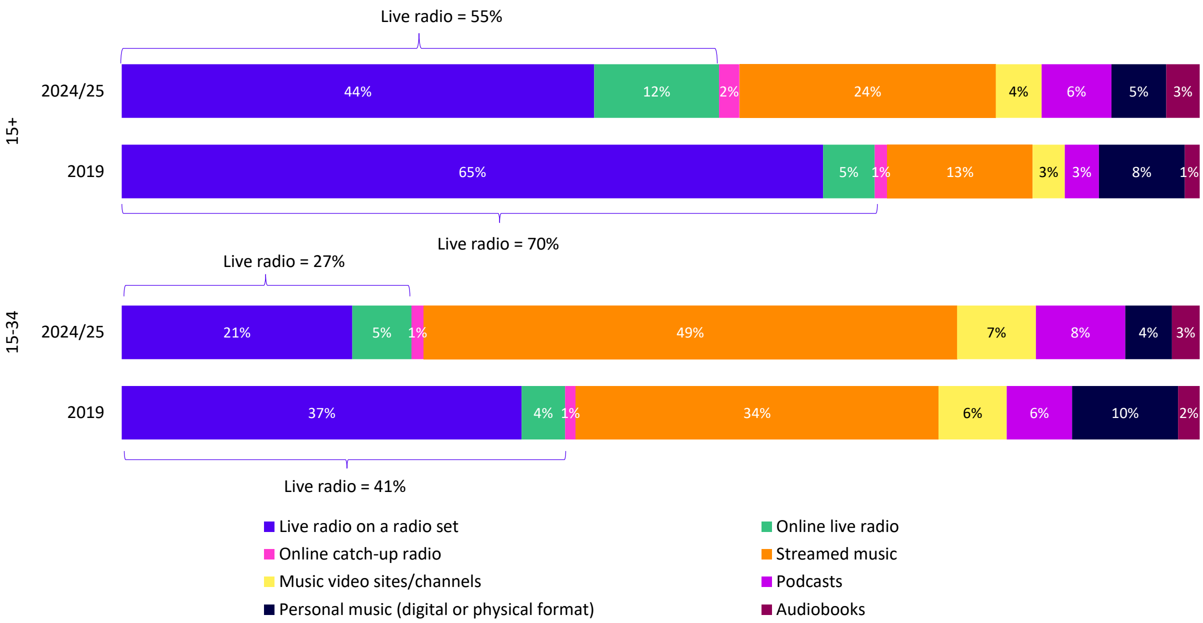
Streamed music and other forms of online audio are increasing their share of our audio diets, especially for younger listeners

Moving from reach to look at time spent, data from IPA TouchPoints shows that streamed music and other forms of online audio are increasing their share of our audio diets. This increase is more pronounced in younger people aged 15-34, who now spend more than half of their weekly listening time with streamed music and podcasts (58%, up from 40% in 2019), almost double the amount for the average listener (30%). Younger listeners' audio listening in fact resembles the mirror image of the average, with the proportions of time spent listening to live radio and streamed music flipped.

This growth in music streaming has largely come at the expense of live radio listening on a radio set, where share of listening has decreased in both age groups (down 16pp for 15-34-year-olds and down 21pp for the average listener). Online live radio has fared better, increasing its share of audio listening from 5% to 12% for the average listener and holding steady for those aged 15-34 (4% to 5%).

Despite the trend towards these more recent digital formats, live radio still accounts for a significant proportion of listening time each week: 56% for the average listener and just over a quarter (27%) for 15-34-year-olds. Below we look more closely at live radio listening trends and explore some of the differences between radio and music streaming.

Figure 62: Share of time spent listening to audio each week



Source: IPA Touchpoints 2025 (wave 2 2024 & wave 1 2025). Note: data labels rounded to nearest whole percentage.

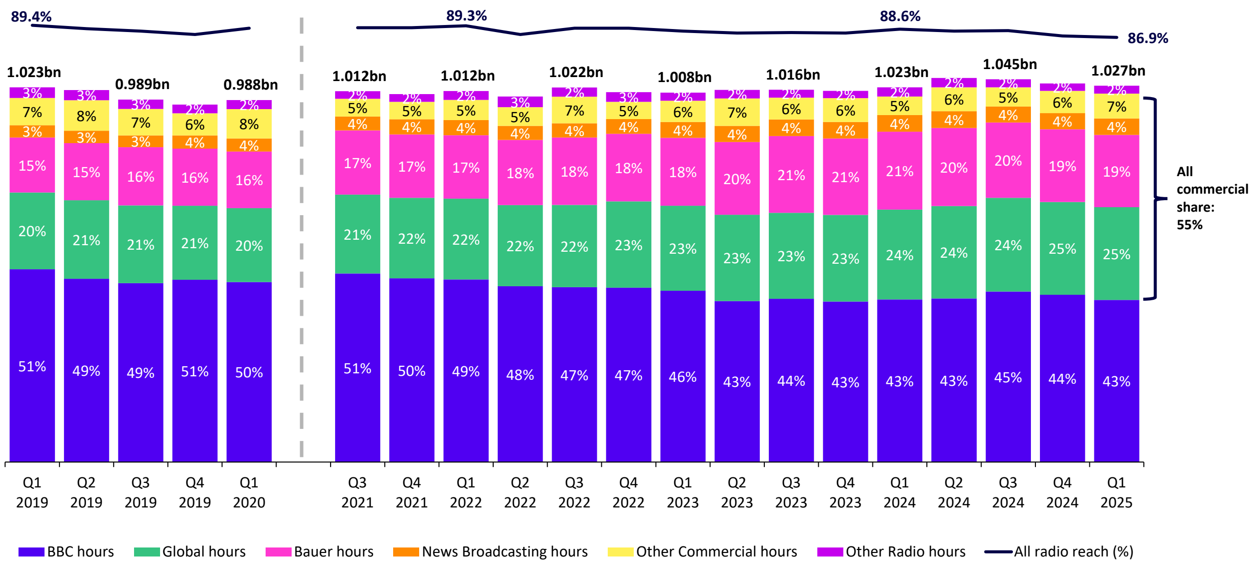
Live radio listening

Reach of live radio has decreased but remains high, with the average listener tuning in for 20.5 hours per week

According to RAJAR (the industry body responsible for measuring radio audiences in the UK), 87% of adults aged 15 and over tuned into the radio for an average of 20.5 hours per week in Q1 2025. While average reach is down by 1.7 percentage points year-on-year and 2.4 percentage points over the past three years, total radio listening has increased, from 1.012 billion weekly hours in Q1 2022 to 1.023 billion weekly hours in Q1 2024 and now to 1.027 billion weekly hours in Q1 2025. Average weekly hours per listener is also up by 6 minutes in the same period (from 20.4 hours per week in Q1 2022 to 20.5 hours in Q1 2025), showing that those who do listen are listening for longer each week.

