

Audience Insights 2025



Full Year 2025

Key Audience takeaways

- Average monthly reach of STV/STV Player was 75% of Scots (3.5million), greater than the Ad tier of Netflix, Prime, and Disney+ combined.
- 11% of time spent watching content on a TV set in 2025 was watching STV/STV Player programming.
- STV/STV Player had the greatest commercial share of any broadcaster or streaming service on a TV set in 2025 (17.6%*).
- More drama (57%) is watched via STV Player than on STV. A total of 60.1m hours were spent watching drama on STV/STV Player in 2025, a YoY increase of +8% . For under 45s, STV Player accounts for 75% of all drama consumption
- **Protection** was STV's top drama for 2025 with an average audience of 538k, a significant +220k (+69%) above our closest commercial rival's top drama title. It also takes the mantle as the quickest title to hit 1m viewing hours on the Player.
- STV Digital News offering continues to go from strength to strength, with average combined page and video views of 66.4m reflecting a +142% YoY increase.
- A total of 83.6m soap hours were consumed on STV/STV Player in 2025, with STV Player reflecting a +37% YoY increase across network stalwarts Coronation Street and Emmerdale.

Full Year 2025

STV highlights

- STV has outperformed ITV1 network across all time viewing for the 8th year in a row.
- STV's peak time audience of 200k was **3x** greater than Ch4 and **4x** greater than Ch5.
- **STV News at Six** maintains its status as the top news programme in the country for the 7th year in a row with an average audience of 275k, whilst our Digital offering has grown its page and video views to 66.4m up +142% YoY.
- STV delivers mass audiences, as 97% of the top 500 overnight audiences across all commercial broadcasters and streaming services were on STV.
- **The Calcutta Cup** (Six Nations : England v Scotland) was the most watched moment on STV in 2025, with its audience peaking at 750k.
- **I'm a Celebrity...Get Me Out of Here!** was the top Entertainment title across all commercial broadcasters, with an average series audience of 523k.
- **Coronation Street** was the best watched Soap with an audience of 322k.
- **The Chase** continues to be the most watched Daytime programme across all broadcasters in 2025, with an average audience of 236k.

Full Year 2025

STV Player highlights

- STV Player had its highest ever annual consumption, with viewing hours of **75m**, up +9% YoY.
- Total viewing hours across STV own platforms was a record **65m**, +15%, or 8.5m hrs yr on yr.
- STV Player viewers watched for longer (29% more than prior year) with average viewing across our 1.8m yearly active users increasing by +8 hrs to 36 hrs in 2025.
- STV Player had 159m streams in 2025, the highest ever annual total streams, increasing by +7% YoY.
- There were an average of 145,000 registered active users per day across 2025, a +10% YoY increase that mirrors the overall growth in total consumption.
- Large screen/connected TV (CTV) share of viewing hours grew by +2% YoY, increasing to 88% of all viewing across 2025.
- Total VoD viewing hours of network soaps - Corrie & Emmerdale - grew by 42% or 4.5m hours last year, as the early 7am STV Player drops ahead of transmission gave STV viewers more choice in how to watch their favourite shows.
- The 25th instalment of I'm A Celebrity Get Me out of Here! was the biggest yet across our digital platforms with 5.7m live and on-demand streams, +19% versus prior series.

STV/STV Player reaches 75% or 3.5m Scots a month

1.2m

27% Daily Reach

2.5m

53% Weekly Reach

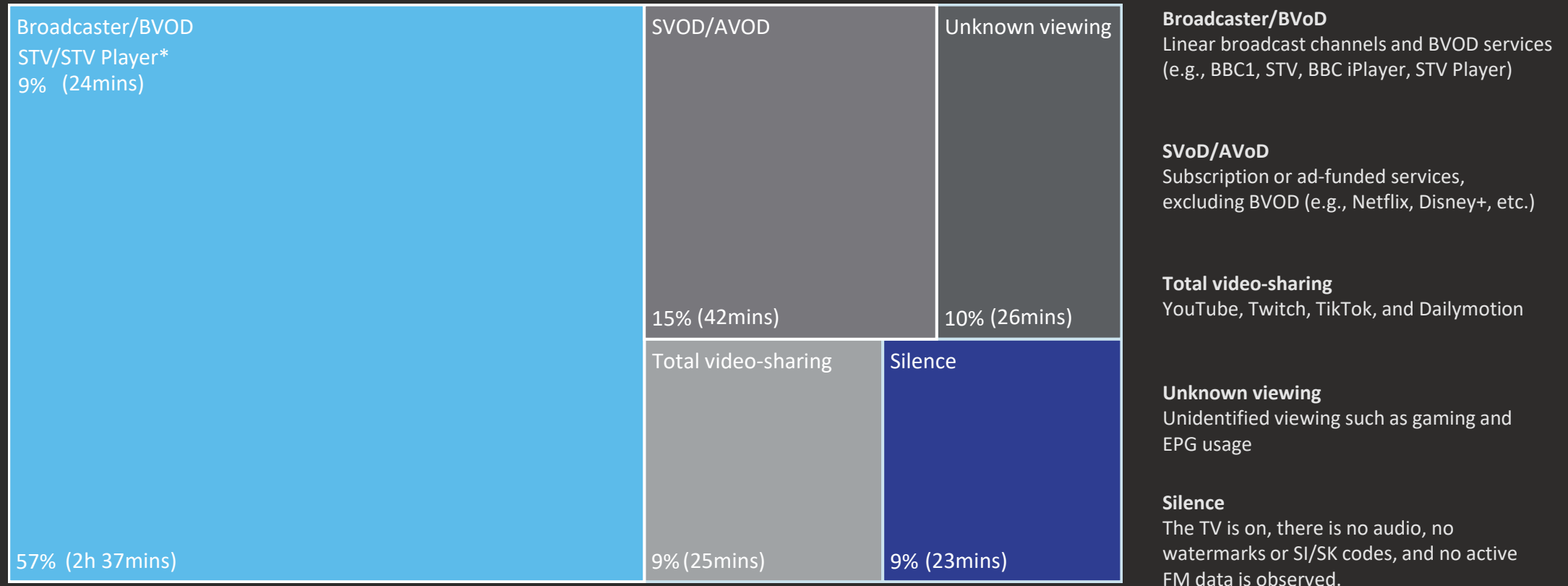
3.5m

75% Monthly Reach



Time spent on a TV Set

24mins per day spent with STV – 9% of total TV screen time increasing to 11% of identifiable viewing*



