

# The European advertising market in 4 questions

A presentation of the European Audiovisual Observatory  
by Christian Grece

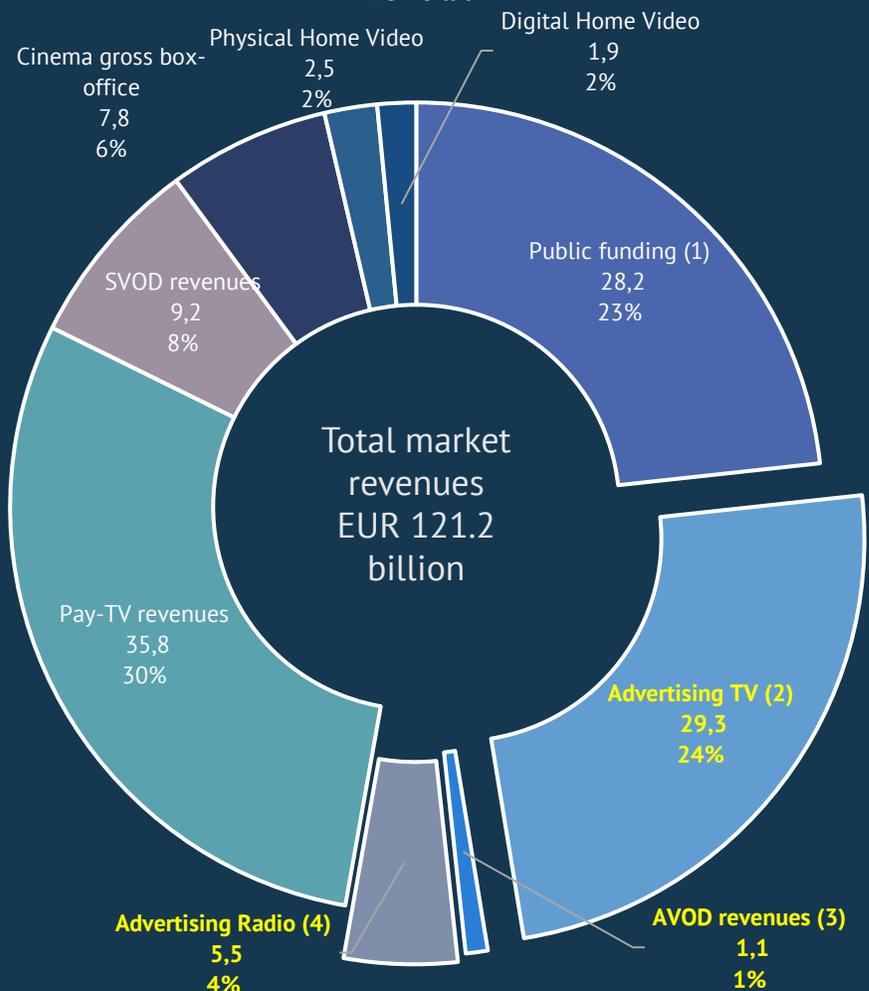
DLI Workshop – Audiovisual commercial communications 21.11.2025



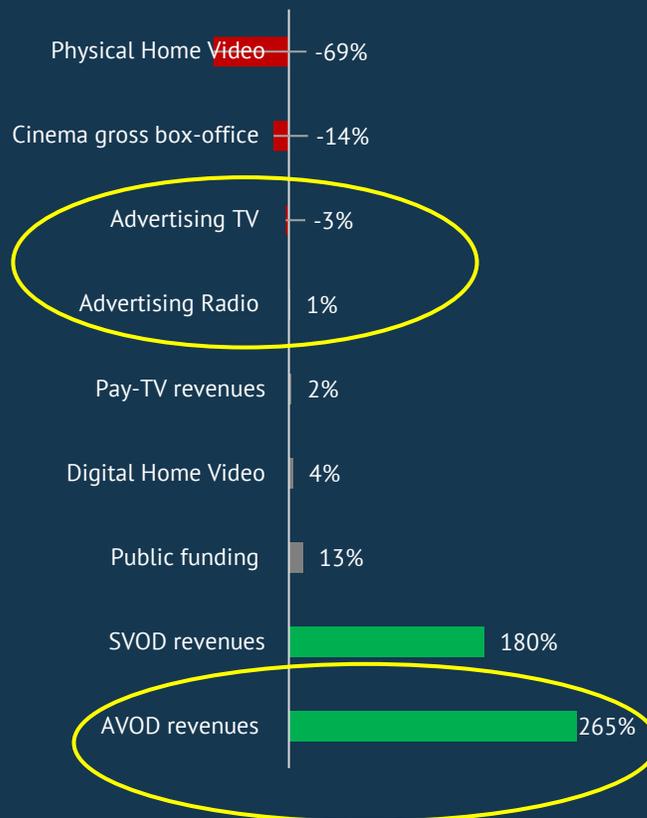
# The weight of linear TV advertising is decreasing in the European AV market, while AVOD revenues have experienced explosive growth.