Commercial radio stations continue to account for the majority of live radio listening (54.9% of weekly hours), while the BBC still has the greatest share of any single UK broadcaster (43.1% of weekly hours compared to Global's 24.7% and Bauer's 19.2%) across all platforms, i.e. DAB/DAB+, AM/FM, digital television (DTV) and online, including smart speakers.

Figure 63: Total radio reach and listening hours, by broadcaster group: Q1 2019 – Q1 2025

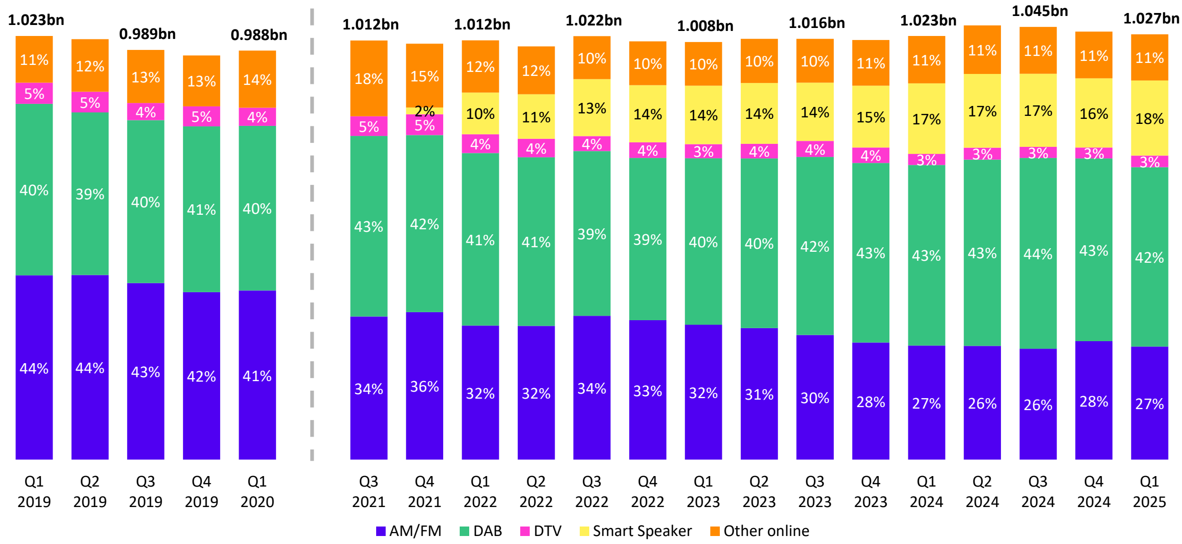


Source: RAJAR. Note: dotted line indicates suspension of fieldwork from the end of Q1 2020 until Q3 2021 due to the Covid-19 lockdowns. This led to subsequent changes in methodology, so comparison with previous quarters should be made with caution. Listening hours are for an average week in each quarter.

Online accounts for over a quarter of all radio listening

Most live radio listening is still through an AM/FM or digital (DAB/DAB+) set, accounting for 69% of all radio listening hours, but online listening is gradually increasing. DAB's share of listening (now 42%) has remained relatively steady, accounting for just over four in ten hours since Q3 2021, while AM/FM's share of listening (27%) has been falling slowly since Q3 2022. Meanwhile, online listening has been increasing slowly and steadily, up by 6pp in the last three years; from 22% of hours in Q1 2022 to 28% in Q1 2025. Smart speakers alone accounted for 18% of radio listening in Q1 2025, up 2pp from the previous quarter.

Figure 64: Weekly radio listening (hours) and share by platform over time: Q1 2019 – Q1 2025

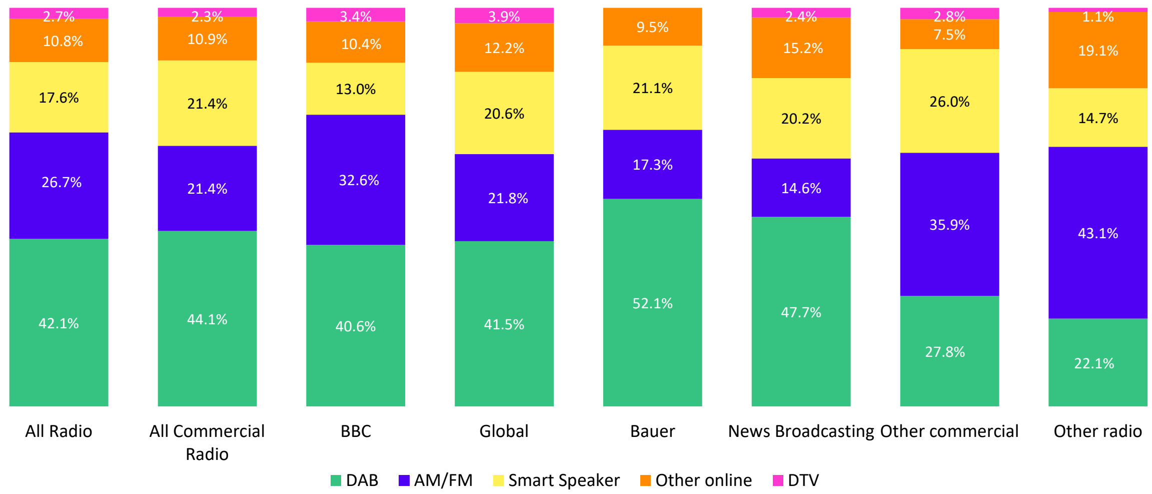


Source: RAJAR. Note: dotted line indicates suspension of fieldwork from the end of Q1 2020 until Q3 2021 due to the Covid-19 lockdowns. This led to subsequent changes in methodology, so comparison with previous quarters should be made with caution. DTV is digital television – respondents self-classify so it may include some IPTV / television delivered via the internet. DAB includes DAB+, as separate figures are not available in RAJAR.

Much of commercial radio's success in increasing its share of listening stems from increased DAB coverage, and a push from the sector to maximise use of the existing multiplexes and radio brands

Boosted by the launch of the second commercial UK-wide multiplex, Sound Digital, in early 2016, Global and Bauer have introduced a steady stream of new, digital-only radio stations in the past decade: 28 in the past five years and 17 in the last year alone (nearly all of which are brand extensions including Heart Love and Hits Radio 00s, which we discuss below). The impact of this strategy can be seen in commercial radio's platform share, with DAB and smart speakers accounting for a higher proportion of commercial radio listening (44.1%) compared to BBC Radio (40.6%). Almost a third of BBC Radio listening is on AM/FM (32.6%) compared to just over a fifth (21.4%) on average for commercial stations. This difference is due in large part to the BBC operating more UK-wide stations on analogue compared to the commercial radio sector, as well as differences in listener demographics which we discuss below.

Figure 65: Share of listening of main broadcaster groups by platform: Q1 2025



Source: RAJAR Q1 2025.

When looking at the most popular UK-wide radio stations/networks, only BBC Radio 5 Live is not broadcast nationally on FM.[61] Four of the top ten are BBC stations, five are from Global and one, Greatest Hits Radio, is from Bauer, all of which are available on AM/FM, digital and online. Of these stations, BBC Radio 1 and Capital have the youngest average listener age, at 38, while listeners to BBC Radio 4 tend to be older, with an average age of 60.

