

Transactional Video on Demand Market – Global Industry Size, Share, Trends, Opportunity and Forecast, Segmented By Type (Electronic Sell Through, Download to Rent), By Vertical (Media & Entertainment, Education, Others (Sports, etc.)), By Region & Competition, 2021-2031F

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Abstracts

The Global Transactional Video on Demand (TVOD) Market is projected to experience substantial growth, expanding from USD 8.03 Billion in 2025 to USD 17.73 Billion by 2031, demonstrating a robust 14.11% CAGR. TVOD operates as a digital model enabling consumers to rent or purchase individual video content on a pay-per-view basis, distinct from subscription services. Key drivers for this expansion include the increasing global availability of high-speed broadband and a rising consumer desire for immediate access to premium theatrical releases and specialized niche content without needing bundled subscriptions. For example, the digital transactional market in the United Kingdom reached ?381 million in 2024, underscoring its underlying stability.

However, the market's growth is significantly challenged by the widespread dominance of Subscription Video on Demand (SVOD) platforms. The perceived superior value of unlimited content libraries offered for a fixed monthly fee often makes the cumulative expense of single-transaction purchases appear costly to consumers who are sensitive to price. This dynamic inhibits the broader adoption of the transactional model within an already saturated entertainment environment.

Market Driver

The strategic reduction of theatrical release windows and the prevalent adoption of

Direct-to-Digital distribution strategies are pivotal catalysts for the market, effectively bridging the divide between cinema and home viewing. By providing Premium Video on Demand (PVID) options, studios leverage the immediate marketing momentum of theatrical debuts, encouraging consumers to pay a premium for early access before content becomes available on subscription services. This approach maintains the high value of individual transactions, ensuring digital purchase and rental platforms remain crucial for viewers who prioritize immediate viewing over delayed streaming. In fact, according to the British Association for Screen Entertainment, premium priced films available to buy or rent increased by 15 percent in 2024, with the average window from cinema to home release consolidating to just 40 days.

Concurrently, the sector benefits from a growing consumer preference for flexible, contract-free, a la carte content models, which offer a financial alternative to the accumulating expenses of multiple subscriptions. As the streaming landscape becomes more fragmented, audiences are increasingly willing to pay for specific, high-quality titles on a per-view basis, rather than committing to continuous access to extensive, often unused, content libraries. This consumer behavior is particularly evident in the resilience of digital rental figures for new content; the Digital Entertainment Group reported a 7.7 percent increase in consumer spending on internet-delivered digital rentals of new theatrical releases during Q3 2024, highlighting the enduring appeal of the single-transaction format. Further demonstrating this demand, Universal Pictures noted that the digital release of the film *Wicked* generated over \$70 million in sales across the United States and Canada in its initial week alone in 2025.

Market Challenge

The primary obstacle hindering the growth of the Global Transactional Video on Demand market is the intense competitive pressure from the dominant Subscription Video on Demand (SVOD) platforms. The economic efficiency of SVOD models, which provide unlimited access to vast content libraries for a flat monthly fee, presents a challenging value proposition for the transactional sector. For consumers who are sensitive to price, the aggregated cost of renting or purchasing individual titles frequently appears prohibitive when compared to the consistent, flat-rate structure of subscriptions. This financial disparity discourages frequent use of transactional services, relegating them to a secondary option primarily reserved for specific theatrical releases not yet available on subscription tiers.

This measurable shift in consumer preference is directly impacting the financial performance of the sector in key regions. For instance, in 2024, total consumer

spending on digital transactional formats in the United States saw a 7 percent decline, while the subscription streaming segment expanded by over 25 percent during the same period. This significant divergence in spending patterns illustrates how the concentration of viewership within subscription ecosystems is directly shrinking the potential market for single-transaction purchases, thereby impeding the broader expansion of the transactional model.

Market Trends

The increasing adoption of Electronic Sell-Through (EST) for film franchises and box sets serves as a vital market stabilizer, appealing to collectors who prioritize permanent ownership over temporary streaming access. While demand for rentals often fluctuates with theatrical release schedules, the "buy-to-keep" model is gaining considerable traction among consumers keen to own complete television series and film franchise collections without relying on subscription services. This trend helps protect the sector from cannibalization by SVOD, specifically targeting highly engaged fandoms prepared to pay a premium for lasting library access. According to the Digital Entertainment Group, consumer spending on the digital purchase of TV titles notably increased by 3 percent in the fourth quarter of 2024, even as the broader transactional market faced challenges.

Concurrently, the migration of live sports and exclusive events to digital Pay-Per-View (PPV) is effectively broadening the addressable market beyond traditional movie content. Digital platforms are increasingly incorporating transactional gateways for major combat sports and significant football matches, enabling rights holders to directly monetize high-demand events to global audiences independently of linear television contracts. This strategy capitalizes on the flexibility of digital distribution to capture impulse purchases from fans who opt against full season passes. SportsPro reported that DAZN, a specialized streaming service, saw its annual revenue grow by 11 percent to \$3.19 billion in 2024, a performance primarily driven by the strategic expansion of its digital pay-per-view operations.

Key Market Players

Amazon.com, Inc.

Apple Inc.

Rakuten Group, Inc.

The Walt Disney Company

Vudu LLC

Redbox Automated Retail LLC

Bigtree Entertainment Pvt. Ltd

Alphabet Inc.

Hulu LLC

DIRECTV, LLC.

Report Scope

In this report, the Global Transactional Video on Demand Market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

Transactional Video on Demand Market, By Type

Electronic Sell Through

Download to Rent

Transactional Video on Demand Market, By Vertical

Media & Entertainment

Education

Others

Transactional Video on Demand Market, By Region

North America

United States

Canada

Mexico

Europe

France

United Kingdom

Italy

Germany

Spain

Asia Pacific

China

India

Japan

Australia

South Korea

South America

Brazil

Argentina

Colombia

Middle East & Africa

South Africa

Saudi Arabia

UAE

Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the Global Transactional Video on Demand Market.

Available Customizations:

Global Transactional Video on Demand Market report with the given market data, TechSci Research offers customizations according to a company's specific needs. The following customization options are available for the report:

Company Information

Detailed analysis and profiling of additional market players (up to five).

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