



The State of Streaming

U.K. | Q4 2025

EXECUTIVE SUMMARY

In 2025, U.K. streaming audiences demonstrate distinct viewing behaviours shaped by selective subscription practices and strong genre preferences. Netflix commands the streaming landscape, capturing seven of the 10 highest-reaching series releases, while the broader competitive environment reveals platforms pursuing divergent success strategies.

This presents opportunities for marketers to achieve efficient reach through understanding specific viewing patterns. The U.K. market exhibits more conservative subscription behaviour than global patterns, demanding that platforms and advertisers optimise against focused household portfolios rather than expansive multi-platform adoption.

Genre Preferences Define Viewership

Drama content represents 57% of the top U.K. streaming shows, followed by crime and thrillers. U.K. audiences demonstrate pronounced appetite for suspenseful, plot-driven narratives over lighter formats. This genre concentration creates premium advertising environments where viewers engage in focused, attentive states which are optimal conditions for brand messaging that requires sustained attention and emotional investment.

Divergent Paths to Platform Success

Competitive advantage emerges through distinct positioning. Netflix produces 59% of the top 100 original shows and captures nine of 10 top movie positions, winning through volume and content diversity. Apple TV and NOW pursue more targeted, prestige-oriented strategies with smaller portfolios. Platforms succeeding in this market either achieve scale across multiple niches or build prestige through curated, quality programming.

Selective Subscription Behavior

U.K. households maintain conservative streaming portfolios, with 23% subscribing to only one service. This selective behaviour contrasts with more expansive global subscription patterns, reflecting budget consciousness and deliberate content prioritisation. For platforms, this demands differentiation through pricing strategy, content exclusivity, and clear brand positioning.

To succeed in the U.K. streaming ecosystem, platforms and marketers should invest in:

- **Audience strategy:** Planning is critical. Find the segment you can define and dominate, regardless of your budget.
- **Analytics.** The key to making fragmentation your friend is cross-platform measurement. All of your stakeholders need to be optimising against your source of truth for cross-platform reach and frequency.
- **Narrow Segmentation.** Move beyond demographic labels to target specific audiences, from cultural tentpole events all the way down the long tail. Make your audience and your attribution your currency – it’s a buyers market, after all.
- **Agentic.** The war for attention is a 24/7 business, so make sure to introduce AI agents into your workforce. Agentic marketing and optimisation must live in your learning agenda to win in 2025.
- **Follow the data.** Data-driven decisions drive outsised results. Keep real-life results front and centre in every decision you make.

We are here to be your data partner to strengthen your decisions and confidence at this pivotal moment for our industry,



Ashwin Navin
Samba CEO & Co-founder

59%

Netflix’s share of the top 100 streaming originals in the U.K.

23%

Almost one-quarter of U.K. households maintain only one streaming subscription

57%

Drama’s share of top U.K. streaming originals

Netflix's Adolescence and Paramount+'s MobLand were the top releases of 2025

Netflix captures seven of the 10 highest-reaching premieres including Adolescence, Dept. Q, and Wednesday. Paramount+ secures second with MobLand, while Prime Video and NOW each claim one spot. Brand equity and established franchises prove essential for breaking through initial awareness barriers in the U.K.'s crowded streaming landscape, with strong premiere performance driving subscription sign-ups and cultural conversation.

