UK advertising: moving beyond broadcast

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About Ofcom

Ofcom: making communications work for everyone in the UK

Media we trust and value
A wide range of high quality media and protection for audiences across the UK

We live a safer life online
Platforms are incentivised to reduce harms and make consumers safer

Enabling wireless services in the wider economy
Ensuring efficient use of spectrum and supporting growth across the economy

Internet we can rely on
Fast and reliable connections and services for everyone, everywhere

Our principal duty is to further citizen and consumer interests

The Media Act implementation and PSM review were a key focus in 2025

Media we trust and value

This priority is about ensuring audiences across the UK can continue to access a variety of broadcast and on-demand media and are protected against harmful content. As people increasingly move online for entertainment and information, it is particularly important that they are able to access trusted, duly accurate and duly impartial broadcast news.

- Audiences can find and access a wide range of content, including PSM content which is produced across the UK and reflects its diversity.
- Audiences can find and access a plurality of news that is duly accurate, duly impartial and trusted.
- Media providers compete fairly and openly for audiences.
- Audiences are protected from harm, and freedom of expression is safeguarded.

Media Act Implementation

The Media Act is designed to protect public service broadcasting while fostering innovation, so that UK audiences can enjoy the services, video and programming they love. We are committed to implementing these new rules as set out our roadmap, as quickly as possible in a way that is fair, proportionate and effective.

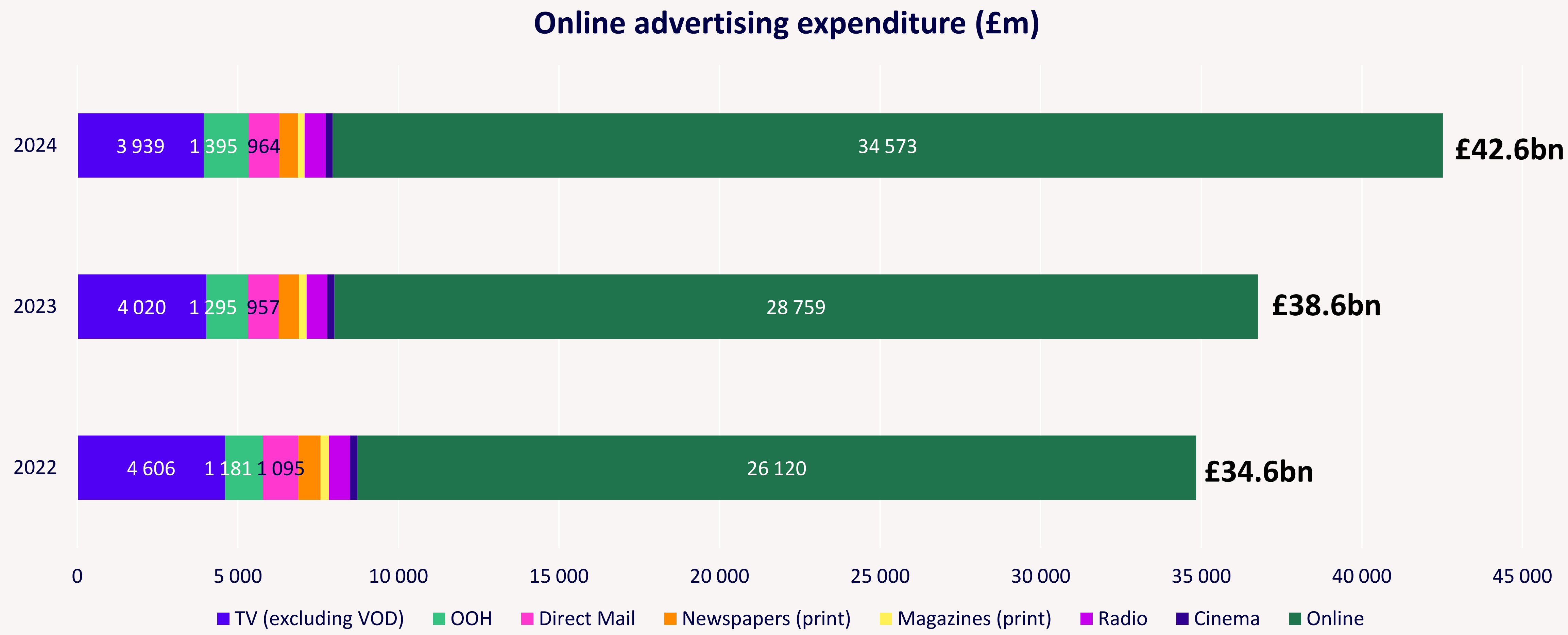
Public Service Media Review

Published: 21 July 2025

The UK media landscape is undergoing rapid transformation. Traditional broadcasters are in a fierce battle for audience attention, while global tech giants flood the market with an ever-growing range of content.

Advertising in the UK

Advertising is a £42.6bn market in the UK and online is the largest medium



Source: AA/Warc Expenditure Report

Traditional media is more sensitive to economic cyclicalities and 2025 has been challenging