Figure 66: Top ten UK-wide stations/networks by market share (% of listening)

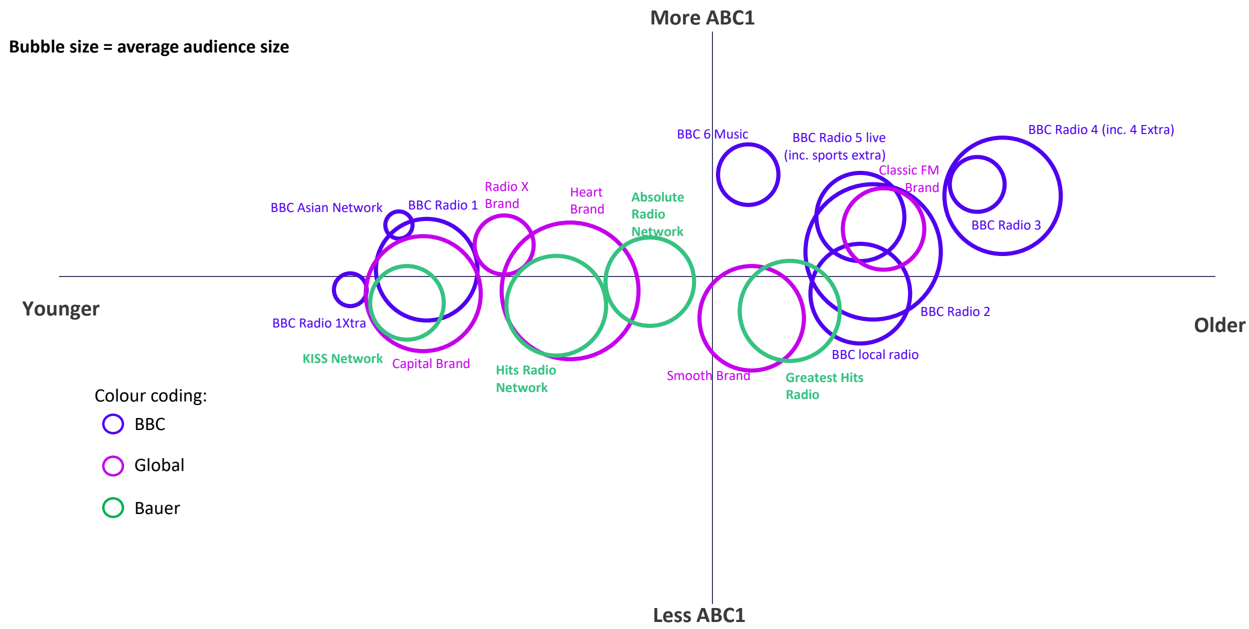
	National station / network	Market share	Average hours per listener	Station listening on DAB	Average listener age	Owner
1	BBC Radio 2	13.5%	10.6	38%	53	BBC
2	BBC Radio 4	10.8%	11.9	45%	60	BBC
3	Greatest Hits Radio	6.1%	8.7	47%	50	Bauer
4	Heart Network	5.9%	6	34%	42	Global
5	BBC Radio 1	4.8%	6.7	31%	38	BBC
6	Smooth Radio Network	4%	6.6	34%	50	Global
7	Capital Network	3.4%	4.9	37%	38	Global
=7	Classic FM	3.4%	7.7	32%	57	Global
9	BBC Radio 5 Live	3.1%	6	45%	53	BBC
10	LBC	2.8%	10.7	42%	50	Global

Source: RAJAR Q1 2025. Automatic weighting (each station weighted by its own weight). Average age figures have been rounded down to nearest whole number.

[61] Simulcasts are broadcast overnight on BBC nations and regions radio, but 5 Live is not broadcast separately on FM during the day.

Radio listening in general tends to skew older, with an average audience age of 48. However, as the table above shows, this varies greatly by broadcaster, brand and the type of station i.e. music radio versus speech radio. The average commercial radio listener is 48 years old, while the average BBC listener is slightly older at 51. This difference can be attributed to a number of factors, including the higher advertising value of younger age groups and the appeal of different brands to different audiences. The chart below shows the spread of audience profiles for the main BBC, Global and Bauer brands. It’s clear from this that commercial radio listeners tend to be younger and more likely to be in the C2DE socio-economic groups, compared to the average across all UK radio stations, while BBC listeners are more likely to be older and in ABC1 socio-economic groups.

Figure 67: Audience profile of main BBC Radio stations and Global and Bauer brands, by age and socio-economic group: Q1 2025



Source: RAJAR Q1 2025. Note: axes cross at average across all UK radio stations. Bubble size denotes average weekly reach of adults aged 15+.

Digital radio offers listeners more choice, with music stations focused on particular decades, moods and genres of music

The chart above relates to radio brands which, as mentioned earlier, have expanded in recent years. The number of commercial network extension stations has multiplied, with heritage brands like Heart, Classic FM and Smooth becoming ‘parent stations’ to more and more digital-only offspring like Heart 10s, Smooth Soul and Classic FM Calm. These brand extensions simultaneously offer listeners greater choice and more specificity, with playlists drawn from a specific genre, mood or decade. This narrower focus provides listeners with more certainty in terms of the music they can expect when tuning in.

Over time, as channel-hopping and mood-matching has become even easier with station names clearly visible on digital radio displays, online aggregators and smartphone apps, music radio networks’ strategies have necessarily evolved. We now inhabit a world of immense online curation, where people can find and listen to whatever track/album/genre of music they want, whenever they want it, and stations have recognised that modern listeners’ needs and expectations of audio are changing as a result. Broadcasters have simultaneously expanded and tailored their offerings so that those who do ‘touch that dial’ can easily find a neighbouring station from the same brand playing music that better meets their needs in the moment. In some cases, as with the Absolute network of stations, the main programmes and presenters often stay the same and only the music changes between stations. Having a bigger brood of stations with very clear music offerings acts as a competitive response to the hyper-specificity provided by a key competitor for the radio industry: music streaming services.