Top streaming originals based on premiere viewership in first 2 weeks

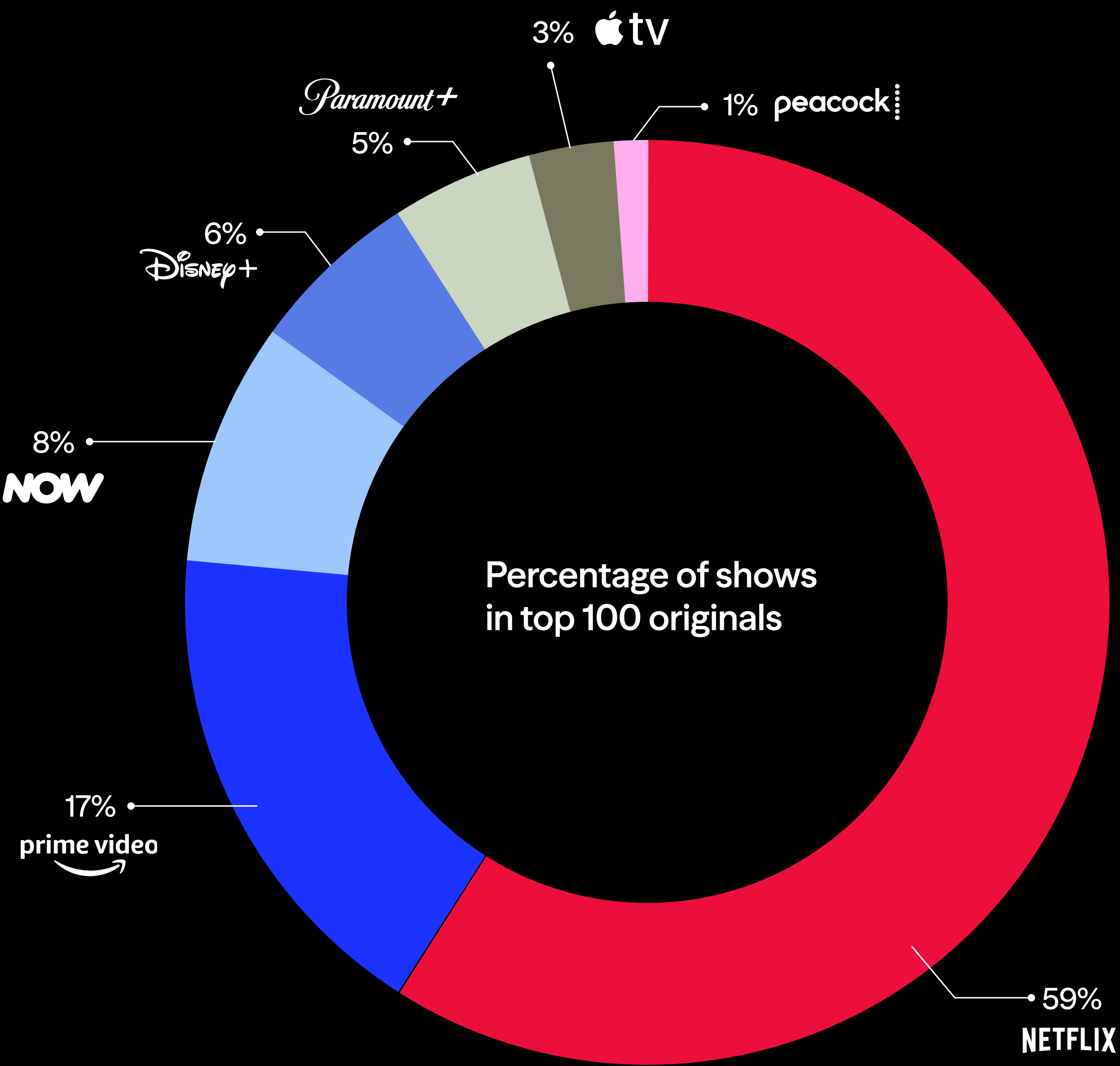
1	Adolescence S1	NETFLIX
2	MobLand S1	Paramount+
3	Dept. Q S1	NETFLIX
4	Wednesday S2	NETFLIX
5	Missing You S1	NETFLIX



6	Hostage S1	NETFLIX
7	Untamed S1	NETFLIX
8	Last One Laughing UK S1	prime video
9	Fred & Rose West: A British Horror Story S1	NETFLIX
10	The Last of Us S2	NOW