UK advertising expenditure

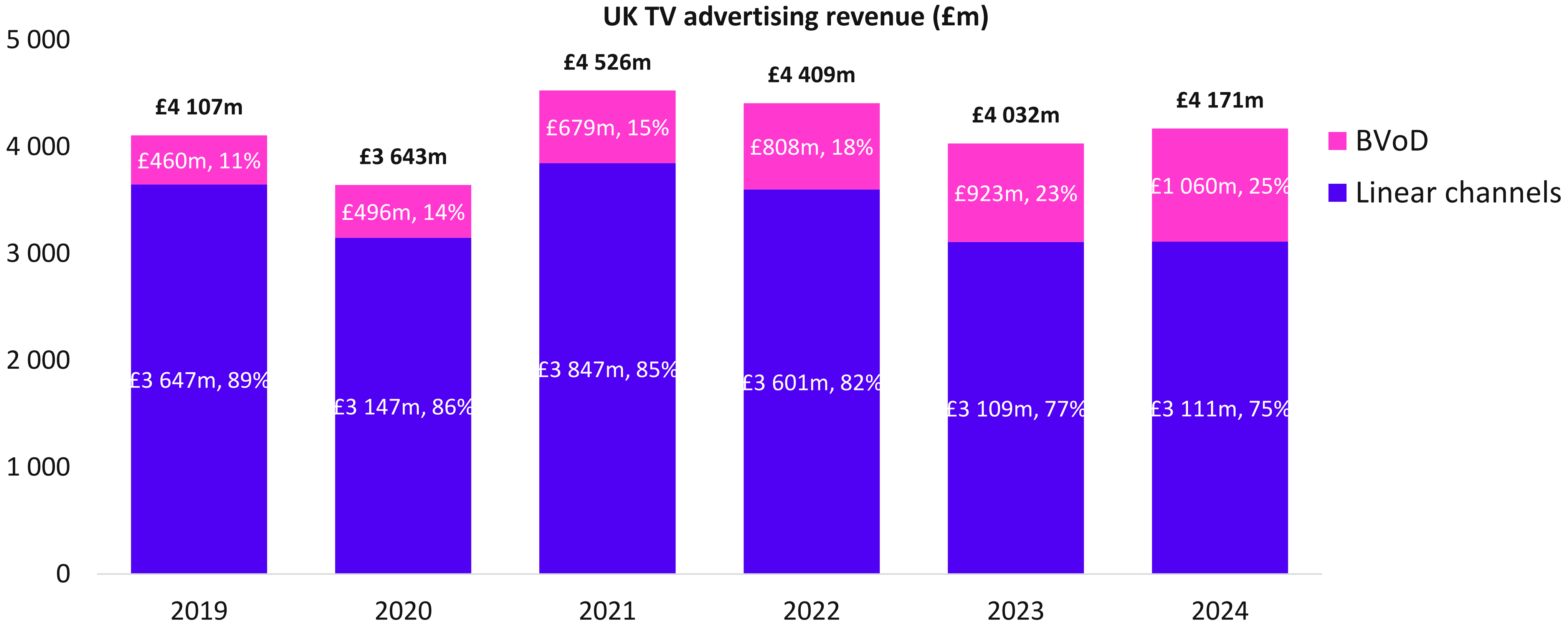
	Q2 2025		H1 2025		2025 (f)			2026 (f)	
	Adspend	% change	Adspend	% change	Adspend	% change	Latest vs. last	Adspend	% change
Search	4,864.2	14.3%	9,485.7	14.0%	19,862.1	12.6%	+3.2pp	21,695.1	9.2%
Online display	4,363.4	12.1%	8,365.1	11.2%	17,642.4	10.7%	+1.5pp	18,816.5	6.7%
TV	1,233.8	-4.1%	2,519.3	-2.5%	5,126.8	-2.7%	-1.8pp	5,424.9	5.8%
of which VOD	373.2	23.2%	745.2	15.5%	1,558.1	16.9%	+6.8pp	1,817.3	16.6%
Out of home	350.5	-1.2%	644.9	-0.2%	1,412.8	1.3%	-1.8pp	1,470.6	4.1%
of which digital	233.3	-0.7%	425.2	0.3%	946.2	2.1%	-1.6pp	996.2	5.3%
Online classified	235.9	-2.4%	454.3	-5.3%	980.2	-3.6%	+1.1pp	964.3	-1.6%
Direct mail	233.5	4.8%	471.7	4.2%	972.5	0.9%	+2.5pp	955.0	-1.8%
Radio	170.7	-0.3%	358.4	0.0%	738.5	0.2%	-1.0pp	755.9	2.4%
of which digital	20.4	11.2%	42.7	13.9%	87.5	12.3%	+0.1pp	93.1	6.3%
National newsbrands	167.9	-4.6%	331.0	-6.4%	693.2	-4.7%	+0.3pp	683.7	-1.4%
of which digital	82.0	-1.6%	159.8	-3.0%	342.7	-1.2%	+0.5pp	344.4	0.5%
Magazine brands	142.8	-2.4%	233.1	-5.9%	445.4	-5.1%	+1.7pp	433.1	-2.8%
of which digital	96.2	4.4%	138.1	-1.9%	255.9	-1.2%	+5.2pp	251.5	-1.7%
Regional newsbrands	107.2	-7.8%	207.0	-7.3%	414.1	-5.5%	-1.1pp	413.0	-0.3%
of which digital	64.0	-2.3%	118.1	-0.1%	247.3	-0.4%	-1.2pp	253.0	2.3%
Cinema	48.3	19.7%	97.8	19.5%	237.5	11.9%	+2.9pp	241.1	1.5%
TOTAL UK ADSPEND	11,282.5	9.1%	21,964.3	8.9%	46,034.0	8.2%	+1.4pp	49,093.8	6.6%

Note: % change is year-on-year, latest vs. last is change in forecast from last projection. VOD, digital revenues for newsbrands, magazine brands, and radio station websites are also included in the online display and online classified totals, so care should be taken to avoid double counting. **From H1 2025**, IAB UK is partnering with Oliver Wyman to deliver its Digital Adspend report. This new collaboration introduces an updated methodology, with all reported data beginning from H1 2025. As a result of this methodological change, it is not possible to reconcile this new data with previous editions. Care should therefore be taken when making year-on-year comparisons

Source: AA/WARC Expenditure Report

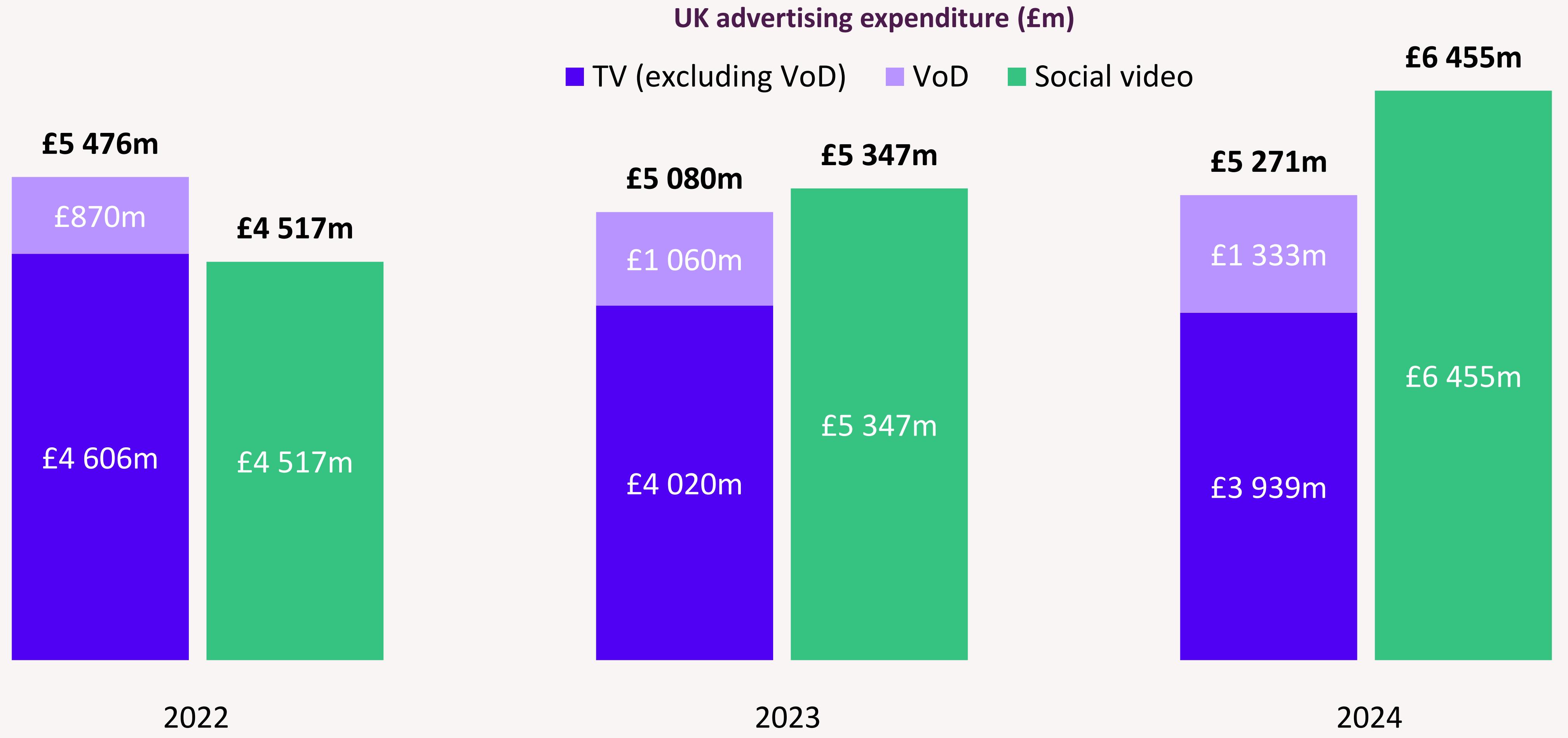
TV and audiovisual advertising

Advertising is key to broadcaster monetisation and BVoD is just a quarter of TV advertising market