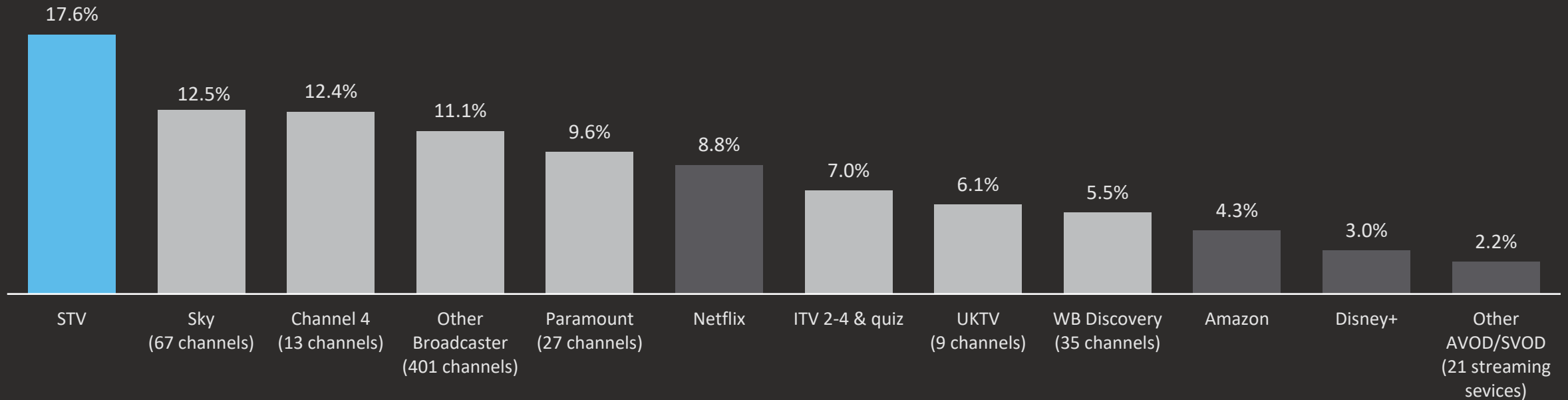
Source: Barb (As-Viewed), Jan – Dec 2025, Scotland, Individuals, TV sets *STV/STV Player includes all non-linear viewing

*Identifiable viewing - when actual content is being watched (Silent and unknown excluded)

Commercial Viewing Share : broadcasters and streamers

STV has the greatest share across all commercial broadcasters and ad-tier streaming services

Share of commercial broadcaster/streamer viewing in Scotland

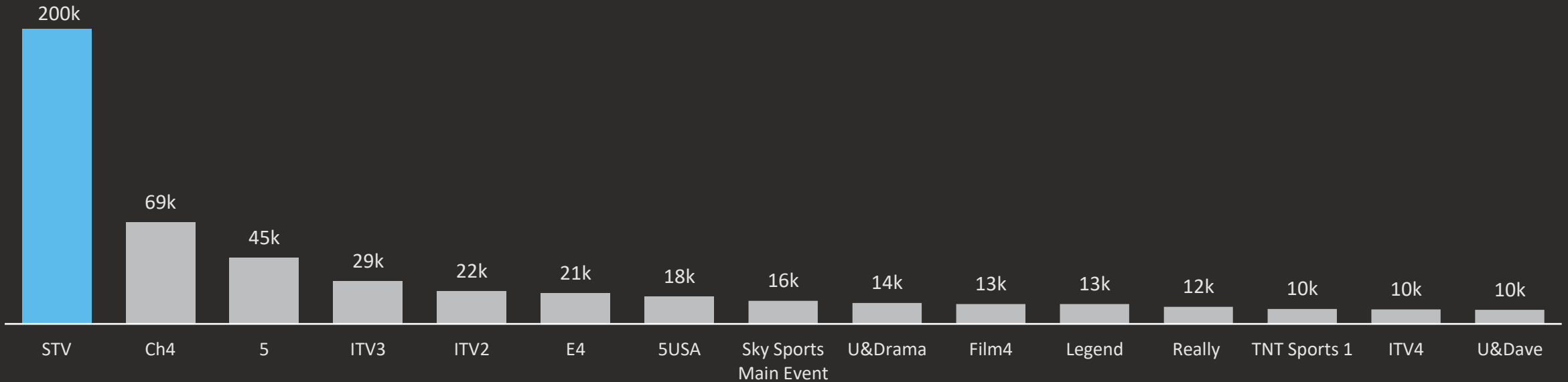


Source: Barb (As-Viewed), Jan – Dec 2025 (all-day), Scotland, Individuals, TV sets, SVoD Ad-tier only, STV includes all non-linear viewing (chart excludes video sharing platforms)

