NMHH

National Media and Infocommunications Authority • Hungary

2022

MEDIA MARKET REPORT

TELEVISION
RADIO
PRINT MEDIA
ONLINE MEDIA
NEW MEDIA PLATFORMS

MEDIA MARKET REPORT

2022

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Table of contents

The President's Welcome Address 4

Summary 6

Television market 16

Radio market 30

Print media market 42

Online media market 58

New media platforms 72

Advertising market 90

Diversity in media consumption 102

The role of the NMHH in the media and communications markets 114

Afterword 116

Definitions 118

The President's Welcome Address

The domestic content industry is a vibrant, changing and evolving business, closely linked to the development of technology, which plays a key role in our everyday lives in terms of information, work and leisure. However, its significance goes far beyond the important business, convenience and efficiency aspects: a well-functioning media system supports the fundamental values of Hungarian culture, the mother tongue, freedom of expression and diversity of opinion, which are the basis of the democratic system, and hence, overall, of national identity.

In order to ensure that the audience is well-informed, and to increase their welfare, satisfaction and security, the National Media and Infocommunications Authority and the Media Council consider it a priority task to ensure the proper functioning of democratic publicity in the Hungarian media market, to promote financial and environmental sustainability and to support innovation and competition.

In carrying out these tasks, our priority is to ensure the continued sustainability of the delicate balance between the audience, the service providers and the policy interests. As far as the audiences of the media are concerned, this means ensuring the availability of services of the appropriate quality and price, effective protection against infringing content, a reassuring resolution of

Dr. András Koltay, President of the National Media and Infocommunications Authority

consumer complaints and choice covering a wide range of content. In terms of the various media service providers, our goal is to ensure their right to protect investments, increase shareholder value, generate market revenues and implement strategic plans, whereas, in the case of policy interests, our primary focus is to ensure media pluralism, technological development, market diversity and competition.

To ensure that the NMHH and the Media Council can meet the above expectations, it is essential that they have adequate information on the key processes in the individual submarkets. The authority has of course already devoted considerable attention and resources to the systematic collection and processing of data on the media. Ongoing representative surveys of the public, data from service providers, targeted media analyses and research have always been integrated into the Authority's decision-making processes and regulatory activities, and have been available on the Authority's website.

However, this is the first time since 2013 that the NMHH has published a comprehensive media market report covering the entire sector. We believe that this systematic overview, presenting both the latest available annual data and indicative trends, will be of interest and use to actors in the business and public administration sectors and also to consumers interested in key media trends. The topics and the scope and depth of the information processed have been set out to facilitate the broadest possible common reflection, to foster a factual and data-driven dialogue that strengthens the partnership between the authority, the service providers and the consumers, in order to improve the effectiveness of regulation and ultimately consumer welfare.

I sincerely hope that our publication will appeal to the interested public. In the future, we will work to make our publication a regular annual report, keeping track of the changes in the exciting and rapidly-changing world of the media.

Summary

Globalisation, technological development and the constant transformation of media consumption habits have not only brought rapid and profound changes in some media submarkets, but also **changed and blurred the boundaries** between certain submarkets. The Media Market Report of the National Media and Infocommunications Authority (NMHH), which continuously monitors market changes, reveals a diverse, technology-intensive, constantly changing and evolving domestic content industry, which at the same time faces **increasing challenges** due to the growing weight of global platforms in the media and advertising market.

The different departments of the NMHH dealing with media regulation-related issues have been analysing the media market along different dimensions and perspectives, but for a long time there has not been a systematic media market report that could provide a **comprehensive picture of the diverse Hungarian media market by** analysing the actual figures of the supply and demand sides of the market (official registers, coverage and usage data, media consumption measurements, market research, etc.). This document aims to fill this gap.

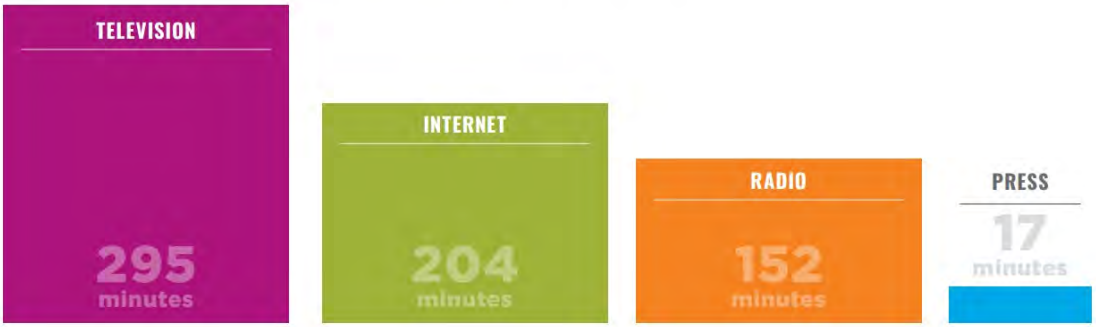
The publication, which is planned to be published annually in future, aims to **increase the transparency of the market and its regulation** by presenting the Hungarian media market in a factual and easy-to-understand manner and by analysing the correlations between the communications, media and advertising markets. Even though the media and advertising markets together account for less than 1% of GDP and employment, their social importance goes far beyond their narrow economic significance.

Among the **European surveys** in this field, the *Media Pluralism Monitor*[1], published since 2014 by the Centre for Media Pluralism and Media Freedom, is worth highlighting; it tracks the media markets in European countries across the TV, radio, print and online markets, showing, among many other aspects, the level of diversity of

[1] https://www.rcmediafreedom.eu/Tools/Monitoring-tools/Media-Pluralism-Monitor-2021

DAILY TIME SPENT ON MEDIA CONSUMPTION (MINUTES)

Source: Kantar Hoffmann-Scores Group/NMHH; Nielsen, Ariosz, Scores Group/NOK.



opinion and media. The Danish Ministry of Culture publishes an annual survey on online services based on a massive data analysis. In addition to its annual comprehensive media market reports, Ofcom, the UK media authority, has been publishing a special study focusing on online media and new platforms for some years.

Drawing inspiration from international examples, the NMHH has undertaken to produce a media market report that, in addition to analysing the latest supply and demand trends in the traditional media services market, underpinned by statistical data and research, also provides an **insight into the operation and market weight of new media platforms,** which so far have not been assessed in a comprehensive manner.

As shown in the chapter on **news consumption habits,** almost three quarters of the Hungarian population use several different media platforms for obtaining information. The same can also be said for overall media consumption: in 2021, the average Hungarian citizen[2]

- listened to the **radio for more than two and a half hours** per day (Kantar Hoffmann-Scores Group/NMHH);
- watched more than **four and a half hours of television** per day (Nielsen Médiakutató Kft.);
- spent almost **three and a half hours online** per day (Ariosz);
- spent an additional quarter of an hour reading daily newspapers and magazines per day (Scores Group/NOK).

While the **"traditional" media market segments** – television and radio as defined by the Hungarian Media Act, and press products covered by the Freedom of the Press Act – do not need to be explained, the definition of new media platforms is

[2] The audience measurements cited refer to different populations. In the Nielsen Médiakutató Kft. survey, the total population is represented by those aged four and over, in the Kantar Hoffmann-Scores Group/NMHH survey by those aged 15 and over, and in the Ariosz survey by those aged 16 and over.

however not always obvious. In the **online media market** chapter of the report, we look at the digital readiness of the demand side (internet habits of the population), the content services available exclusively online in Hungary, and the online forms of traditional media types (TV, radio, print).

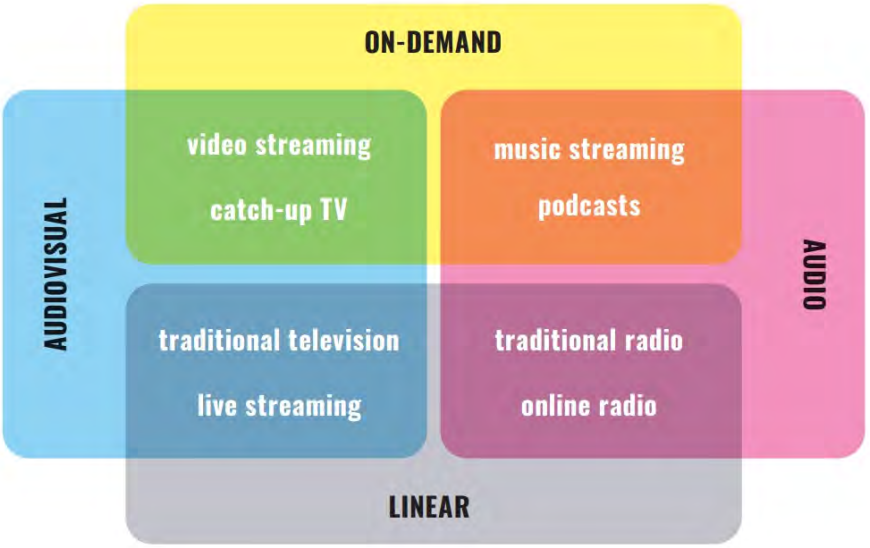
In the **new media platforms** chapter, we analyse the market for online services that directly challenge and compete with traditional media services, including online content services that have been around for decades, in the race for consumers' attention and advertisers' money. These platforms fall outside the regulatory framework of the Media Act and Press Act that were designed for the media market of the 20th century (e.g. streaming and video-sharing sites, social media, podcasts). The role of search platforms, which are also important in terms of advertising and content distribution, is discussed in the advertising market chapter.

The report's main supply and demand-side indicators for each submarket show that Hungary has a diverse and broad content supply in each of the submarkets examined:

- in the **television market**, at the end of 2021, there were 15 national television media services (7 public service and 8 commercial), 39 regional and 310 local television stations operating under Hungarian jurisdiction, and 163

On-demand and linear audiovisual and audio services

Source: Edit by NMHH



HUNGARY HAS A DIVERSE AND BROAD CONTENT SUPPLY IN EACH OF THE SUBMARKETS EXAMINED

foreign channels or channels offered by Hungarian content providers under foreign jurisdiction;

- the **Hungarian terrestrial radio supply** comprises 165 media services: in addition to 6 radio stations with nationwide coverage (i.e. the five public service radio stations and the commercial Retro Rádió), there are 159 regional, local and small community radio stations, using a total of 223 frequencies. Besides the public service radio stations, 83 stations are commercial and 77 stations are community radio stations. Regional and local radio stations are being organised into several networked services, the largest being the Radio 1 network, which has almost full nationwide coverage;

- although the popularity of **print media** is declining in parallel with the rise of online media, there are still more than 7,000 print media products published at various intervals in Hungary every year by almost 5,000 different publishing organisations;

- the **online media market** supported more than 3,000 online content services in the 4th quarter of 2021, but only 635 websites were included in website traffic measurements and various industry surveys: the largest content services include both independent news portals and online platforms connected to printed press products;

- there is no comprehensive inventory of the **new media platforms** and services available in Hungary, but the vast majority of the largest services in the global supply are also accessible in Hungary, and smaller domestic players are also trying to establish themselves.

In line with international trends, **the supply market** in each submarket **is fairly concentrated**:

- in the **television** market, only 13 operators achieved annual revenues above HUF 1 billion, and only 5 operators achieved revenues above HUF 4 billion, with the two market leaders (RTL and TV2) sharing the largest share of revenues in 2021;

- of the 96 media service providers operating **radio stations**, only two (Radio Plus Kft., which operates a significant part of the Rádió 1 network, and Hold Reklám Kft., which operates Retro Rádió) have annual net sales revenues of more than HUF 1 billion; the majority of companies are small businesses with revenues of less than HUF 100 million, and 31 companies have annual net revenues of less than HUF 10 million;

MULTI-SCREEN DEVICE USE IS INCREASING AND EXCLUSIVE TV VIEWING IS BECOMING LESS COMMON

- of the approximately 549 professional **newspaper and magazine publishing companies**, only 13 had sales revenues of over HUF 1 billion in 2021, and 78 formed a group with a sales revenue of between HUF 100 million and HUF 1 billion. The largest newspaper and magazine publishing company is Mediaworks Zrt., which publishes magazines and all county daily newspapers, with an annual net sales revenue of almost HUF 50 billion, and which has almost 40% of the HUF 122 billion print media market;
- of the 271 media companies operating more than 3,000 **online content services** in Hungary, six exceed the HUF 1 billion annual sales revenue level, with the vast majority of players being small businesses with annual sales revenues below HUF 100 million;
- the revenues of the Hungarian online market leaders are dwarfed by – and increasingly lagging behind – the

revenues that **global platform operators** generate in Hungary: according to an estimate by Whitereport[3], an independent media market database service provider, the Hungarian revenues of Alphabet (Google, YouTube) are roughly nine times higher than those of the largest Hungarian online content provider.

Looking at **demand-side trends**, the use and popularity of traditional media services is steadily declining, albeit modestly, apart from during the shutdown periods caused by COVID-19, while the advance of online services and global media platforms is unstoppable:

- the vast majority of Hungarian adults (86%) still watch **TV** regularly; the time spent watching TV is mostly determined by age, social status and digital readiness; the highest viewing rates are among older people, those with lower levels of education and those without internet access; the two leading commercial channels, RTL Klub and TV2, had the highest number of viewers in 2021 in the 6–10 p.m. time-slot – and the most watched public service channel was Duna TV;

- regular **radio listeners** comprise almost 70% of the Hungarian population and they spend on average almost four hours a day listening to radio broadcasts; in the list of the daily audience of radio stations with nationwide coverage; in the fourth quarter of 2021, Retro Rádió was followed by Rádió 1, which networks local and regional stations, and then by two public service stations (Kossuth and Petőfi);

- the circulation figures of **printed press products** have been decreasing for years: among the daily newspapers audited by MATESZ, Észak-Keleti Napló, distributed in three counties, continues to have the largest circulation, while, among the national newspapers, only Blikk has a circulation of over 50,000; among the weekly magazines, Nők Lapja has the largest audited circulation, while Kiskegyed, Színes RTV and Story also have a circulation of over 100,000;

- the major news portals and magazines are the market leaders in the field of **online content services** in Hungary, followed by the online versions of some of the printed media market players (Blikk, HVG, Nők Lapja); the list has been topped by Index year after year, with Origo, 24.hu and blikk.hu sharing the top spots;

- In Hungary, **new media platforms** (audio and video streaming services, video sharing platforms, social networking sites, etc.) are also becoming increasingly popular, not only competing with traditional media for users' attention and advertising revenues but also with online content providers – often by reposting their articles and posts:

[3] http://whitereport.hu

- the business model and revenue prospects of TV channels are being challenged by video streaming services and video sharing platforms;
- radio stations have to compete with a countless number and variety of online radio stations, music streaming service providers and podcasts;
- the printed media – and increasingly audiovisual and online content providers as well – must respond to the challenges posed by the various social media platforms (e.g. Facebook, Instagram, TikTok, etc.).

The rapid expansion of both the domestic online media market and global media platforms has been made possible by the fact that **more than three quarters of the total domestic population are now regular internet users**, with non-internet users being the majority only among adults aged 70 and over:

THE RISE OF ONLINE SERVICES AND GLOBAL MEDIA PLATFORMS IS AN INCREASING CHALLENGE FOR THE DOMESTIC CONTENT INDUSTRY

- as mobile internet has become cheaper, the device most people use to surf the internet has changed to a **smartphone**, making the place where content is consumed location-independent;

- browsing (looking for information, reading), social networking and chatting are currently the **most common activities** on the internet, but more and more people are also consuming video content, which is driving mobile operators to build faster mobile networks, capable of providing larger mobile data quotas;

- in 2021, half of Hungarian internet users had access to the big international paid **streaming services** competing with linear content services (this represents far fewer subscriptions due to multi-user subscriptions);

- the major domestic linear content providers have been offering **catch-up TV** services for several years (RTL Most, TV2 Play, Médiaklikk);

- according to data from the European Audiovisual Observatory, there were already more than 300 **on-demand audiovisual services** in Hungary in December 2020 (this statistic also takes into account non-localised services available worldwide);

- the **crowding-out effect of online media** consumption on television is already evident: while only 12% of internet users who do not watch any online video do not watch traditional TV, 20% of those who watch at least one hour of online video content a day have already stopped watching TV altogether;

- with the rise of on-demand video services, the popularity of global video-sharing sites (e.g. YouTube, TikTok) and torrenting has not declined significantly.

As advertising is almost the sole source of revenue for radio and online content providers, but also indispensable for television and print media, without the **advertising market** most media would not exist; the chapter on the advertising market also covers the growing role of global platforms and their crowding-out effect on the domestic media and advertising market:

- according to the estimated data of the Hungarian Advertising Association (MRSZ), the **HUF 144 billion ad spend** in 2013 had more than doubled to HUF 305 billion by 2021, which means a 78% increase in real terms over eight years;

- the **internet's share** (HUF 156 billion) exceeded 50% of the total advertising market for the first time in 2021, but two thirds of this was generated by global platforms with faster than average revenue growth; of the HUF 54 billion spent on online advertising in Hungary, only HUF 33 billion went to content providers, as HUF 21 billion was spent on listing providers (typically advertising sites);

- **Google and Facebook**, with their huge development capacity and ability to offer low-cost and highly targeted advertising opportunities to reach target audiences, have grown to become dominant players at many points along the online market value chain, eroding the advertising revenues of all traditional content services.

According to research on **news consumption habits**; almost three quarters of the Hungarian population obtain information from two or three different media platforms on a weekly basis, using some combination of the internet, TV, print media and radio as a source of information:

- the vast majority of those who obtain information from a single source (19% of the total population) get it **exclusively from the internet**, while 4% of the population do not receive any information at all from any media source and do not look for news;

- the **15—29 age group** relies exclusively on the internet for news and information, at almost twice the rate of the general population;

- about half of the population regularly watches the **news programmes** of the three main television media service providers (RTL, TV2, MTVA); 7% watch news programmes on all three channels and 16% regularly watch news programmes on two channels;

- more than half of the 30% of respondents who get their information from a **single television news source** only watch the news programmes of RTL;

- the other half of the population who do not consume television news programmes at all are typically under 40, highly-qualified urban dwellers; multi-screen device use is increasing year by year and **exclusive TV viewing is becoming less common**;

- when looking for news, television is still the first choice for most people, but **mobile phones are expected to dethrone TV** in the near future.

An annual sectoral report like this one – due to the specificities of the genre and the lack of space – cannot aim to formulate comprehensive, regulatory-level recommendations; however, based on the different submarket analyses, the NMHH experts considered it appropriate to **highlight some relevant regulatory and research challenges**:

- the problems facing the domestic content industry, and the threats to its continued existence are manifold, but most of them can be traced back to the **significant and growing weight of the technology giants** operating platform services in the media and advertising markets, which essentially means an increasing flow of advertising revenues going abroad;

- the situation is further aggravated by the fact that

- the **availability of the IT expertise/ workforce**, which is essential for the technology-intensive content industry, is decreasing;
- the relative competitive immunity afforded by the insular nature of the **Hungarian language** is disappearing (for example, as a result of the proliferation of artificial intelligence-based translation systems);
- **technologies** used in key areas of the digital content industry are becoming increasingly **expensive**.

- in this context, the main challenge for the domestic (and also the international) media market is how to at least give local media companies the chance to maintain/improve their competitiveness vis-à-vis global players, **by extending the tax payment obligations to global players** and/or mitigating the competitive disadvantage of local players;

- the accelerating pace of change in the media market since the advent of the internet has reached a critical mass that can prompt the regulatory authorities of the media and communications market to develop **new methods** of enumeration, analytical methodologies, market surveillance solutions and even new regulatory tools and strategies;

- given that the Hungarian population, especially the youngest age group, spends as much time on new media platforms as watching TV, there is an urgent need for the Digital Services Act (DSA) and the Digital Markets Act (DMA) – i.e. **EU level legislation** already adopted but not yet applied – to be implemented as soon as possible;

- while the report provides important data on the diversity of submarkets and also clearly shows how online platforms are reducing barriers to entry in certain areas, **future research and deep dives into media consumption and media pluralism will be needed** to contribute to a data-driven and professionally reasoned discourse on the system of democratic public sphere involved.

TELEVISION MARKET

SUPPLY SIDE

In the 4th quarter of 2021, **364 television media services** were operating in Hungary (i.e. under Hungarian jurisdiction), **according to the NMHH's registers:** in addition to **15 national channels** (7 public service and 8 commercial), there were **39 regional and 310 local** television stations. However, the television channel selection[4] included a total of 527 television channels, **163** of which **were not under the jurisdiction of the Hungarian Media Authority** (i.e. the media service provider is registered abroad but the content is provided to Hungarian viewers and/or is available in Hungary – such stations included Cool TV, RTL+ and SuperTV2).

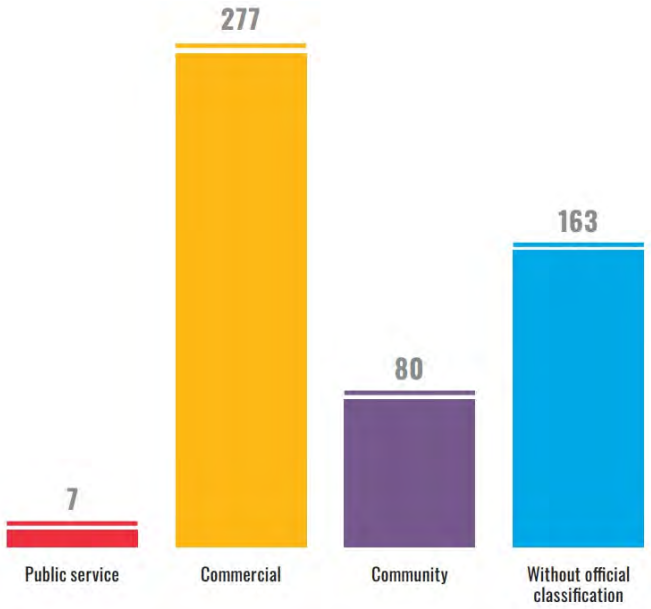
The market for television media services consists of **public service** (state-owned), **commercial** (typically owned by domestic or foreign companies) and **community** service providers (a mix of profit and non-profit organisations, e.g. municipalities, foundations, etc.).

In the 4th quarter of 2021, there were **7 public service television channels** (M1, M2, Duna, Duna World, M4 Sport, M4 Sport+, M5) and **8 national commercial** television media services in Hungary. The audiovisual media service providers operating the latter 8 channels also operated two non-national channels and 20 channels outside the Hungarian jurisdiction (see table below).

TELEVISION MEDIA SUPPLY BY TYPE OF CONTENT SERVICE, Q4 2021

Source: NMHH, Whitereport database

The category "without official classification" contains the channels that are not under Hungarian jurisdiction but are available in Hungary, regardless of the type of content services they provide.



[4] Based on the Whitereport database

TELEVISION PORTFOLIO OF MEDIA COMPANIES OPERATING NATIONAL COMMERCIAL CHANNELS, 2021

Source: NMHH, Whitereport database

TV2 MÉDIA CSOPORT ZRT.

Operated national channels:
TV2

Hungarian language channel interests not under Hungarian jurisdiction:
FEM3, Izaura TV, Jocky TV, Mozi+, Moziverzum, Prime, Spíler, Spíler2, SuperTV2, TV2 Comedy, TV2 Kids, TV2 Séf, Zenebutik

14

MAGYAR RTL TELEVÍZIÓ ZRT.