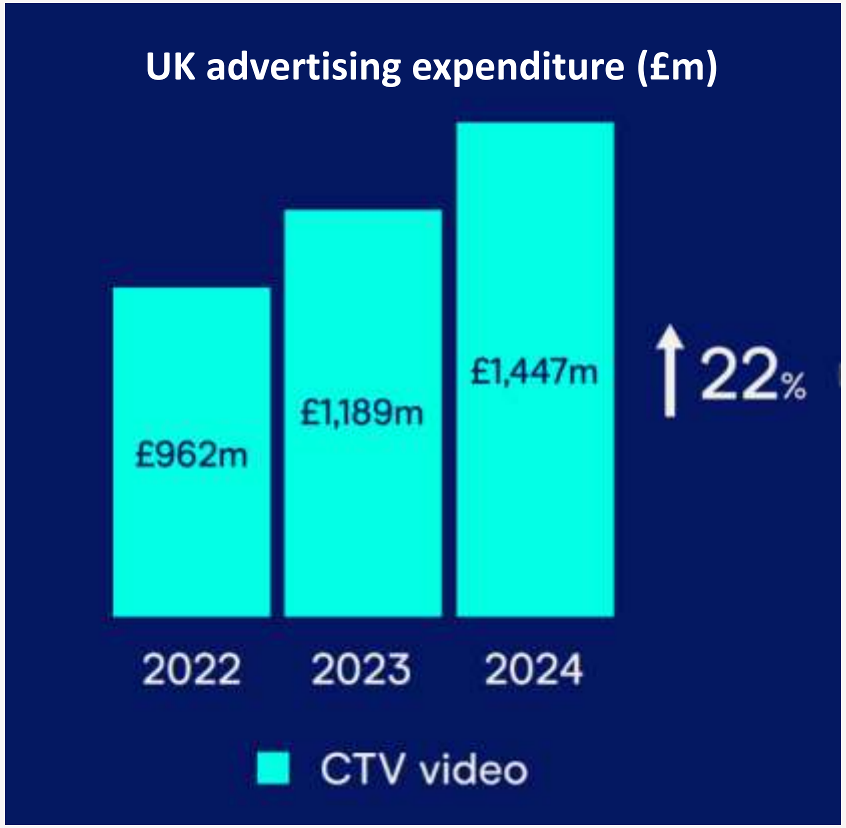
Source: Ofcom/broadcasters

Social video surpassed TV in 2023 and continues to grow at a faster rate than TV

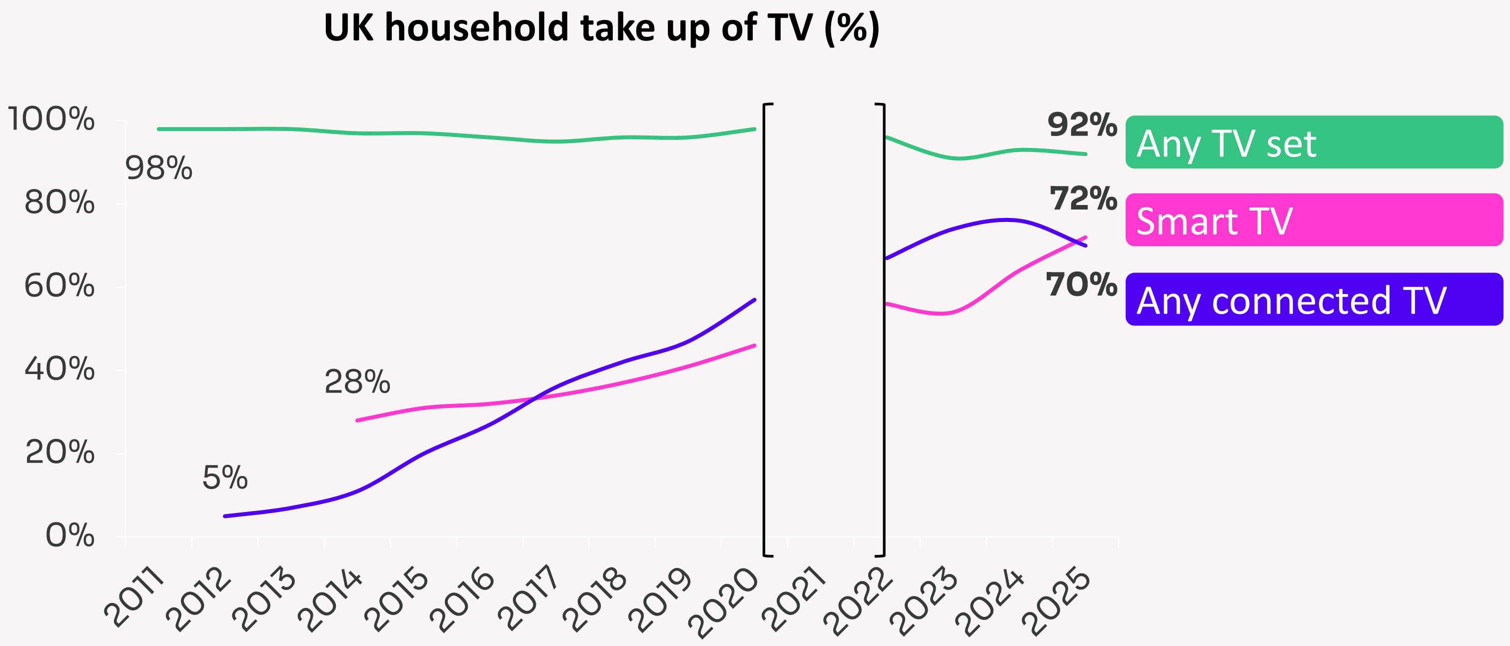


Source: AA/WARC Expenditure Report; IAB UK PwC Digital Adspend Study 2024. Figures are presented in nominal terms.