STV top commercial channel in Peak time : Broadcast only

STV has a higher average audience than the next 5 commercial channels combined

Peak time audience

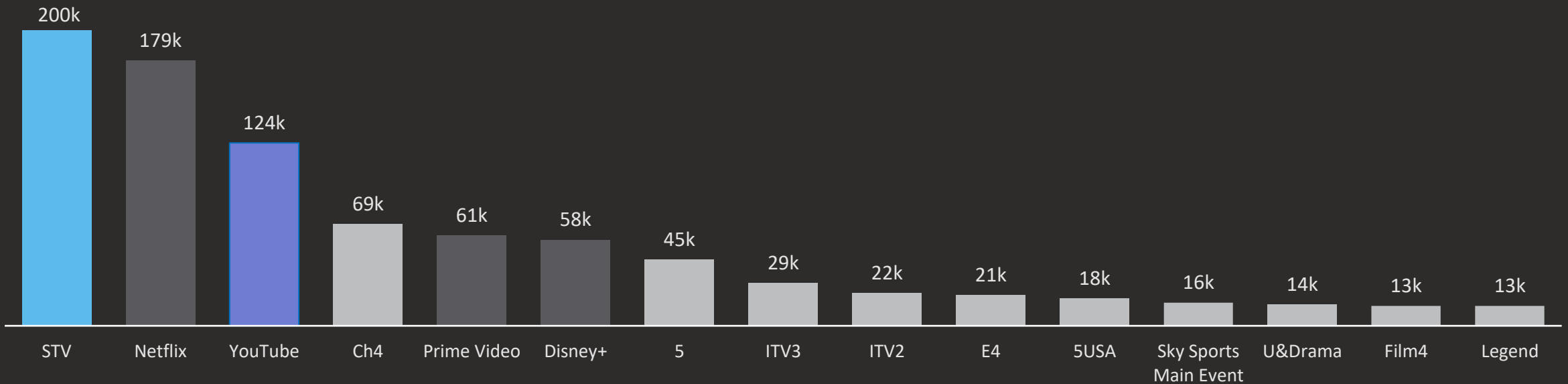


Source: Barb, Jan – Dec 2025, (18:00-22:30), Individuals, Scotland

STV top commercial channel in Peak time : Broadcast, Streamers & YouTube

STV has a higher average audience than all commercial broadcasters, streamers, and video sharing platforms across peak time

Peak time audience

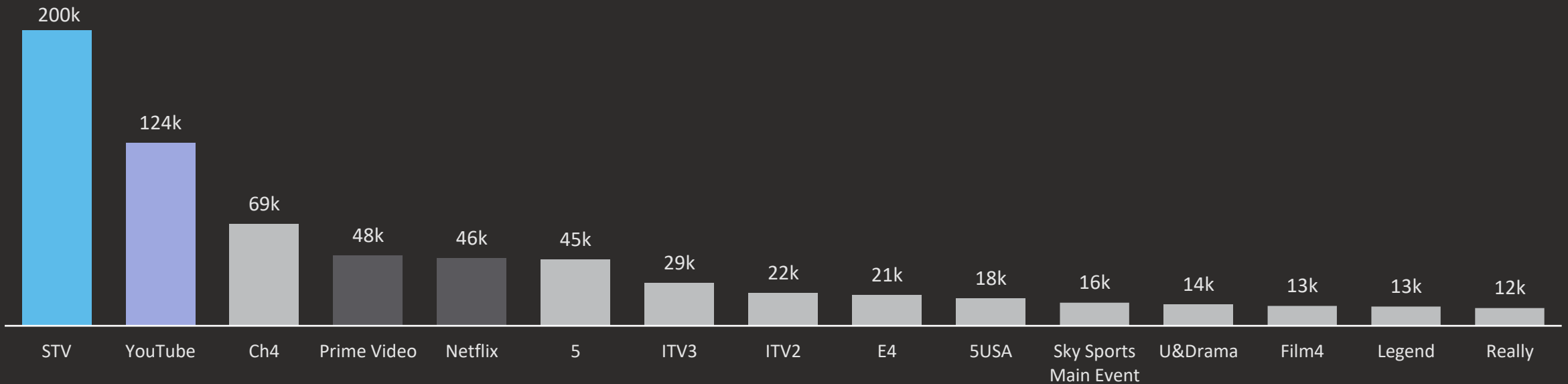


Source: Barb (AdvantEdge/AsViewed), Jan – Dec 2025, Scotland, Individuals, TV Sets only, (18:00-22:30)

STV top commercial channel in Peak time : Broadcast, Ad Tier of Streamers & YouTube

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Peak time audience

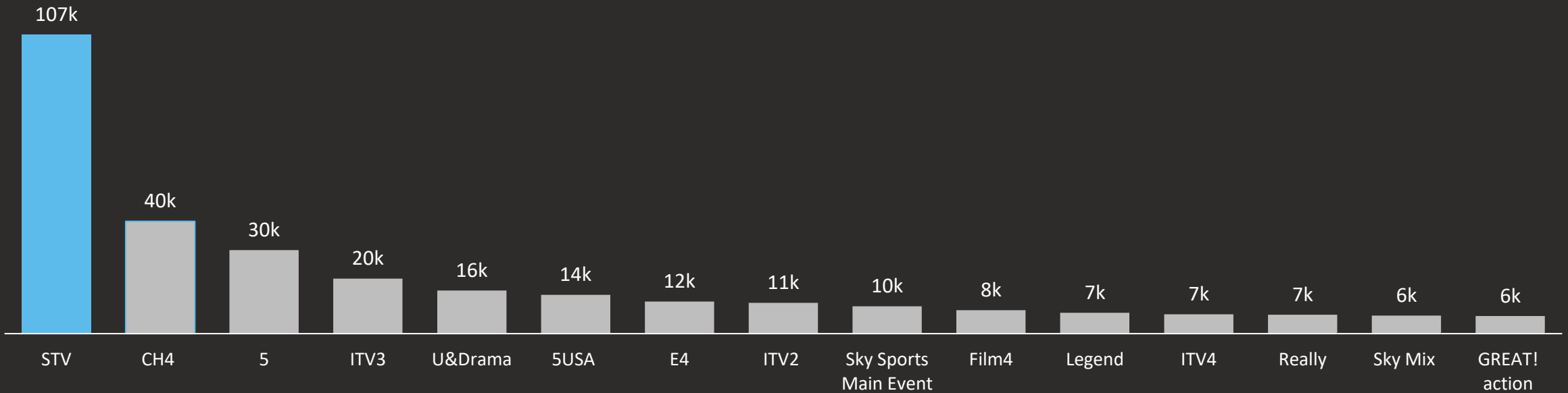


Source: Barb (AdvantEdge/AsViewed), Jan – Dec 2025, Scotland, Individuals, TV Sets only, (18:00-22:30), SVoD Ad-tier only

