UK

UK: key data 2025

Population (m)	69.6
TV households (m)	26.6
Consumer spending on total video (€m)	7,124.2
Comparison with 2024	15.6%
Consumer spending on digital video and TV VoD (€m)	6,953.8
Comparison with 2024	16.4%
Consumer spending on physical video software (€m)	170.4
Comparison with 2024	-10.4%

Consumer spending on total video (€m) - Total Europe	44,140.6
Comparison with 2024	10.9%
Consumer spending on digital video and TV VoD (€m) - Total Europe	43,421.1
Comparison with 2024	11.6%
Consumer spending on physical video software (€m) - Total Europe	719.5
Comparison with 2024	-21.0%
Exchange rate EUR/GBP	0.86

UK key commentary

2025 IVF United Kingdom

The total value of the UK media and entertainment industry rose to £34bn, an industry record, with Visual Entertainment remaining the top choice for audiences, ahead of gaming and music. This figure includes transactional and Pay TV Home Entertainment, Cinema, Games, and Music, with visual Home Entertainment consumer spend accounting for £5.7bn (+10% year-on-year) of that total. The value of the sector grew to an all-time high without the disruptions to production and distribution that have challenged the industry in recent years. (Source: OMDIA)

The UK and Ireland box office grew by 1% vs. 2024, reaching a post-pandemic high, with total revenue hitting £1.07bn (Source: Comscore), with strong conversion into buying and renting blockbuster films at home. The value of the UK transactional video market rose to £381mn in 2025, an increase of 5.2%, driven by fantastic stories and the growing popularity of early access premium Home Entertainment releases (Source: OMDIA).

Streaming services remained audiences' top choice for watching at home, with the number of OTT subscriptions growing another 2.8% to 54.5mn (Source: OMDIA) across 20.3mn (Source: BARB) UK households.

Physical disc sales continued to decline by 8.6% (Source: OMDIA); however, Blu-ray rose by 3% in value, driven by an incredibly successful year for the 4K format, which grew 19.5% YoY as collectors were eager to fill their shelves with limited editions and high-value SteelBooks (Source: Official Charts Company).

Transactional

Digital transactional formats continued to expand in line with savvy consumer understanding of availability; electronic-sell-through (EST) grew 3.7% in value, and digital rentals increased by 7.7%. (Source: OMDIA)

Digital transactional formats are forecast to grow 3.6% YoY in value in 2026, driven particularly by value growth in EST movies, which are expected to grow another 7% YoY in value and now account for more than 53% of overall spend on transactional formats (Source: Futuresource Consulting).

WICKED, filmed entirely in the UK, soared to the top of the sales charts in 2025, selling and renting 1.4mn units with a value of £17.7m across UK Home Entertainment. This figure includes all sales and rentals of the film across digital and disc (EST, VOD, Blu-ray and DVD) (Source: Official Charts Company). WICKED grossed £61.2mn at the UK box office in 2024, while WICKED: FOR GOOD totalled £47.2mn at the box office across 2025 and early 2026, before its Home Entertainment release on 2 January 2026 (Source: BFI).

GLADIATOR II, released 25 years after the Russell Crowe original, fought its way to the number two spot in the Official Video Chart 2025, generating a value of £7.1mn across individual sales and rentals (Source: Official Charts Company).

BAFTA Best British Film of 2025, CONCLAVE, proved the popularity of independent films and original stories with audiences, achieving the most rentals across the year and a value of £4mn (Source: Official Charts Company).

Seventy-nine ‘Premium’ titles were released fresh from cinema at a higher initial price on both Premium Electronic Sell-Through (PEST) and Premium Video on Demand (PVoD), up from 62 titles in 2024 (Source: BASE). This drove value growth for the sector and reinforced the importance of transactional as a vital value bridge between the theatrical and streaming models.