Operated national channels:
RTL Klub

Hungarian language channel interests not under Hungarian jurisdiction:
Cool TV, Film+, RTL+, RTL Gold, RTLII, Sorozat+, Muzsika TV

8

ATV ELSŐ MAGYAR MAGÁNTELEVÍZIÓS ZRT.

Operated national channels:
Magyar ATV

Operated non-national channels:
ATV Spirit

2

ELSŐ ROMA MÉDIA MŰSORSZOLGÁLTATÓ KFT.

Operated national channels:
Dikh TV

1

HÍRTV MŰSORSZOLGÁLTATÓ ÉS HIRDETÉSSZERVEZŐ ZRT.

Operated national channels:
Hír TV

1

MEDIA VIVANTIS MŰSORSZOLGÁLTATÓ ZRT.

Operated national channels:
Life TV

Operated non-national channels:
Ozone TV

2

MAGYAR SLÁGER TV MÉDIASZOLGÁLTATÓ KFT.

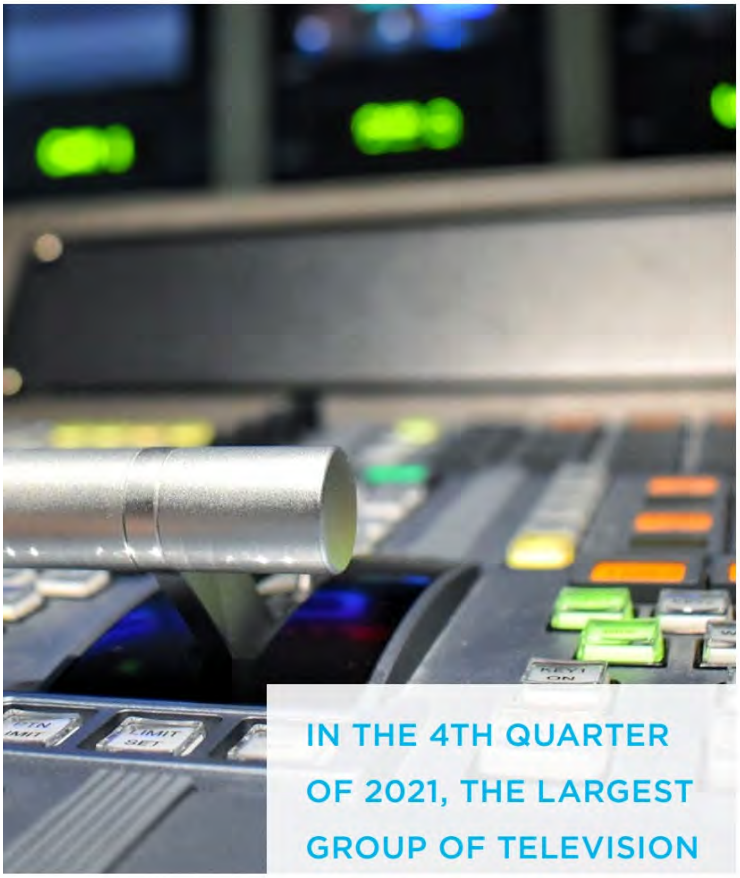
Operated national channels:
Magyar Sláger TV

1

PROGRESS MÉDIA HUNGARY KFT.

Operated national channels:
Pesti TV

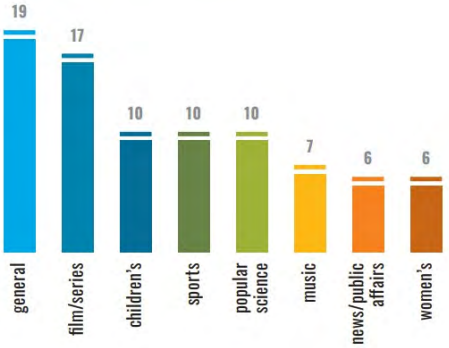
1



IN THE 4TH QUARTER OF 2021, THE LARGEST GROUP OF TELEVISION CHANNELS IN HUNGARY COMPRISED CHANNELS CLASSIFIED AS GENERAL ENTERTAINMENT/ TABLOID

Leading television genres among the TV stations covered by the industry measurements, Q4 2021 (Media number)

Source: Whitereport database



Among the 94 channels[5] included in the industry measurement in Q4 2021, **most media services** were classified as **general entertainment/tabloid**, followed by film/ series, children's, sports, and educational/ popular science and music channels.

The 527 television channels available in Hungary are operated by 379 organisations, of which 140 are media companies and the rest are typically municipalities or foundations. Only **thirteen of** the media companies[6] **had a net sales revenue of more than HUF 1 billion** in 2021; the rest were typically small businesses with a sales revenue of less than HUF 100 million.

[5] 94 television channels (9 channels with other thematic content in addition to the 85 channels shown in the figure) are included in Nielsen's audience measurement and/or Kantar Hoffmann TGI's consumer measurement and/or Kantar Hungary's advertising spend monitoring. Municipal or local TV stations are not included in the measurement.

[6] For two of the thirteen television media companies with annual net revenues exceeding HUF 1 billion (HBO Holding Üzletviteli Tanácsadó Csoport Zrt. and CEE Thematics Kft.), only financial data for 2020 were available at the time of writing this report.

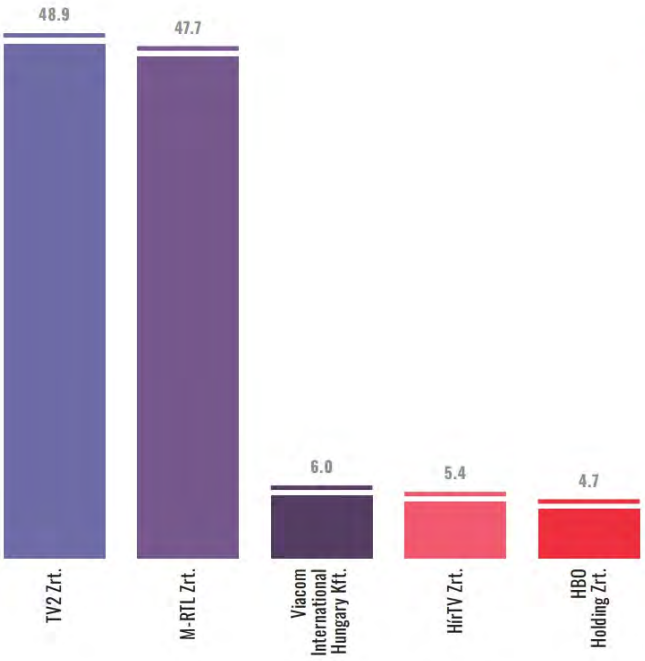
The group of the top **5 television companies with the highest net sales revenue –** if Viacom's international revenues[7] are excluded – is led by TV2 Média Group Zrt. and Magyar RTL Zrt. The annual net revenue of these players in 2021 was close to HUF 50 billion each (combined distribution, advertising and other revenues).

The **revenues of** the public service media provider, **Duna Médiaszolgáltató Zrt., are not comparable to those of companies operating on a market basis**, as its financing is primarily provided by the Media Service Support and Asset Management Fund (MTVA). The MTVA is a separate asset manager and fund with a number of tasks specified in the Media Act. In 2021, the Fund altogether spent approximately HUF 111 billion of its HUF 119 billion income on financing public service television channels and radio stations, the national news agency (MTI) and several other items.[8]

COMMERCIAL TELEVISION MEDIA SERVICE PROVIDERS WITH THE HIGHEST REVENUE, 2021 (HUF BILLION)

Source: Whitereport database & Opten

The 2021 financial data of HBO Holding Zrt. were not available at the time of finalising the manuscript, therefore the 2020 revenue data are shown in the figure.



[7] Viacom International, as a regional headquarters located in Hungary, achieved a net sales revenue of HUF 71 billion in 2021, of which HUF 6 billion was generated in Hungary.

[8] Business Report of MTVA for year 2021: https://mtva.hu/wp-content/uploads/sites/17/2022/05/2021_évi-beszámoló_MTVA_30_küldhető_döntéssel.pdf

DEMAND SIDE

Composition of the audience

Around 96% of Hungarian households have a TV set, about 80% of them having a modern flat-screen version. The vast majority (90%) of households with TV also subscribe to some form of cable, satellite or terrestrial TV service; **the vast majority of subscriptions (82%) use a digital platform**.

Households that have a TV set but do not subscribe to a TV service tend to live in smaller settlements or in more modest financial circumstances. Many of them use the free terrestrial digital **MindigTV service** from Antenna Hungaria Zrt., which is available almost throughout the entire area of the country and currently offers 12 TV channels.

One third of households with a fixed (landline), satellite or terrestrial digital TV subscription are Magyar Telekom subscribers. The Digi Group (Digi + Invitel) has a 28% share: Vodafone, which acquired UPC, has 19% and the still independent former UPC Direct[9] has 6%. The rest of the market is shared by smaller operators.

Although the **proportion of people watching TV has fallen by around 10 percentage points over the past ten years**, television still plays an important role in the content consumption of Hungarian people: on a typical day, **around three quarters[10] of the Hungarian population** aged 4+ **watch television**. According to the Nielsen international comparative survey,

[9] Current name: Direct One.
[10] According to Nielsen data

the time spent watching TV in Europe is becoming increasingly significant from north to south: in Northern Europe (Finland, Denmark, Sweden) and Ireland, people spend on average less than three hours watching, while people in Portugal, Romania and Serbia spend almost twice as much time in front of the TV screen. **Hungary is among the nations spending the most time watching television**.

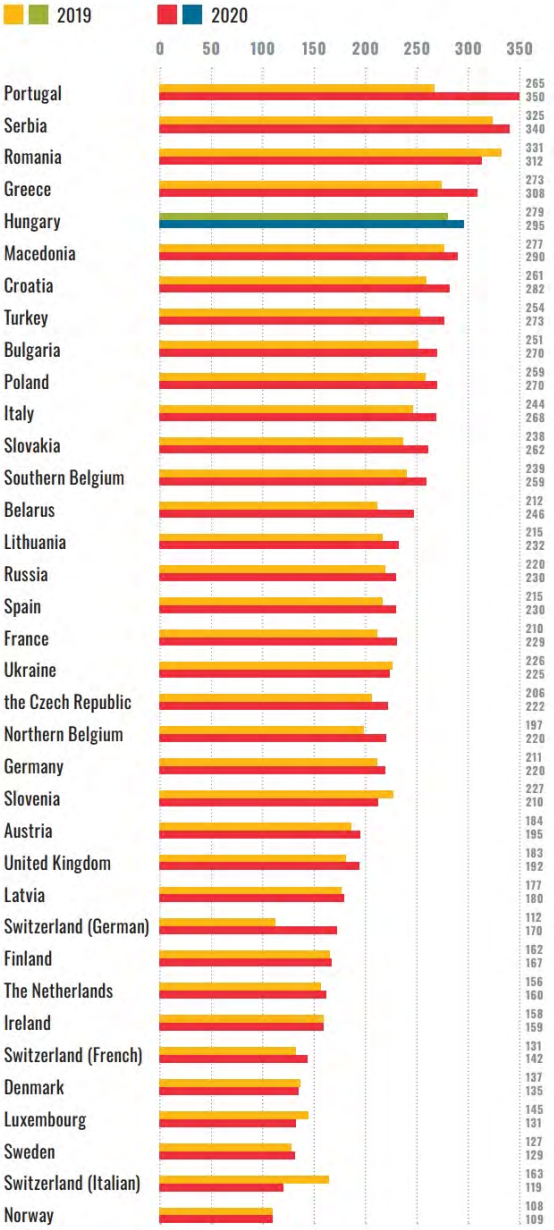
The **time** the Hungarian population **spent watching TV did not increase further in 2021**, but there was a significant **increase of almost 6%** in the previous year, probably **due to the pandemic**, with the largest increases in the time spent watching TV

HUNGARY IS AMONG THE NATIONS SPENDING THE MOST TIME WATCHING TELEVISION IN EUROPE

among those living in the capital (+12%), 18–49 year olds (+10%) and those without internet connection at home (+7%). The reason for the large increase in 2020 is, in addition to the restrictions due to the epidemic situation, the low base: these segments had spent significantly less time watching TV than the national average in previous years.

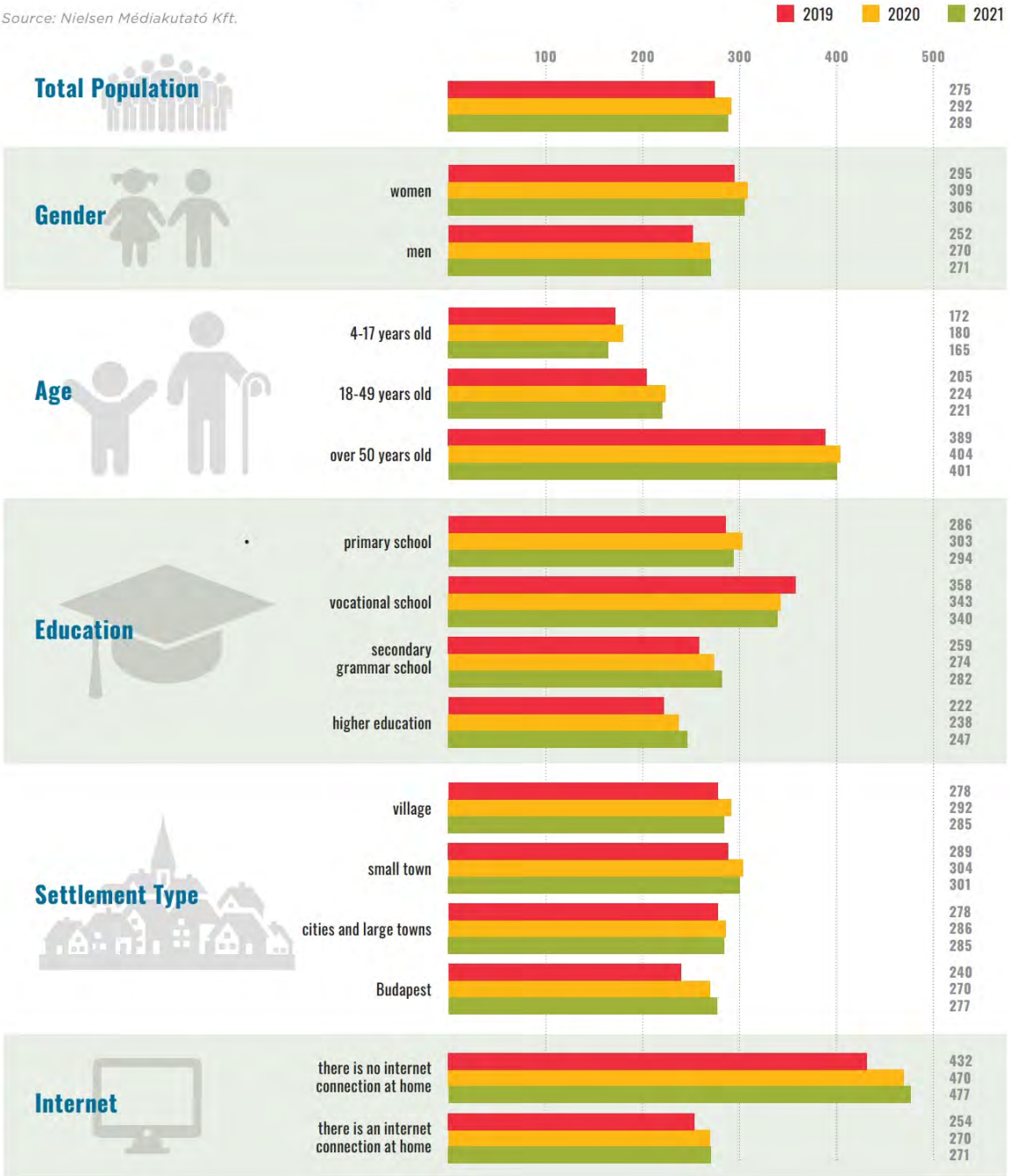
Average daily TV viewing time in Europe, 2019—20, in minutes, for the total population

Source: Nielsen Médiakutató Kft..
ATV: average time viewing, average number of minutes target audience watched the programme.



TIME SPENT WATCHING TV PER DAY BY AGE GROUP, GENDER, EDUCATION AND TYPE OF SETTLEMENT, 2019—2021 (MINUTES)

Source: Nielsen Médiakutató Kft.



THE INTERNET IS MORE POPULAR THAN TV AMONG YOUNG PEOPLE AND THOSE WITH HIGHER EDUCATION

Looking at multi-year trends, the **time spent watching TV shows a strong correlation with age and social status**, **as well as internet use**; the older someone is or the lower their status, the more TV they watch, on average. Among them, the biggest TV viewers are those who do not have an internet connection at home. In 2021, **people aged 50 and over spent almost one and a half times as much time in front of the TV screen as those aged 18–49** and more than twice as much as 4–17 year olds. In terms of educational level, those with secondary level vocational/trade school education watched the most television, while those with tertiary education watched the least.

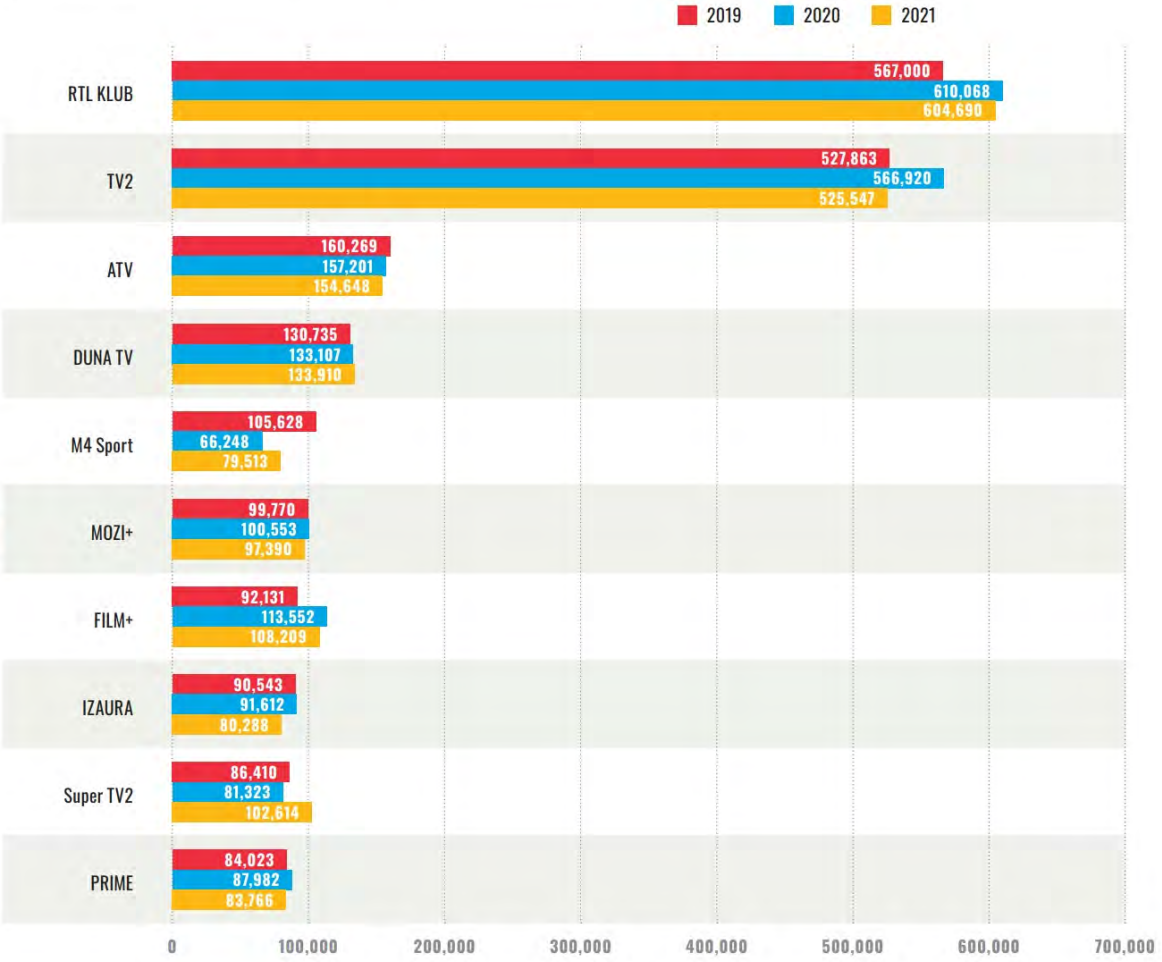
Most watched channels and programmes

As has been the case for decades, in 2021 **the two market-leading commercial channels, RTL Klub and TV2**, continued to **have the largest audience** in the 6–10 p.m. time slot, with an average of 567,000 and 527,000 viewers per minute respectively, while the six public service channels were watched by

MOST WATCHED CHANNELS IN PRIME TIME (18-22 HOURS) 2019—2021 (AMR)

Source: Nielsen Médiakutató Kft.

AMR: average number of viewers per minute in the population aged 4 and over.



a total of 350,000 viewers. Approximately 2.3 million consumers watched programmes on other TV channels.

In 2020, during the closures due to the pandemic, TV2 saw significant growth, but in 2021, both channels saw a decline in viewership, **leaving RTL Klub as the market leader in the 6-10 p.m. time slot**. The audience of M4 Sport has increased significantly – thanks to the Summer Olympic Games, held a year late, and the European Football Championship.

Daily viewership of the two dominant commercial channels **reaches its first peak**

between 6:15 and 7 p.m., around the time of the evening prime-time news, and has its second peak **between 8 and 9 p.m., when they typically broadcast their own productions**. The most watched public service channel, Duna TV, starts to increase intensively from 6:45 p.m. and peaks at a quarter to eight in the evening.

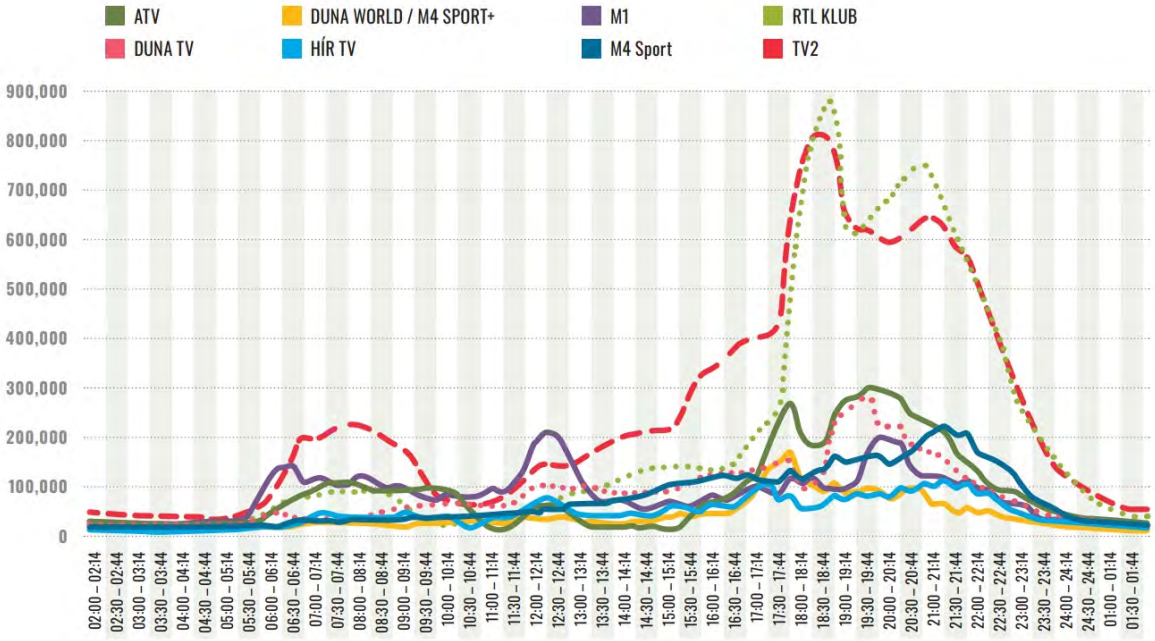
In the ranking of the most popular independent programmes, RTL Klub had the first place with **'X-Faktor'** music talent show in 2019 and **'Álarcos énekes'** celebrity show in 2020, but in 2021 only one of its productions (X-Faktor) was among the most popular programmes, as M4 dominated that year's list due to the **European Football Championship**; the matches were followed in the rankings by TV2's music quiz show entitled 'Sztárban sztár leszek'.