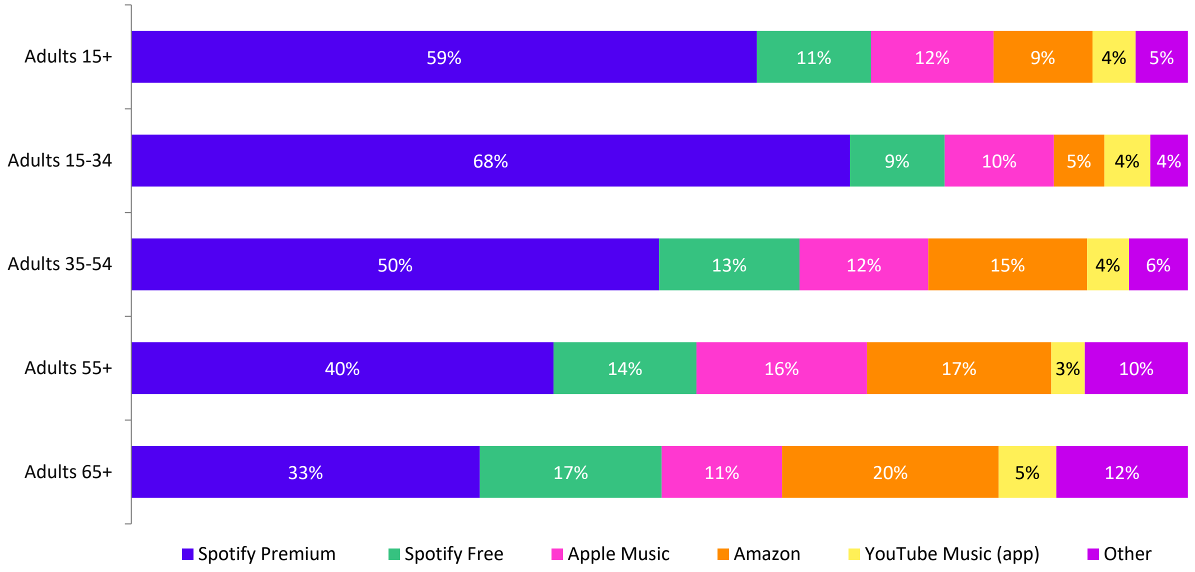
Music streaming

Younger people are more than twice as likely to use music streaming services compared to older age groups, with Spotify accounting for the majority of time spent listening to these services

As mentioned above, our latest Audio Survey shows that online music services such as Spotify and Amazon are used by six in ten adults each week (61%). Younger people are more than twice as likely to use them compared to older age groups: more than eight in ten 16-34-year-olds (85%) use an online music service weekly, compared to 39% of those over the age of 54 and two-thirds of those aged 35-54 (67%).

Spotify accounts for the most time spent listening to music streaming services (70%). The majority of this is to its paid-for Premium service (59% of total listening) while the Free, ad-supported tier accounts for just over one in ten listening hours (11%). Apple Music accounts for a similar proportion of time spent as Spotify Free (12%) followed by Amazon's audio services (Amazon Prime Music and Amazon Music Unlimited) at 9%. For 15-34s, the use of Spotify Premium increases further still, accounting for over two-thirds (68%) of time spent. Among those aged 65+ who listen to music streaming services, Spotify Premium still accounts for the single largest share (33%), but listening is spread more widely across other services, in particular Amazon's music offerings.

Figure 68: Share of time spent listening to music streaming services by service and age: 2024-2025



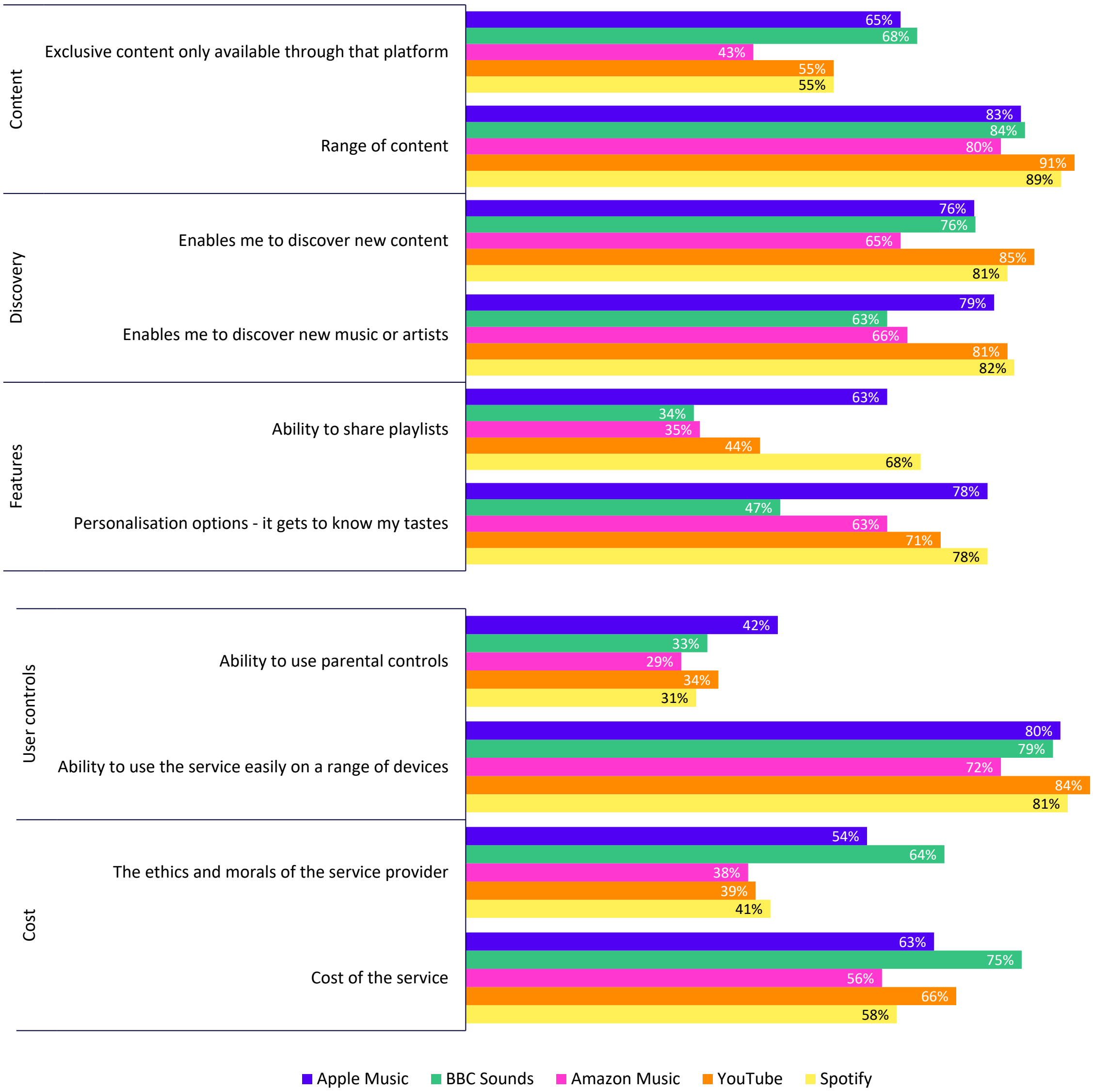
Source: IPA TouchPoints 2025 (wave 2 2024 & wave 1 2025). Note: Amazon includes Amazon Prime Music and Amazon Music Unlimited.

Users rate BBC Sounds and Apple Music highly for their exclusive content offerings, while YouTube and Spotify are rated higher for discovery of new content

To understand more about what people value when using these services, in our Audio Survey we ask users to rate how well they perform on a range of different attributes. Focusing just on the top five for online music (see Figure 61), we can see that they all perform well in terms of the range of content they offer, with at least eight in ten users rating them as good or very good at this. Apple Music and BBC Sounds ranked higher than the others for exclusive content, with at least six in ten users saying they were good or very good on this (65% of Apple Music users, 68% of Sounds users), while over half of YouTube and Spotify users rated them as good for exclusive content (both 55%).