All time average audience : Broadcast Only

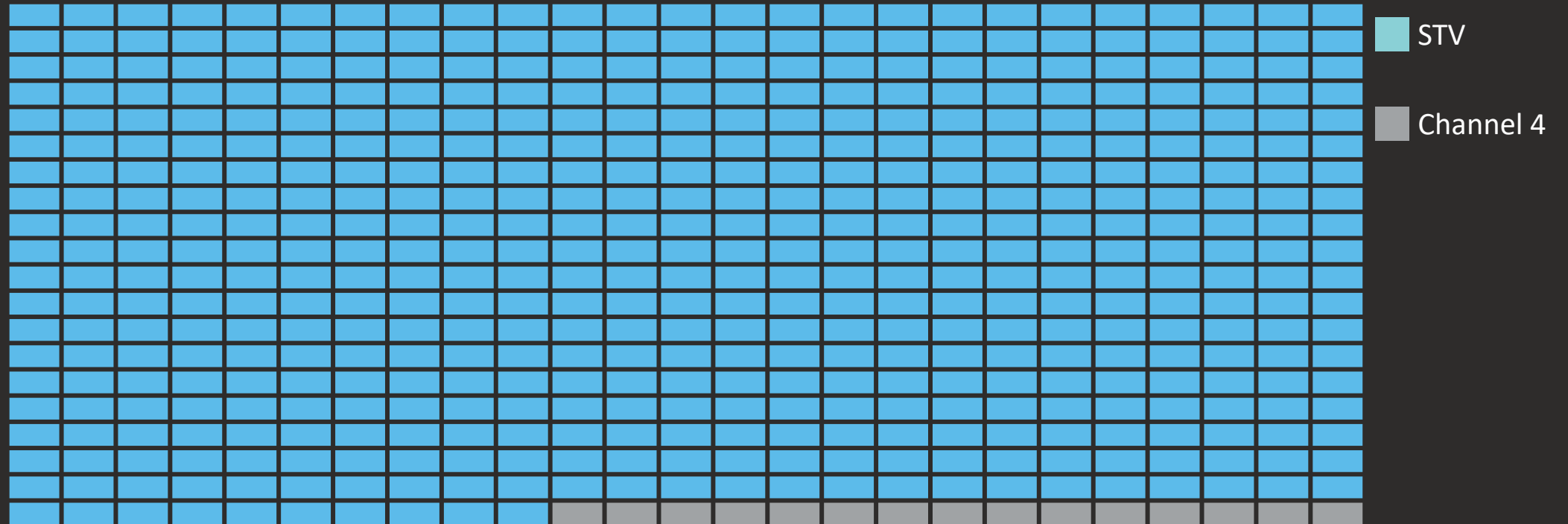
STV is the top commercial channel across all time, with an audience greater than the next 4 commercial channels combined

Top all time channels



Source: Barb, Jan – Dec 2025, (09:30-24:00), Individuals, Scotland

STV delivered 97% of the 500 commercial audiences in Scotland : across all TV channels and SVOD



Source: Barb (Advantage/AsViewed), Jan – Dec 2025, Scotland, Individuals, Overnight viewing, TV sets

Top Programmes

2025



STV Top Programmes for 2025 : series average

Programme Title	7 days				28 days	
	Avg. Aud	TVR	Share	Reach	Avg. Aud	% uplift
Protection	283k	6	24%	807k	538k	90%
Unforgotten	344k	7	26%	812k	533k	55%
I'm a Celebrity... Get Me Out of Here!	470k	10	38%	1.6m	523k	11%
Playing Nice	286k	6	20%	673k	521k	82%
Vera	295k	6	22%	769k	501k	70%
Six Nations Championship: The Calcutta Cup	490k	10	44%	1.0m	490k	0%
Karen Pirie	288k	6	27%	699k	474k	64%
The Bay	328k	7	25%	686k	463k	41%
Britain's Got Talent	403k	9	36%	1.7m	417k	3%
Grace	316k	7	27%	651k	406k	28%
Ridley	280k	6	27%	673k	393k	40%
I Fought the Law	244k	5	21%	489k	385k	58%
Code of Silence	121k	3	18%	675k	376k	211%
Coronation Street	349k	7	30%	1,776k	363k	4%
Trigger Point	234k	5	17%	585k	359k	53%
Out There	197k	4	14%	708k	353k	79%
Emmerdale	338k	7	31%	1,940k	343k	2%

Source: Barb (AdvantEdge/As-Viewed), Jan – Dec 2025 (all-day), Individuals, 3+ mins continuous reach, 7, 28 days TV sets consolidated viewing, 4-screen viewing for drama's includes both STV/ITV1 non-linear channels. Sport figures are full programme broadcast from top performing fixture

STV Top programmes for 2025 : top TX by title

Programme Title	7 days				28 days	
	Avg. Aud	TVR	Share	Reach	Avg. Aud	% uplift
I'm a Celebrity...Get Me Out of Here!	591k	13	41%	719k	602k	2%
Unforgotten	476k	10	32%	540k	578k	21%
Protection	418k	9	31%	460k	568k	36%
Playing Nice	357k	8	25%	415k	542k	52%
Karen Pirie	390k	8	35%	427k	518k	33%
Coronation Street	514k	11	40%	517k	517k	1%
Britain's Got Talent	493k	11	37%	669k	513k	4%
Vera	465k	10	25%	510k	508k	9%
Six Nations Championship	490k	10	44%	1,028k	490k	0%
STV News at Six	485k	10	33%	571k	485k	0%
Emmerdale	464k	10	36%	551k	473k	2%
The 1% Club	410k	9	36%	504k	445k	9%
Grace	372k	8	33%	470k	442k	19%
The Masked Singer	424k	9	37%	619k	425k	0%
Ant & Dec's Limitless Win	410k	9	36%	502k	410k	0%
The Chase	403k	9	44%	554k	403k	0%
Wheel of Fortune	356k	8	35%	506k	356k	0%

Source: Barb (AdvantEdge/As-Viewed), Jan – Dec 2025 (all-day), Individuals, 3+ mins continuous reach, 7, 28 days TV sets consolidated viewing, 4-screen viewing for drama's includes both STV/ITV1 non-linear channels. Sport figures are full programme broadcast from top performing fixture

STV Player top programmes across 2025

4 of the top 10 best watched VoD titles are third party acquired (3P), whilst daytime programming dominates live Player viewing

VoD

Programme Title	Hours (m)	Streams (m)
Emmerdale	8.0	21.9
Coronation Street	7.3	13.9
Brookside*	3.7	11.1
I'm A Celebrity...Get Me Out Of Here!	2.5	3.9
Red Rock*	1.5	3.2
Protection	1.4	2.5
Unforgotten	1.2	2.1
Taggart*	1.1	1.4
Karen Pirie	1.0	1.2
Burden of Truth*	0.9	1.9