The internet platforms and online services of television channels are discussed in Chapter 7, entitled 'Online media market,' and Chapter 8, entitled 'New media platforms'.

Daily reach of major TV channels measured by Nielsen, by quarter-hour, 2021 (RCH)

Source: Nielsen Médiakutató Kft.

RCH: the number of TV viewers in a given quarter of an hour who watched the programme concerned for at least one minute, in this case those who watched TV for at least one minute in the given quarter of an hour.



SUMMARY AND CONCLUSIONS

1. The **Hungarian television market** is **extremely diverse**, both in terms of volume and genres, as well as regarding ownership:
   - at the end of 2021, Hungarian viewers had access to **527 foreign and Hungarian-language channels**, of which 364 were domestic and 163 were under foreign jurisdiction;
   - **15 national channels** (7 public service and 8 commercial), 39 regional and 310 local television channels were under national jurisdiction;

2. The television market is **fairly concentrated in terms of** annual **sales revenues**: annual revenues of over HUF 1 billion were achieved by 13 operators and over HUF 4 billion by 5 operators, with the two largest commercial operators (RTL and TV2) sharing the largest share of revenues in 2021.

3. **With the rapid spread of the Internet, television has gained a competitor** that not only attracts audiovisual media consumers with its unprecedented wealth of content, but also with the option of on-demand consumption, which is neither time nor location-dependent. As more and more people own a smartphone, the expanding data quotas make it possible to watch video content in almost any situation.

4. **At the same time, the TV market remained a dominant factor, even with the growing consumption of online content**, as the platform reaches nearly three quarters of the population over four years old (around 6.5 million people) every day. The average time spent watching TV (295 minutes in 2021) makes the **Hungarian population among the most intensive consumers of TV content in Europe**. The time spent watching TV is determined by age, social status and internet usage: older people, those with lower education and those without internet access watch the most TV.

5. **Traditionally, RTL Klub and TV2 have the largest audience;** in 2021, in the 6—10 p.m. time-slot, their average number of viewers per minute was 567,000 and 527,000 viewers respectively, with 350,000 viewers choosing the six public service channels combined. Approximately 2.3 million viewers watched programmes on other TV channels. The television market is characterised by opposing trends: media service providers are compensating for the long-term decline in the number viewing general entertainment channels by launching thematic channels.

6. RTL, TV2, ATV and the public service media channels are the most watched in the typical **news** time slot (between 6 and 10 p.m.).

7. Among television programmes, **the original programmes of commercial channels** and flagship **sporting**

events, especially those of domestic interest, **attracted the most viewers** in 2021. A long-standing tendency in the Hungarian television market is for viewers to give priority to domestically produced entertainment and information programmes.

8. **Global streaming providers**, as described in the Chapter on new media platforms, **are creating more and more competition** in the Hungarian audiovisual market – this is not yet reflected in the viewing figures for consumers aged 40+, but traditional linear media consumption is becoming less important for 15-39-year-olds in urban areas and among the population with Internet access in general.

9. There is also a phenomenon called **cord-cutting** among young urban households, where they do not subscribe to linear television services but use their smart TVs and laptops for streaming services, video sharing and online games.

10. **Multi-screen device use** increasingly favours the consumption of on-demand content over linear content. The **rise of catch-up TV and streaming services** could eventually eclipse the consumption of linear content.

11. Nevertheless, the **television market has its own reserves**, since, for example, during important events that affect the life of society as a whole (e.g. parliamentary elections, international disasters), television news usually become more valuable and its viewership increases.

12. For the television market, there are further opportunities in the **distribution of the produced content online and on new media platforms**.

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RADIO MARKET

SUPPLY SIDE

There are 7 public service radio stations in Hungary, 5 of which are also available through terrestrial broadcasting, including Kossuth rádió, Petőfi rádió, Bartók rádió and Dankó Rádió, which can be heard on the VHF-FM band with nationwide coverage. **The national terrestrial radio supply made of 165 stations** consists of 5 public service radio stations and 160 radio media services operating under public contracts concluded with the Media Council. **In addition to the sole commercial media service with nationwide coverage, Retro Rádió**, there are 159 regional, local and small community radio stations, using a total of 223 frequencies. Of the non-public service radio stations, 83 are commercial and 77 are community stations.

In quantitative terms, radio media supply is dominated by regional and local media services: this included 36 regional radio stations and 110 local radio stations, the latter including 13 small community radio stations. 18 of the radio stations with non-nationwide coverage are in Budapest.

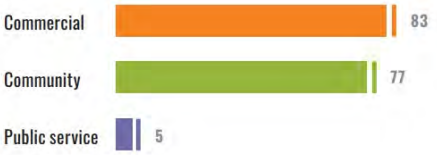
In terms of listenership and advertising market coverage, the media service of Rádió Plusz Kft., operating under the **Rádió 1** brand, can be considered a commercial media service with a quasi-nationwide coverage; it had 31 media service licences on a total of 38 frequencies in the 4th quarter of 2021, thanks to reception area expansions and its networked operation mode.

Other local and regional radio stations also **operate in a networked mode**, such as BEST FM, KARC FM, Magyar Katolikus Rádió, Mária Rádió, etc. This operation mode is cost-effective, as the network partner receives the networked media service provider's programme for the majority of its transmission time, subject to the condition that, for a certain time interval (typically 4 hours per day), it must also provide a programme different from the one received.

Terrestrial broadcast radio media supply by type of content service, Q4 2021 (Number of radio stations)

Source: NMHH, 4th quarter of 2021

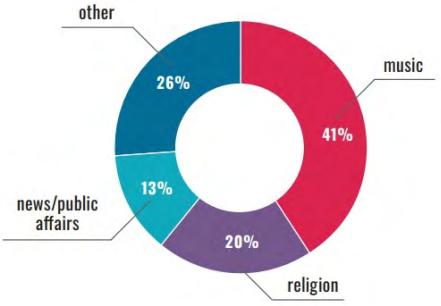
In addition to the 5 public service radio stations with terrestrial access, there are also Parlamenti Rádió and Duna World Rádió, which are distributed via satellite and the internet.



REGIONAL AND LOCAL RADIO STATIONS PLAY AN IMPORTANT ROLE. IN ADDITION TO THE PUBLIC SERVICE STATIONS, ONLY RETRO RÁDIÓ AND RÁDIÓ 1 HAVE QUASI-NATIONWIDE COVERAGE

Top genres among measured radio stations, Q4 2021

Source: NMHH



In terms of the different genres of the radio stations, the most listened to radio stations **are music stations** (41%), followed by **religious/church-oriented** channels (20%) and **news/public affairs** media services (13%).

FIRST HUNGARIAN RADIO STUDIO IN A FURNITURE VAN IN THE COURTYARD OF THE POSTAL PILOT PLANT (1923)

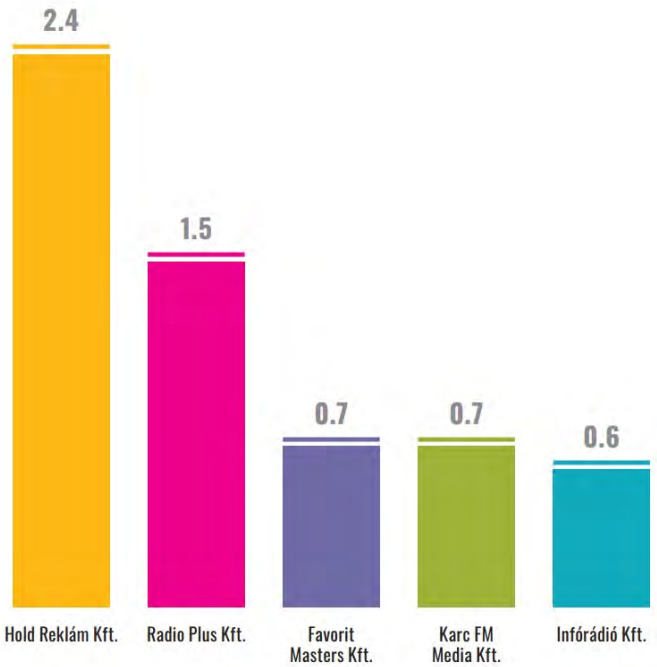
In terms of revenue, **most of the companies operating radio stations are small businesses with a sales revenue of less than HUF 100 million**; 31 companies have an annual net turnover of less than HUF 10 million, and – not counting MTVA's channels – of the 96 media service providers operating radio stations, only two (Radio Plus Kft., which operates a significant part of the Rádió 1 network, and Hold Reklám Kft., which operates Retro Rádió) have annual net sales revenues of more than HUF 1 billion.

The **revenues of** the public service media provider, **Duna Médiaszolgáltató Zrt., are not comparable to those of companies operating on a market basis**, as its financing is primarily provided by the Media Service Support and Asset Management Fund (MTVA). The MTVA is a separate asset manager and fund with a number of tasks specified in the Media Act. In 2021, the Fund altogether spent approximately HUF 111 billion of its HUF 119 billion income on financing public service television channels and radio stations, the national news agency (MTI) and several other items.[11]

COMMERCIAL RADIO MEDIA SERVICE PROVIDERS WITH THE HIGHEST REVENUE, 2021 (HUF BILLION)

Source: Whitereport database & Opten & MTVA

- Hold Kft. operates Retro Rádió; Radio Plus Kft. operates some of the channels of the Rádió 1 network and Favorit Masters Kft. operates the Budapest regional channel Sláger FM.
- The revenues shown in the figure are the annual net revenues of media service providers, which include their online and other revenues in addition to the advertising revenues of each company, but exclude the commission payable to intermediaries selling advertising time on their stations.



[11] Business Report of MTVA for year 2021: https://mtva.hu/wp-content/uploads/sites/17/2022/05/2021_évi-beszámoló_MTVA_30_küldhető_döntéssel.pdf

DEMAND SIDE

Composition of listeners

Almost 70% of the Hungarian population listens to the radio every day, for an average of almost four hours a day[12], and the average radio listening time for the total population is more than two hours. With this rate, Hungary was **among the European countries with the highest radio use** in 2020.

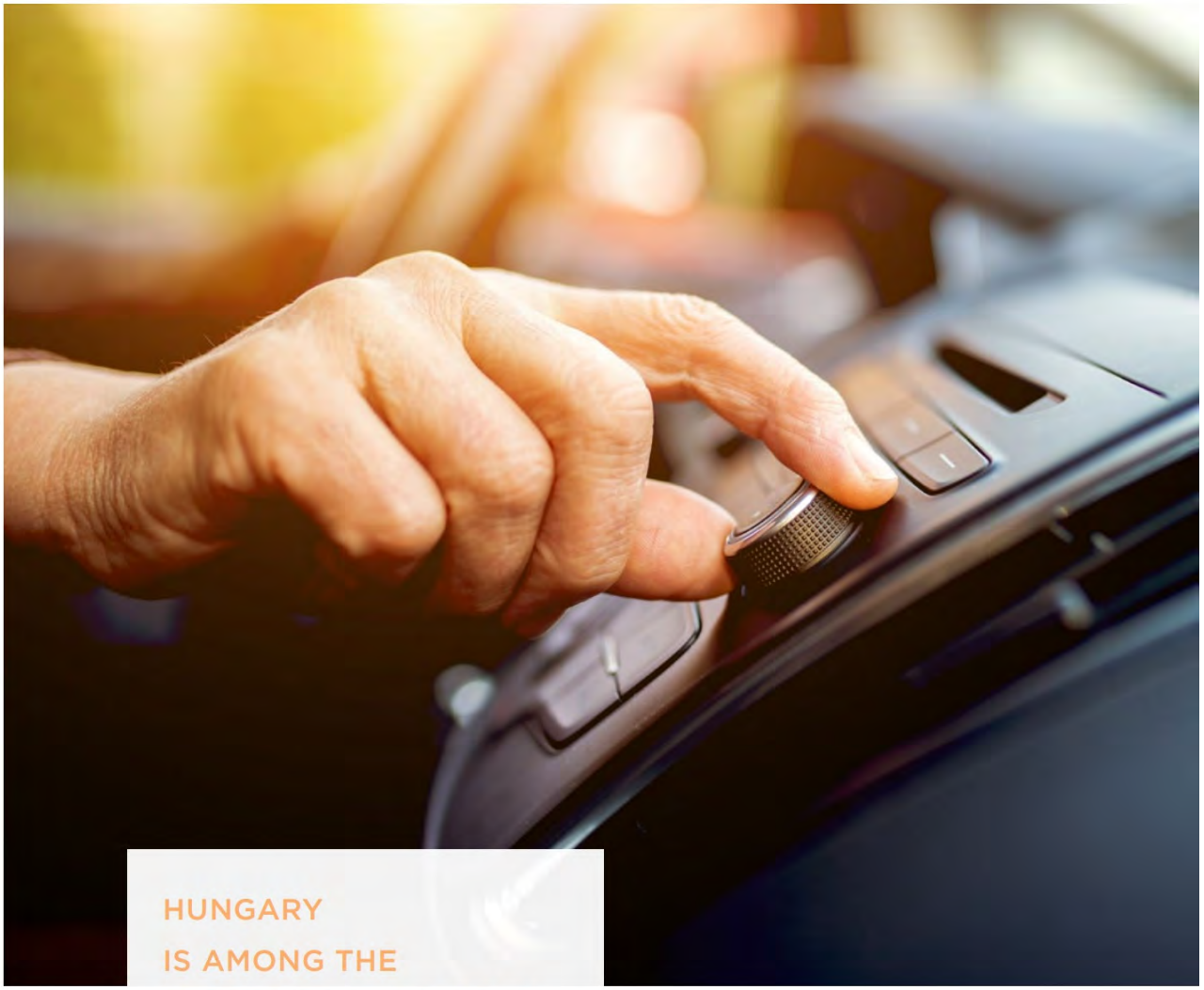
15–29-year-olds spend significantly less time listening to the radio than older age groups, which may be due to the high uptake of new digital media platforms, their dissatisfaction with linear media consumption and the music offerings of traditional radio stations, in addition to their time spent at school. From 2019 to 2021, the time this age group spent listening to the radio fell dramatically.

Average daily radio reach in some European countries, 2020 (total population, RCH%)

Source: Kantar Hoffmann—Scores Group/NMHH

Reach % (RCH%): the proportion of the audience reached by the radio stations on an average day within the entire population.

[12] According to Kantar Hoffmann-M-Meter data



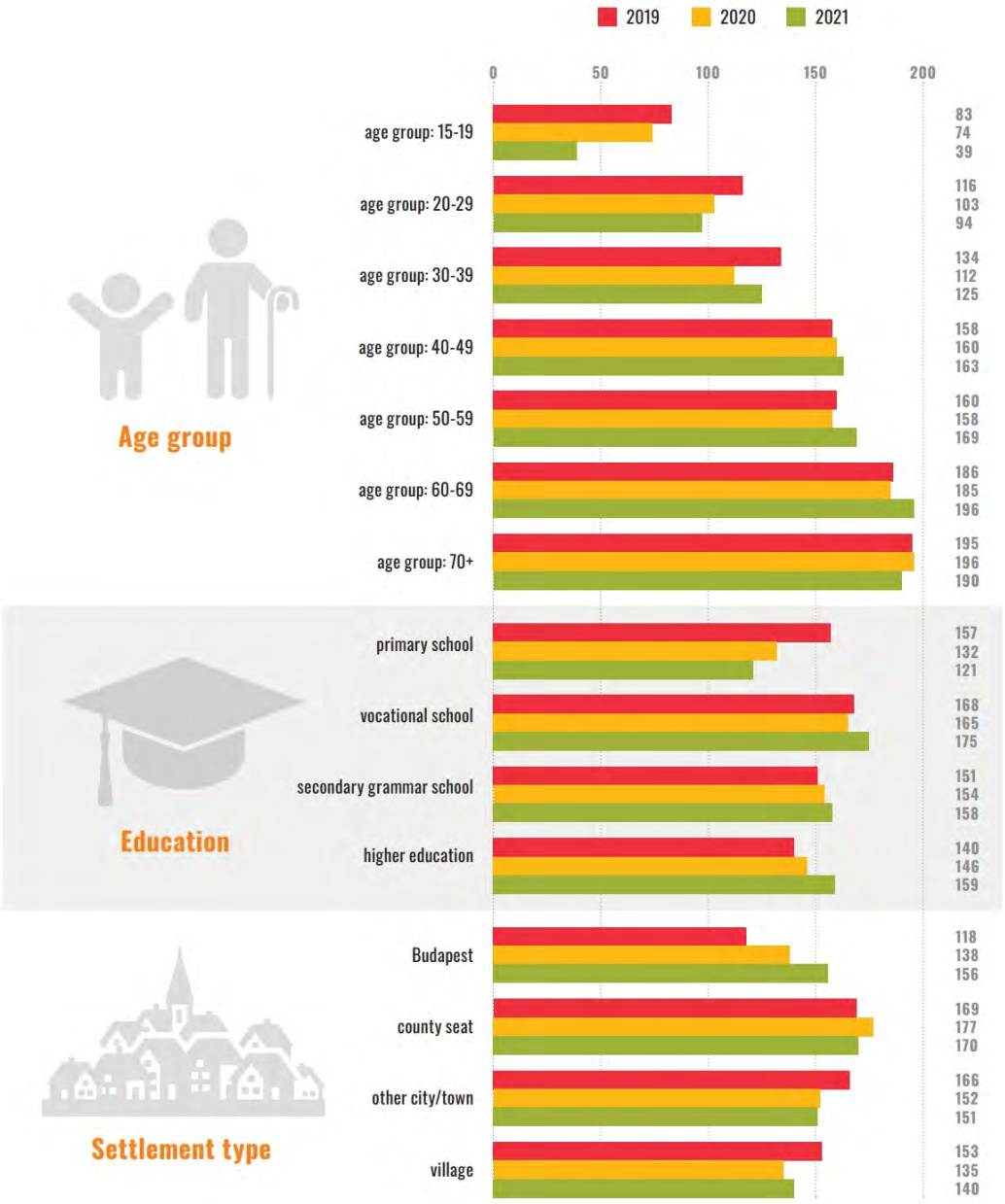
HUNGARY IS AMONG THE EUROPEAN COUNTRIES WITH HIGHEST RADIO LISTENING, BUT IT IS STEADILY DECLINING AMONG YOUNG PEOPLE

The time spent listening to the radio fell significantly by more than half an hour a day among those who completed only primary education (8 grades of elementary school), but those living in Budapest and holding higher education degrees spent significantly more time listening to the radio in 2021 than two years earlier – presumably not unrelated to **telework and the restrictive measures introduced during the COVID-19 pandemic**.

TIME SPENT LISTENING TO RADIO PER DAY (MINUTES) BY AGE GROUP, EDUCATION AND SETTLEMENT TYPE, 2019—2021

Source: Kantar Hoffmann—Scores Group/NMHH

Average Time Spent (ATS): the average number of minutes a listener spent on the radio.



Radio stations and programmes most listened to

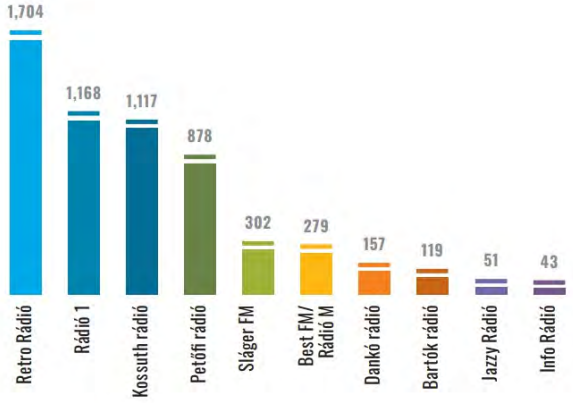
In the national daily audience list in the fourth quarter of 2021, Retro Rádió was followed by Rádió 1, operating in a networked mode, followed by two public service stations.

Local and regional radio stations have a significant listener base, partly due to the spreading **networked mode of operation**, and these stations together outstrip the reach of most national commercial and public service stations.

National daily audience in Q4 2021 (RCH, thousand people)

Source: Kantar Hoffmann—Scores Group/NMHH[13]

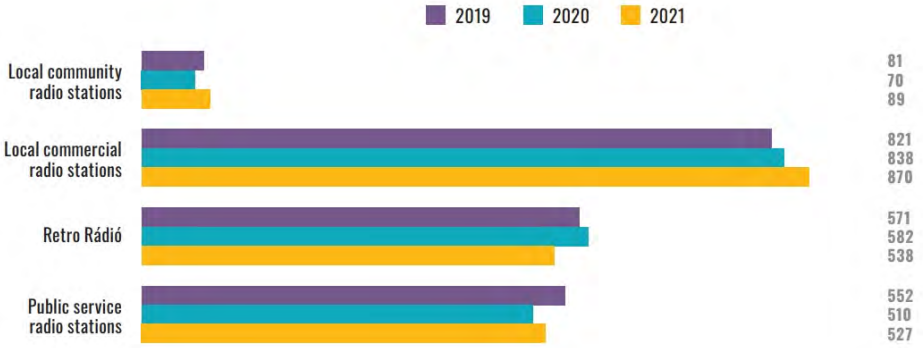
Daily reach or Reach N (RCH): the size of the audience reached by the channel type on an average day in thousands (daily radio listener population).



Reach by type of radio stations available in the county seats (weekly reach in thousand people) 2019—2021

Source: Kantar Hoffmann—Scores Group/NMHH

Daily reach or Reach N (RCH): the size of the audience reached by the channel type on an average day in thousands (daily radio listener population).



[13] https://nmhh.hu/dokumentum/226883/orszagos_radiohallgatottsag_2021_iv_negyedeves_attekintes.pdf

While television is typically the medium of the late afternoon and evening, **radio is more associated with morning activities and getting to work** – it's no coincidence that the most popular shows are the so-called morning shows. For radio, audience measurements are not made for specific programmes, but only for time slots, with radio stations starting to increase their reach significantly around 6 and 7 a.m., before giving way to television in the afternoon.

