

Europe Deepfake AI Detection Market Size and Forecast (2021 - 2031) Regional Share

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Abstracts

The deepfake AI detection market in Europe is poised for significant growth, with projections indicating that it will reach approximately \$910.68 million by 2031, up from \$62.76 million in 2023. This represents a remarkable compound annual growth rate (CAGR) of 39.7% from 2023 to 2031.

Executive Summary and Market Overview

The landscape of digitalization in Europe is rapidly evolving, impacting various sectors such as banking, healthcare, information technology, telecommunications, and retail. Major banking institutions across the continent are actively pursuing digital transformation strategies aimed at enhancing customer experiences and providing round-the-clock digital services. The European Union (EU) has set ambitious digitalization goals for 2030, which include ensuring that over 90% of small and medium-sized enterprises (SMEs) achieve at least a basic level of digital intensity and that 75% of EU companies utilize cloud computing services. As of 2023, more than 70% of EU companies have reached this basic digital intensity, with SMEs at 69% and large enterprises at an impressive 98%. This surge in digitalization correlates with an increased demand for security solutions to manage the vast amounts of data generated. A recent report from Amazon Web Services highlights that over 33% of European companies adopted artificial intelligence (AI) in 2023. This growing adoption of AI is expected to accelerate the EU's Digital Decade goals, which were outlined by the European Commission in 2021. However, the rise in digitalization and AI integration has also led to a corresponding increase in fraudulent activities, particularly deepfake fraud. In 2023, deepfake-related frauds in the UK, Spain, and Germany accounted for over 40% of total fraud incidents within the EU, according to data from Sum and Substance Ltd. This alarming trend is anticipated to drive the demand for deepfake AI detection solutions from 2023 to 2031.

Market Segmentation Insights

The deepfake AI detection market can be segmented based on various criteria, including components, deployment methods, enterprise size, and industry verticals:

By Component: The market is divided into software and services, with the software segment holding a larger market share in 2023.

By Deployment: The market is categorized into cloud-based and on-premises solutions, with cloud deployment dominating in 2023.

By Enterprise Size: The market is segmented into large enterprises and SMEs, where large enterprises accounted for a greater share in 2023.

By Industry Vertical: Key sectors include media and entertainment, banking, financial services and insurance (BFSI), government and politics, healthcare, IT and telecom, retail, and e-commerce. The media and entertainment sector led the market in 2023.

Market Outlook

AI is increasingly vital in enhancing user engagement on over-the-top (OTT) platforms, providing advertisers with real-time insights into campaign performance. As AI technology advances, it is expected to deliver more personalized experiences to audiences while gathering valuable behavioral data. The media and entertainment industry is leveraging AI for game development, film production, and advertising, leading to innovative processes and strategic investments aimed at meeting the growing demands of audiences.

However, deepfake technology presents both risks and opportunities, complicating public trust in media authenticity. While malicious applications of deepfake technology can undermine trust through misleading content, there are also legitimate uses in filmmaking and language translation. A survey by Forbes Advisor revealed that 35% of companies are utilizing AI in content production, while 24% are focusing on audience segmentation.

The rise of AI-generated media has sparked significant concerns regarding the authenticity of digital content and the potential for misinformation. In the first quarter of 2025, it was reported that 26% of global deepfake operations were based in Europe, with a notable increase during national and regional elections. These synthetic media attacks often target political figures and parties, aiming to sway public opinion and voter behavior. In response, EU member states are increasing investments in AI-based deepfake detection and content verification technologies, reflecting the urgent need for

reliable solutions in this area.

Country-Specific Insights

The deepfake AI detection market in Europe includes key countries such as the UK, Germany, France, Italy, Russia, and others, with the UK holding the largest market share in 2023. Reports indicate that deepfakes have become the second most prevalent information security incident affecting UK businesses, with over a third of organizations experiencing such incidents in 2023. The identity fraud rate in the UK also saw a rise of 1.63% compared to 2022, with deepfake fraud attacks increasing by over 300% during the same period. This surge in cyber threats is expected to significantly boost the demand for deepfake AI detection solutions in the UK from 2023 to 2031.

The UK government is actively investing in the digital transformation of healthcare, with a notable investment of \$182.38 million announced in June 2022 to support social care and enhance cybersecurity. As healthcare digitalization progresses, the potential for fraud and misuse of public data through deepfake technology is anticipated to further drive the growth of the deepfake AI detection market in the UK.

Key Players in the Market

Prominent companies in the deepfake AI detection market include Sightengine, Clarity, FaceOnLive, Buster.Ai, SpoofSense, Facia.ai, Kroop AI, Reality Defender Inc., Au10tix, Microsoft, BioID, Sensity B.V., ValidSoft, Sentinel, HyperVerge Inc., DuckDuckGoose, McAfee Corp, deepfakedetector.ai, Attestiv Inc., and Intel Corporation. These companies are employing various strategies, including expansion, product innovation, and mergers and acquisitions, to enhance their offerings and increase market share.

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