Netflix wins through volume, competitors bet on premium content

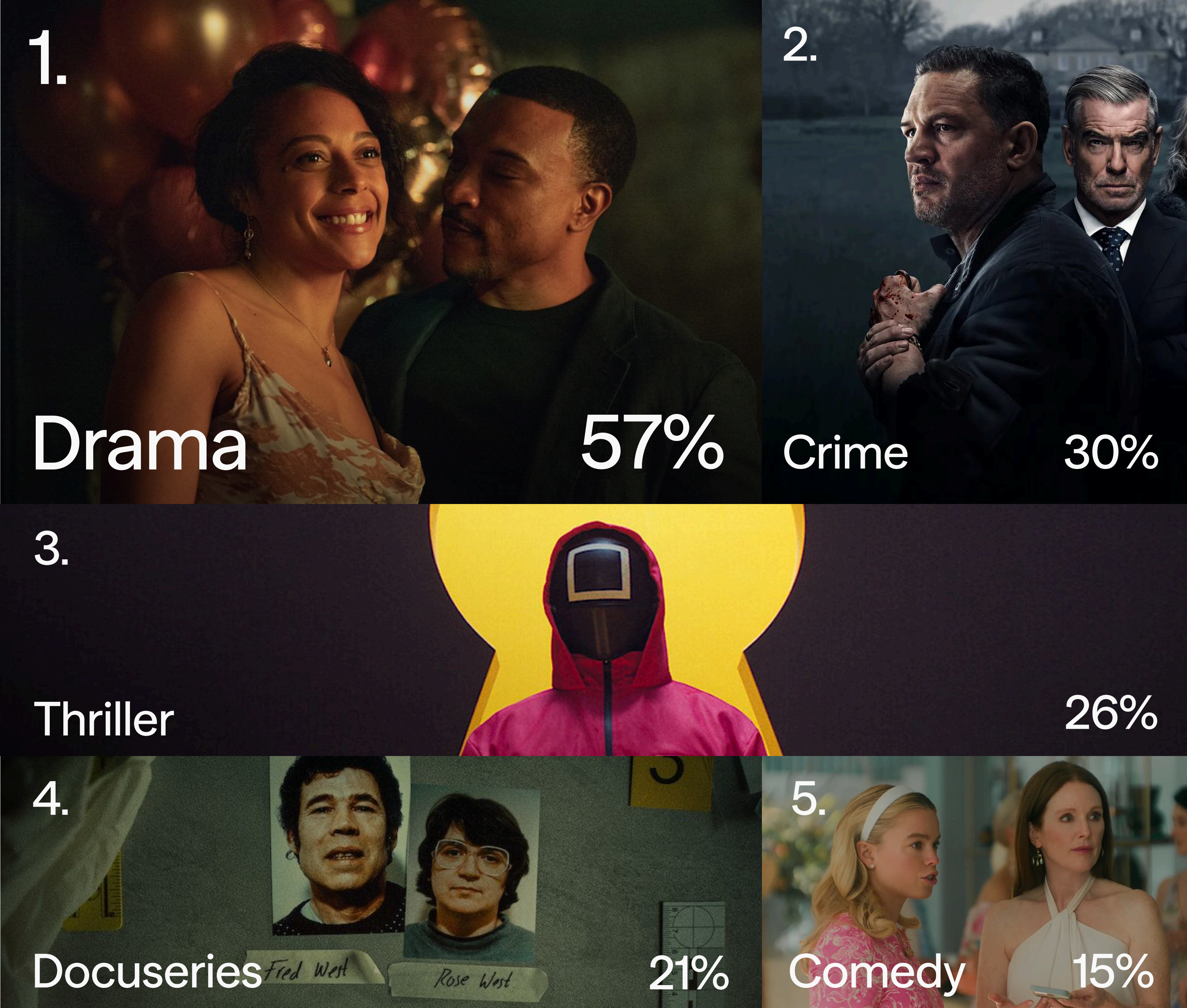
Netflix dominates streaming originals, producing 59% of the top 100 shows, followed by Prime Video at 17% and NOW at 8%. Two distinct competitive strategies emerge: Netflix wins through volume and content diversity that serves varied audience segments, while platforms like NOW and Apple TV compete through selective, quality programming that builds premium and loyal, niche audiences. The platforms under the most competitive pressure often fall in the middle, producing less content than Netflix while not benefiting from the premium positioning of quality-focused competitors.



Drama and crime are top genres among hit streaming shows

Drama content represents 57% of the top U.K. shows, followed by crime (30%), and thriller (26%). U.K. audiences demonstrate a strong appetite for suspenseful, plot-driven storytelling over lighter formats. This genre distribution creates optimal conditions for advertiser engagement, as viewers consume drama and crime content in focused, attentive states. Content investment and advertising strategy should prioritise these high-engagement, narrative-driven formats that command sustained audience attention.

Most represented genres across the top 100 streaming shows



Docuseries and suspenseful shows drive binge behaviour

Binge rates vary significantly, with docuseries leading at 44%, followed by thriller (41%), and crime (40%). Individual shows like Caught and Missing You on Netflix achieved 57% and 53% binge rates, respectively. These patterns indicate that genres that feature particularly suspenseful or serialized storytelling drive binge behaviour. Content with cliffhangers and unresolved narratives generate intense and sustained engagement, while episodic formats allow more sporadic viewing patterns.