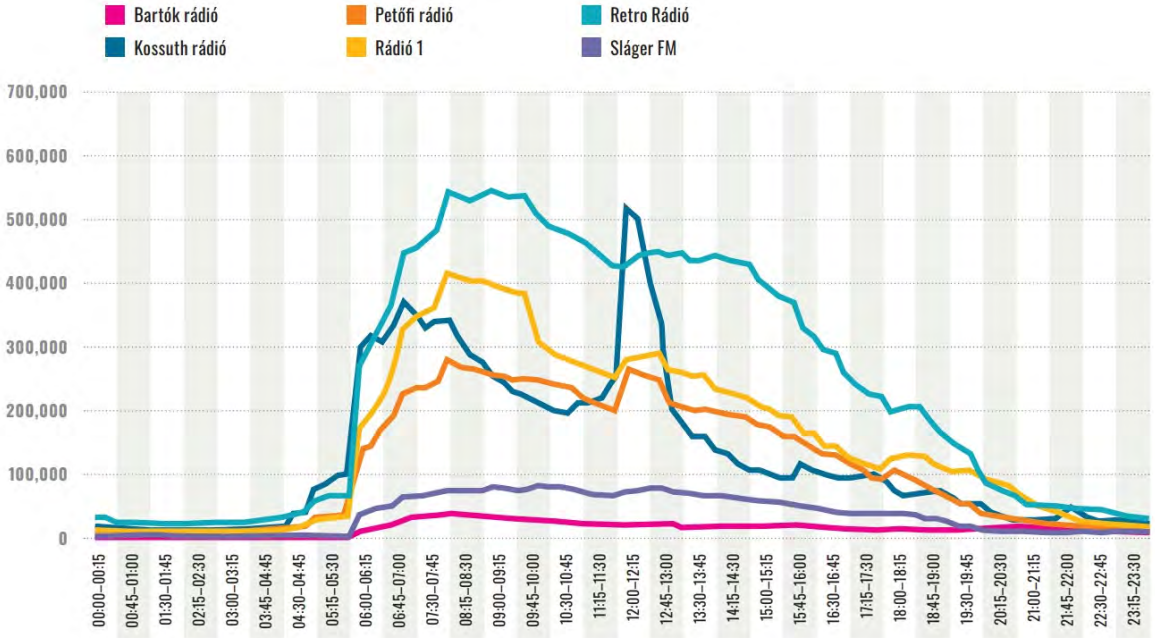
Rivalling the popularity of morning programmes, **Déli Krónika** (Midday Herald) is the programme most listened to on Kossuth rádió.

The internet platforms and online services of radio stations are discussed in Chapter 7, entitled 'Online media market', and Chapter 8, 'New media platforms'.

Changes in average daily listenership of major national and Budapest radio stations by quarter-hour (daily reach in thousand people) 2019—2021

Source: Kantar Hoffmann—Scores Group/NMHH

Reach N (RCH): the size of the audience reached by the channel on an average day in thousands (daily radio listener population).



SUMMARY AND CONCLUSIONS

1. The national terrestrial broadcasting **supply consists of 165 radio stations**: in addition to 6 radio stations with nationwide coverage (the public media stations and the commercial Retro Rádió), there are 159 regional, local and small community radio stations.

2. Several **networked services** are being organised among regional and local radio stations, the largest being the Rádió 1 network, which has almost full nationwide coverage.

3. Most radio media service providers **are small businesses with a sales revenue of less than HUF 100 million**, and many of them do not even reach HUF 10 million a year.

4. The radio market has suffered a significant loss of revenue in recent years due to the **transformation of the advertising sector** – more on this in the Advertising Market section.

5. **Hungary is among the European countries with the highest radio use**. On average, 70% of the adult population listen to the radio for almost 4 hours a day. This is partly due to the fact that radio is not tied to a specific location – it can be accessed at home, at work or in the car, with a radio device or on a mobile phone.

6. **Radio is a real mass medium**: the majority of the Hungarian population regularly listens to one of the stations. Radio listening is popular mainly outside Budapest, in the larger towns and cities, among **people aged 50 and over**. Radio is part of people's daily routines, fitting well between the peaks of internet and television media consumption. **Radio listening by the under-29 age group is declining**, mainly due to the large number of substitute media, the music offerings of stations and the age of their presenters. The outbreak of the Coronavirus pandemic and the introduction of telework temporarily increased the time spent listening to the radio among the population with higher education degrees living in Budapest.

7. **Local content provision is important** in the radio market: some local and regional radio stations are networked. They have a significant audience base and their combined reach exceeds that of some national media.

8. While television is typically the medium of the late afternoon and evening, **radio is more associated with morning activities,** and getting to work – the most popular shows are the so-called morning shows.

9. With the rapid growth in the use of new media platforms, especially among younger age groups and more highly educated groups, **online-only radio stations, and audio streaming services, including podcasts, are also growing rapidly**, which may reduce the audience for traditional radio in the longer term.

10. **However, radio listening has not yet declined**, despite the fact that, according to NMHH research on internet usage, 23% of the adult population listened to podcasts in 2021 and there were at least 294 podcast channels in Hungarian.

11. In order to ensure that radio broadcasting remains a competitive media product in the future, it is essential **to introduce innovative technological developments** and to renew the content of the stations. In the absence of such changes, the drift away from radio among the younger generation could become even more pronounced – and even permanent.

12. Radio stations can also increase their competitiveness by distributing their existing content in a form that is appropriate for **online and new media platforms**.

PRINT MEDIA MARKET

SUPPLY SIDE

In Hungary, 7,350 print media products were published in Q4 2021, according to the Whitereport database. Of these, 2,941 were national, 3,040 were locally distributed, and the remainder were county and regional or could not be classified for distribution purposes. **The official NMHH register includes 6,676 printed press products.** The reason for the difference is that 674 publications are not published as a separate, independent economic service, and therefore these publications (e.g. print media from supermarket chains or municipalities) are not considered as press products.

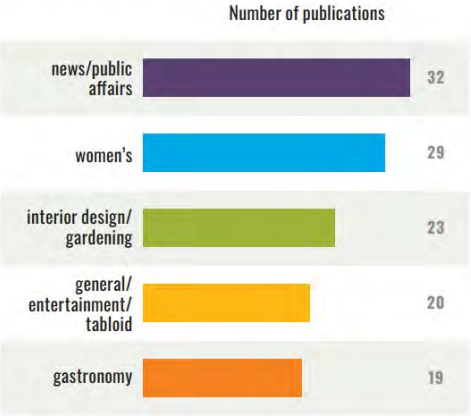
The various readership and advertising market measurements[14] only cover fewer than 300 print media products – these are examined below in terms of their genre and periodicity.

In terms of genre, the **largest group** of the 294 print media products in the Hungarian print media market included in readership measurement and/or advertising spend monitoring **is made up of news and current affairs publications**. This is followed by women's and home furnishing magazines.

In terms of frequency of publication, most of the measured print media products in Hungary are published monthly, weekly or daily, but

Top 5 print press genres among measured papers, Q4 2021

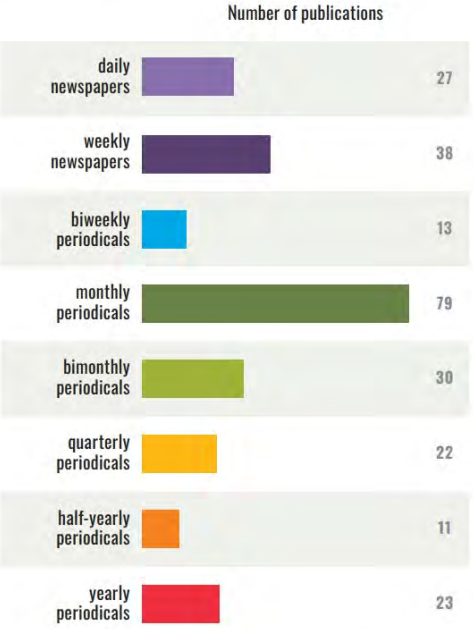
Source: Whitereport database



Publication frequency of print media products among measured print media products, Q4 2021

Source: Whitereport database

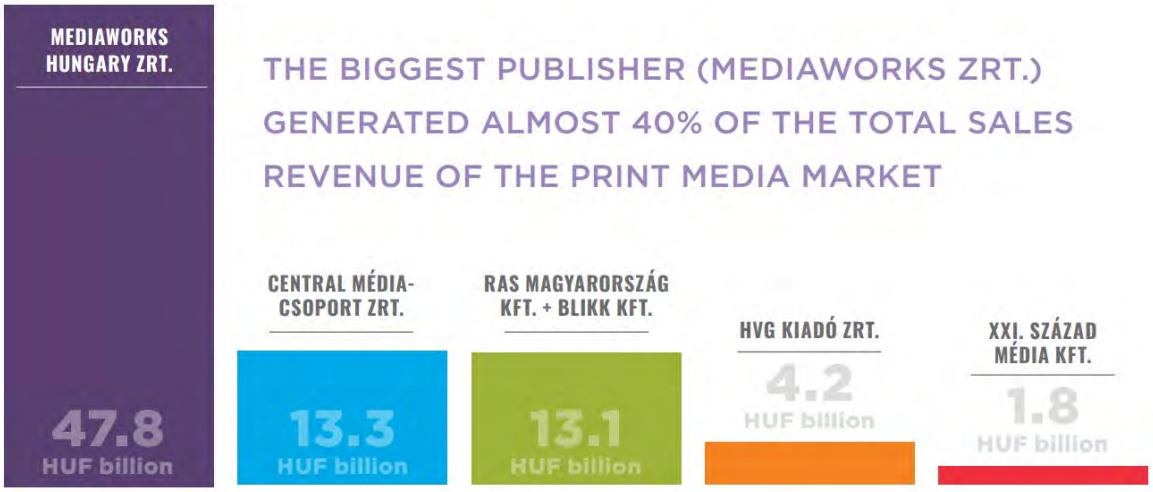
In addition to the above, 51 other media products published with another frequency are also included in the measurements.



[14] Kantar Hoffmann-M-Meter NOK's readership measurement and/or the Kantar Hungary advertising spend monitoring include 294 print media products.

THE 5 BIGGEST PRINT PUBLISHERS BY REVENUE, 2021

Source: Whitereport database & Opten
Annual net revenues include companies' online and other revenues in addition to their newspaper distribution and advertising revenues.



there are also papers with different periodicity (e.g. published fortnightly, every several months or irregularly).

Based on the publisher, 549 of the 4,825 organisations that publish print media products are professional newspaper and magazine publishing companies, 13 of which had an annual net sales revenue of more than HUF 1 billion in 2021, and 78 of which were in the group with a sales revenue of between HUF 100 million and HUF 1 billion. **Almost 83% of the publishers (458 publishers) are small businesses with a sales revenue of less than HUF 100 million, typically employing only a few people and publishing only one publication**.

Mediaworks Zrt., the publisher of magazines and all county daily newspapers, leads the list of the **print media publishers with the highest revenue** by a significant margin. Over the years, the company has grown through the acquisition of several publishers to be a large company with a net annual sales revenue of almost HUF 48 billion (combined distribution, advertising and other revenues) and was acquired by the Central European Press and Media Foundation (KESMA), after the government declared the transaction to be of national strategic importance. This represents almost 40% of the total annual net sales revenue of the HUF 122 billion print media market.

The second place is occupied by **Central Médiacsoport Zrt.** (Nők Lapja, Story, 24.hu, etc.), the third place by the magazine publisher **Ringier Axel Springer Magyarország Kft.** (Kiskegyed, Glamour, etc.) together with the primarily daily newspaper publisher Blikk Kft. (the latter two companies are owned by the same entity), with annual net sales revenues of around HUF 13 billion each.

DEMAND SIDE

The composition of readers

According to national readership survey data, **in 2021, 42% of the population aged 15 and over regularly read newspaper**. Men (39.6%), young people (aged 15–29) (29%), middle-aged people (aged 30–59) (38.6%) and residents of Budapest (32.2%) are less represented among regular newspaper readers. In contrast, women (44.3%), people aged 60 and over (60.6%), people with vocational training (44.1%), people living in other towns (44.4%) and people living in rural areas (44.4%) read more.

Among the total population, the proportion of regular readers **fell by nine percentage points from 2020 to 2021** – presumably not independently of the Covid-19 pandemic.

This trend was common to all groups, with a fall of between 5.2 and 14.4 percentage points in each category.

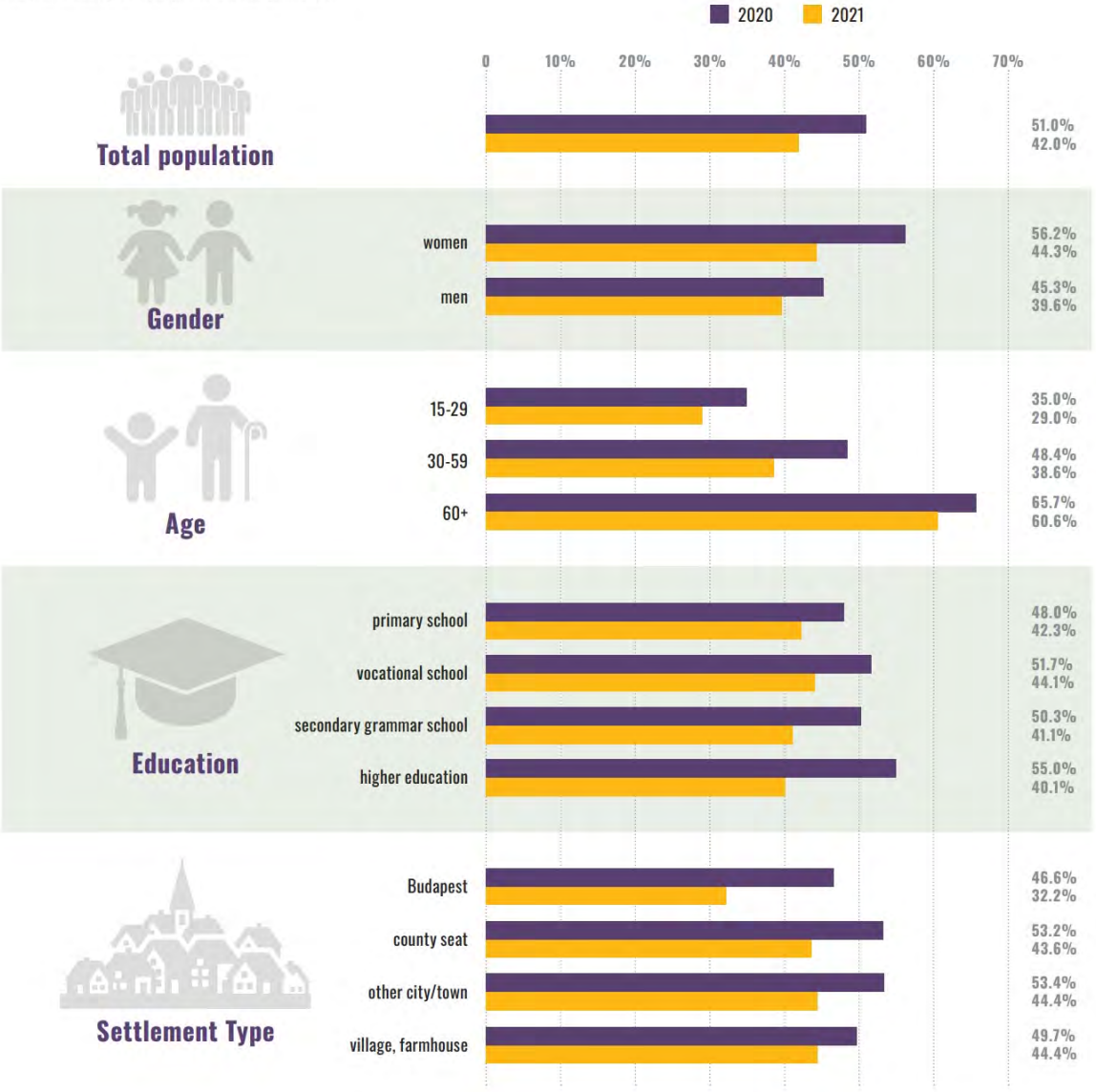
Among the regular readers of the different print media products on different genres, **free newspapers delivered to the door were the most popular** – in the last two years, 18.9% of residents aged 15 and over picked up the last issue of one of these free newspapers published before the survey. 11.5% of residents read a **national daily newspaper** daily in 2021, and 13.9% read **a regional daily newspaper daily**. Other popular categories include **women's magazines** (14.7%), **other magazines**[15] (10.2%), **programme guides** (9.2%) and **health, lifestyle and fitness** publications (9%).

[15] Other magazines include the following categories: cars and motoring magazines; men's, sports and computer magazines; gastronomy magazines; home, home furnishing and garden magazines; leisure, science and popular science.

PROPORTION OF REGULAR NEWSPAPER READERS BY GENDER, AGE GROUP, EDUCATION AND SETTLEMENT TYPE, 2020—2021

Source: NOK

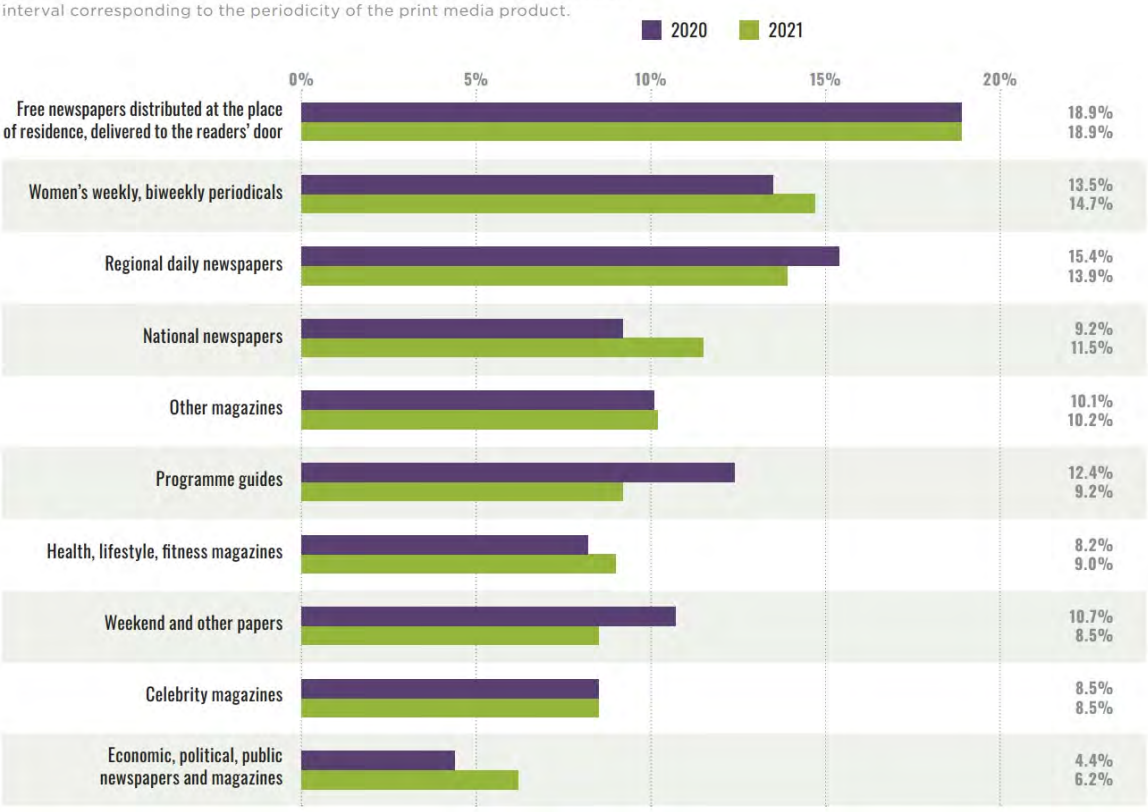
Recent readership: the reader read the print media product within the time interval corresponding to the periodicity of the print media product.



PROPORTION OF REGULAR READERS BY GENRE, 2020–2021 (PERCENTAGE)

Source: NOK

Recent readership: the reader read the print media product within the time interval corresponding to the periodicity of the print media product.



The most widely circulated and read printed press products

The circulation figures for almost all printed press products have been on a downward trend for years. Among the 23 daily newspapers audited by MATESZ[16], the **Észak-Keleti Napló** group of county newspapers (Hajdú-bihari Napló, Észak-Magyarország, Kelet-Magyarország) continues to have the largest circulation (62,000 copies in 2021). Besides these, only the national daily tabloid **Blikk** has a circulation of more than 50,000.

Some print media products also have a **digital edition** (not to be confused with the online version of the given print media product, which is just a digital version of the print media product, typically distributed

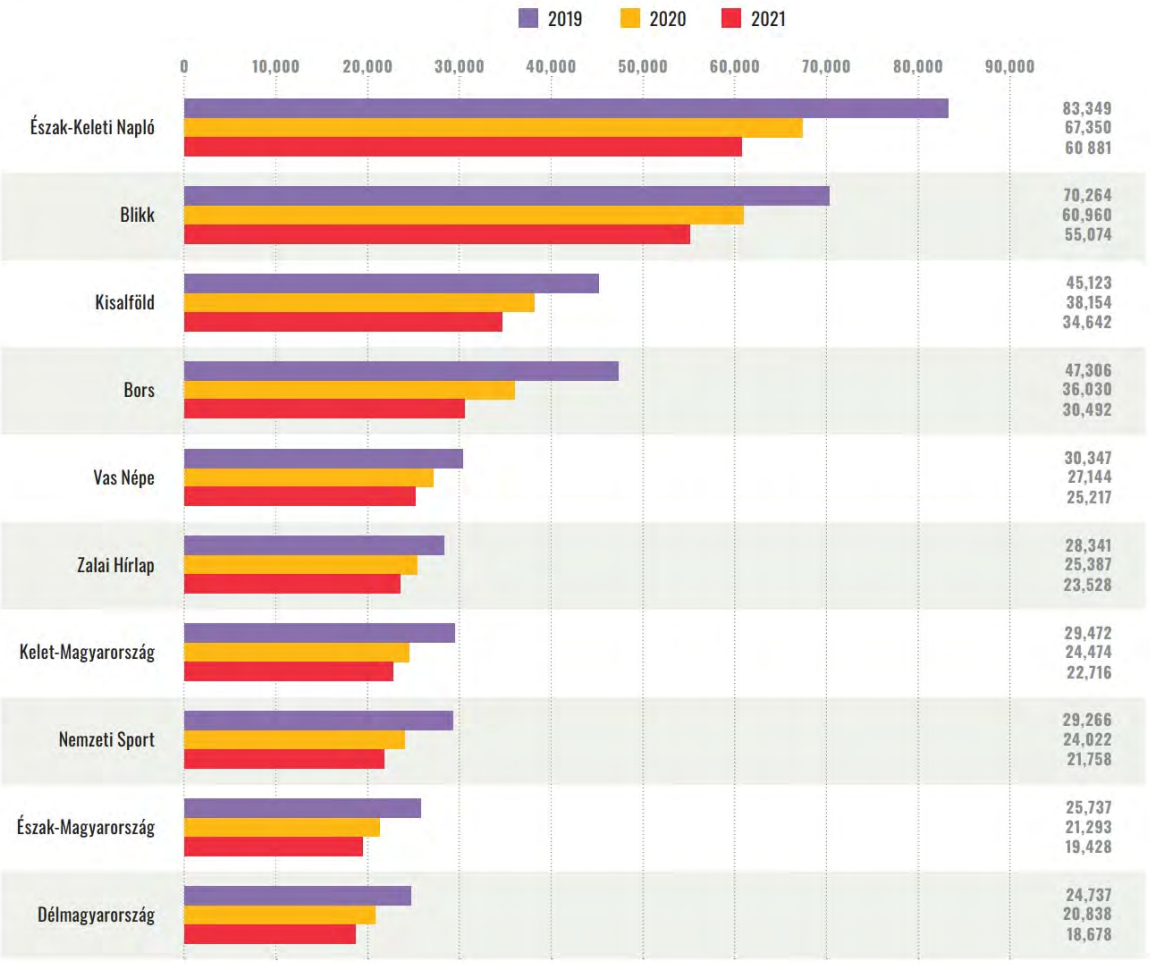
[16] Hungarian Distribution Monitoring Association (MATESZ).