According to some estimates, CTV is growing and may challenge broadcaster budgets in near future



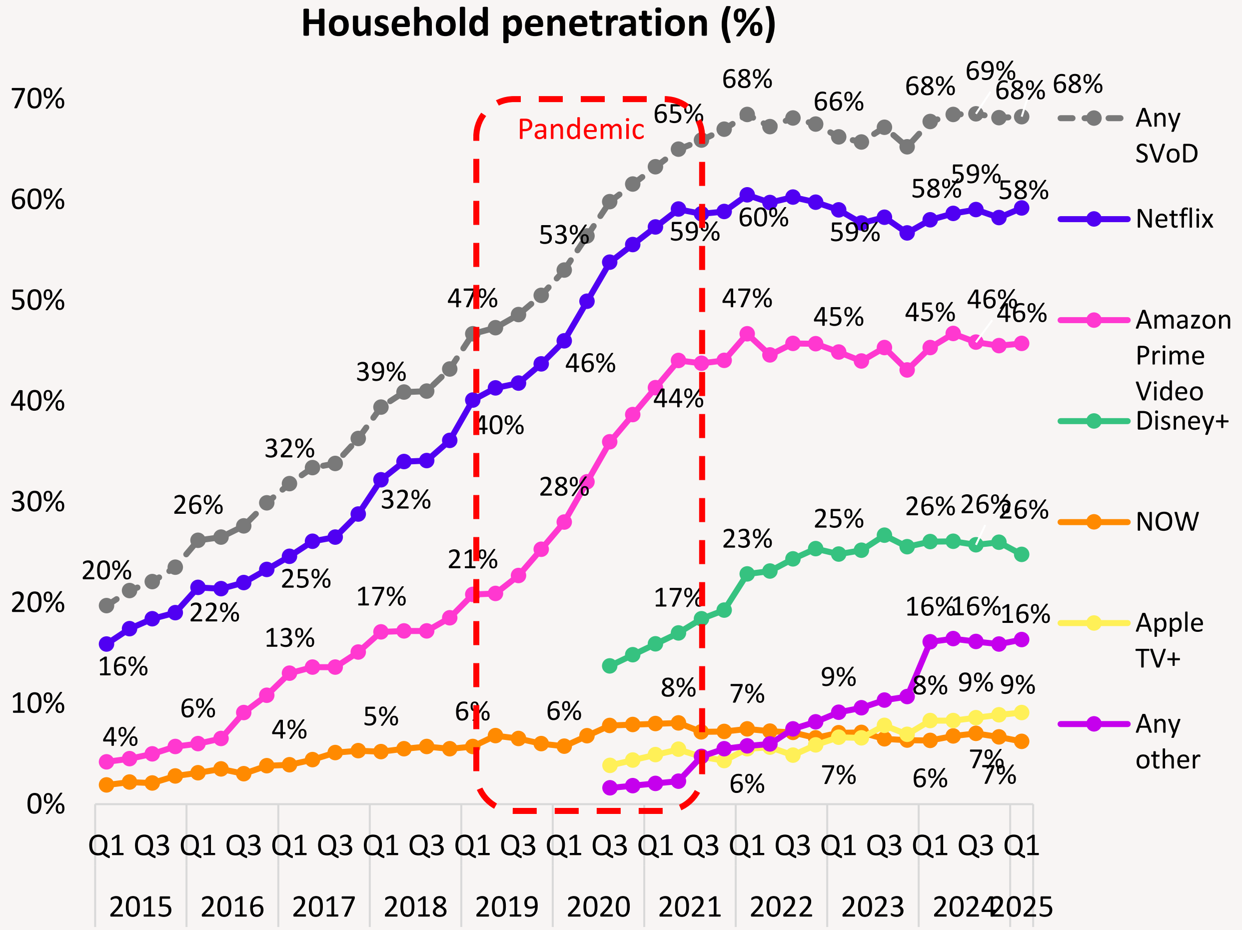
Source: IAB UK PwC Digital Adspend Study 2024. Figures are presented in nominal terms.