Average binge rate by genre

Docuseries	Thriller	Crime	Comedy	Drama
44%	41%	40%	38%	38%

Highest binge rate shows

Caught (Netflix)	57%
Missing You (Netflix)	53%
Critical: Between Life and Death (Netflix)	53%
Zero Day (Netflix)	50%
Attack on London: Hunting the 7/7 Bombers (Netflix)	50%
Just One Look (Netflix)	49%
The Survivors (Netflix)	47%
Squid Game (Netflix)	45%
The Breakthrough (Netflix)	45%
Sirens (Netflix)	44%

Connect TV viewership with online interests to gain a unified audience view

Samba's technology connects TV viewership with online behaviour patterns, enabling sophisticated audience targeting beyond demographic data. Wednesday viewers show interest in gaming and Star Wars, whereas Untamed viewers engage with investing content and travel deals. This interest-level intelligence based on viewership and web behaviours allows advertisers to reach specific audience mindsets across premium content environments, delivering contextually relevant messaging that traditional demographic targeting cannot achieve.



Wednesday S2

Online Interests

Gaming

Parents of young children

Star Wars



Untamed S1

Online Interests

Investing

Crypto

Travel deals



Adolescence

Online Interests

Alcoholic beverages

Home decor shopping

Back to school electronics



Netflix captures nine of top 10 movie slots

Netflix claims nine of the 10 top streaming movie positions, including The Thursday Murder Club, Happy Gilmore 2, and Back in Action. Prime Video's The Accountant 2 represents the sole non-Netflix entry. This concentration demonstrates Netflix's comprehensive movie strategy success of combining original productions with licensed content to create consistent movie availability. The Thursday Murder Club's top position suggests U.K. audiences respond highly to relevant local content that reflects British culture, even within Netflix's global catalogue.



The Thursday Murder Club

Top streaming movies

1	The Thursday Murder Club	NETFLIX
2	Happy Gilmore 2	NETFLIX
3	Back in Action	NETFLIX
4	Havoc	NETFLIX
5	The Old Guard 2	NETFLIX
6	Straw	NETFLIX
7	My Oxford Year	NETFLIX
8	The Electric State	NETFLIX
9	The Accountant 2	prime video
10	Titan: The OceanGate Disaster	NETFLIX

Platform strategies diverge: family friendly vs. beloved franchises

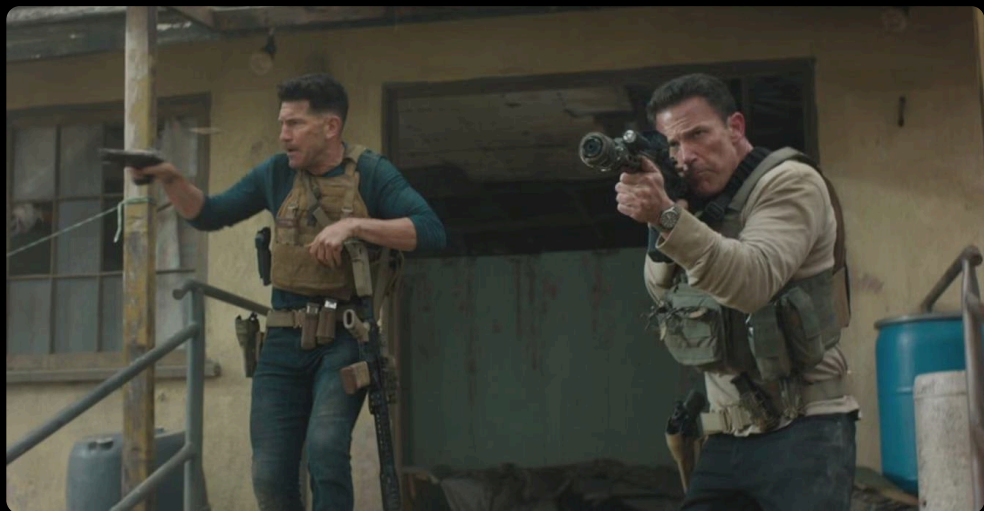
Top performing movies reveal distinct strategies across streaming platforms. Netflix leads with The Thursday Murder Club, appealing to British cultural preferences. Prime Video leans into action with The Accountant 2, Disney+ leverages Moana 2 for family audiences, and Peacock presents Bridget Jones: Mad About the Boy to capitalise on the beloved franchise. No single movie strategy prevails, but each platform differentiates through content to reinforce core brand positioning and target demographic preferences. For advertisers, that means new precision in targeting where the platform itself defines audience and context.