AUDITED DAILY NEWSPAPERS WITH THE HIGHEST CIRCULATION (AVERAGE CIRCULATION PER ISSUE) 2019—2021

Source: MATESZ

Circulation: number of copies distributed free of charge and sold (based on subscription or by sale).

Of the major political and current affairs daily newspapers, MATESZ does not audit Nógrád Megyei Hírlap, Magyar Nemzet and Magyar Hírlap. The Authority does not have precise data on the circulation of these newspapers, but estimates suggest that the direction and extent of change is similar to that of other daily newspapers.



as a PDF or HTML file), reaching not more than up to a few hundred readers. The list below does not include free (e.g. Metropol) or traditional daily newspapers (e.g. Magyar Nemzet, Magyar Hírlap) the circulation of which is not audited by MATESZ. The audited circulation of Népszava was 15,891 at the end of 2021.

Readership figures tell more about the real market position of a press product than circulation figures. Readership shows how many people have picked up an issue (recent readership) and how many people have read at least one issue of the last 12 issues (broadest readership).

It is important to note that **there are significant discrepancies between the size of the circulation and readership**, the extent of which is influenced by a number of different factors (e.g. frequency of publication, genre and typology of the print media products). Accordingly, **the "afterlife" of a daily newspaper and a thematic magazine is quite different** after their primary distribution.

International studies have shown that a single copy of a print media product put in a public place (e.g. hairdressers, doctors, libraries) can reach an average of 30 or even 50 people, thereby increasing the **number of readers per copy** (RPC). The periodicity of the publication, the demographic composition of its readers, the proportion of subscribers and the price of the publication are also important factors.

Blikk is the most read of the daily newspapers included in the **National Readership Survey** (NOK)[17], with almost

BLIKK LEADS THE READERSHIP LIST, FOLLOWED BY BORS AND NEMZETI SPORT

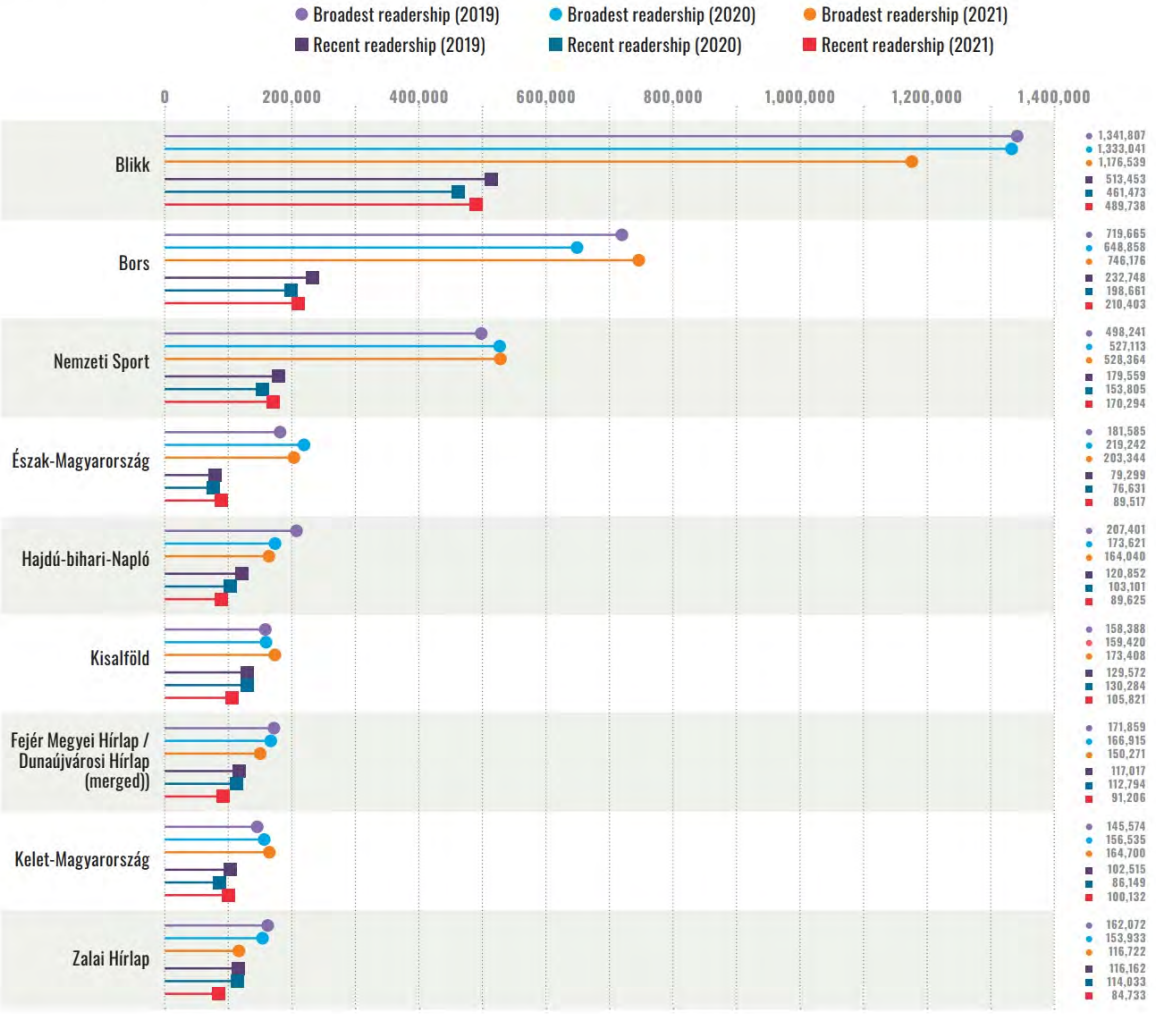
[17] National Readership Survey (NOK): audience measurement of the print media carried out by Media Meter-Kantar-Hoffmann.

THE BROADEST AND RECENT READERSHIP OF THE MOST READ MEASURED DAILY NEWSPAPERS 2019—2021

Source: NOK

Broadest readership: the reader read at least one of the last 12 issues.

Recent readership: the reader read the print media product within the time interval corresponding to the periodicity of the print media product.



490,000 daily readers (recent readership) in 2021 and 1.16 million readers of at least one issue of the last 12 issues (broadest readership). The second and third places were occupied by **Bors** and **Nemzeti Sport**. Fewer people read county daily newspapers, and the target group is much smaller as well.

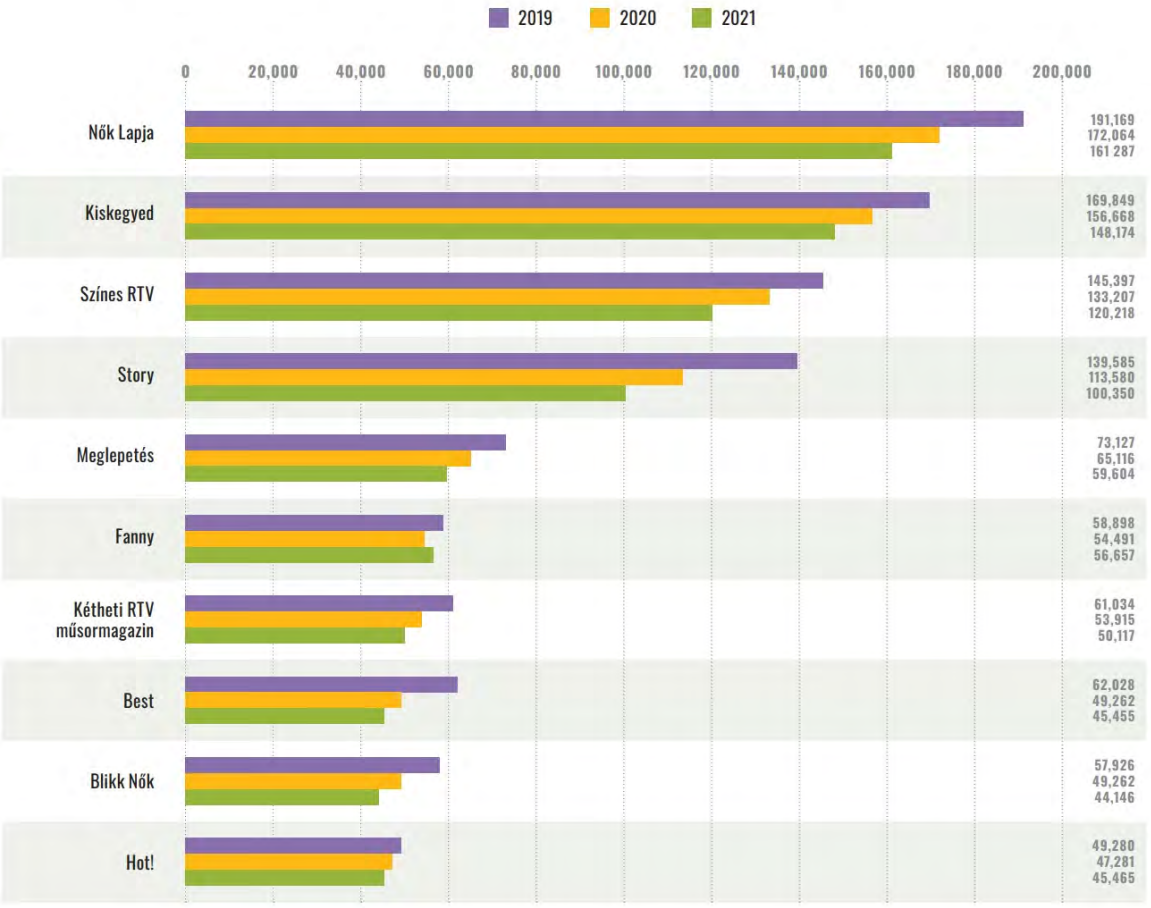
Of the **weekly magazines audited by MATESZ,** women's magazine **Nők Lapja** has the largest circulation, while gossip magazines **Kiskegyed** and **Story**, and the television programme magazine **Színes RTV** have a circulation of over 100,000.

Of the weekly magazines audited, only Kiskegyed publishes its issues in digital format as well. The digital version accounted for 1.4% of the total circulation in the first year audited (2020), and the figure rose to 3.1% in 2021.

AUDITED WEEKLY NEWSPAPERS WITH THE HIGHEST CIRCULATION (AVERAGE PER ISSUE) 2019—2021

Source: MATESZ

Circulation: Quantity of copies distributed free of charge and sold (based on subscription or by sale).



The list below does not include free (e.g. Szuperinfó) or traditional weekly newspapers (e.g. Figyelő, Élet és Irodalom) and programme guides (e.g. Színes RTV, tvr-hét) the circulation of which is not audited by MATESZ.

The **most read weekly newspaper in the NOK survey** was the free advertising newspaper **Szuperinfó**, with a recent readership (1.35 million in 2021) higher than the broadest readership of any other newspaper. Besides this, the recent readership of Nők Lapja, Story and Kiskegyed exceeded 400,000.

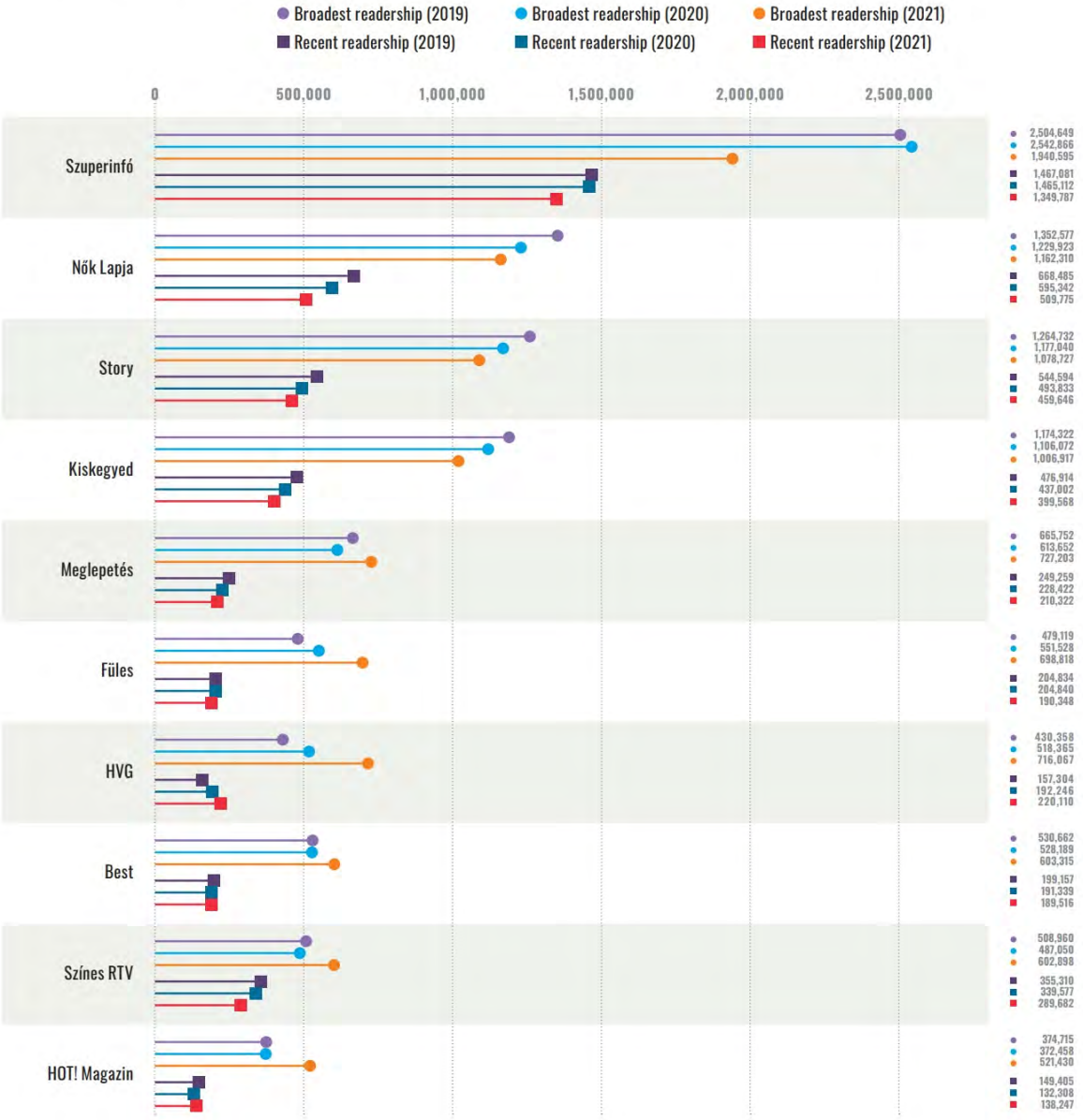
IN THE WEEKLY NEWSPAPER AND MAGAZINE READERSHIP RANKING, SZUPERINFÓ IS FOLLOWED BY NŐK LAPJA, STORY, KISKEGYED AND MEGLEPETÉS

THE BROADEST AND RECENT READERSHIP OF THE MOST READ MEASURED WEEKLY NEWSPAPERS 2019—2021

Source: NOK

Broadest readership: the reader read at least one of the last 12 issues.

Recent readership: the reader read the print media product within the time interval corresponding to the periodicity of the print media product.



THE MOST POPULAR MONTHLY MAGAZINES HAVE A CIRCULATION OF AROUND 70,000 WITH 'VITÁL MAGAZIN' AND 'GLAMOUR' TOPPING THE LIST

Of the **monthly magazines audited by MATESZ**, more than 75,000 copies of **Vitál Magazin** are sold, while the print edition of **Glamour** and its digital counterpart reach almost 60,000 readers. These two magazines are followed by **Nők Lapja Konyha** and **DUE Tallózó,** published by the Student Journalists' Association.

Out of the monthly magazines included in the NOK survey, Patika Magazin, which is available free of charge in pharmacies, stands out with its high readership: 1.17 million people read at least one issue in 2021. Besides these, **National Geographic**, **Lakáskultúra** and **Kiskegyed Konyhája** had the broadest readership. close to or above 300,000.

Among magazines published less frequently than monthly, the most popular in the MATESZ list was Joy, which sold only 29,000 copies in 2021 compared to 39,000 in 2019, but its digital edition accounted for around 10% of its total circulation. Trade Magazine and Nők Lapja Évszakok reached a circulation of nearly 20,000.

SUMMARY AND CONCLUSIONS

1. In Hungary, **more than 7,000 print media products** were published in 2021 with various periodicities by almost 5,000 publishing organisations. Of the 549 professional newspaper and magazine publishing companies, only 13 had a sales revenue of over 1 billion HUF in 2021 – however, they also account for a high proportion of the largest media companies.

2. **Mediaworks Zrt. led the list of the newspaper and magazine publishing companies with the highest sales revenue by a significant margin:** over the years – in line with the concentration trend in other European countries – it grew through the acquisition of several publishers to become a company with an annual net sales revenue of almost HUF 48 billion, accounting for about 40% of the total sales revenue generated by the entire print media market.

3. The **proportion of regular newspaper readers** is higher among older people (61% among people aged 60 and over) and below 30% among those under 30.

4. It is a global phenomenon that **print media have been steadily losing importance since the emergence of online media:** both the number of subscribers and the intensity of consumption (the number of people who regularly read the print media products and the readership of the individual press products) are declining. Publishers are trying to make up for the loss of revenue by the digital transformation of their activities and increasing their online audience, with varying degrees of success.

5. The disruption caused in the printed media by the spread of digital technologies first appeared in the daily newspaper market: **online platforms**, among them content services optimised for mobile devices, are **taking up an increasingly large share of daily news consumption**.

6. In the print media market, the **position of free publications and tabloid periodicals is more stable**, while interest in print media products offering serious content has been declining for years, with a few exceptions.

7. The **readership of national daily newspapers is significantly lower than that of county newspapers** (262,000 copies according to MATESZ), which may be an indication of the local patriotism that still dominates among the rural population.

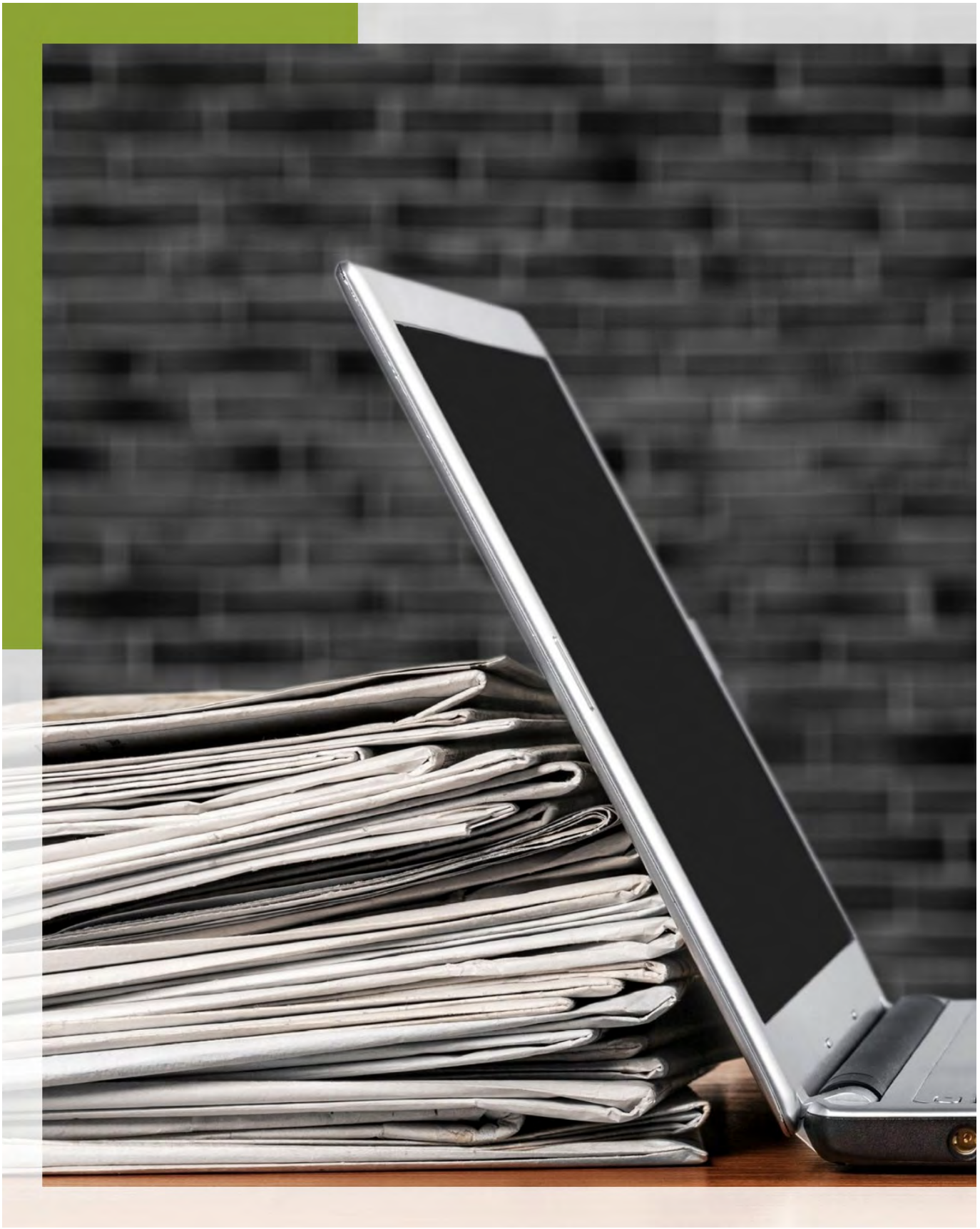
8. In recent years, **several well-established, highly-read newspapers have ceased to exist** (e.g. Népszabadság, Heti Válasz), but their competitors have not been able to benefit from this and their circulation has not shown an upward trend.

9. Among the traditional media, fragmentation in the press market occurred decades before that in the radio and television market, while **market/publisher concentration** occurred much later, following the changes in the television and radio segments.

10. Perhaps the biggest challenge for daily newspaper publishing is that, inevitably, printed media can only meet people's demand for information with a delay. On the one hand people who want to be informed, on the other hand, want to be informed of what is happening in the world in near-real time. This contradiction can be resolved by a **more prominent presence of newspapers in the online space**, and by providing **deeper analysis**, the ability to show **the wider context**, to contrast opinions and, above all, to ensure a more thorough **fact-check**.

11. The online output of some print media products (e.g. Blikk, HVG, Nők Lapja) are currently also among the most visited online sites, indicating that **they have been able to transfer their established brand, audience and credibility successfully to the online world**.

12. A major challenge for the profession is that while **parallel media consumption** is becoming increasingly common these days, print media are characterised by attentiveness and in-depth reading. It is possible to enjoy radio or television as background, but "background reading" is not.



ONLINE MEDIA MARKET

In this chapter, in addition to online newspapers and news portals, we also examine the competing online content service platforms of printed press products (collectively: online press products) and the online presence of television channels and radio stations. Hungarian internet users have a particularly high take-up of social media platforms, video-sharing platforms and other new media services, which will be discussed in the next chapter.