Source: Ofcom Technology Tracker 2025

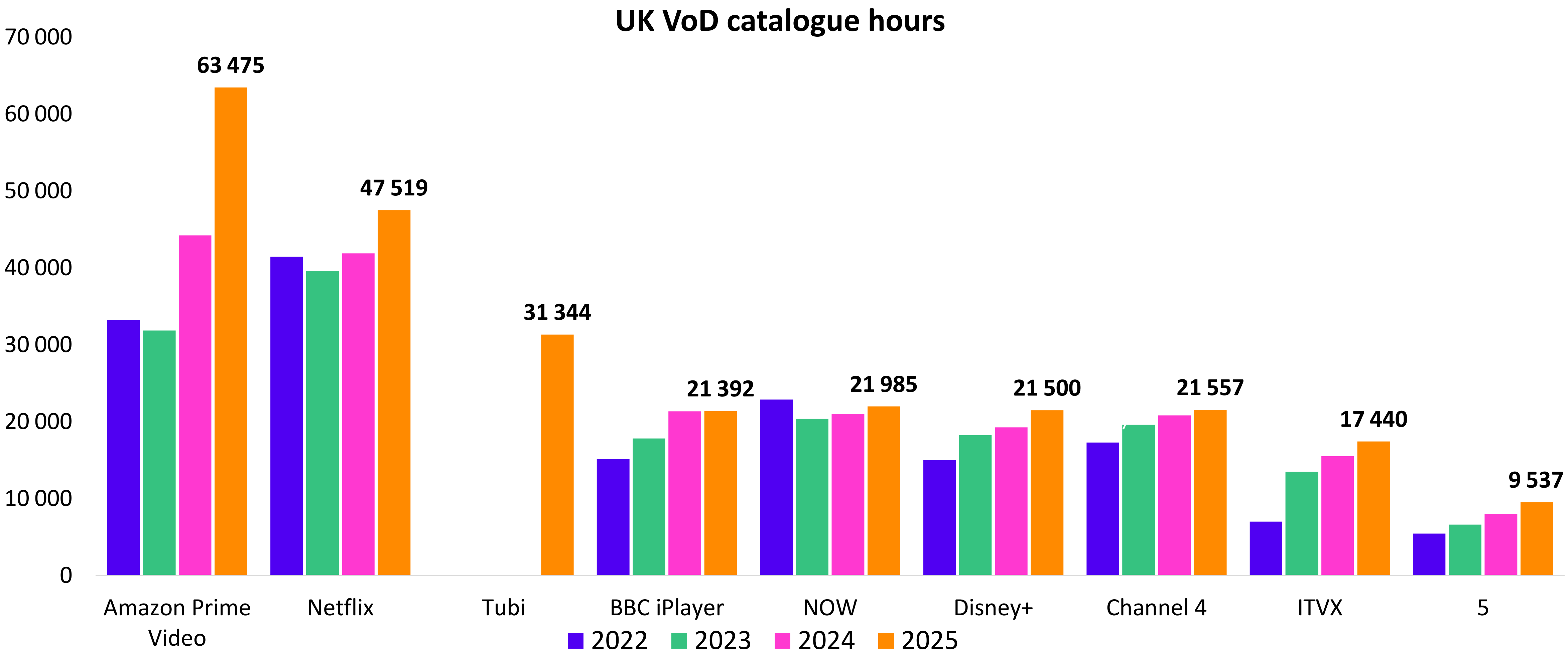
SVoD advertising

Lockdown-fuelled subscription growth accelerated SVoD ad-tier rollout



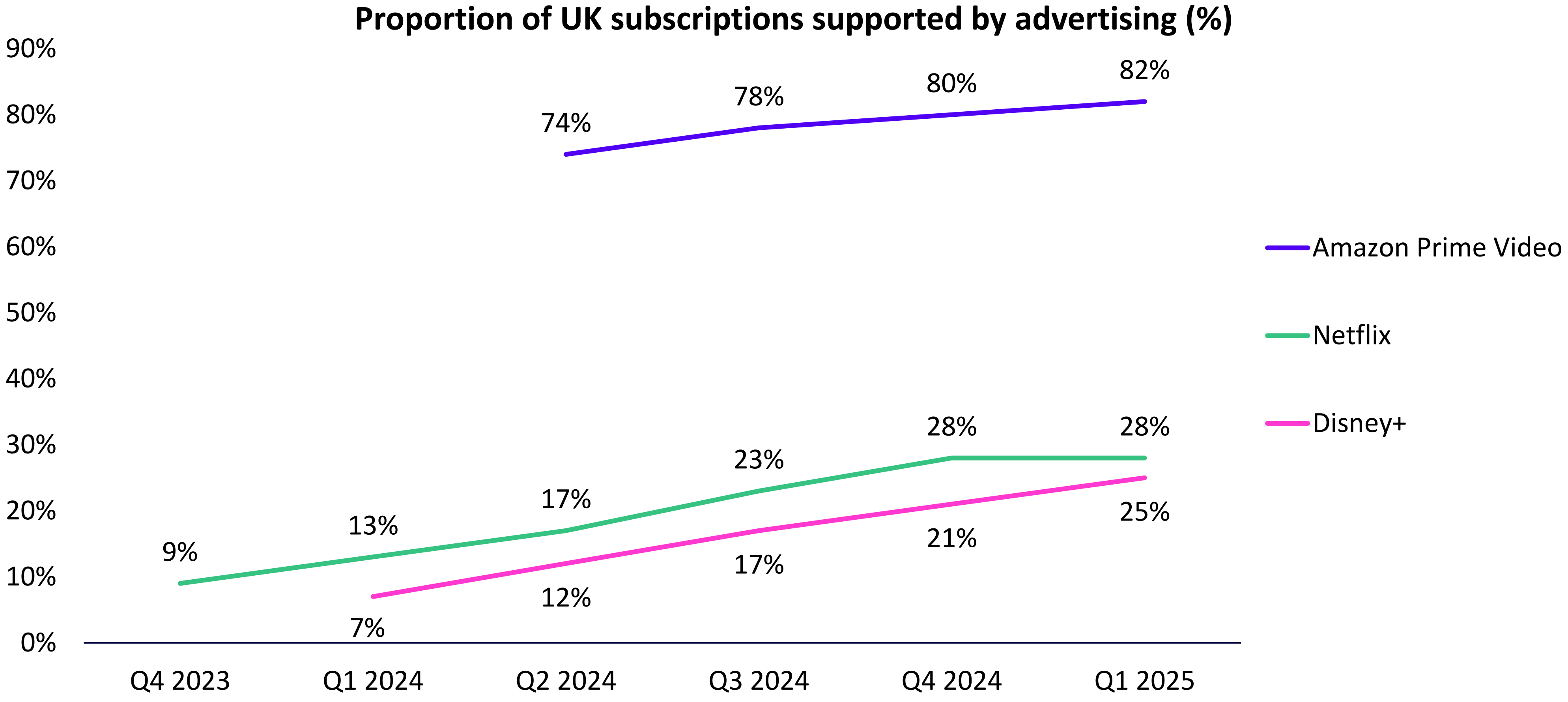
Source: Barb Establishment Survey

VoD catalogues are getting bigger



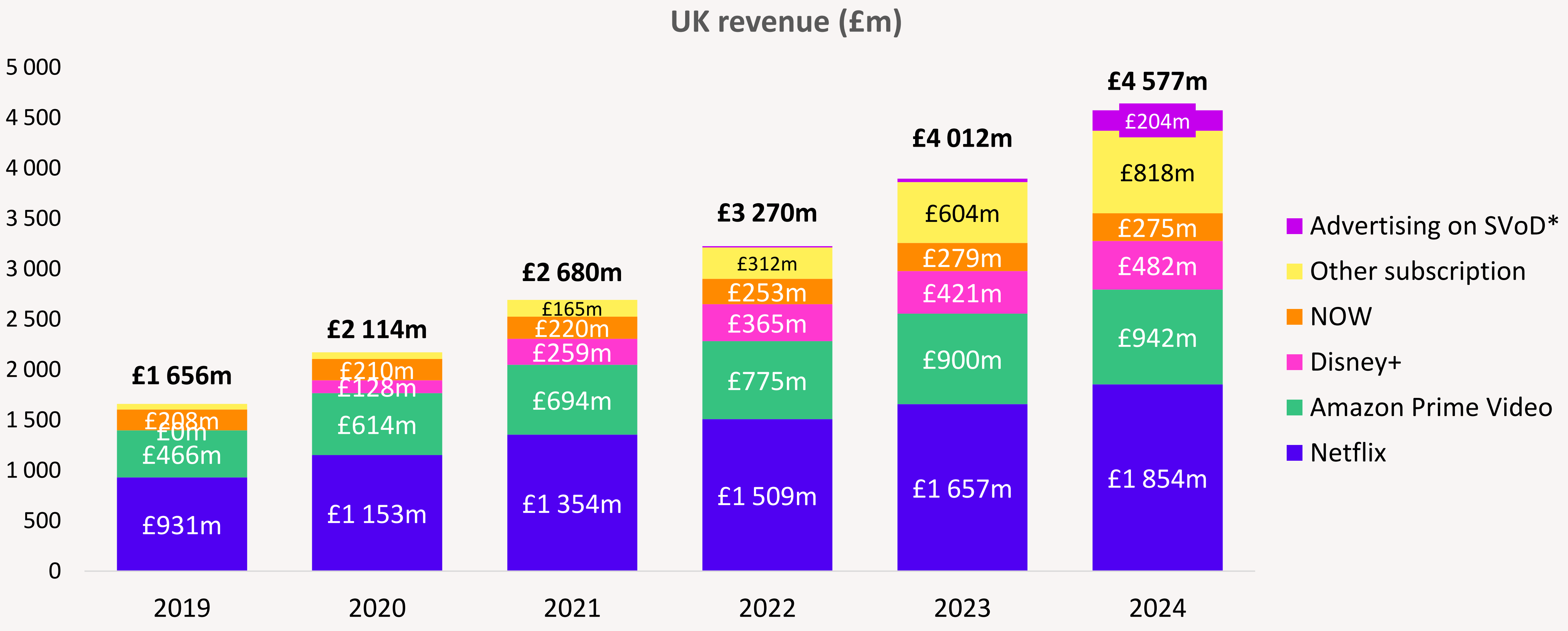
Source: Ampere Analysis – Analytics (May-2022 – May-2025). ITVX catalogue hours are free-to-view only.