## Europe 2019 - Audiovisual market revenues

in EUR billion

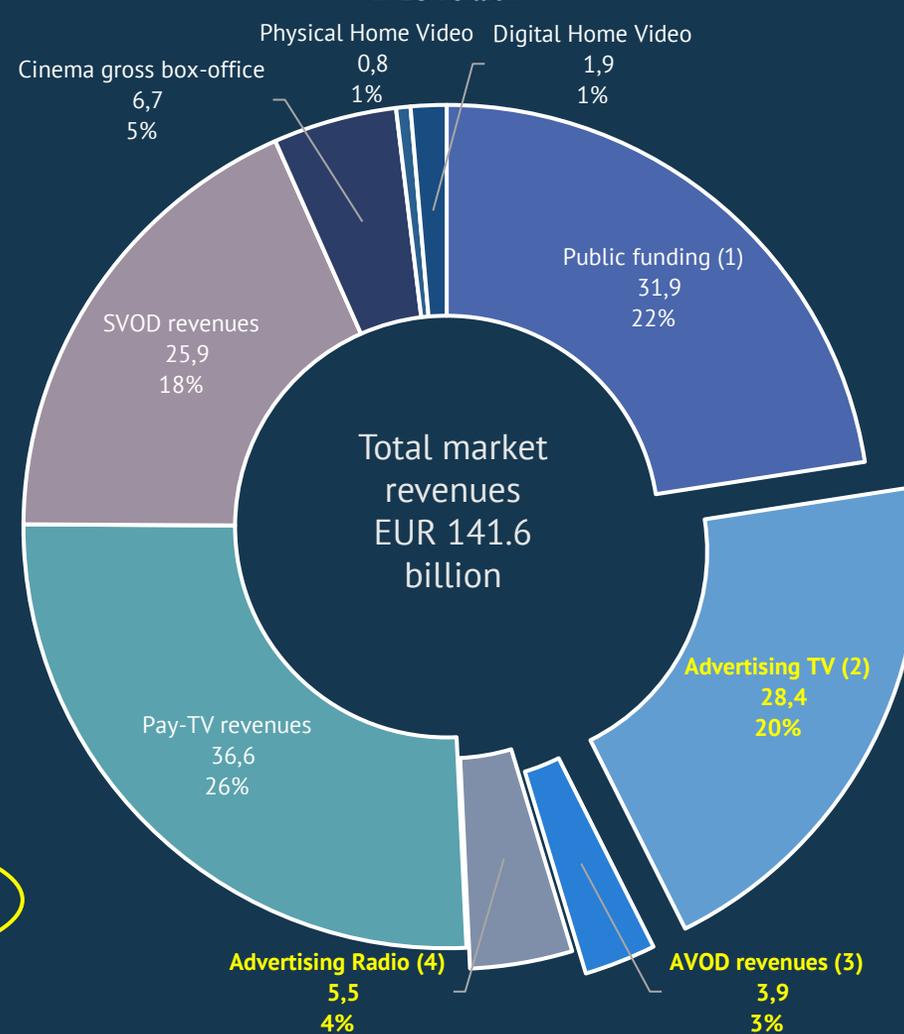


## Europe - Change in revenues by market segment 2019-2024



## Europe 2024 - Audiovisual market revenues

in EUR billion



All figures exclude VAT except cinema gross box-office.

(1) Public funding of public broadcasters.