SUPPLY SIDE

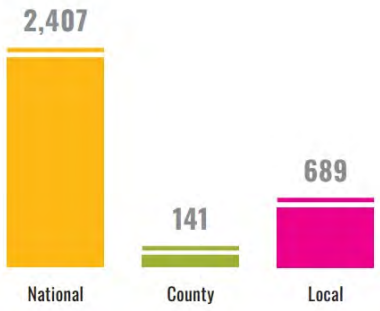
There were **more than 3,000 online content services** operating in Hungary in the 4th quarter of 2021 according to the Whitereport database, including the online platforms of non-exclusively online content providers. Online media can be accessed from anywhere so, in their case, regionality does not of course mean territorial accessibility, but content-related characteristics.

There are **635 online Hungarian content services** included in the industry measurements[18]. Among these, the **news/current affairs theme is** clearly the **most common**. This is followed by women's, sports and general entertainment/tabloid websites.

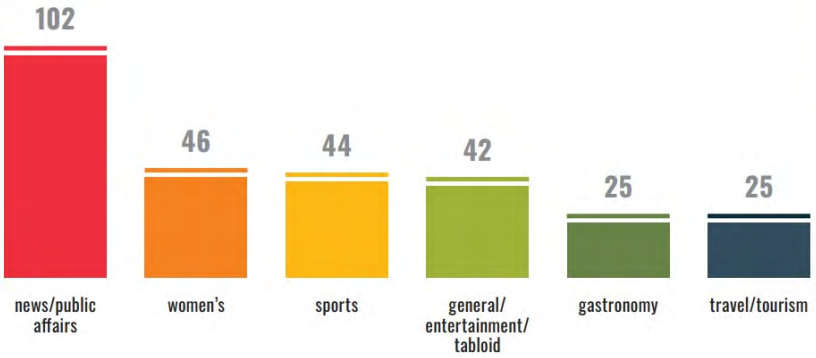
ONLY A FRACTION OF THE MORE THAN 3,000 ONLINE CONTENT SERVICES ARE MEASURED USING INDUSTRY METRICS; THE MAJORITY OF MEASURED SITES ARE NEWS/CURRENT AFFAIRS-RELATED

ONLINE MEDIA OFFERINGS BY REGION, Q4 2021 (NUMBER OF TITLES)

Source: Whitereport database



[18] Meaning: the Digital Audience Measurement Council (DKT)/Gemius Hungary media consumption measurement and/or Kantar Hoffmann TGI's consumer measurement and/or the Kantar Hungary advertising spend monitoring.



TOP ONLINE GENRES AMONG MEASURED WEBSITES, Q4 2021

Source: Whitereport database

Note: 635 sites are included in the Digital Audience Measurement Council (DKT)/Gemius Hungary media consumption measurement and/or Kantar Hoffmann TGI consumer measurement and/ or Kantar Hungary advertising spend monitoring

Only six out of the 271 media companies operating online content services in **Hungary exceed the HUF 1 billion annual revenue level**:

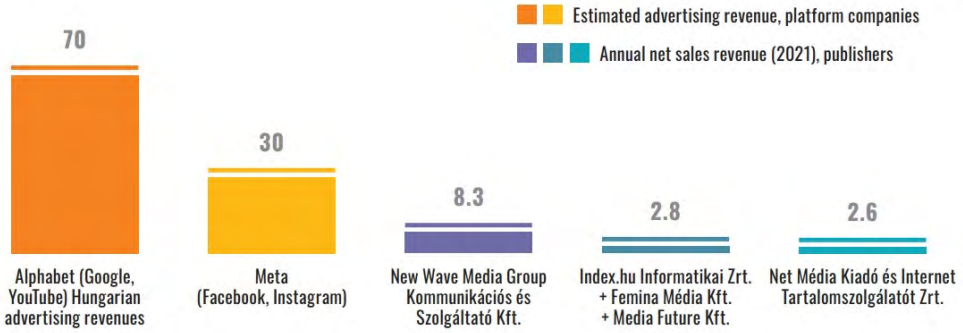
- New Wave Media Group Kft. (origo.hu, she.hu, travelo.hu etc.)
- Net Média Kiadó és Internet Tartalomszolgáltató Zrt. (portfolio.hu, penzcentrum.hu, etc.)
- Top News Hungary Kft. (twn.hu)
- Index.hu Zrt. (index.hu, velvet.hu etc.)
- AC News Kft. (acnews.hu, pepitamagazin.com)
- esport1 Kft. (esport1.hu, pcguru.hu, esportguru stream on mindigtvgo.hu)

ALPHABET (GOOGLE, YOUTUBE) IS ESTIMATED TO HAVE NINE TIMES MORE SALES REVENUE IN HUNGARY THAN THE LARGEST HUNGARIAN ONLINE CONTENT PROVIDER

ONLINE PUBLISHERS AND PLATFORM PROVIDERS WITH THE HIGHEST REVENUE, 2021 (HUF BILLION)

Source: Actual figures: Whitereport database & Opten. Estimated data: based on IAB 2021 ADEX segment-level estimate Whitereport estimate for company-level revenues

The figure includes only the revenues of publishers with online services.



The vast majority of market players are small businesses with annual sales revenue below HUF 100 million.

However, the revenues of the Hungarian market leaders in the online segment are **only a fraction of the revenues that companies operating global platforms realise in the Hungarian online market**: according to Whitereport experts, the revenues of Alphabet (Google, YouTube) achieved in Hungary are about nine times higher than those of the largest Hungarian online content provider.

In addition to media that exist solely as online content services, **the online mutations and web platforms of traditional television channels and radio stations and printed press products are also important players in the online media market**. The advertising and subscription (paywall) revenues of these platforms are typically indicated with the publisher's core business activities (television, radio, print media).

DEMAND SIDE

Composition of users

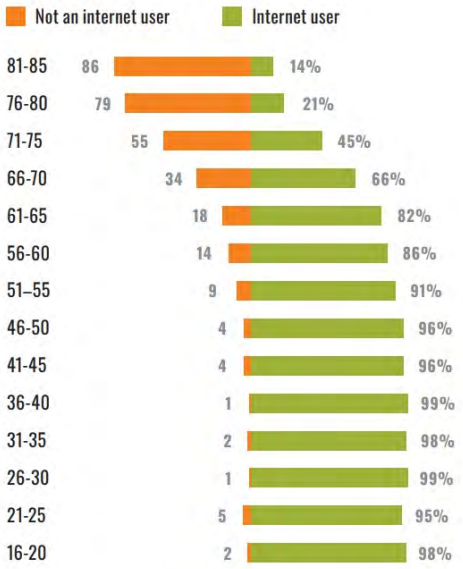
A representative survey of 4,000 people commissioned by the NMHH[19] found that **76% of the population aged 16 and over were internet users in November 2021**. Internet use is almost universal in the 16–50 age group, but the proportion of people over 50 who do not use the internet increases with age.

Two thirds of internet users use the internet outside their home, most of them at work (43%) or when travelling (36%). Time-series data show a significant decrease (8 percentage points) in internet use outside the home in 2020 compared to 2019 (most likely due to the pandemic), and this lower rate remained in 2021.

TWO THIRDS OF INTERNET USERS SURF THE WEB OUTSIDE THEIR HOME

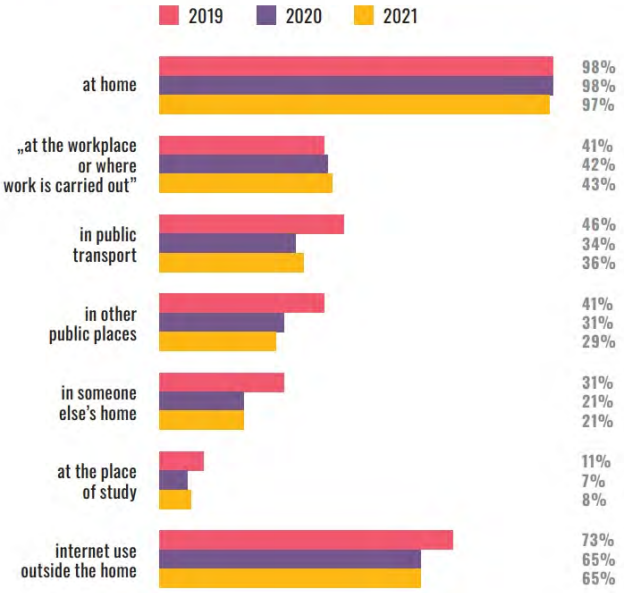
Internet users and non-internet users within the population, 2021 (percentage)

Source: NMHH Internet usage research, 2021 (ARIOSZ)



Places of Internet use, 2019–2021 (percentage)

Source: NMHH Internet usage research, 2021 (ARIOSZ)



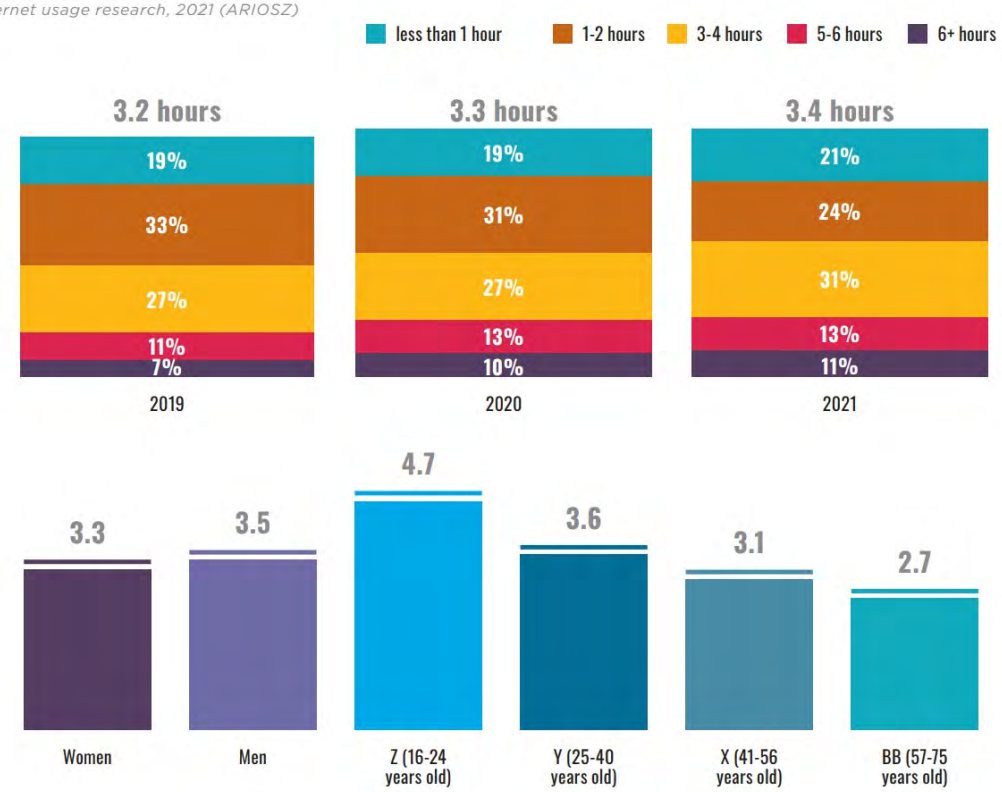
[19] https://nmhh.hu/dokumentum/228626/elektronikus_hirkozlesi_piaci_fogyasztonak_vizsgalata_internethasznalok_2021.pdf

The **time spent online has continued to increase over the past 3 years**: in 2021, 55% of Hungarian internet users spent more than 3 hours online per day on average, up from 49% in 2019, and the average amount of time spent online increased from 3.2 to 3.4 hours. **Young people and men** use the internet **more than the average, while older people and women** use the internet **slightly less**.

In terms of device use, it is prominent that **more and more people**, especially in younger age groups, **and more often** are **using their smartphones** to surf the internet.

TIME SPENT ONLINE, 2021
2021

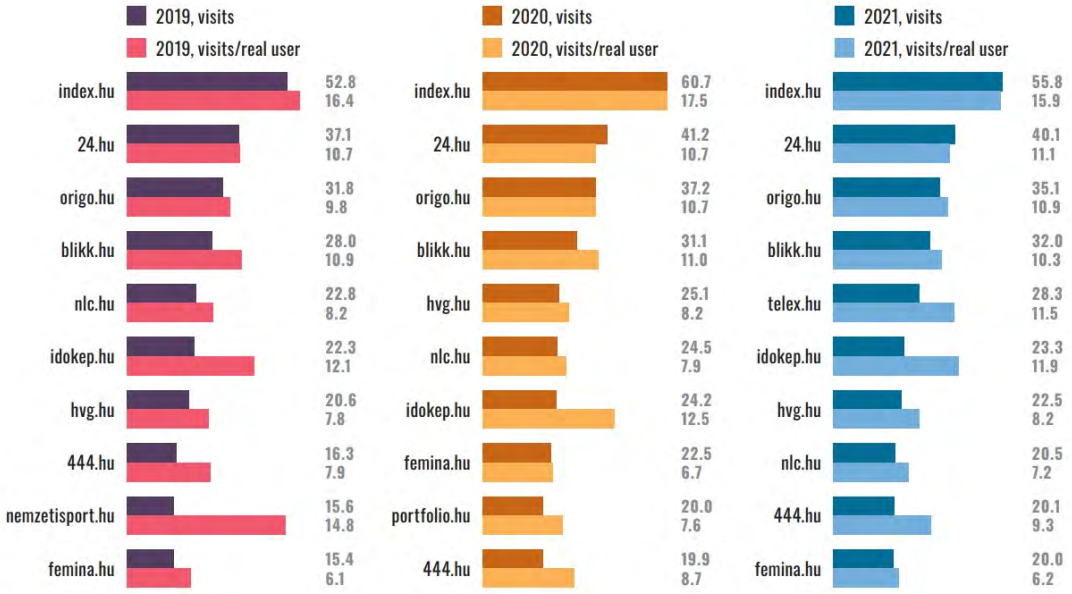
Source: NMHH Internet usage research, 2021 (ARIOSZ)



Top ten most visited domestic online content services, 2019–2021

Source: DKT-Gemius 15+, domestic

Real users: the number of domestic internet users who visited the given website during the period under review.
Visits: the number of visits per month to the website under review (restarted after a stay of more than 30 minutes).



The most popular domestic content providers

In addition to the major online-only news portals and magazines, **some players in the print press market (Blikk, HVG, Nők Lapja)** have also managed to get the online versions of their products among the most visited websites in Hungary.

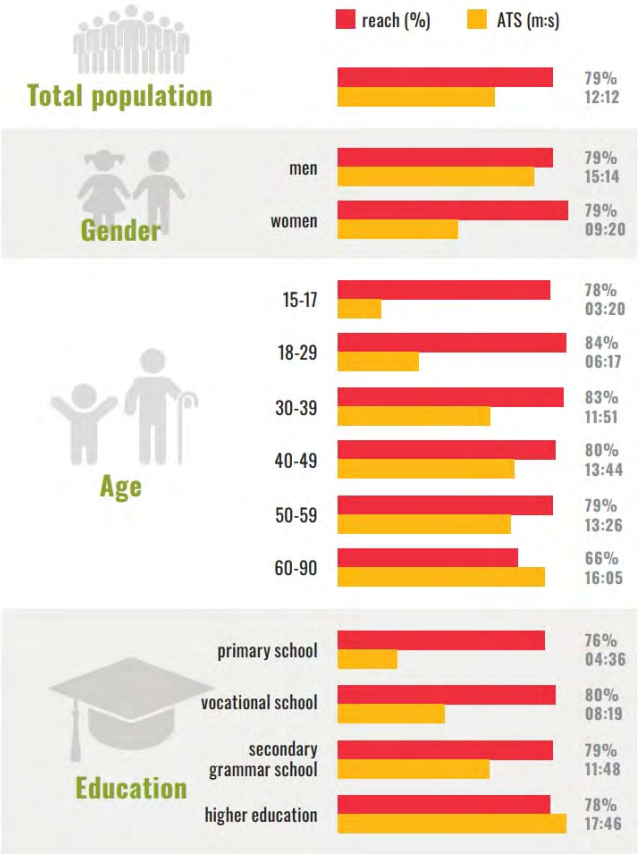
Based on the number of visits, **index.hu was the most visited website** in all three years (in 2021 this meant an average of 56 million visits per month), followed by **24.hu, origo.hu and blikk.hu**. Based on the number of visits per user to a given site (Visits/Real user), index.hu was the most visited site in 2021 (on average, a user returned to the site almost 16 times a month).

IN 2021, INDEX WAS FOLLOWED BY 24.HU, ORIGO, BLIKK.HU AND TELEX IN THE TOP LIST OF CONTENT SERVICES ATTRACTING THE MOST VISITORS

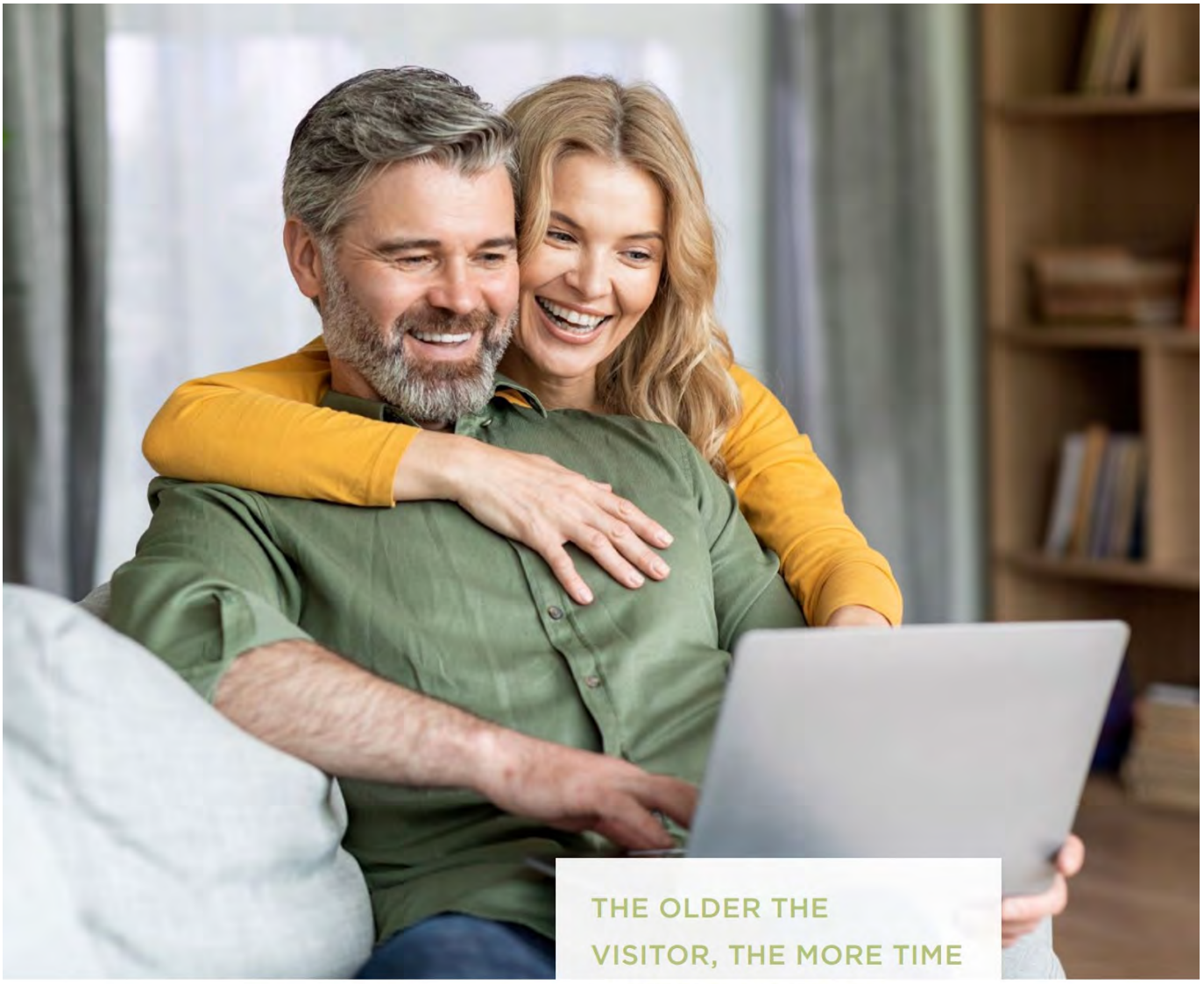
DAILY TIME SPENT ON THE TEN MOST VISITED CONTENT PROVIDERS' WEBSITES (IN MINUTES AND SECONDS)
AND ACCESS BY GENDER, AGE GROUP AND EDUCATION

Reach: what percentage of each group visited any of the ten sites in 2021 (monthly average).

ATS: average time spent by users on the 10 sites in one day in total.



The top ranking of the most visited domestic content services is fairly stable: between 2019 and 2021, only one site per year could make it into this group: in 2019 it was nemzetisport.hu, in 2020 portfolio.hu and in 2021 telex.hu. In each of the three years, it took around **2 million unique users per month for a site to be in the top 10**. In the last three years, blikk.hu and femina.hu have managed to increase their readership by more than 20%; Index has increased its readership by almost 10%, while the other sites have seen barely noticeable changes in the number of readers reached.



THE OLDER THE VISITOR, THE MORE TIME THEY SPEND ON THE WEBSITE THEY VISIT

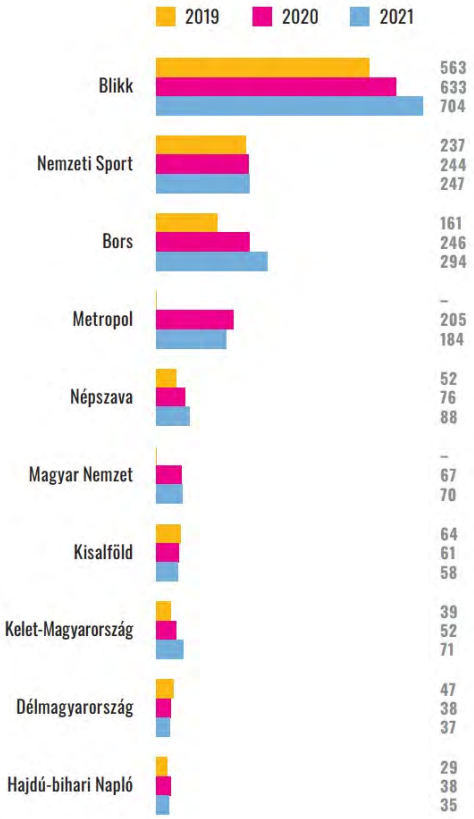
If we take into account not only the number of users but also the **number of visits**, then frequently updated, topical and high-volume content can be the key to success; readers of Index or nemzetisport.hu visit the site every two days on average, just as users return to Időkép (a weather forecast website) frequently, while the "women's topics" offered by femina.hu or nlc.hu lose their freshness less quickly, so readers return to these sites only every five days on average.

Looking at the composition of the users of the most visited sites, it is apparent that **one of the top 10 sites reaches almost every social group** (since its reach approaches or exceeds 80% in all strata except the over-60s, although even among pensioners the lower use is not due to a lack of interest, but rather to the lack of internet access).