Physical formats remained resilient and the preferred choice for many consumers. Blu-ray value was up 3.2% YoY, led by SUPERMAN (2025), which was the number one title on the Official Blu-ray Chart. The value of the 4K Blu-ray market grew 19.5% YoY as collectors swooped on limited editions and high-value SteelBooks. Only 10% of all 4K Blu-ray titles had a SteelBook edition, but SteelBook sales accounted for 18% of total 4K Blu-ray revenue, with an average consumer retail price of £32 per unit. (Source: Official Charts Company)

Subscription

Streaming dominated consumption, with 20.3mn UK households subscribed to at least one streaming service, an increase of nearly half a million YoY (Source: BARB). Although growth has slowed, consumers continue to increase their number of subscriptions, with the total number held across all UK households now standing at 54.5mn, an increase of 2.8% YoY, generating £5.6bn in consumer revenue, an increase of a staggering 19% (Source: OMDIA).

Ad-supported streaming models accelerated adoption worldwide and are here to stay. The UK alone reached 23mn ad-supported subscriptions by Q3 2025, with 53% of all SVoD subscriptions being ad-supported (Source: Ampere Analysis).

One third of new UK SVoD subscriptions are now ‘bundled’, taken through partner platforms including traditional Pay TV, broadband and mobile network providers, and online channel platforms such as Amazon Channels, Apple Channels and YouTube Primetime Channels (Source: OMDIA). The launch of HBO Max in the UK in 2026 is predicted to drive further change in the market.

The Future

The UK box office is forecast to reach £1.2bn by the end of 2026, a rise of 10% year-on-year (Source: Gower Street Analytics).

The UK and Ireland box office was tracking 16% ahead of 2025 year-to-date in May 2026. At the end of April, that rise was only 7% for the first four months of the year, but the success of releases such as MICHAEL and THE DEVIL WEARS PRADA 2 lifted those numbers, providing optimism for the rest of the year as major releases including TOY STORY 5, THE ODYSSEY and SPIDER-MAN: BRAND NEW DAY are set to hit the big screen (Source: Comscore).

Transactional Home Entertainment is heavily dependent on cinema performance and, although sporting events such as the FIFA World Cup and record-breaking heatwaves are impacting the market, cinema performance provides optimism that theatrical success will convert into Home Entertainment.

The industry remains committed not only to growing and supporting engagement with new release titles on transactional formats, but also to continuing to foster catalogue titles, for example through category-wide monthly initiatives such as Mega Movie Weekend, which has been an ongoing success.

The UK over-the-top (OTT) video market will continue to dominate and is projected to reach £9bn by 2029, with ad-tier streaming and FAST models expanding aggressively to claim a 35% share of total revenue. (Source: PwC). Globally, FAST revenues are forecast to reach $11bn by 2030, up from $6bn in 2025 (Source: OMDIA).

Piracy

Unofficial content consumption dropped to 30% in 2025, a 4% decrease from 2024, while the volume and frequency of paid content consumption continued to trend upwards.

Seventy per cent of infringers now discover pirated content via social media, with the most popular platforms being YouTube, TikTok and Facebook. A third of infringers pay for unofficial content, steady YoY, but the average amount spent per person annually has risen by £11 to £74, highlighting the importance of industry initiatives to keep this at bay and promote official methods of consuming content (Source: The Industry Trust for IP Awareness).

In collaboration with its members and partners, the Industry Trust for IP Awareness continues to educate consumers on the importance of watching films on the big screen through its long-standing 'Moments Worth Paying For' campaign. Additionally, the Trust raises awareness of the risks linked to piracy through its well-established Digital Disruption campaign, which targets the substantial number of piracy journeys that begin with internet searches.