Live

Programme Title	Hours (m)	Streams (m)
Good Morning Britain	4.0	2.9
This Morning	1.8	1.5
The Chase	1.7	2.0
ITV News	1.0	1.5
Lorraine	1.0	1.0
Tipping Point	0.8	0.7
STV News	0.8	1.7
Coronation Street	0.7	1.1
Emmerdale	0.7	1.3
I'm a Celebrity...Get Me Out of Here	0.6	1.8

STV's regional programming in 2025

Programme Title	7-day consolidated aud.			
	Avg. Aud	TVR	Share	Reach
STV News at Six	275k	5	30%	2.1m
What's On Scotland Rewind	197k	4	18%	355k
Bringing in the Bells	167k	4	13%	348k
What's On Scotland	146k	3	18%	1m
STV Appeal Show 2025	143k	3	16%	178k
What's On Scotland Christmas Special	141k	3	16%	165k
STV Children's Appeal: It Takes a Village	128k	3	15%	152k
Scotland Tonight (Peak)	88k	2	9%	1m
The People's History Show	64k	1	7%	389k
Scotland Tonight (Late)	49K	1	9%	1.3m

Source: Barb, Jan – Dec 2025, Scotland, Individuals, 3+ mins continuous reach

Daytime programmes 2025

7-day consolidated aud.

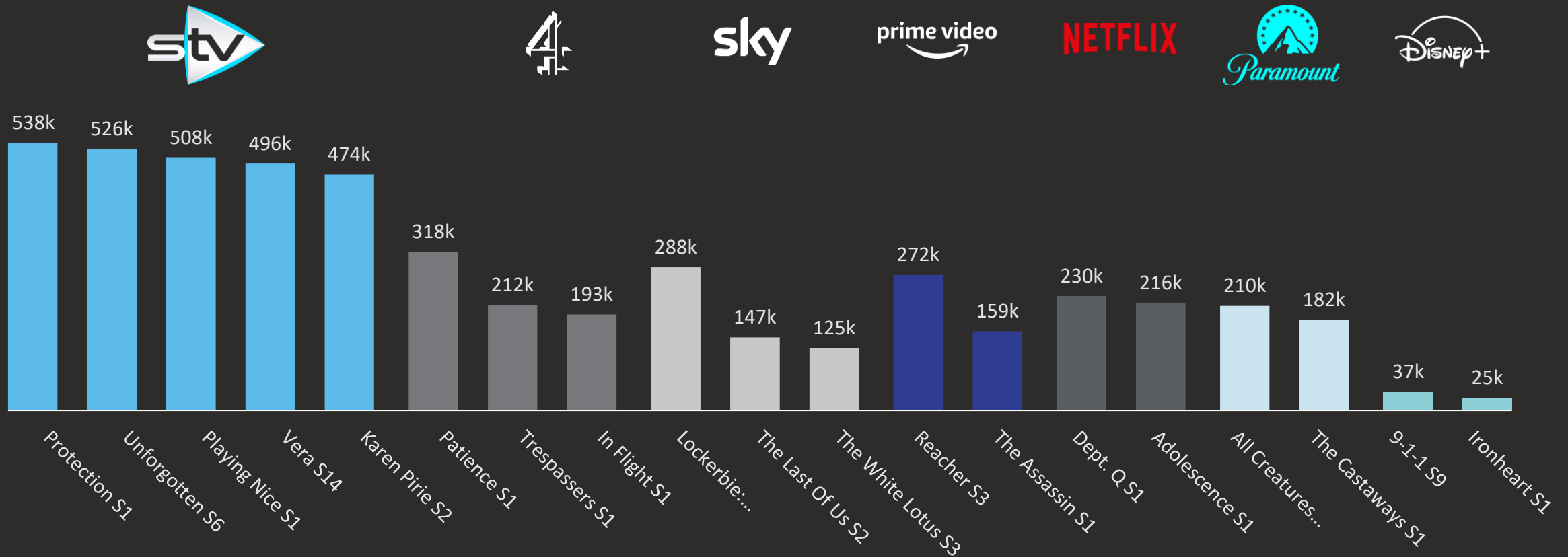
Programme Title	Avg. Aud	TVR	Share	Reach
Lorraine	53k	1	16%	1.1m
This Morning	57k	1	17%	1.6m
Loose Women	65k	1	14%	1.2m
ITV News Lunchtime	54k	1	11%	1.3m
Lingo	76k	2	15%	689k
Jeopardy!	54k	1	12%	634k
Deal or No Deal	149k	3	24%	1.3m
Tipping Point	105k	2	19%	1.1m
The Chase	237k	5	30%	1.7m

9am
6pm

Source: Barb, Jan – Dec 2025, (Mon-Fri 09:30-18:00), Lorraine (Mon-Fri 09:00-10:00), exclude repeats

Top Dramas 2025 : across all commercial competitors (TV channel & SVoD)

STV's top five titles significantly outperformed our closest commercial rivals : TV set viewing only



Source: Barb (As-Viewed), Jan – Dec 2025, Scotland, Individuals, TV sets, 28-day viewing including pre-tx if applicable. STV figures includes STV/ITV non-linear; Paramount inc. 5; Sky all channels; 4 all channels; Ad Tier SVOD only

STV Audience

Daypart splits

107k

All time

(09:30 – 24:00)

200k

Peak-time

(18:00 – 22:30)

77k

Daytime

(09:30 – 18:00 M-F)