Top streaming movie by platform



The Thursday Murder Club

NETFLIX



The Accountant 2

prime video



Moana 2

Disney+



Fountain of Youth

Apple tv



Bridget Jones:
Mad About the Boy

peacock



Star Trek: Section 31

Paramount+



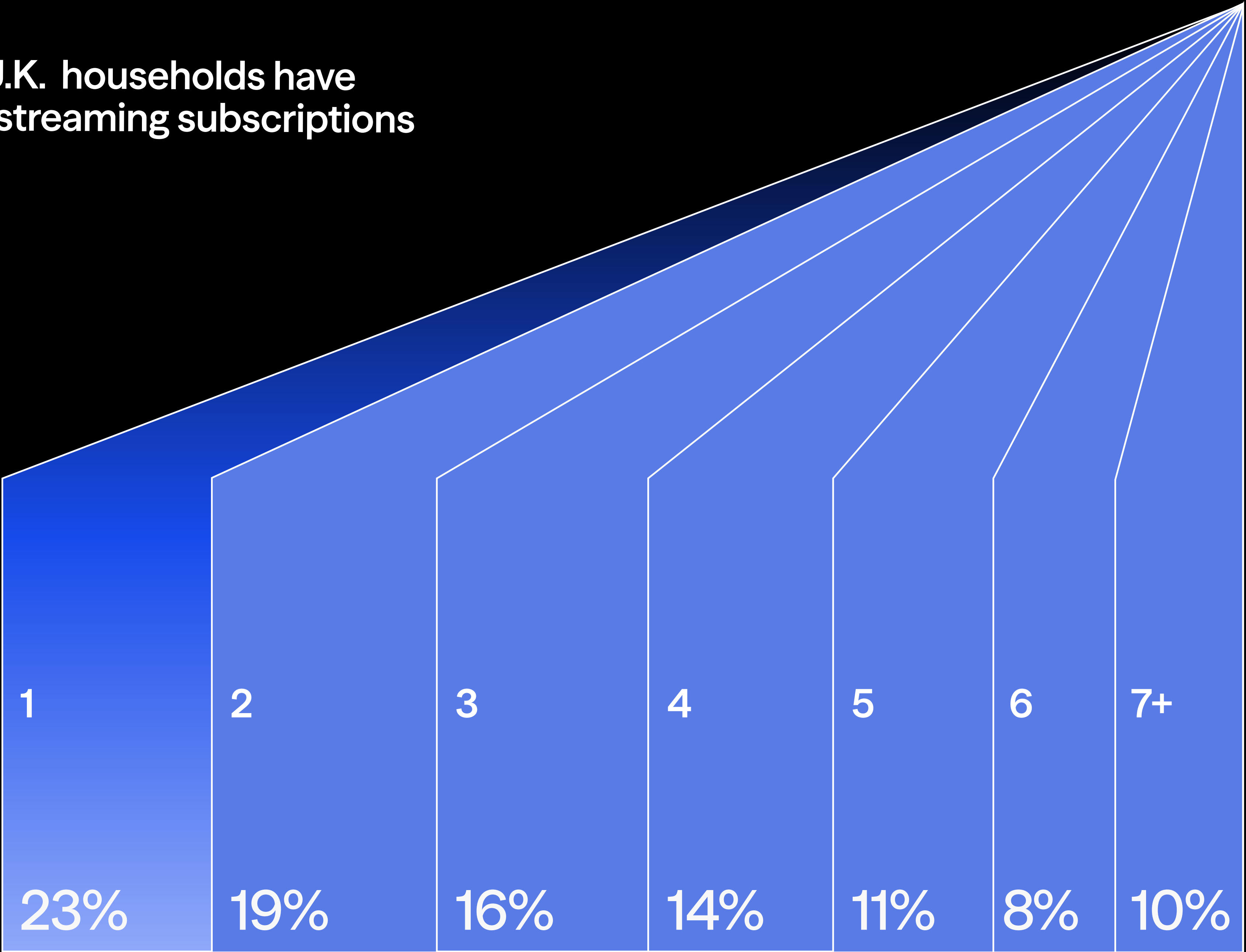
58%

Over half of U.K. households have fewer than 3 streaming subscriptions

U.K. households demonstrate selective subscription behaviour, with platform portfolios skewing smaller than global patterns. The largest segment (23%) subscribes to only one service, while 19% have two and 16% have three. This conservative approach reflects careful platform selection, likely influenced by cost considerations and a focus on content over volume. Platforms must deliver compelling, differentiated value to justify inclusion in limited subscription portfolios, making content quality and strategic pricing essential.