Ad-tiers are growing fast in the UK



Source: Barb Establishment Survey, household weight, proportion of paid subscriptions using respective ad-supported subscription tiers

But advertising remains a small proportion of SVoD revenue

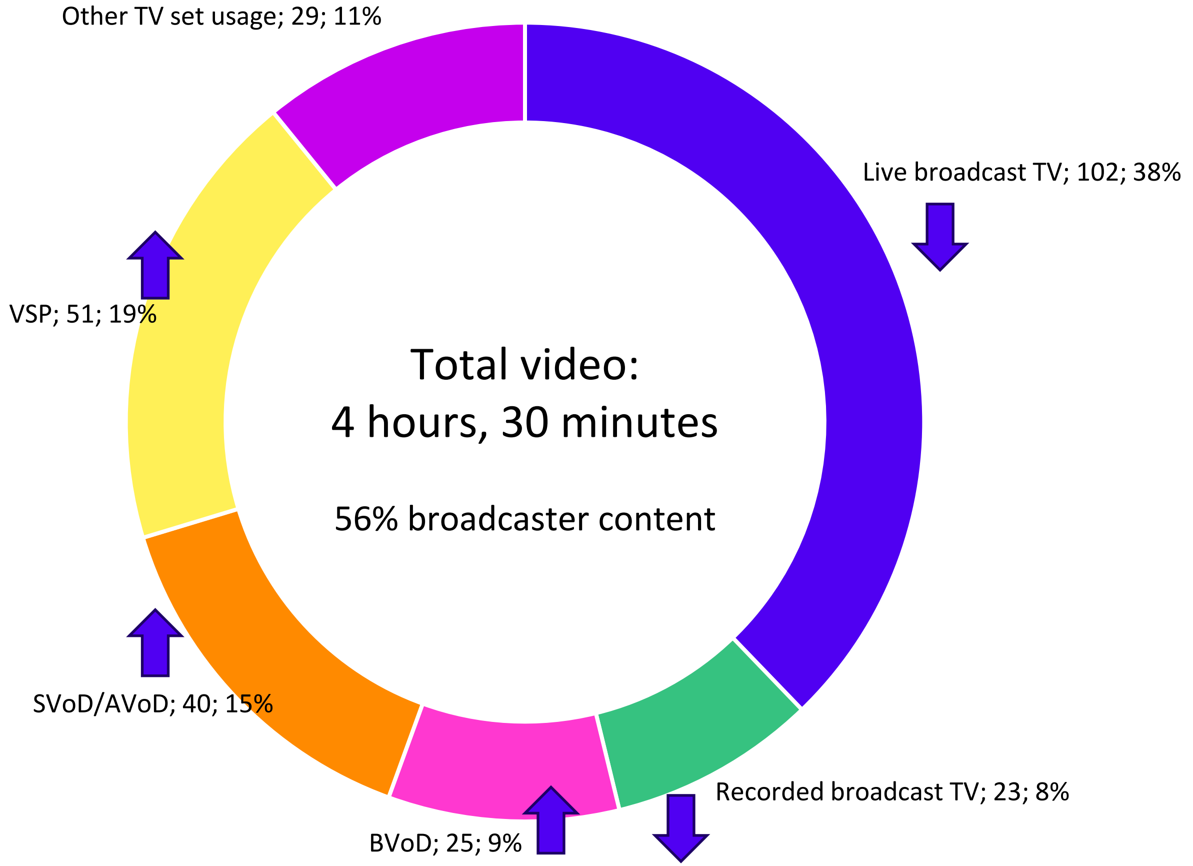


*Source: Ampere Analysis. *Advertising on SVoD includes Netflix, Discovery+ and Disney+ only. Figures are presented in nominal terms. Amazon Prime Video revenue is estimated based on users of the service – revenue is not ascribed to Amazon Prime customers who do not claim to use Prime Video (e.g. subscribe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

Audiovisual viewing in the UK

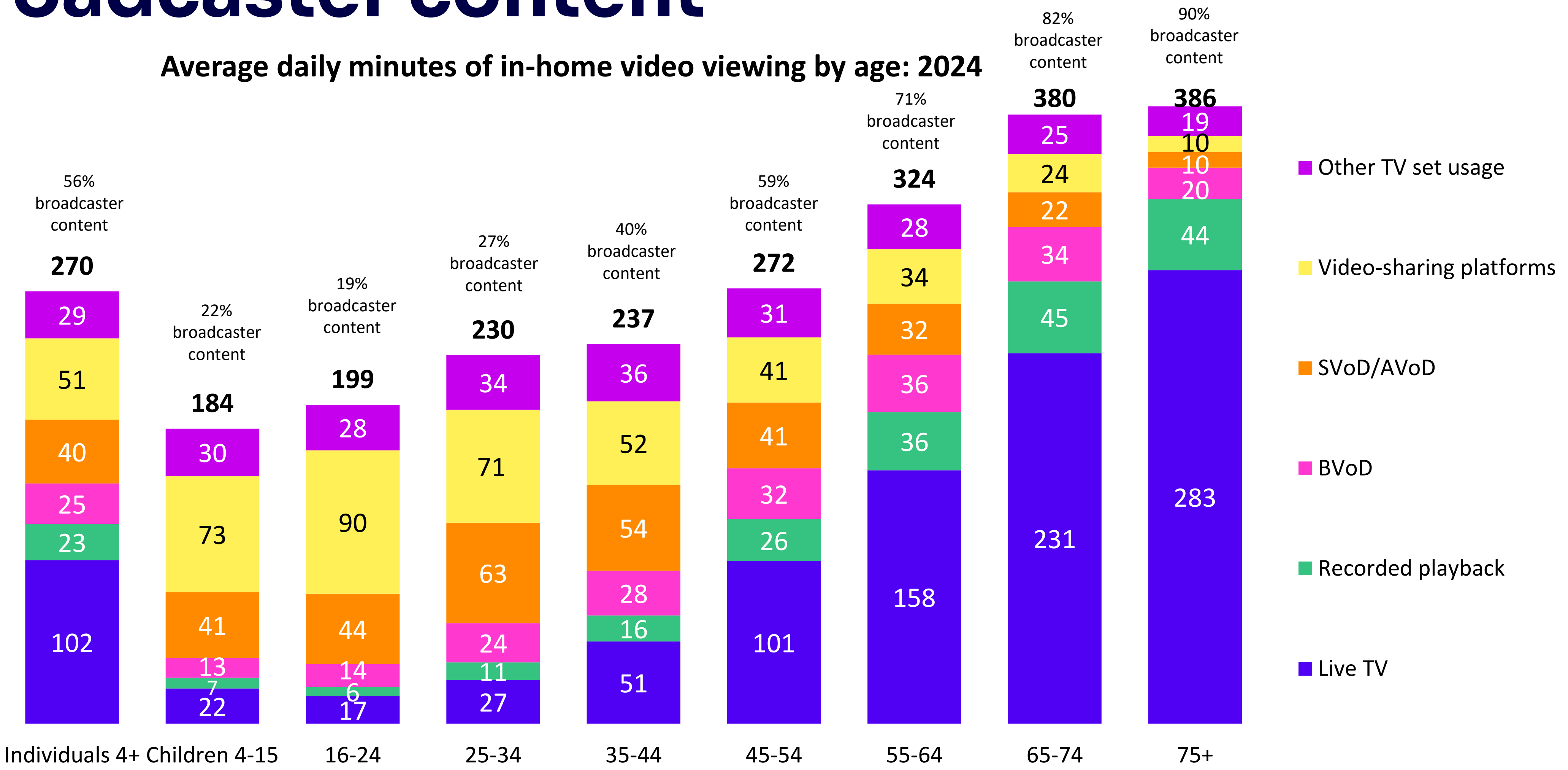
UK audiences watch 4.5 hours of TV every day