Source: Barb, Jan – Dec 2025, Scotland, Individuals

STV News

2025

stv News

6

stv News

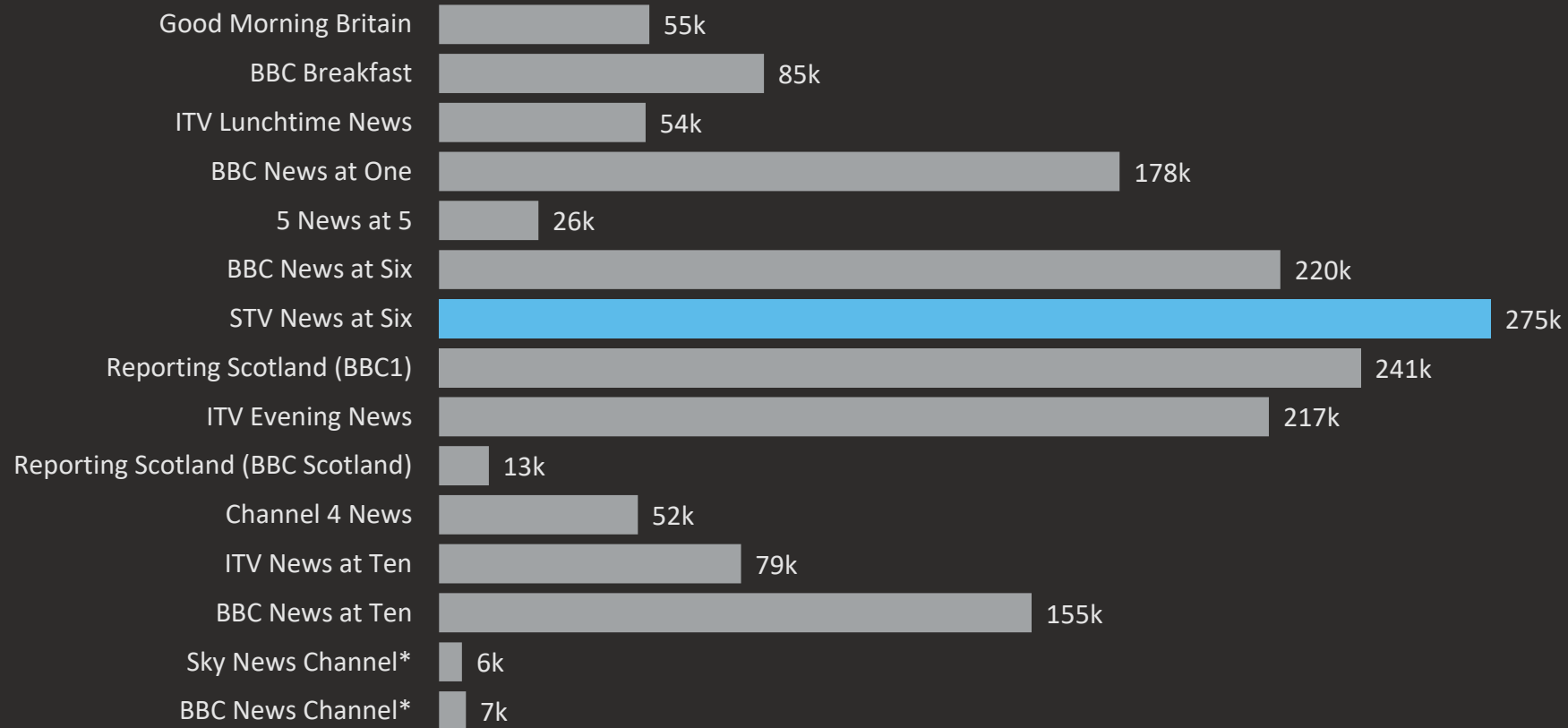
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STV News at Six

Scotland's most watched News programme for the 7th consecutive year

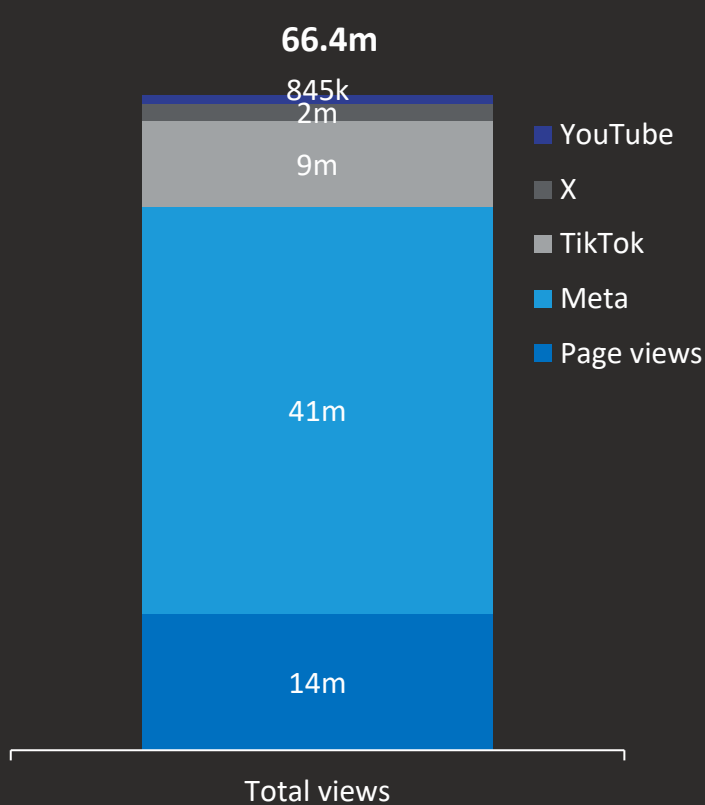


Source: Barb, Jan – Dec 2025, Scotland, Individuals, TV sets, 7-day viewing, *viewing throughout the day (09:30-24:00)

Digital News

Total Digital News views were up +142m YoY, driven by significant +351% increase in video views

Average monthly page and video views



Most-watched videos	Video Views
<i>"Primary School boys become Christmas sensation after doorbell camera footage of them singing..."</i>	21m
<i>"Moment Australian man jumped into River Kelvin to get football back prompts cheers from crowd"</i>	4.6m
<i>"Jimmy Fallon gets highland welcome from King's Royal Guards"</i>	3.0m

Most-read stories	Page Views
<i>"UK Supreme Court rules 'woman' means biological female"</i>	719k
<i>"Almost 20 cheddar products recalled over fears they could cause meningitis"</i>	338k
<i>"John Barrowman: I don't regret anything, everyone on set was having a laugh"</i>	267k

Source: Jan – Dec 2025, STV News website page views = Plausible | Video views = Social Sprout. News & Sport pages on: Meta (Facebook & Instagram), X, YouTube (on platform views only), and TikTok