YouTube and Spotify ranked much higher for content discovery, with more than eight in ten users rating then as good or very good for discovering new content (85% of YouTube users and 81% of Spotify users) and specifically new music or artists (81% and 82%). Two-thirds of BBC Sounds users (66%) rate it as good for enabling them to discover new music and artists, which may be linked to new music played on the radio as well as playlists and music mixes. Just under two-thirds of users (64%) also rate BBC Sounds as good or very good for ethics and morals. This is much higher than ratings by users of other services, where the comparatively low ratings may be linked to perceptions of their remuneration of artists or their connection with other services and owners.

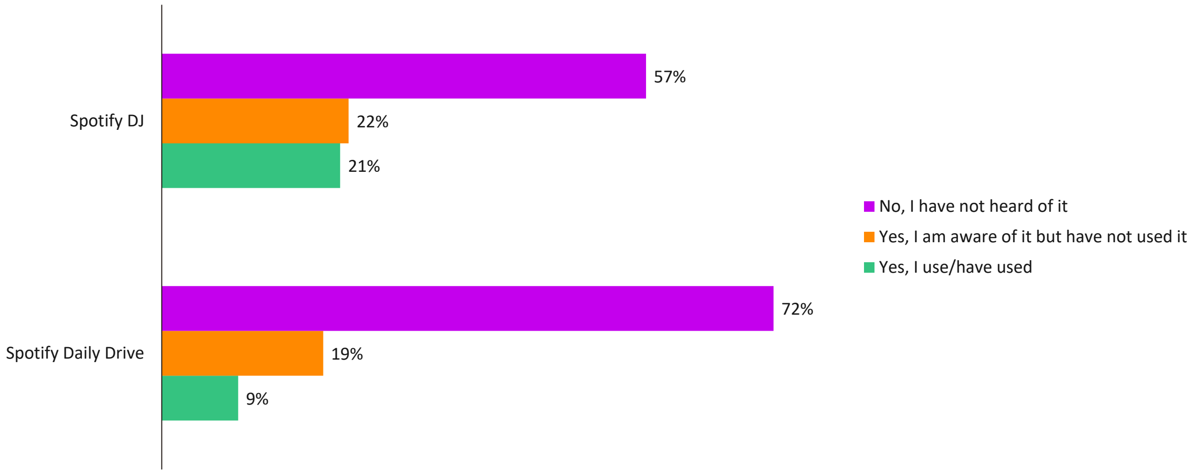
Figure 69: User ratings of audio services on different attributes



Ofcom Audio Survey 2025. Q18. You said you use [service name]. How good or bad are they on each of the following? Apple Music (319) BBC Sounds (1072) Spotify (1466) Amazon Music (779) YouTube (1190).

Over three-quarters of users ranked Spotify and Apple Music as good or very good at personalisation, with 78% of users agreeing that they get to know their taste. As we touched on earlier in relation to radio brand extension stations, online audio services are employing increasing levels of personalisation and algorithmically-powered content curation in a bid to bolster listener retention and keep people on their platform for longer. In our latest Audio Survey, we asked whether Spotify users were aware of two specific features offered by the platform – Spotify DJ and Spotify Daily Drive – with the results showing a stark difference in terms of take-up. In both cases, the majority of users said they were not aware of these features, but those who were aware were more than twice as likely to have used the DJ (21%) as the Daily Drive (9%).

Figure 70: User awareness of Spotify's additional features



Source: Ofcom Audio Survey 2025. NEWSPOTIFY1. You said you use Spotify, were you aware of and/or used these services offered by Spotify? – Summary. Base: All Spotify users (1,458).

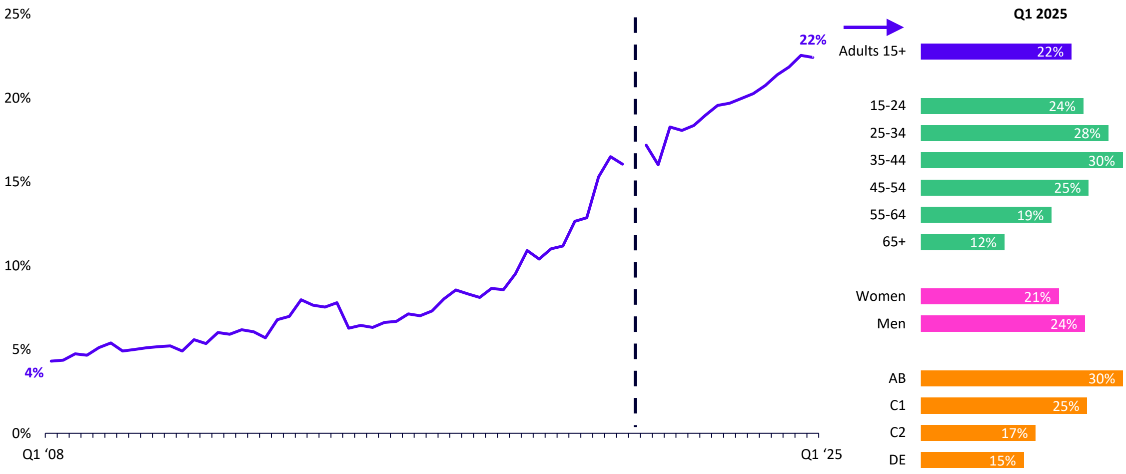
While awareness and use of Spotify DJ is higher than Daily Drive, a similar proportion of users said they were aware but had not used it, in both cases (22% vs 19%). This may be linked to expectations of such services and users' general attitudes to AI. To understand more about listeners' attitudes to the role of AI specifically in our audio listening experience, we asked those who were aware of such features what they thought about them. Could they replace traditional radio in the future? Views varied greatly: some people positively cited the levels of personalisation offered by these features as something that radio could not replicate, while others stressed that streaming and AI could not generate the same sense of community and feel of live radio.

Podcast listening

Reach of podcasts continues to grow, with over a fifth of adults now listening to at least one each week

Over a fifth of adults listen to podcasts each week, with reach higher among young people and those in AB socio-economic groups. Since RAJAR began tracking podcast listening, we have seen a slow increase in the proportion of people listening to them each week, from just 4% in 2008 to over a fifth of all adults (22%) at the start of 2025.

Figure 71: Weekly reach of podcasts over time and in selected demographic groups (Q1 2025)



Source: RAJAR. Average weekly reach of podcasts among adults aged 15+ each quarter on a 3-month weight. 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.

Those who do listen to podcasts each week are more likely to be younger (28% of 25-34s and 30% of 35-44s listen weekly), in AB socio-economic groups (30% reach) and live in the South-East of England (29% reach). People between the ages of 35 and 44 are the most likely to listen to podcasts, with 15-24s less likely to listen (24%) and those aged 65 and over the least likely of any group (12%). Reach drops to 17% and 15% for those in the C2 and DE socio-economic groups respectively, and about four in ten people (40%) never listen to podcasts.