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



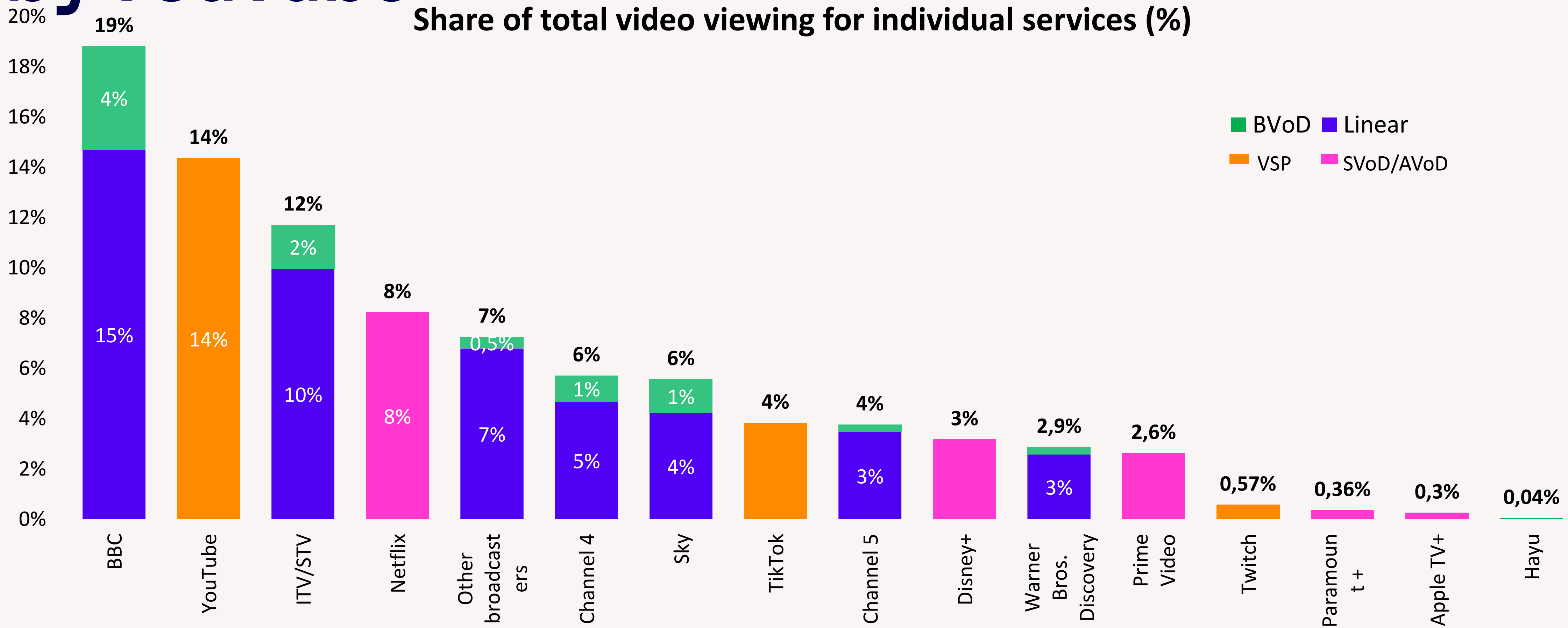
Source: Barb as-viewed, all individuals (age 4+)

Less than 20% of 16-24s' viewing is to broadcaster content



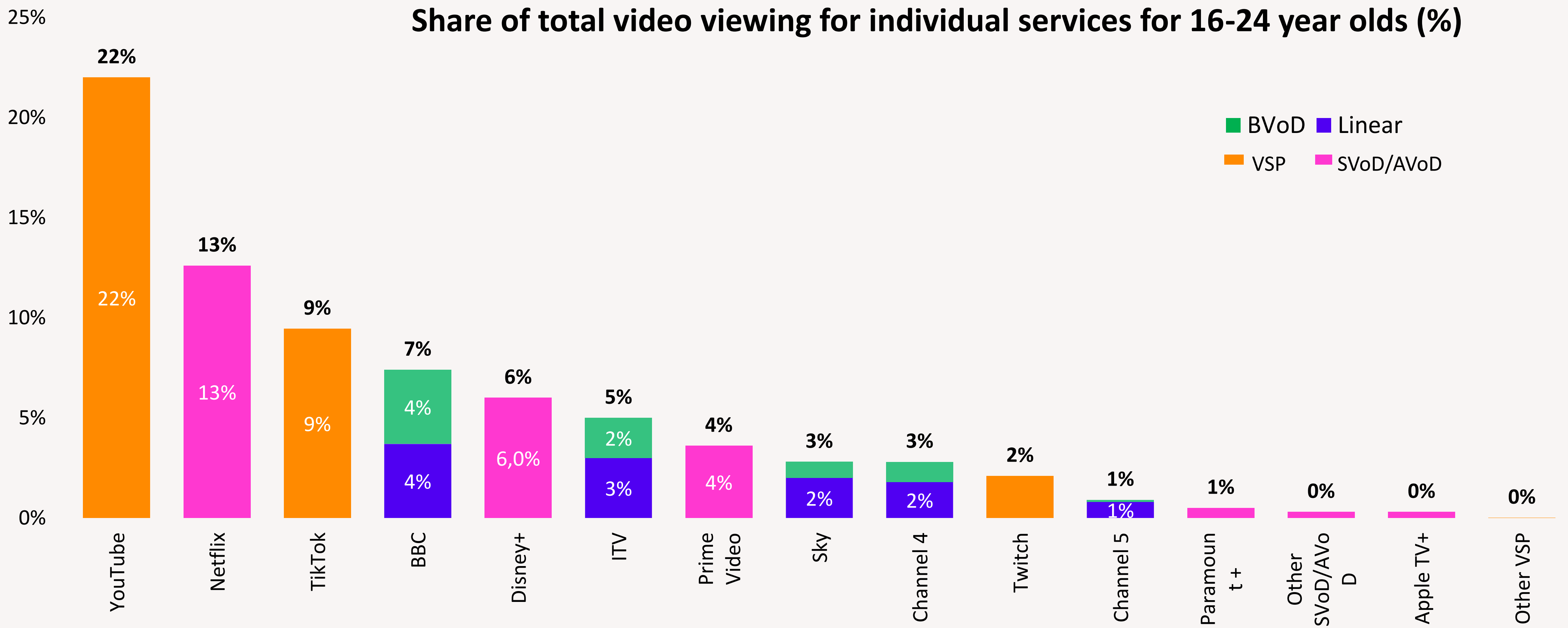
Source: Barb as-viewed, all individuals (age 4+)

The BBC continues to account for almost a fifth of all viewing, followed by YouTube