Digital
2025

stv  Player

STV Player Year on Year review

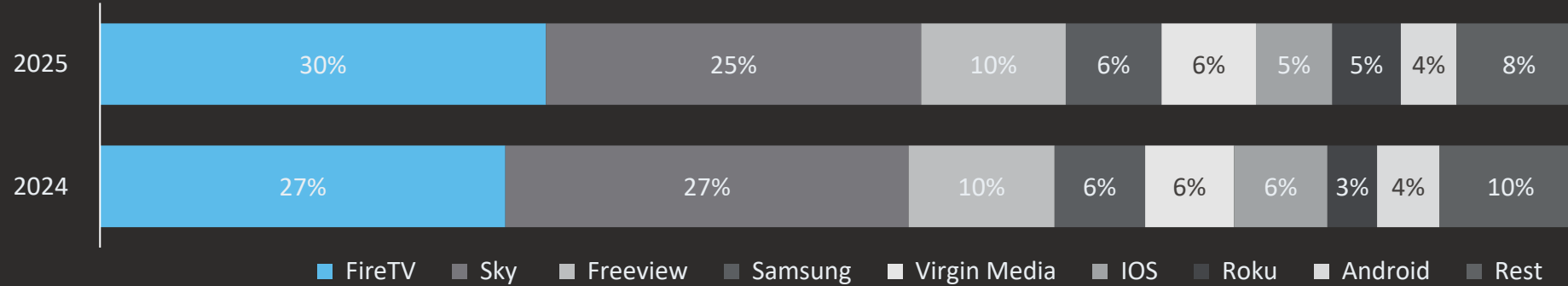
Time spent with STV Player in 2025 increased by an impressive +9% YoY

Period	FY 2024	FY 2025	Change	Change %
Total content time spent (hours)	69.0 m	75.1m	6.1m	9%
Total VOD hours	49.5m	53.6m	4.1m	8%
Total live hours	19.5m	21.5m	2.0m	10%
Total long-form streams	147.9m	158.6m	10.7m	7%
Total VOD streams	102.0m	111.4m	9.4m	9%
Total live streams	45.9m	47.2m	1.3m	3%
Total ad impressions available	1.3b	1.3b	-	Flat
Active registered users (total for period)	2.0m	1.8m	-0.2m	-10%
Active monthly users (MAUs)	1.0m	789k	-211k	-21%
Active daily users (DAUs) 000's	102k	112k	10k	10%
Total time spent per user (hours)	29	36	8	27%

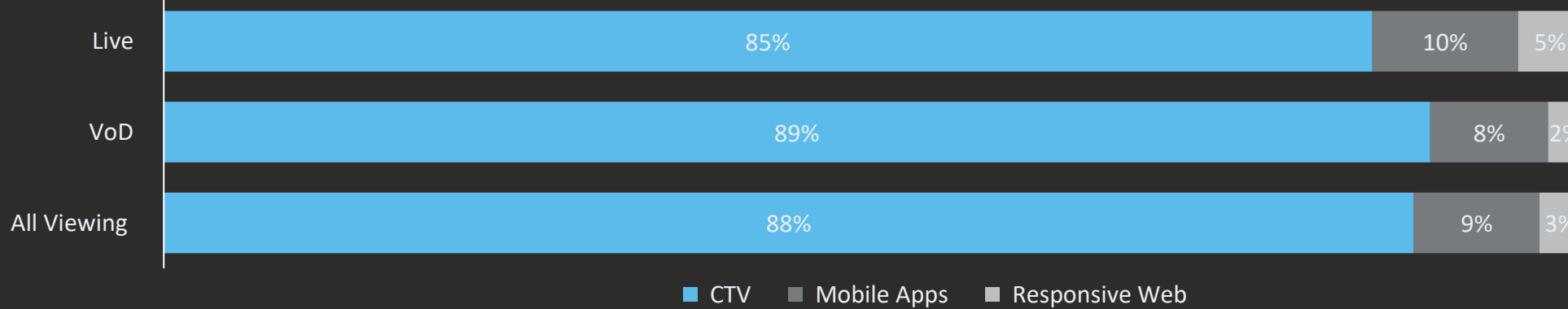
Source: Jan-Dec 2025, Adobe | Conviva | Freewheel | STV Database.

STV Player viewing by platform & device

Viewing by Platform



Viewing by Device Type



STV/STV Player Drama consumption

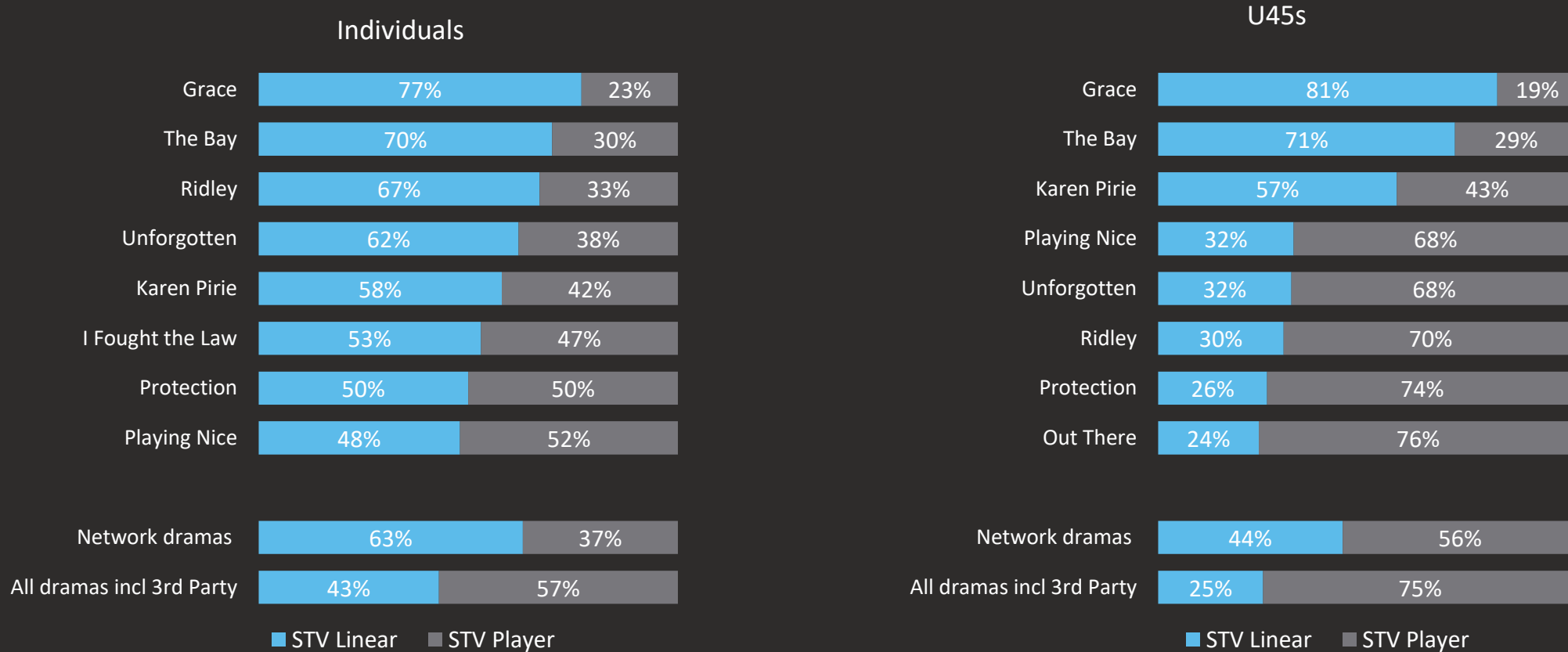
STV Player is now the dominant platform for drama consumption, with **57%** of all drama viewing in 2025. Third-party acquired titles alone accounted for 13.6m hours or 22% of all drama.