Nearly a quarter (23%) of regular podcast listeners say their podcast listening has encouraged them to listen to the radio more, whereas just under three in ten (28%) say they listen to the radio less.[62] The activities most likely to be impacted by podcast listening are listening to personal music collections and reading newspapers, which 30% and 29% of regular listeners say they do less as a result of their podcast listening, as well as listening to music streaming services, which almost a third (31%) say they do more often.[63]

The average podcast listener listens to five episodes per week, with the most popular genres remaining entertainment, news and current affairs, comedy, discussion and talk shows

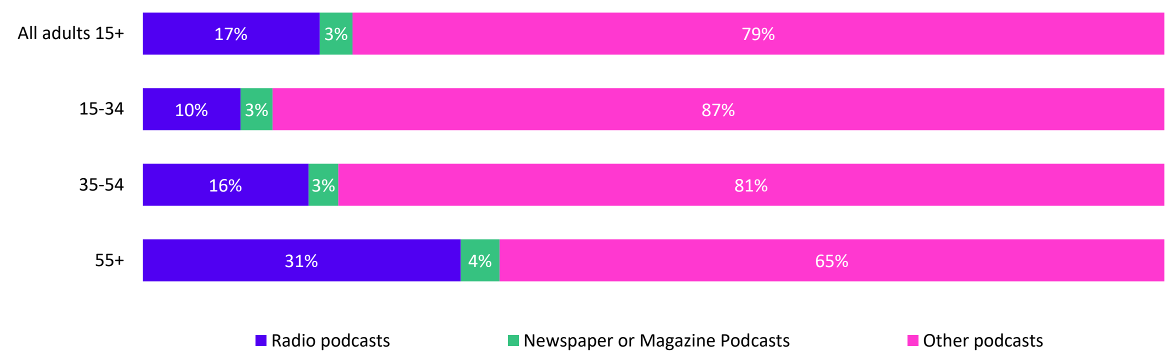
The average podcast listener follows or subscribes to six podcasts and listens to five episodes each week. Findings from Edison Podcast Metrics reveal that almost two-thirds of podcast listeners (64%) spend more than three hours each week listening to podcasts, with about one in six listening for ten hours or more (17%). Three in five (60%) podcast listeners also say that they spend more time listening to podcasts now than they did a year ago, and almost three-quarters (74%) say they've binge-listened to podcasts in the past.

Data from IPA TouchPoints shows that the majority of time spent listening to podcasts is to independent podcasts i.e. those not affiliated with radio stations, newspaper or magazines. Listeners

[62] Ofcom Podcast Survey 2025.
[63] Ibid.

aged over 54 are more likely than younger listeners to spend their time listening to radio podcasts, perhaps linked to the higher reach of live radio among older age groups.

Figure 72: Share of time spent listening to podcasts, by type: 2025



Source: IPA Touchpoints 2025 (wave 2 2024 & wave 1 2025).

Looking at the kinds of podcast people are listening to; entertainment, news and current affairs, comedy, discussion and talk shows remain the most popular, with each reaching 45-50% of regular podcast listeners each week.

News and current affairs podcasts remain the most popular type of podcast among those aged 55 and older, but have also taken the top spot among 35-54s, surpassing both entertainment and comedy podcasts. While news and current affairs, politics and discussion and talk shows remain the top three types of podcasts among the 55+ age group, their popularity has declined over the past year as other genres have increased their listenership, potentially suggesting this age group are listening to a wider range of podcasts. Politics podcasts remain popular in both the 35-54 and 55+ age groups, but this year also sees them enter the top ten genres for 18-34s, replacing true crime podcasts.

Figure 73: Top ten types of podcasts listened to at least weekly, by age group: 2025

	18-34		35-54		55+	
1	Entertainment	57%	News and current affairs	48%	News and current affairs	46%
2	Comedy	53%	Entertainment	45%	Politics	37%
3	Discussion and talk shows	50%	Comedy	45%	Discussion and talk shows	32%
4	News and current affairs	46%	Discussion and talk shows	45%	Entertainment	31%
5	Society and culture	44%	Politics	40%	Comedy	30%
6	Health and Wellbeing	42%	Health and Wellbeing	37%	Music	29%
7	TV and film	42%	Society and culture	35%	Football	22%
8	Politics	40%	Football	35%	Society and culture	21%
9	Football	40%	TV and film	33%	TV and film	20%
10	Hobbies	39%	Hobbies	32%	Health and Wellbeing	19%

Source: Ofcom Podcast Survey 2025. Base: all regular podcast listeners (1504) NET weekly figure. Percentages refers to percent of weekly podcast listeners in each age group.

The Edison Podcast Metrics UK Podcast Ranker places *The Joe Rogan Experience* as the show with the largest weekly audience in the UK over the past year, reaching one in ten (10.0%) weekly podcast listeners aged 15 and older. The second most popular podcast, *The Diary of a CEO*, in which British entrepreneur and investor Steven Bartlett interviews guests, reaches just half as many weekly podcast listeners (5.1%). The UK's largest independent podcast producer, Goalhanger, has three podcasts from its *'The Rest is'* series in the top ten: *The Rest is Politics* (5.1% weekly reach), *The Rest is History* (3.1%) and *The Rest is Football* (3.1%). *The Rest is Politics*, hosted by Alastair Campbell and Rory Stewart, takes the top spot among listeners aged 55 and older.[64]

[64] Edison Podcast Metrics UK Q2 2024 – Q1 2025.

The majority of listeners value podcasts for their convenience, wide ranging content and ease of discovery