Daily traffic of the measured online platforms of daily newspapers, (thousand visitors) 2019—2021

Source: DKT-Gemius 15+, domestic

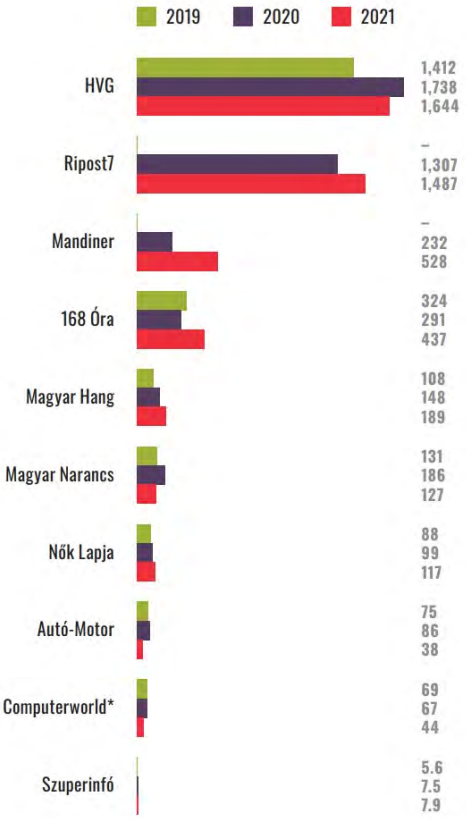
Real users: the number of domestic internet users who visited the given website during the period under review.



Weekly traffic of the measured online platforms of weekly newspapers, (thousand visitors) 2019—2021

Source: DKT-Gemius 15+, domestic

Real users: the number of domestic internet users who visited the given website during the period under review.
*Computerworld is a biweekly magazine.



The **average time spent** on these **sites per day** is likely to be influenced by two factors: the interest in the content and the amount of free time available. It is difficult to keep under-30s, and especially teenagers, staying engaged with the content of news portals (this does not mean that young people do not consume news at all, but rather that they spend less time reading an article). The online versions of women's magazines, which have a high circulation among print media, are not, but current affairs, sports and tabloid topics are popular according to aggregate audience figures. Among the **traditional**

press products, **Blikk's website** has had the highest number of visits among daily newspapers (enough to enter the top list of Hungarian online content services) in recent years; at about 600,000 visitors per day. The online versions of Nemzeti Sport and Bors also had a relatively high number of visitors, with more than 200,000 a day.

Among the weekly newspapers, the online version of HVG achieved enough visits to be included in the top list of Hungarian online content services: in 2021, more than 1.6 million people visited the hvg.hu news portal on a weekly basis.

Among the **monthly and less frequently published print magazines,** only the online version of Mindmegette managed to surpass the two million monthly visitors in 2021, followed by Glamour with 1.1 million monthly visitors and Joy with 908,000 visitors.

The most popular content **on the web platforms of television channels**, apart from information on the different programmes, is viewing programmes online and catch-up TV. We will examine the latter service in the next chapter, on-demand audiovisual media services.

The majority of **radio stations** use their own web platform, not only to offer online listening to their programmes, but also for community-building, to strengthen listener loyalty and as a news portal. Research shows[20] that most people listen online to the radio stations that they listen to or used to listen to in the traditional way. By subtracting the number of users listening to the radio exclusively in the traditional way from the total number of weekly radio listeners we find that **778,000 people consumed traditional radio in 2021 exclusively through an online platforms** (through a website or via a mobile app). This group is complemented by a group of around 90,000 people who listen exclusively to online radio – a market segment that will be discussed in the next chapter.

MOST PEOPLE LISTEN ONLINE TO RADIO STATIONS THAT THEY LISTEN TO OR USED TO LISTEN TO IN THE TRADITIONAL WAY

[20] Only online listenership data of those radio stations that are also available in the traditional way are measured by name in the TGI database.

SUMMARY AND CONCLUSIONS

1. In Hungary, there were **more than 3,000 online content services** in Q4 2021, but only 635 websites were included in the website traffic measurement and various industry surveys; news/current affairs were the most common genres among these online content services.

2. Of the 271 media companies operating exclusively online content services in Hungary, six exceed the HUF 1 billion annual sales revenue level, **with the vast majority of players being small businesses with annual sales revenue below HUF 100 million.**

3. **However, the revenues of the Hungarian online market leaders are dwarfed by the revenues of companies operating global platforms**: according to Whitereport experts, the advertising revenues of Alphabet (Google, YouTube) achieved in Hungary are about nine times higher than those of the largest Hungarian online content provider.

4. This is significantly **eroding the revenue potential of Hungarian online content providers** and bodes ill for their development prospects. There is no sign of market developments that could change this situation in the short or long term.

5. At the same time, the fact that **more than three quarters of the total Hungarian population are now regular internet users** is an indication of the growing demand side of the domestic online media market. Non-internet users are in the majority among only adults over 70.

6. In terms of device use, it is prominent that **more and more people are using their smartphones more and more often to surf the internet.**

7. In addition to the major news portals and magazines, some other players from the print media market (Blikk, HVG, Nők Lapja) were also **at the forefront of online content services in Hungary** in 2021. The **list was topped by Index.hu year after year**, with Origo.hu, 24.hu and blikk.hu sharing the top spots.

8. **Among the traditional daily newspapers, in addition to Blikk, the online versions of Nemzeti Sport and Bors** also had a relatively high number of visitors, with more than 200,000 a day. Among the weekly newspapers, HVG achieved enough visits to be included in the top list of Hungarian online content services.

9. **Television and radio are looking for their place in the online space**, trying to maintain or expand their audiences. Television channels are competing with video on-demand (VOD) and video-sharing services, while radio stations are competing with podcasts, audio streaming platforms and online-only radio stations for users' attention and advertising revenue.

10. Consumption of online content shows a completely different pattern to those of radio and TV. While traditional content services are dominated by radio in the morning and television in the late afternoon and evening, online services do not show a periodic peak: **online users are almost constantly active**.

11. **In times of extraordinary situations or emergency** (e.g. pandemic, extreme weather, war), not only did the number of visits and time spent on news sites increase, but also the interest in government information sites related to the epidemic (e.g. koronavirus.gov.hu).

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NEW MEDIA PLATFORMS

Introduction

In this chapter, we examine **the domestic market share and user take-up of new media platforms** that have become available as a result of the widespread penetration of the Internet and rapid technological developments, and which pose a direct challenge to traditional content providers in the competition for consumers' attention and time, and for advertising revenues.

From this point of view, the **players in the online media market** presented in the previous chapter **are also considered "traditional"**, since the new media services are as much a threat to the established business models of Hungarian internet content service provision, which has a history of more than 20 years, as they are to the players in the television and radio market.

Although primarily the "traditional" content services described in the previous chapters are covered by the tasks and competences of the NMHH, at the same time, the NMHH, acting as a modern media and communications authority, cannot ignore the new media platforms that are having an **increasing impact on traditional content services and the media market as a whole**, bringing about profound changes in media consumption patterns and the allocation of advertising and distribution revenues.

The business model and revenue prospects of television channels worldwide, and hence also in the Hungarian market, are challenged by **subscription-based on-demand media services** (commonly known as video streaming services, e.g. Netflix, HBO Max and Amazon Prime) and **video sharing services** (e.g. YouTube, Vimeo and Indavideo); radio stations have to compete **with online radio stations**, **music streaming services** (e.g. Spotify, Tidal, Deezer) and **podcasts**; and print media – and increasingly audiovisual and online content providers as

NEW MEDIA PLATFORMS ARE HAVING A GROWING IMPACT ON THE TRADITIONAL MEDIA MARKET, ADVERTISING MARKET AND CONSUMER HABITS

well – have to compete with various **social media platforms** (e.g. Facebook, Instagram, TikTok).

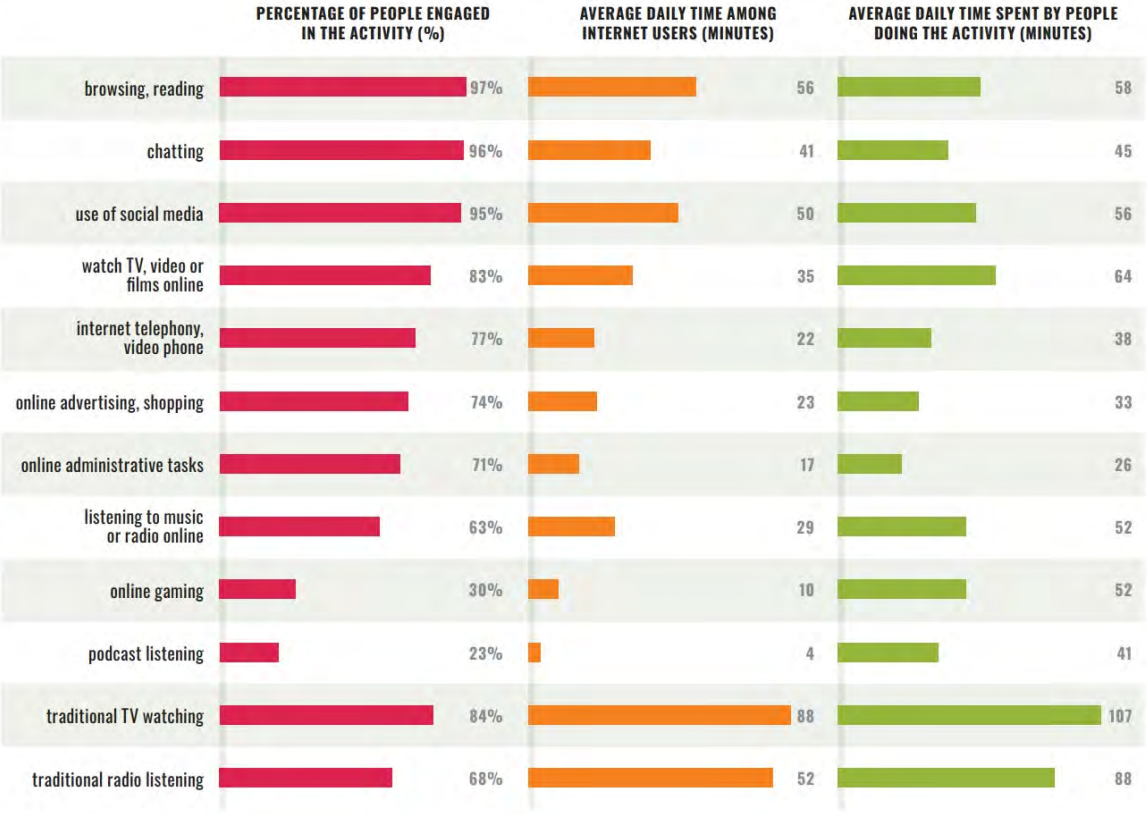
The **advertising revenues of all traditional media are being eroded by** Google and Facebook, which have become dominant players at many points in the online market value chain, offering increasingly sophisticated targeting. These businesses, with their huge development capacity, offer **simple, low-cost and well-targeted advertising opportunities** that traditional media cannot compete with, or only to a very limited extent.

Due to the ever-changing and evolving nature of the market, **there is not yet a complete inventory of** the new media platforms and services available in Hungary, but the vast majority of the largest services offered on the global market are available in Hungary as well. As with the supply market, there are no comprehensive surveys on the take-up of these services but, based on the research already carried out, it is safe to say that Hungarians are actively using these services, in some cases at a higher rate than the EU average.

HUNGARIAN USE OF SOCIAL MEDIA IS ABOVE THE EU AVERAGE

PREVALENCE OF ONLINE ACTIVITIES AND AVERAGE TIME SPENT ONLINE AMONG HUNGARIAN INTERNET USERS AGED 16+, 2021

Source: NMHH Internet usage research



In this chapter we look at the following new media platforms:

- *on-demand media services (VOD, catch-up TV, streaming and podcasts)*
- *video sharing services*
- *social media platforms*
- *online radios, live streaming*

The key condition determining the demand for new media platforms is access to fixed or mobile internet. Internet use and the composition of users were discussed in more detail in the previous chapter, whereas in this chapter we will examine the **proportion of internet users who use new media platforms**.

According to a **survey of internet users aged 16 and over** commissioned by the NMHH in autumn 2021[21], Hungarian internet users

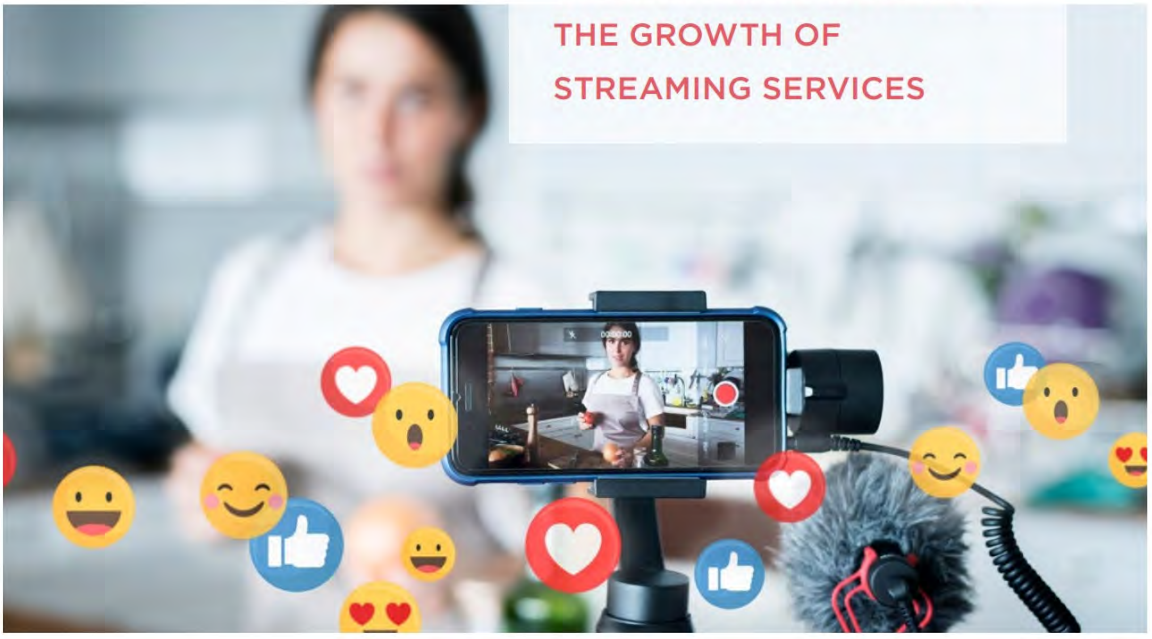
[21] For comparability, data on the use of two traditional media, radio and TV, are also included in the figure.

browse the internet (looking for information, reading), use social networking sites and chat online at a rate of over 95%, but 83% also mentioned watching online movies (this is virtually the same rate as the 84% rate of traditional TV viewing measured among internet users).

For internet users, the increasing trend is that the **consumption of video-based content** online represents the main form of entertainment. This is one of the strongest online trends today, enabled technologically by **broadband fixed internet** (gigabit) and increasingly fast and affordable **mobile internet**, and supported by the development and expansion of VOD and streaming services offered by the service providers.

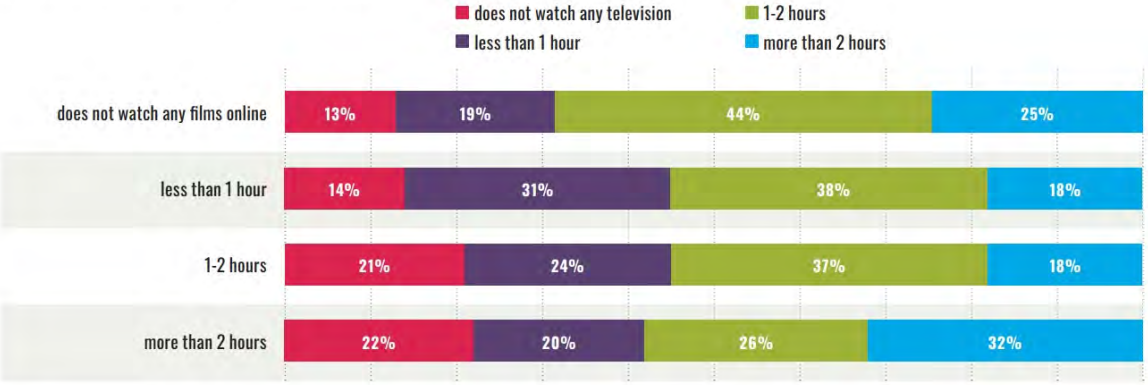
The substitution effect of online media consumption on television is already evident based on the data: the more a user watches online, the less they watch traditionally. While only 13% of internet users watching no online videos stopped watching traditional TV, 22% of those who watch at least two hours of online video content a day stopped watching traditional TV completely.

THE AVAILABILITY OF SUPER-FAST FIXED AND MOBILE INTERNET, AND THE ABUNDANCE OF CONTENT HAVE BOOSTED THE GROWTH OF STREAMING SERVICES



THE IMPACT OF WATCHING FILMS ONLINE ON WATCHING TV

Source: NMHH Internet usage research, 2021



The correlation also holds in reverse: internet users who do not or only marginally access online video content watch a lot of TV: 68% of those who do not watch movies at all watch at least an hour of TV a day, while **only 55% of those who watch more than an hour of movies online are heavy TV consumers**.

On-demand audiovisual media services

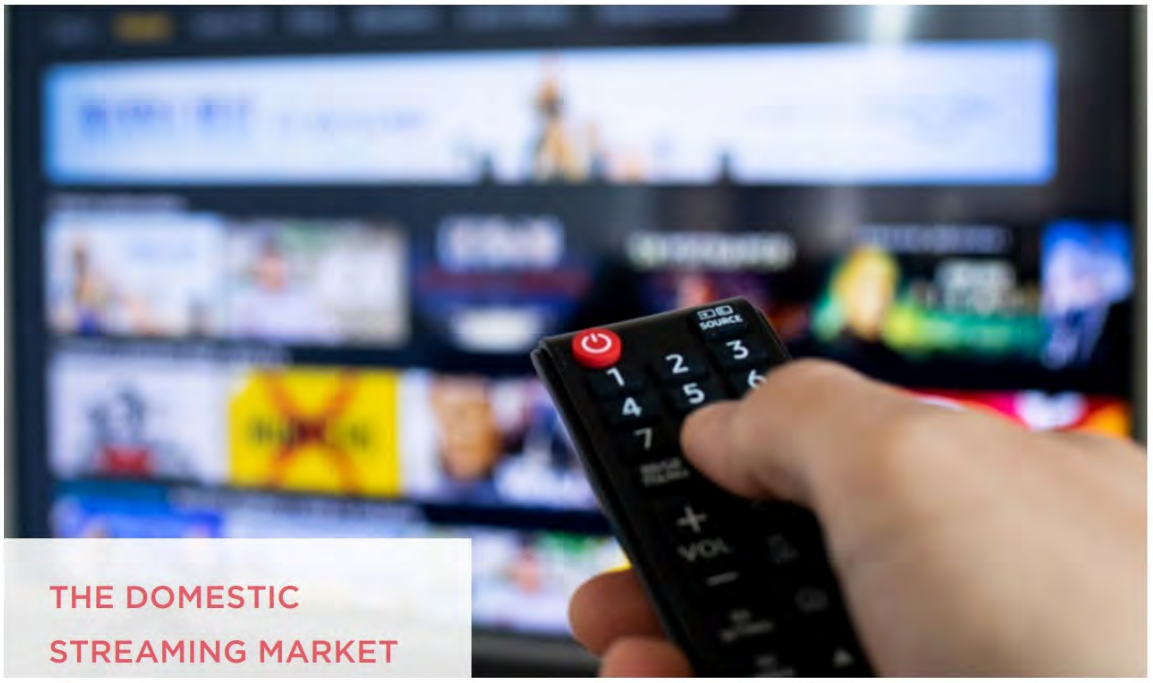
Two broad service groups can be identified within the on-demand audiovisual media services. One group is made up of **catch-up TV services operated by linear media service providers**, the other is **video-on-demand (VOD) services**, which are independent of traditional media services. Among the catch-up services operated by domestic media service providers, RTL Most and TV2 Play deserve special mention.

There are also platforms that broadcast edited content **online as a linear service** (e.g. ittott.tv, Yettel Tv) and others that **offer a mix of linear and catch-up TV services** (mediaklikk.hu, Direct One).

A trend that has been observed in recent years is the rise of **non-paying live streams**. These are typically audiovisual services offering user-generated content, mainly in the field of gaming (e.g. Twitch), but also voice-based live community-based broadcasting (e.g. Clubhouse). **Providers are typically global platforms;** there are no domestic providers with significant reach in this market, but some domestic channels (streamers) have significant audiences, especially among young people.[22]

According to the European Audiovisual Observatory, the total **revenue generated by video-on-demand (VOD) services – independent of traditional media**

[22] Twitch: https://twitchtracker.com/channels/ranking/hungarian, YouTube: https://www.influencertoplista.hu/



THE DOMESTIC STREAMING MARKET IS EXPANDING RAPIDLY, BUT THE LACK OF A SOLVENT AND STRONG CUSTOMER BASE MAY BE A LIMIT TO THE GROWTH OF SUBSCRIPTION

services – in Hungary in 2020 was EUR 42 million, a significant increase of 48.4% compared to the previous year, but still below 0.35% of the total European VOD revenue in 2020.

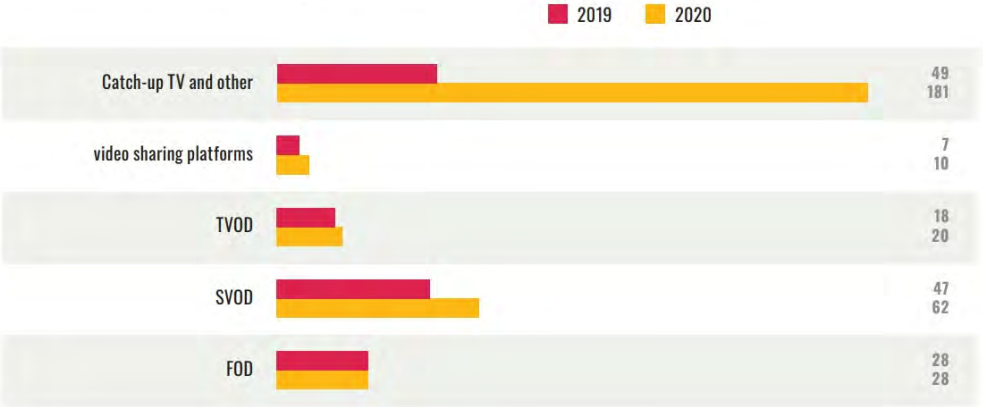
VOD services are available **in three main business models**:

- free-on-demand (FOD), which is **free** to users and based solely on advertising revenue;
- subscription video-on-demand (SVOD) market, where a **subscription fee** is to be paid and which relies mainly on popular, often original, series;
- transaction video-on-demand (TVOD) market, which **charges separately for each item of downloaded content**, where operators offer users mainly recent, popular films, but also make many older programmes available.

According to the data of the European Audiovisual Observatory, there were available 301 on-demand audiovisual services in Hungary in December 2020; however, this statistic also takes into account non-localised services available worldwide. The data show that **catch-up services account for a significant and dynamically growing share**

Number of on-demand audiovisual services available in Hungary, 2019–2020

Data source of the figure: OBS/Ampere-analysis @ European Audiovisual Observatory Yearbook 2021



of on-demand services in Hungary (which is also consistent with the conclusions drawn from domestic records), and that three quarters of paid on-demand media services are subscription-based services.

According to the NMHH register, there are **160 on-demand audiovisual media services**[23] operating in Hungary. A significant part of these services are free-to-view programmes available on the websites of the various (even municipal) television channels. However, only a small number of media service providers are included in the register that provide SVOD or TVOD services on a commercial basis (for profit), effectively competing with linear content services (e.g. FILMIO, or online video libraries provided by domestic telecom operators).