(2) Includes broadcasters' on-demand services advertising revenues; includes agencies commissions; excludes production costs.

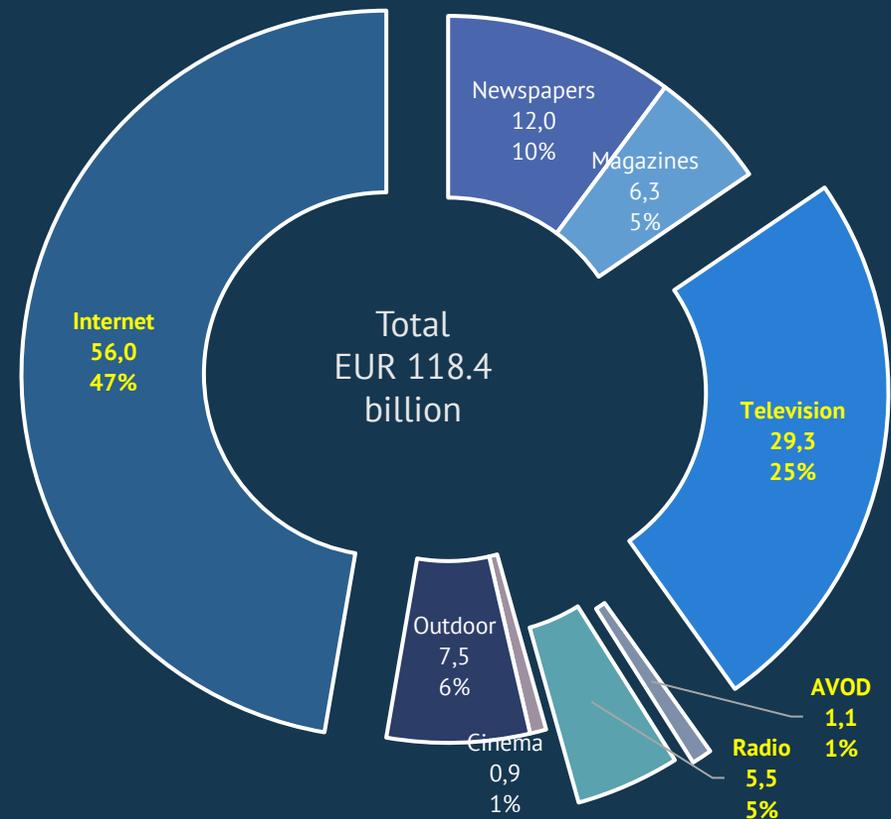
(3) Includes BVOD, FAST, advertising revenues of pay-SVOD services; net revenues of services.

(4) Includes agencies commissions; excludes production costs.