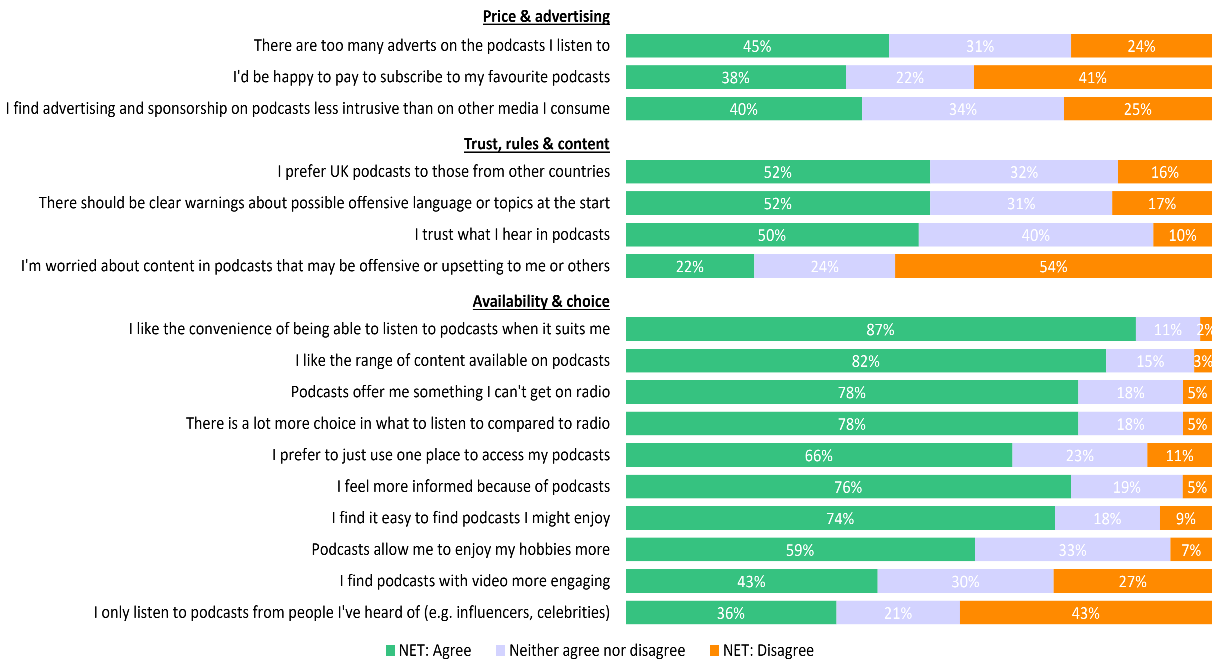
Our Podcast Survey shows that a majority of listeners value podcasts because of the convenience of being able to listen whenever it suits them (87% agree with this statement) and the range of content available (82% agree). More than three-quarters of listeners (78%) believe there is more choice in what to listen to, compared to radio, and that podcasts offer something they can't get on radio (78% agree with this). Related to this sense of greater choice and novelty, almost six in ten (59%) agree that podcasts allow them to enjoy their hobbies more.

When it comes to discovering podcasts, more than seven in ten podcast listeners (74%) say they find it easy to find podcasts they might enjoy. About a third of listeners hear about new podcasts from friends and family (34%) or social media (33%), but this jumps to 47% and 63% for listeners aged 18-34. Just over one in five (22%) say they find out about new podcasts from where they listen to them (e.g. Spotify, BBC Sounds, YouTube), with listeners under the age of 55 more likely than average to discover them in this way.

We see some tension between the findings that the majority of podcast listeners (76%) feel that they are more informed because of podcasts, while only half of listeners (50%) say that they trust what they hear. While around half of listeners (52%) say that there should be clear warnings about possibly offensive language or topics at the start of podcasts, less than a quarter (22%) are actually worried that the content may be offensive or upsetting to themselves or others.

We found mixed views around the amount of advertising on podcasts, with the majority of listeners (55%) saying they are comfortable with the amount of advertising on the podcasts they listen to, but more than four in ten (45%) saying there are too many adverts. Many podcasts also offer listeners a paid premium subscription, which might give them an ad-free version of the podcast, exclusive content or other perks. Our research shows that two in five podcast listeners (38%) would be happy to pay for a subscription to their favourite podcasts, although this willingness decreases with age.

Figure 74: Listener attitudes to podcasts



Source: Ofcom Podcast Survey 2025. Q23. How strongly would you say you agree or disagree with the following? Base: all regular podcast listeners (1504) NET weekly figure.

Smart speakers

Voice assistants such as Amazon's Alexa and Google Assistant are voice-controlled platforms through which people can access audio content, search for information and control connected devices and household systems such as lights and heating. Voice assistants can be accessed through a range of devices, including smartphones, tablets, smart TVs and in cars, as well as smart speakers. Smart speakers are dedicated audio hardware (such as the Amazon Echo or Google Nest) which people can interact with using their voice. Most smart speakers are only compatible with a single voice assistant, although some brands (such as SONOS) allow users to choose which voice assistant they would like to use with their smart speaker device.

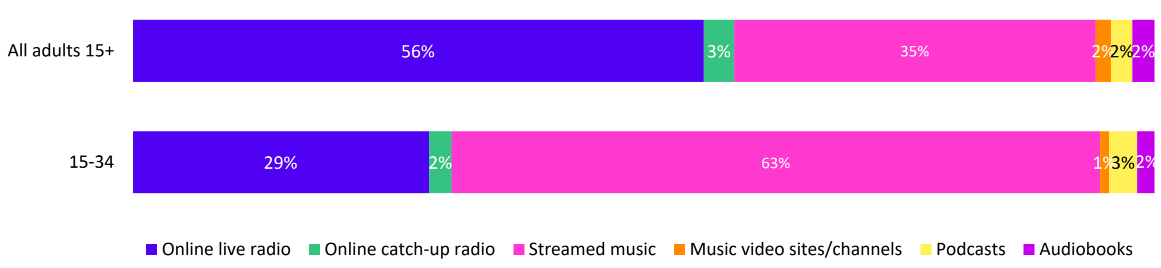
Four in ten UK households have a smart speaker, the vast majority of which have an Amazon Echo with Alexa

According to our latest Technology Tracker, four in ten households had a smart speaker in Q1 2025 (40%). The most popular brand by far was the Amazon Echo with the Alexa voice assistant: more than eight in ten smart speaker households had at least one of these (81%). This was more than five times higher than the next most popular brand, the Google Home / Google Nest, which was in 15% of smart speaker households. One in twenty households with smart speakers had a Sonos (5%) and 3% had an Apple HomePod.

People can use smart speakers for a range of activities, but listening to audio is by far the most popular. Most smart speaker owners reported using their device for music streaming (63%) and listening to the radio (58%); the next most common activities were searching for information online (43%) and getting weather reports and travel updates (40%), using as an alarm clock/reminder or for making shopping lists (38%). Just over a fifth said they used their smart speaker to get news reports (22%) and just under a fifth (19%) used it to control smart home devices such as smart TVs or lights.

Live radio accounts for the greatest share of listening on smart speakers, at just over half of the time spent listening each week (56%). Streamed music comes next, accounting for over a third (35%) of weekly listening hours. However, when we look at users aged 15-34 we see that this is flipped, with streaming music making up the largest proportion (63%) and online live radio coming in second (29%).

Figure 75: Share of listening on smart speakers, by audio type: 2025

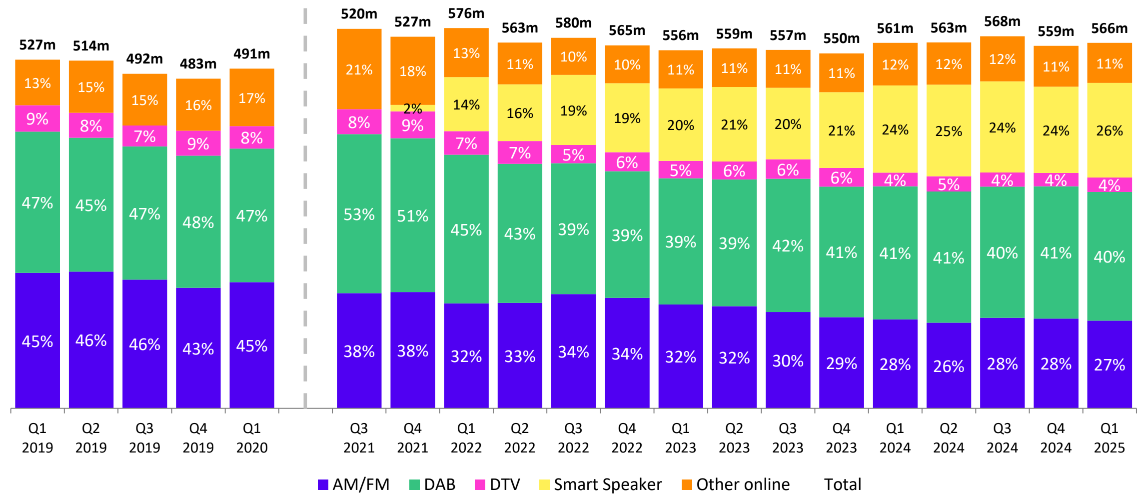


Source: IPA TouchPoints 2025 (wave 2 2024 & wave 1 2025).