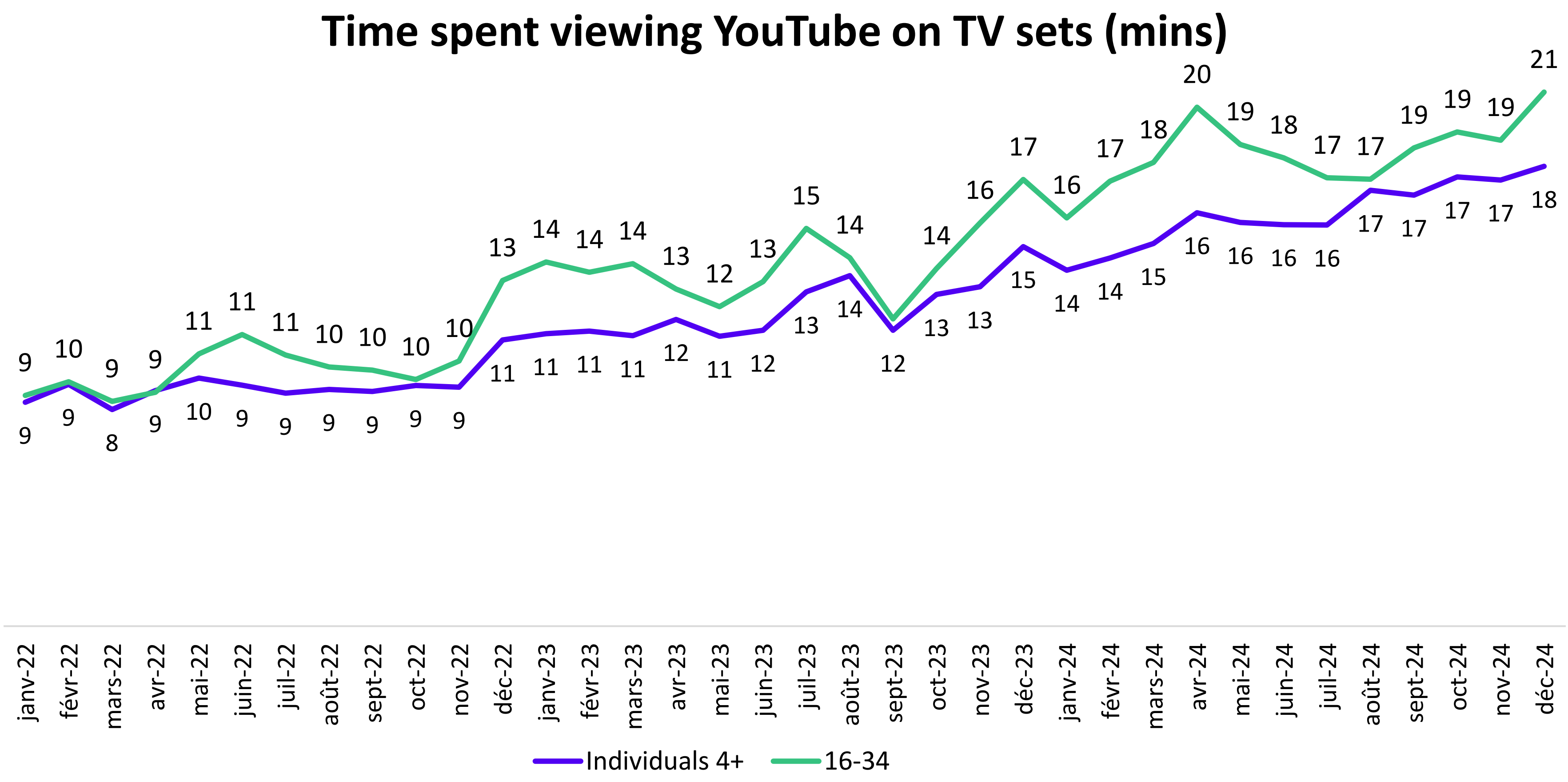
Source: Barb as-viewed, all individuals (age 4+). Proportion of all in-home video viewing by service. In-home video viewing on TV sets and other devices connected to the home wifi (total excludes unknown viewing on games consoles and radio listening).

Younger adults increasingly prefer content on social video



Source: Barb as-viewed, all individuals (age 4+). Proportion of all in-home video viewing by service. In-home video viewing on TV sets and other devices connected to the home wifi (total excludes unknown viewing on games consoles and radio listening).

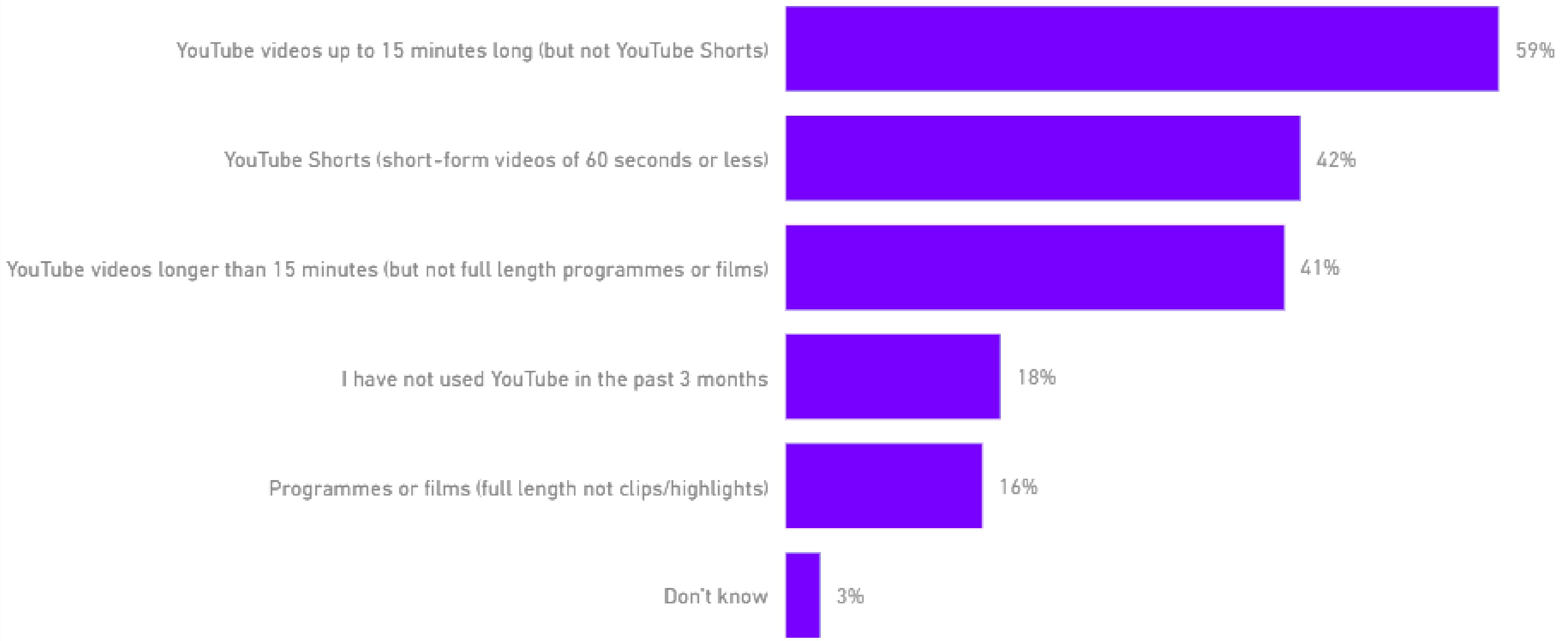
YouTube viewing on TV sets is growing…



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

.. and this is not just to watch short videos anymore

Share of respondents on forms of content watched on YouTube (%)



Source: Ofcom VoD survey 2025

Thank you

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