Number of streaming platforms →

Percent of streaming households watching →



Key takeaways

Suspenseful shows drive views and binging

Audiences demonstrate a strong appetite for suspenseful, plot-driven storytelling over lighter formats and are more likely to binge these shows, creating optimal engagement conditions for advertisers targeting attentive, focused viewing states.

Divergent paths to platform success

For streaming platforms, market leadership can be achieved through multiple, distinct strategies, from Netflix's success through massive scale and content volume to the curated prestige model of NOW and Apple TV.

Netflix dominates content volume and viewership

Netflix produces 59% of the U.K.'s top 100 streaming originals and captures nine of the 10 top movie positions. This concentration demonstrates a successful content strategy combining original productions with licensed movies.

U.K. households maintain selective subscription portfolios

With the largest segment of households (23%) subscribing to only one streaming service, content quality and strategic pricing are essential for platforms to justify inclusion in limited household portfolios.

Fragmented audiences need precise targeting

Audiences today are defined by nuanced behaviours like binging, watching multiple shows at once, and consuming new shows alongside old favourites. Understanding and targeting these granular personas is now a critical prerequisite for success.

Key takeaways

Understand your audience

Move beyond broad demographic labels by using proprietary first-party data to target true viewer personas. Combine viewership behaviour with online interests to deliver contextually relevant messaging.

Bridge TV and online behaviour

Understand what your audience is watching on TV and where they are spending time online to activate campaigns that nurture users at precise moments in the marketing funnel.

Measure outcomes and reach & frequency

Platforms can track how many households saw an ad for a show or service and subsequently watched, proving the ROI. Complement with true reach and frequency measurement to ensure incrementality.

Reach the streaming majority

Access a direct path to the rapidly expanding ad-supported streaming audience with advanced CTV and digital targeting at the show level.

Connect Samba signals with first-party data

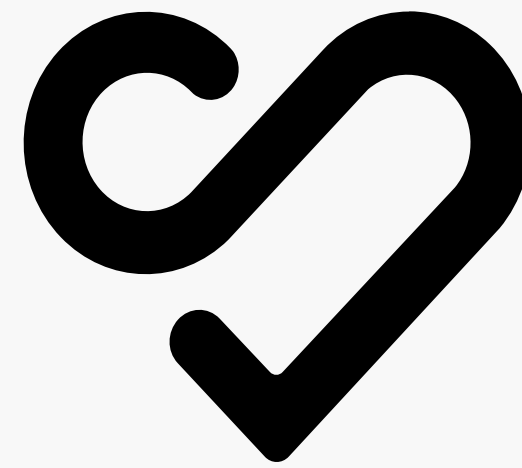
Combine our TV and web data with your customer lists to refine targeting and accurately measure campaign results.

METHODOLOGY

Samba TV is a global leader in AI-driven media intelligence powered by first-party data from millions of opted-in connected televisions and billions of web signals across more than 50 countries. Our independent, cross-platform measurement provides advertisers and media companies a unified view of the entire consumer journey. Samba TV gathers viewership data via its proprietary Automatic Content Recognition (ACR) technology from tens of millions of opted-in Smart TVs. Samba TV's ACR is integrated at the chipset level across 24 of the top Smart TVs sold in more than 100 countries globally and captures content that crosses the TV screen, regardless of source.

As is standard industry practice, we analyse our large proprietary dataset to project household level TV viewership. We do not estimate viewership on non-TV devices, nor do we estimate co-viewing (number of people watching). We weight individual households in our dataset to create a research panel that we believe accurately represents viewership behaviours.

Samba®



For more information about Samba TV and our viewership
and advertising insights, visit [Samba.tv](https://www.samba.tv), where you can
subscribe to Samba Insights or schedule a meeting.