Smart speakers account for over a quarter of at-home radio listening

The share of total radio listening accounted for by smart speakers has continued to increase steadily – albeit slowly – over time (see Figure 64). This increase is even more pronounced when looking specifically at at-home radio listening, with smart speaker's share in the home almost doubling in the past three years from 14% in Q1 2022 to 26% in Q1 2025.

Figure 76: Weekly at-home radio listening and share by platform over time: Q1 2019 – Q1 2025



Source: RAJAR. Dotted line indicates suspension of fieldwork during the Covid-19 lockdowns and change in methodology. Comparison with previous quarters should be made with caution.

The convenience of smart speaker listening isn't entirely without problems: almost three in five (58%) smart speaker users who use their device to listen to the radio said that their smart speaker had started playing the wrong thing in response to a request for a particular station or programme. This is a significant increase compared to last year, when there was a more equal split between those who said they had, and had not, experienced this (49% and 48%).[65]

In-car listening

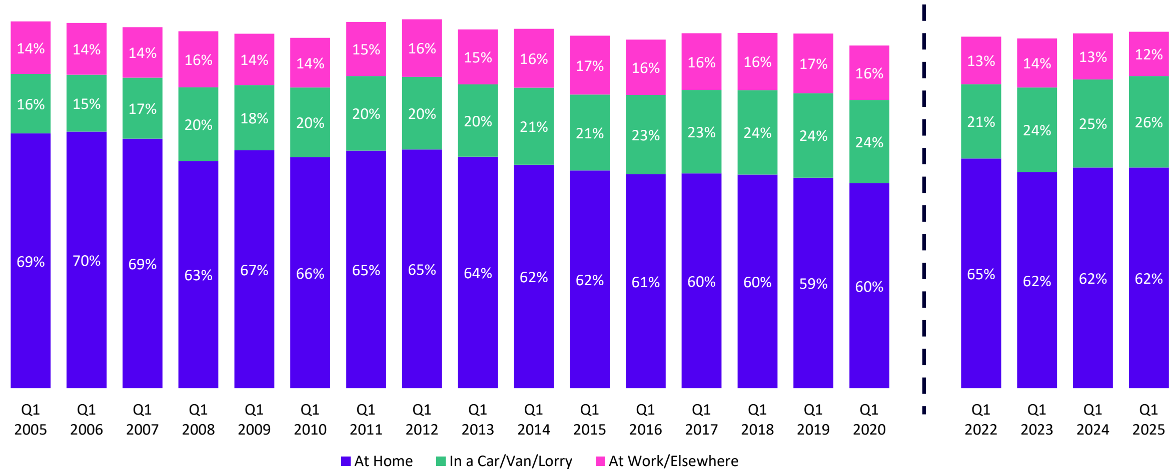
In-car listening is growing over time while at-home listening is declining

Radio listening in vehicles is important to both the radio industry and audiences. For increasing numbers of people, the car is the only place where they listen to the radio, up from 7.8 million adults a week in Q1 2020 (14%) to 11.5 million a week in Q1 2025 (20%).

The importance of in-car listening to the radio industry is exemplified by its steady, gradual growth. Just over a quarter of live radio listening took place in cars, vans and lorries in Q1 2025 (26%), up by 4pp in the last decade and now at its highest level in 20 years, while total listening has remained fairly flat. This growth of in-car listening – in both hours and share – is set against a decline in at-home listening: over the past 20 years, radio listening in cars has grown by 54% from 171 million in Q1 2005 to 263 million weekly hours in Q1 2025, while listening at home has decreased by 13% (from 733 million to 635 million) over the same period.

[65] Ofcom Audio Survey 2025.

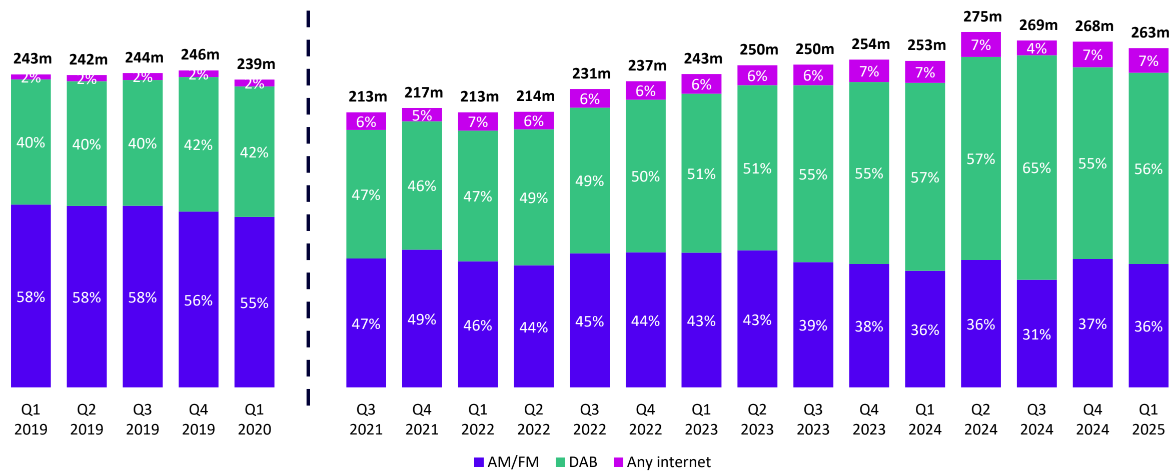
Figure 77: Average weekly radio listening, by location: Q1 2005 – Q1 2025



Source: RAJAR. 3-month weighting. 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 recorded as 'Not Stated' for each quarter rounds to 0% and labels have been removed from the chart.

The majority of this listening (56%) is via DAB, with in-car AM/FM listening stable year-on-year at 38%. However, access to the internet also enables listening to other forms of audio in cars. According to data from IPA TouchPoints, half of in-car audio listening time is still to live radio (51%), but 39% of in-car audio time is now spent listening to music streaming services.[66]

Figure 78: In-car radio listening and share, by platform: Q1 2019 – Q1 2025



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: '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%.

---

[66] IPA TouchPoints 2025 (wave 2 2024 & wave 1 2025).