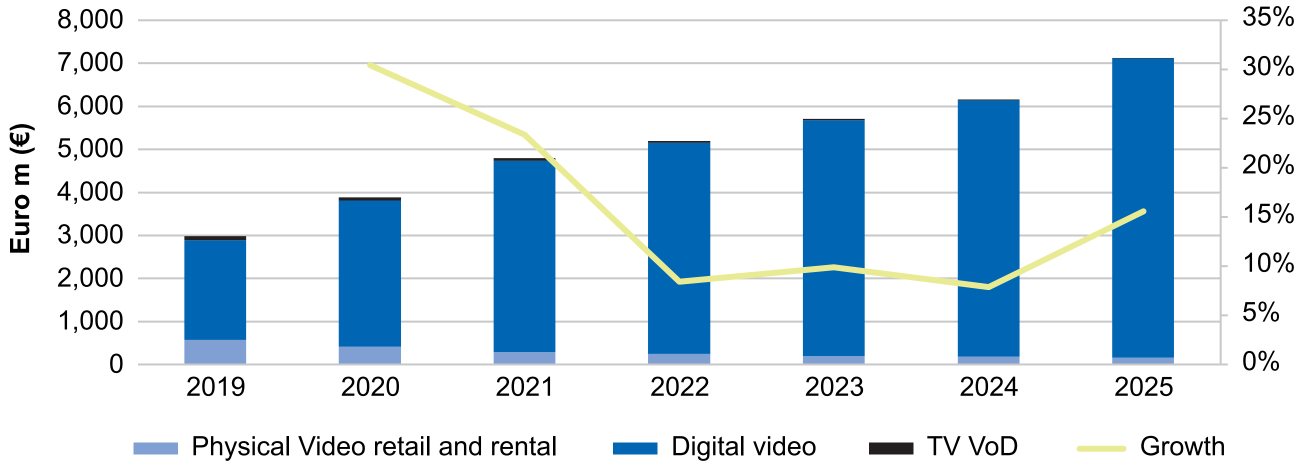
This commentary was provided by BASE, the British Association for Screen Entertainment.

Video market: UK

	2019	2020	2021	2022	2023	2024	2025	24/25
GENERAL								
Population (m)	67.1	67.4	67.7	68.2	68.7	69.1	69.6	0.6%
TV households (m)	26.0	26.0	26.1	26.1	26.2	26.4	26.6	0.6%
Population Total Europe (m)	638.1	638.8	638.7	640.6	642.5	642.2	640.9	-0.2%
TV households Total Europe (m)	258.5	259.6	259.4	260.4	262.9	264.1	264.5	0.2%
Broadband households (m)	22.2	22.6	23.3	23.8	24.4	25.1	25.4	1.5%
Nominal GDP (EUR m)	2,529.2	2,372.2	2,441.7	2,631.1	2,761.7	2,899.7	3,070.1	5.9%
Consumer price index (100 in 2010)	90.0	90.9	97.3	101.1	104.2	107.5	110.7	3.0%
Exchange rate EUR/GBP (GBP)	0.88	0.89	0.86	0.85	*0.87*	0.85	0.86	1.2%
DVD Video player/recorder penetration (%)	52.9	47.3	42.2	37.8	33.9	30.3	27.6	-8.9%
Blu-ray Disc player/recorders penetration (%)	22.5	21.6	20.7	19.9	19.2	18.7	18.1	-2.9%
DVD Video player/recorder Total Europe (%)	60.9	58.7	56.8	54.8	52.6	50.9	48.8	-4.1%
Blu-ray Disc player/recorders penetration Total Europe (%)	22.3	21.6	21.0	20.2	19.4	18.7	18.2	-3.1%
OTT Subscriptions (m)	24.3	39.0	45.4	52.2	53.4	53.0	54.5	2.8%