# Advertisers are spending more on internet advertising, including OTT video advertising

Europe 2019 - Advertising expenditures by media

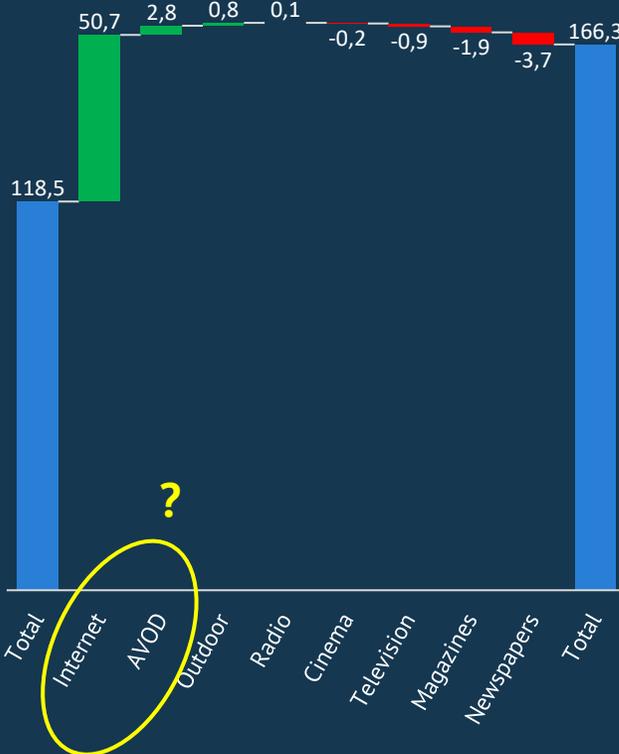
In EUR billion



Contributions by media ad segment

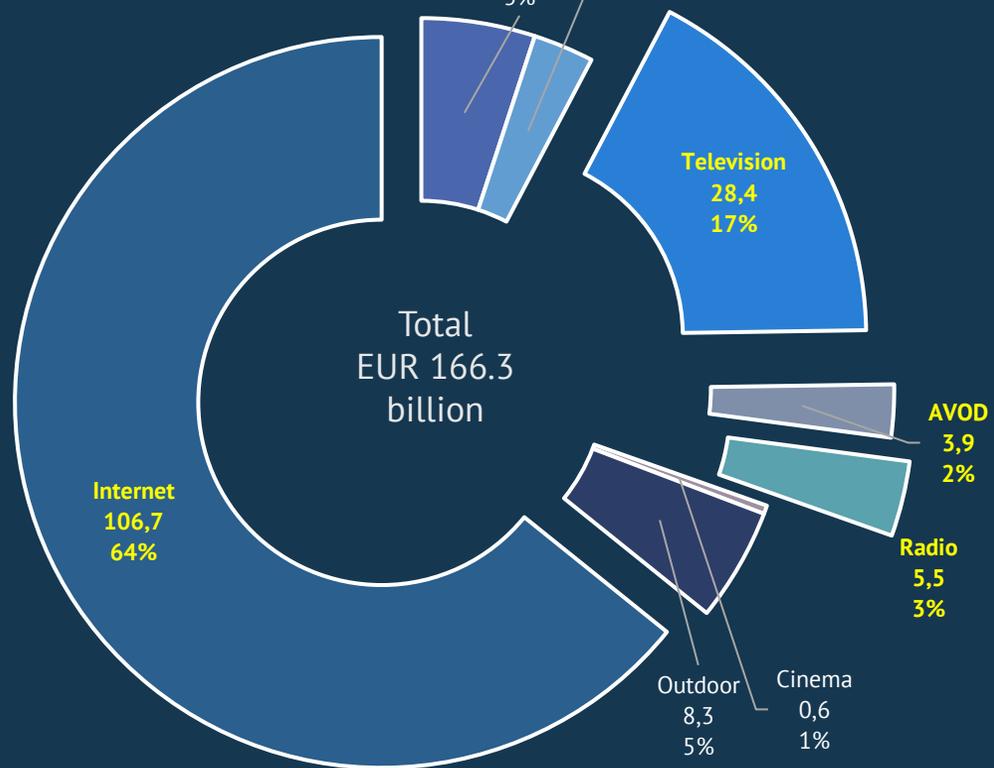
2019-2024

in EUR billion



Europe 2024 - Advertising expenditures by media

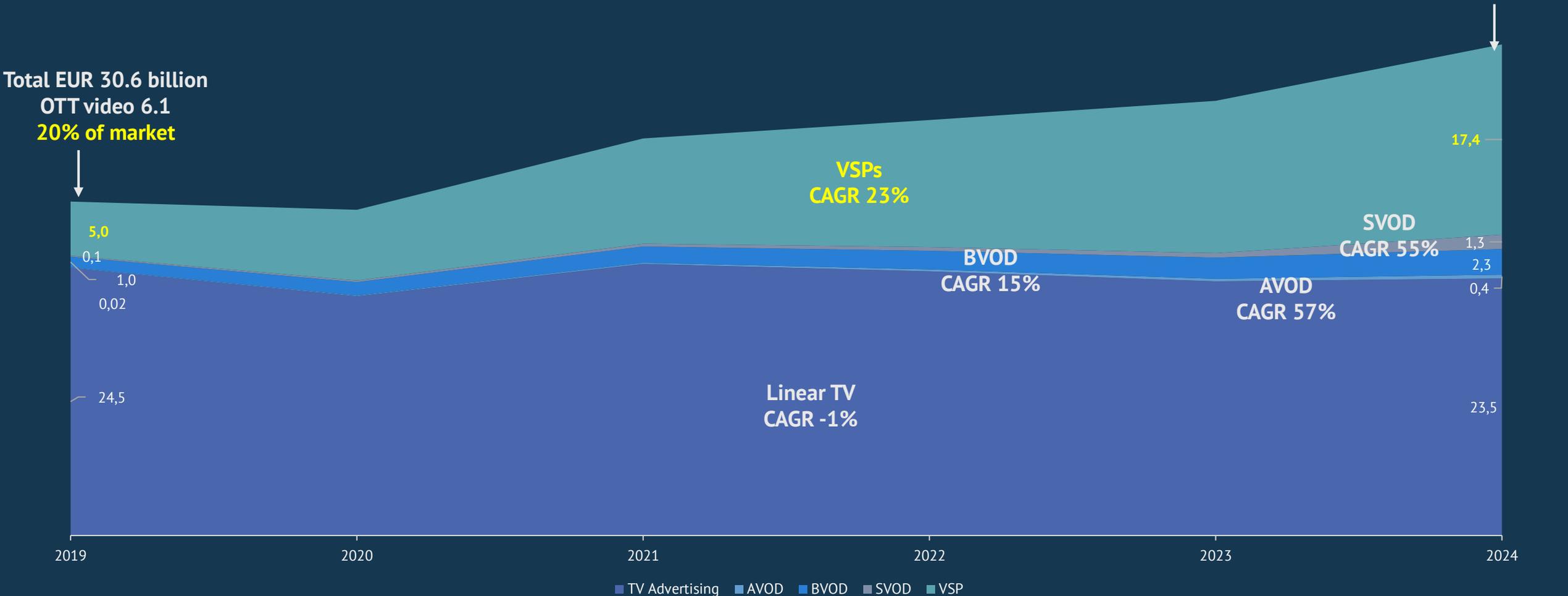
In EUR billion



# “Battle for video advertising” - Video-sharing platforms and AVOD/SVOD services expand AV advertising market

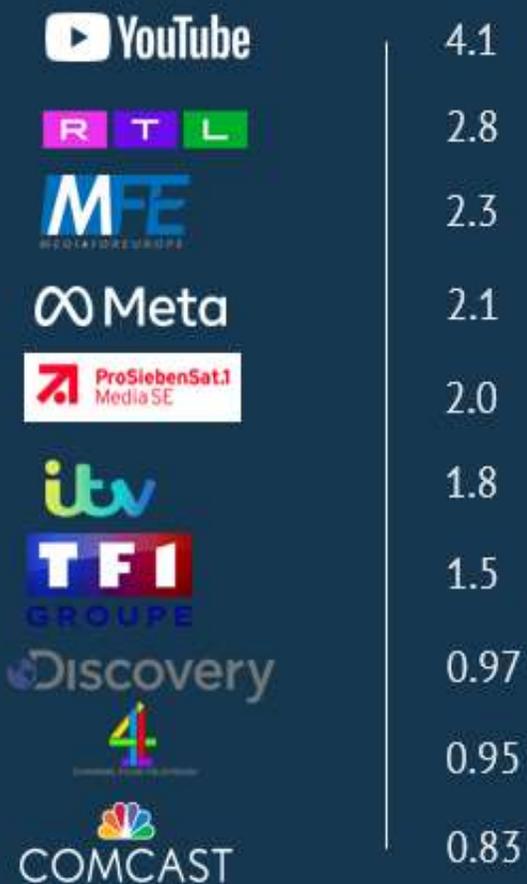
## Europe - Advertising on video services by category of services 2019-2024

in EUR billion, estimates



# Rapid rise of video-sharing and creator platforms with global reach on the European advertising market

## Top 10 groups by AV advertising revenues (2020, in bn EUR)



- Linear TV remains a **major source of advertising revenues** in Europe BUT broadcasters are under pressure due to **ageing audiences and declining viewing times**.
- **Increase in ad inventory options** and increased **use of connected TVs** by European consumers.
- Advertisers' budgets are **migrating to VSPs and online video services**
- **Audience fragmentation**
- European broadcasters **launched BVOD services and FAST channels**
- **Distribution experiments with long-form content on VSPs** by broadcasters/rightsholders
- Reduction in the **attention span of audiences, "lean-back" viewing**

## Top 10 groups by AV advertising revenues (2024, in bn EUR)



**More information:**  
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