Source: (As-Viewed), Jan – Dec 2025 (all-day), 4-screens, includes both STV/ITV1 non-linear channels; Adobe/Conviva 2025, 3P hours factored by 1.303 to account for individual viewing

STV/STV Player Drama consumption

U45 audience increasingly favours our digital platform for drama, with 75% of all STV/STV Player drama viewing from STV Player



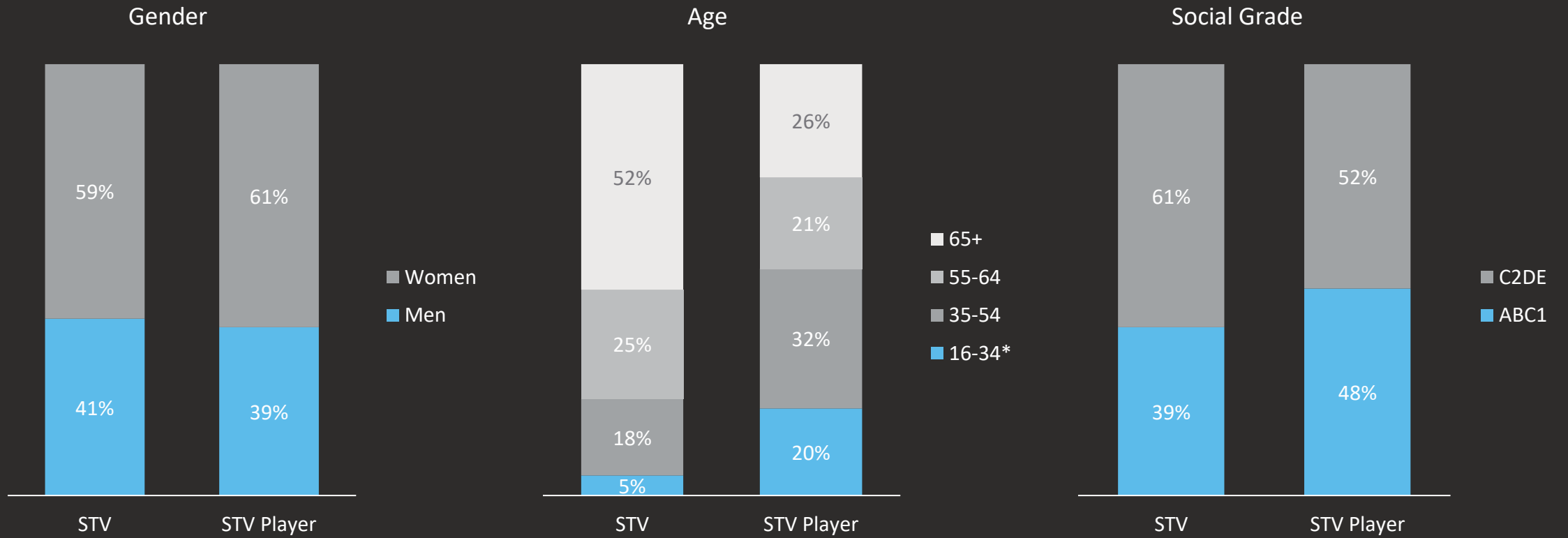
Source: Barb (As-Viewed), Jan – Dec 2025 (all-day), 4-screens, includes both STV/ITV1 non-linear channels

Soap consumption

Whilst overall volume of Soap consumption was down for 2025, STV Player saw a massive +28% YoY increase, with 32% of all STV/STV Player Soap viewing now coming through Player



STV Profiles



Source: Barb, Jan – Dec 2025, (09:30-24:00), base (adults) *18-34 for STV Player. Percentages may not add up to 100% due to rounding

Platforms

All platforms	STV (SD, HD, & +1)
Freeview	40%
Sky & Freesat	32%
Virgin	19%
Online via TV	10%

Source: Barb Jan-Dec 2025 (09:30 – 24:00), Individuals, TV sets, viewer hours by reception type

Ad-Tier Only	Scotland	UK
Prime Video	39%	40%
Netflix	17%	23%
Disney+	6%	9%

	Scotland	UK
Any TV	93%	94%
IPTV*	72%	76%
Freeview	36%	48%
Sky	25%	24%
Virgin	16%	11%
BT Vision	3%	3%
Freesat	2%	3%
Any SVOD	73%	62%
Netflix	65%	62%
Prime Video	50%	48%
Disney+	25%	27%
Discovery+	11%	11%
Paramount+	13%	12%
Apple TV+	8%	10%
NOW	6%	7%

Source: Barb Annual Report Vol. 3 Q1 – Q4 2025, *IPTV = direct or indirect connection to internet via set top box/other device, console, computer ; Barb Establishment Survey Q4 2025, SVOD services include all tiers unless otherwise specified, Household access rather than subscription (i.e., includes free trials), TV Households only, Scotland = Total Scotland.