Consumer spending by segment

Video market: UK



Total video software market

	2019	2020	2021	2022	2023	2024	2025	24/25
CONSUMER LEVEL ALL VIDEO								
Total market figures include consumption of both physical and digital video								
Total spending on video (GBP m)	2,613.5	3,462.6	4,121.1	4,441.4	4,969.5	5,221.3	6,110.9	17.0%
Total spending on video (EUR m)	2,979.5	3,886.2	4,793.7	5,198.2	5,712.5	6,163.0	7,124.2	15.6%
Growth (%)		30.4%	23.4%	8.4%	9.9%	7.9%	15.6%	
Total spending on video Total Europe (EUR m)	18,853.0	23,414.9	27,741.7	30,349.1	34,724.6	39,808.0	44,140.6	10.9%
CONSUMER LEVEL DIGITAL VIDEO (OTT) – TOTAL SPENDING								
The purchase or rental of films and TV series delivered over the open internet. Digital retail numbers include purchase on content on pay TV set-top-boxes where applicable. This category specifically excludes sports, live events and adult content to ensure it is comparable to physical video data.								
Retail digital video (GBP m)	257.8	282.4	214.0	235.9	252.9	247.4	256.6	3.7%
Retail digital video (EUR m)	293.9	316.9	248.9	276.1	290.7	292.0	299.2	2.5%
Rental digital video (GBP m)	72.5	164.4	168.0	101.0	111.7	115.5	124.3	7.7%
Rental digital video (EUR m)	82.7	184.5	195.5	118.2	128.4	136.3	144.9	6.4%
Subscription digital video (GBP m)	1,707.9	2,576.9	3,439.0	3,848.4	4,400.2	4,678.6	5,571.5	19.1%
Subscription digital video (EUR m)	1,947.1	2,892.2	4,000.3	4,504.1	5,058.0	5,522.4	6,495.3	17.6%
Total digital video (GBP m)	2,038.3	3,023.7	3,821.0	4,185.3	4,764.8	5,041.5	5,952.4	18.1%
Total digital video (EUR m)	2,323.7	3,393.6	4,444.7	4,898.5	5,477.2	5,950.8	6,939.5	16.6%
Total digital video Total Europe (EUR m)	10,175.6	14,909.5	19,222.1	22,207.7	25,569.0	29,782.9	35,048.7	17.7%
CONSUMER LEVEL PAY TV TRANSACTIONAL VOD – TOTAL SPENDING								
The rental of film and TV content on a transactional (VoD, NVoD/PPV) basis via cable/satellite/IPTV services, only on set-top-boxes. This category specifically excludes sports, live events and adult content to ensure it is comparable to physical video data.								
Pay TV TVOD (GBP m)	74.6	67.0	51.7	38.7	28.7	18.7	12.2	-34.5%
Pay TV TVOD (EUR m)	85.1	75.2	60.2	45.3	33.0	22.1	14.3	-35.3%
Pay TV TVOD Total Europe (EUR m)	6,345.9	6,722.3	7,155.8	6,975.4	8,137.7	9,114.4	8,372.4	-8.1%
CONSUMER LEVEL PHYSICAL VIDEO – TOTAL SPENDING								
Total market figures include consumption of legacy formats not broken out separately (eg, VHS, HD-DVD, UMD) where relevant.								
Physical video rental (GBP m)	23.4	16.2	12.1	8.4	6.3	4.8	3.4	-28.8%
Physical video rental (EUR m)	26.7	18.2	14.1	9.8	7.2	5.7	4.0	-29.7%
Physical video rental Total Europe (EUR m)	109.5	66.9	43.3	30.1	21.8	16.2	11.6	-28.6%
Physical video retail (GBP m)	477.1	355.7	236.2	209.0	169.7	156.3	142.8	-8.6%
Physical video retail (EUR m)	544.0	399.2	274.8	244.6	195.1	184.5	166.5	-9.8%
Physical video retail Total Europe (EUR m)	2,222.0	1,716.2	1,320.5	1,135.9	996.1	894.4	707.9	-20.8%
Physical video software (GBP m)	500.6	371.9	248.3	217.3	176.0	161.1	146.2	-9.2%
Physical video software (EUR m)	570.7	417.4	288.9	254.4	202.3	190.1	170.4	-10.4%
Physical video software Total Europe (EUR m)	2,331.5	1,783.1	1,363.8	1,166.0	1,017.9	910.6	719.5	-21.0%

*Notes: **1)** Consumer level digital video (OTT) and pay TV transactional VOD figures may differ from locally published figures due to the application of different definitions. **2)** Historical numbers in this section may differ from those published in previous years owing to changes in Omdia methodology, updated data sources and other data restatements. **3)** The current online figures are a snapshot of the market in June 2026. Figures are updated regularly and so it may not possible to compare directly to figures published after this date. **4)** Total Europe include Austria, Belgium, Denmark, Finland, France, Germany, Greece, Iceland, Ireland, Italy, Netherlands, Norway, Portugal, Spain, Sweden, Switzerland, UK, Croatia, Czech Republic, Hungary, Poland, Russia, and Slovakia. **5)** OTT Subscriptions are subscriptions to online channels and virtual pay TV operators. Figures exclude multiscreen services of pay TV operators.*

Source: Omdia

Key players in the market (in alphabetical order)

Physical	Digital (Retail/Rental)		Digital (Subscription)	
Amazon	Apple TV	Virgin Media Store	Acorn TV	HBO Max
Asda	Chili	Youtube Store	Amazon Prime Video	ITVX Premium
Ebay.com	EE TV Store		Apple TV+	MUBI
HMV	Microsoft Movies & TV		BFI Player	Netflix
Morrisons	Prime Video Store		Channel 4+	NOW
Tesco	Rakuten TV		Discovery+	Paramount+
Zavvi	Sky Store		Disney+	

Share of European market 2025

Digital video (OTT)
19.8%

Pay TV TVOD
0.2%

Physical retail
34.5%

Physical rental
23.5%

Average home entertainment spending

Spending per TV household (EURO)
€268.1

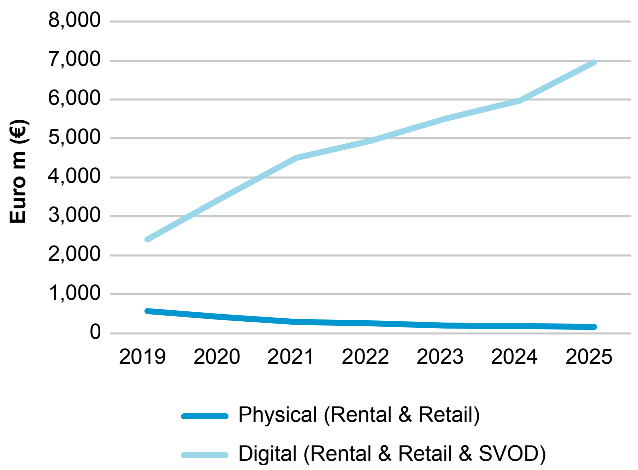
Spending per broadband household (EURO)
€280.2

Digital share of spend vs. broadband speed

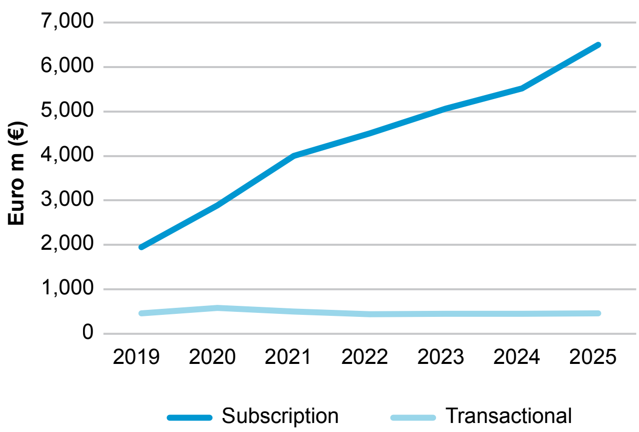
Share digital spend
97%

Broadband subscriptions speed rank
(ranked across the 9 IVF countries)*
#2

Comparison Physical vs Digital



Comparison Subscription vs Transactional



Note: Digital (Rental & Retail) includes SVOD data; Transactional excludes physical.
*Countries are ranked based on the proportion of broadband subscriptions receiving fixed data at speed over 30Mbps.

Source: Omdia