The register does not include services that are not established in Hungary but provide content localised to the Hungarian market, even in Hungarian, such as **Netflix or HBO Max**, which have the significantly largest number of subscribers in the Hungarian SVOD market.

According to the NMHH's annual survey of Hungarian internet users, **one third of internet users aged 16 and over had access to a streaming service in 2019, while by 2021 almost half of them had access to a streaming service**. According to the survey, Netflix was the most popular streaming service in Hungary, with around a quarter of internet users having access to it, and HBO Go (now known as HBO Max) was the second most popular, with 13% of internet users having access to it.

[23] https://nmhh.hu/cikk/185062/Lekerheto_audiovizualis_mediaszolgaltatasok

Although the specific **subscriber data are treated as a trade secret by streaming providers, even at international level**[24], it is likely that this estimated reach represents fewer subscriptions by an order of magnitude, as streaming can occur on multiple devices and in multiple locations at the same time for subscribers to both services. This means that a subscription can be used regularly by whole families or groups of 5-6 consumers.

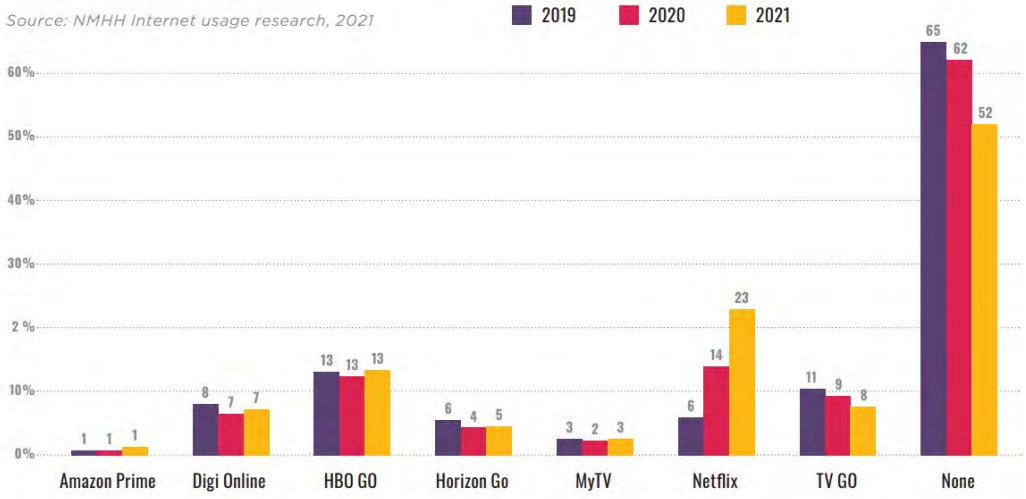
The uptake of subscription video on demand (SVOD) services so far **shows a typical pattern of prestige consumption**: for example, only 15% of people with a primary education use Netflix, compared to 33% of graduates, and similarly 28% of people in active employment use Netflix and only 10% of retired people.

IN 2021, ALMOST HALF OF INTERNET USERS AGED 16 AND OVER HAD ACCESS TO A STREAMING SERVICE

Although the proportion of torrent-only users has declined slightly, the spectacular increase in the use of streaming services has not been accompanied by a significant decline in **torrenting** over the past 3 years.

Prevalence of paid streaming services among Hungarian internet users (%)

Source: NMHH Internet usage research, 2021



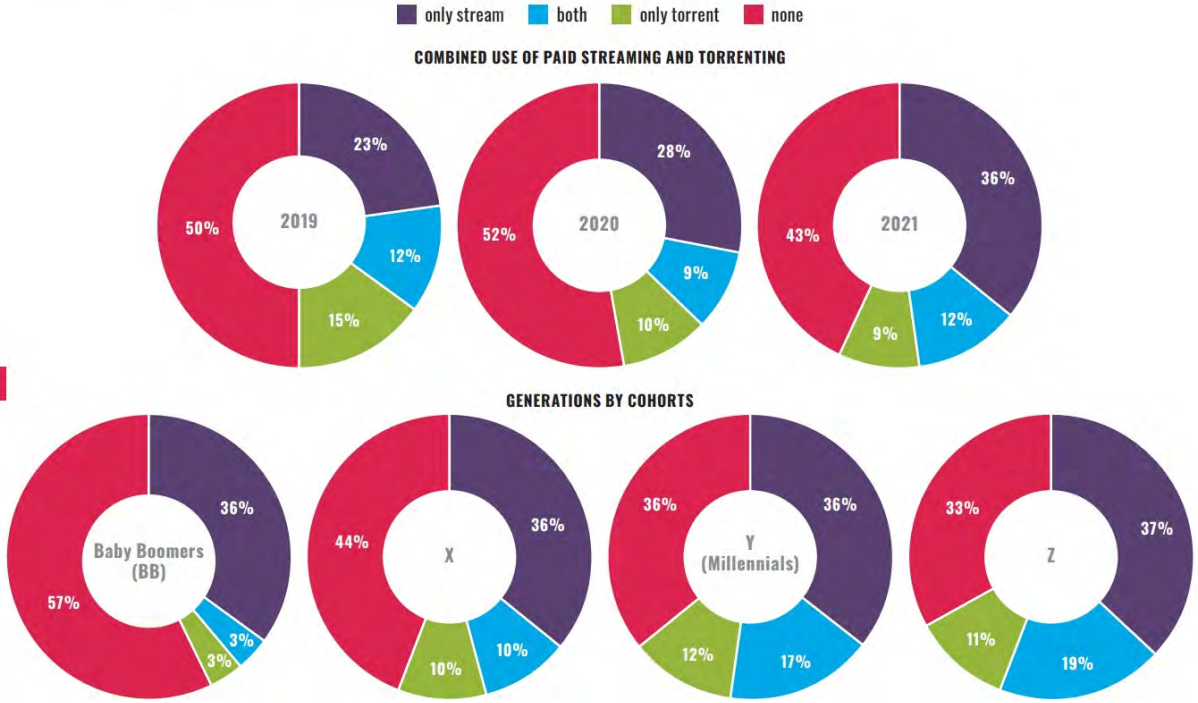
[24] https://www.musoron.hu/2019/06/27/szerinted-mennyi-elofizetoje-van-a-netflixnek-magyarorszagon/

COMBINED USE OF PAID STREAMING AND TORRENTING, 2019–2021

Source: NMHH Internet usage research (ARIOSZ)

- The generation breakdown is for the year 2021.
- The generations shown in the figure (the Silent generation of people aged 76+ does not use any of these services):

Generation Z	Generation Y	Generation X	Generation BB (baby boomers)
aged 16—24	aged 25—40	aged 41—56	aged 57—75



Video sharing platforms

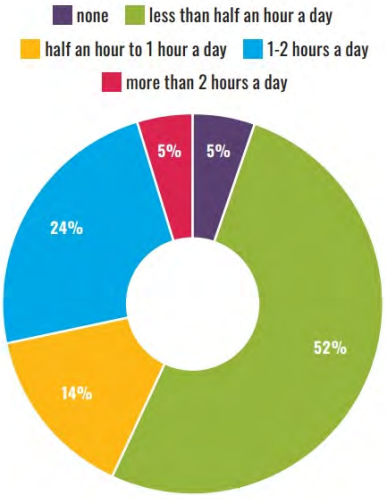
With regard to the different video sharing platforms, it can also be established that **global services are widely available in Hungary** (e.g. YouTube, TikTok). According to the NMHH's register[25], there are only **6 domestic services** operating on the market, the most important of which are videa.hu and indavideo.hu. Presumably, there are many more other video-sharing services (even on international domains) targeted to the Hungarian market (even in addition to torrent sites, which are not very concerned with legality), that offer services by interpreting copyright law in a flexible way – typically generating advertising revenue for the service operator.

[25] https://nmhh.hu/cikk/212895/Videomegosztoplatformszolgaltatasok

NEARLY 30% OF INTERNET USERS AGED 16 AND OVER SPEND MORE THAN AN HOUR A DAY WATCHING VIDEOS ONLINE

Time spent watching online video content among Hungarian internet users, 2021 (%)

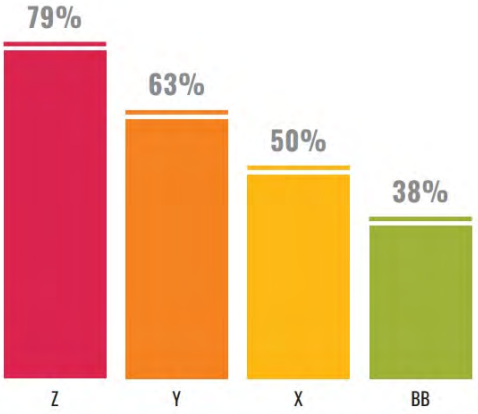
Source: NMHH Internet usage research (ARIOSZ)



Online video content consumption by generation, 2021

Source: NMHH Internet usage research (ARIOSZ)

The question was: "Have you recently watched – on any device – a movie, television film or series that you accessed via the internet?"



Surveys show that **more and more internet users are watching video content for longer and longer**: according to an NMHH survey carried out in 2021, nearly 30% of internet users aged 16 and over spend more than an hour a day watching online videos.

Online video consumption is, unsurprisingly, **most prevalent among the younger generations**: while four-fifths of youngsters born after 1997 watch video content online, the proportion is less than 40% for the baby boomer (BB) generation born before 1964.

Podcast, audio streaming, online radio

Music streaming services are also becoming increasingly popular in Hungary, while free and paid music downloads are on the decline[26]. This phenomenon is probably mainly due to technical reasons: with the spread of fast and unlimited mobile internet, it is no longer necessary to download music, as it is available streamed at any time, and today the user no longer has to wait for it (as back in the days when the internet was slow). With **ever-increasing data quotas[27]**, it doesn't matter that data traffic is generated for each piece of content listened to.

YouTube is the most popular platform for listening to music, followed by Spotify, YouTube Music and Apple Music.[28] The popularity of YouTube is mainly due to the fact that it is free, which seems to compensate for the poor sound quality and frequent advertising. **Music streaming services are mainly popular among young people**: according to Start.io data, more than half of Spotify's domestic user base are aged 18—24 and 96% of them are under 35.[29]

Not only is streaming's share of the domestic music market growing rapidly[30] (by 30% in 2021 compared to the previous year), but **more and more people are willing to pay for better quality and/or an ad-free experience**: in 2021, the value of subscriptions was estimated at HUF 3.5 billion.[31]

TRADITIONAL MEDIA PROVIDERS HAVE ALSO ENTERED THE RAPIDLY EXPANDING PODCAST MARKET

The **year 2021 also saw a breakthrough in the domestic podcast market**, with the launch of a series of high-quality podcast channels produced in well-equipped studios. In addition to programmes produced by private individuals, professional content producers, linear media service providers, online news portals, and communications service providers have also discovered and started to exploit the potential of the podcast format,

[26] International Anti-Counterfeiting Coalition survey, 12/2020 https://www.sztnh.gov.hu/sites/default/files/kutatas_hent_2020_final.pdf

[27] No data is available on the proportion of mobile phone users having unlimited data quotas; however, according to an NMHH analysis of the most popular tariff plans (chosen by the most subscribers at a given operator in a given period) (see: https://nmhh.hu/cikk/230743/Mi_van_a_csomagban__a_mobil_elofizetesi_csomagok_fejlodese) the data quota was 500MB in the first half of 2016, 5GB in 2020 and 100GB in the second half of 2021, which is virtually unlimited for most users.

[28] https://www.statista.com/statistics/1243394/hungary-music-streaming-service-usage-by-provider/

[29] https://www.start.io/audience/spotify-music-users-in-hungary

[30] https://www.mahasz.hu/piaci_adatok

[31] https://www.mahasz.hu/userfile/2021_evi_digitalis_eladasok.xlsx

and many companies have also recognised its brand-building potential. For businesses looking for **new, creative marketing solutions**, podcasts can also be attractive because they are affordable to produce and well targeted to specific audiences.

According to Whitereport data collected from public sources, there were **294 Hungarian-language podcasts at the end of 2021**. Podcasts can be listened to directly from the producer's own website and/or via an online platform or app, or another aggregator platform (Spotify, Apple Podcasts, YouTube, Overcast, Stitcher, Podcastrepublic, TuneIn, etc.).

NMHH's annual survey on internet usage habits[32] shows that **the audience for podcasts increased by 4 percentage points to 23% of the population aged 15 and over using the internet in 2021** compared to the previous year. According to a study carried out during the pandemic, the proportion of podcast users among people aged 18-34 and those with a higher education level was well above average.[33]

ALMOST A QUARTER OF INTERNET USERS LISTEN TO PODCASTS, MAINLY MORE HIGHLY-EDUCATED AND YOUNG PEOPLE

[32] https://nmhh.hu/dokumentum/228626/elektronikus_hirkozlesi_piaci_fogyasztonak_vizsgalata_internethasznalok_2021.pdf

The listenership of certain podcast channels is similar to the listenership of **(exclusively) online radio stations**. According to the NMHH register[34], there are **118 registered online radio stations** operating in the Hungarian market. According to a survey on online radio listening commissioned by the NMHH in 2022[35], **around 90,000 people listened to online-only radio stations every week** in 2021 – but many more (around 778,000 people) chose the online versions of traditional radio stations.

Measuring the listenership of online-only radio stations (due to the fragmented nature of the market and the global nature of the internet) **is methodologically difficult**. Although it is in principle possible to measure on the internet how many people are tuning in to a particular stream, it is impossible to know anything about the individual listeners (not even whether it is a private individual, a crowded gym or a barbershop). Therefore, Kantar Hoffmann–Scores Group, the company conducting the survey, used the same methodology as for traditional radio to examine the listenership of online-only radio stations. This meant that, in 2021, more than 4,000 listeners per week were required to make it into the top 5 most listened to online radio stations, and more than 2,000 listeners for the top 10.

Social media

Among the new media services, we should also mention the role of social networking sites, which, although they provide mostly non-professional content, compete for users' attention and time in the same way as traditional and new media service providers. In the case of social networking sites, the supply is almost limitless, but **the most popular sites in Hungary are the globally available platforms**, which are attracting more advertising revenue from the domestic market every year.

In 2021, traffic to global platforms (especially Facebook) was significantly higher than any other content service, according to Gemius/DKT. **Among 18—29-year-olds, the daily reach of global platforms is 2-3 times higher than that of Hungarian platforms**, and among them, the daily reach of television is lower than that of online media.

95% OF HUNGARIAN INTERNET USERS SPEND TIME (ALMOST AN HOUR A DAY ON AVERAGE) ON SOCIAL MEDIA PLATFORMS

[33] https://www.researchcenter.hu/cikkek/podcastok-es-internetes-radioadasok-hallgatottsaga-a-pandemia-idejen/

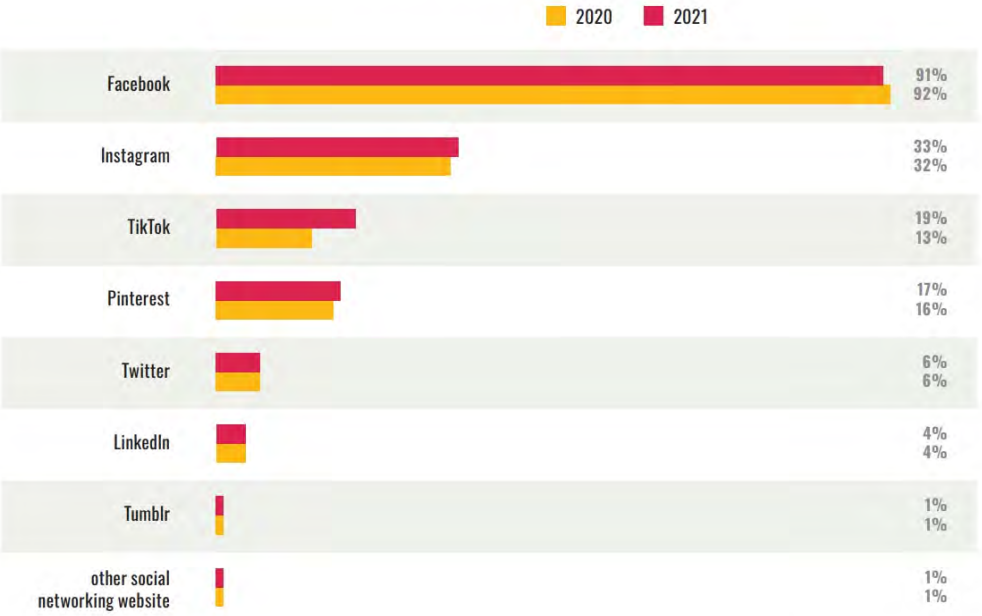
[34] https://nmhh.hu/cikk/185056/Bejelentes_alapjan_mukodo_internetes_linearis_radios_mediaszolgaltatasok

[35] https://nmhh.hu/cikk/218620/Az_online_radiok_hallgatottsaga_2020ban_a_Kantar_HoffmannScores_Group_adatai_alapjan

SOCIAL MEDIA USE AMONG HUNGARIAN INTERNET USERS AGED 16+, 2020—21

Source: NMHH Internet usage research (ARIOSZ)

Percentage of people who have carried out the activity in the last six months.



According to a survey commissioned by the NMHH and conducted in autumn 2021[36], **95% of Hungarian internet users spend time on social media platforms**, 56 minutes per day on average (see the first figure of this chapter). Based on these figures, social media is now catching up with traditional TV as the most popular leisure activity: more internet users are now using it (95% vs. 84%), albeit for shorter periods (internet users watch less than two hours of TV a day on average).

For most social networking sites, the size of the target group reached has remained practically unchanged for years, but **the 19% user share of TikTok, which ranked 3rd,** is noteworthy **– a year earlier, in 2020, only 13% used this platform**. The rapid growth is explained by the popularity of the service among youngsters, with 40% of 16–29 year olds using the service, including over 70% of teenagers.

Facebook use is much less dependent on age, income or education: it reaches around 90% of both users in their 40s and users in their 60s, and is equally popular among people with vocational school education and people with academic degrees.

[36] https://nmhh.hu/dokumentum/228626/elektronikus_hirkozlesi_piaci_fogyasztonak_vizsgalata_internethasznalok_2021.pdf

SUMMARY AND CONCLUSIONS

1. Browsing (looking for information, reading), social networking and chatting are currently the most common activities on the internet, **but more and more people are also consuming video content**.

2. For internet users, the increasing trend is that the consumption of video-based content online represents the main form of entertainment. This has been enabled technologically by **broadband fixed internet** (gigabit) and increasingly fast and affordable mobile internet, and supported by **the expansion of the range of streaming services** offered by the service providers.

3. A complete inventory of new media platforms and services accessible in Hungary is not available, as the cross-border nature of global services has removed the constraints of the analogue world, opening up the market. **The vast majority of the largest services offered on the global market are available in Hungary as well.**

4. The challenge for the coming years – for the authorities, the market and research companies alike – will be to **gather a deeper and more comprehensive picture of the Hungarian market for new media platforms**, which are gaining more and more weight on the market.

5. The consumption of **on-demand audiovisual media services** is not yet comparable to traditional media, but it is a very dynamic segment:
   - **half of Hungarian internet users have had access to** the big international **paid streaming services (SVOD)** competing with linear content services in 2021 (this means far fewer subscriptions due to multi-user subscriptions);
   - the major domestic linear content providers have been offering **catch-up TV and on-demand services** for several years (RTL Most, TV2 Play, Médiaklikk);
   - according to data from the European Audiovisual Observatory, there were already **more than 300 on-demand audiovisual services** in Hungary in December 2020 (this statistic also takes into account non-localised services available worldwide);
   - **the crowding-out effect of online media consumption on linear television is already evident**: while only 12% of internet users who do not watch any online video stopped watching traditional TV, 20% of those who watch at least one hour of online video content a day stopped watching traditional TV completely.

6. **Competition is expected to continue to increase in the domestic SVOD market**, but the public is very price sensitive, so it is questionable whether the growth rate of recent years can be sustained.

7. With the rise of on-demand video services submarket, **the popularity of global video-sharing sites** (e.g. YouTube, TikTok) and torrenting **has not declined significantly**.

8. **Non-professional content** is also gaining an increasingly important role in online media supply, with live streaming, podcast and video sharing platform content expected to grow in the future.

9. At the same time, more channels and content may emerge on online platforms that are not provided by media service providers in the traditional sense (but by influencers, producer and trading companies, etc.), and which nevertheless are produced with professional crew and high quality. Because these services are provided through video-sharing or social media platforms, they **traditionally do not belong to regulated on-demand media services; however, one of the aims of the new European regulations is to address this**.

10. The emergence and rapid spread of new media platforms has brought profound changes, not only in media consumption habits, but also **in the allocation of advertising and distribution revenues**.

11. This process is reinforced by the ease of access: designed for easy and mass use, these new media platforms are exploding in consumer adoption. By playing a dominant role in the race for consumers' attention, they are also **taking a growing slice of the advertising revenues that keep the industry going**.

12. The services offered by the new media platforms have also spread very rapidly in Hungary, with **more than 90% of the internet user adult population using new media platforms and services**.

13. Of the platforms transmitting a virtually infinite amount of media content available on the internet, those platforms that **promise user-friendly entertainment or information without any effort on the part of the user** have become the most popular. Video sharing, social networking and, increasingly, streaming providers are offering new content continuously, according to profiles based on users' previous consumption patterns and behaviour, saving the user the hassle of searching.

14. The growing popularity of paid streaming services may be limited by the **limited availability of content in Hungarian or with Hungarian subtitles**. It is possible that this will change as translation software becomes better and more accurate.

15. **New media platforms** reaching a significant number of consumers **are almost invariably run by global mammoth companies**. Given that the Hungarian population, especially the youngest age group, spends nearly as much time on these channels as watching TV, there is an **urgent need for the** Digital Services Act (DSA) and the Digital Markets Act (DMA) – i.e. **EU level legislation already adopted but not yet effective – to be implemented as soon as possible.**

ADVERTISING MARKET

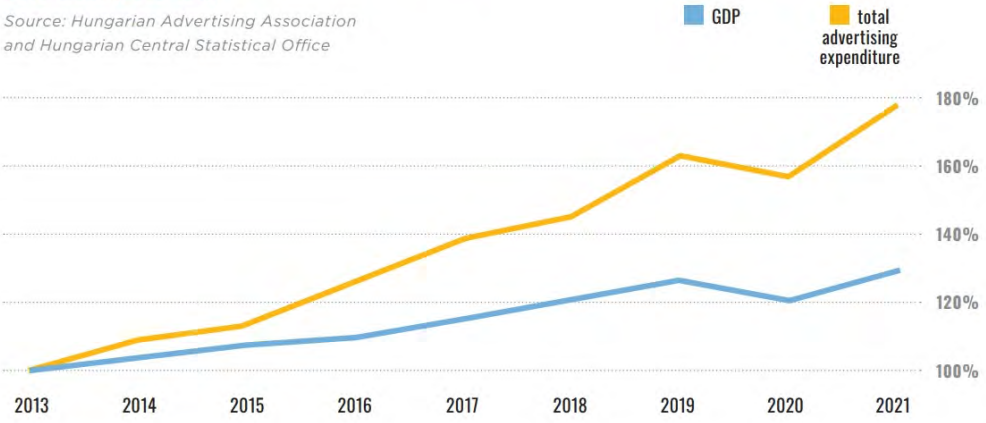
As advertising is almost the sole source of revenue for radio and online content providers, and revenues from the sale of advertising space generally exceed distribution revenues also in the case of the television and print media markets, **the advertising market is the lifeblood of the media**.

According to the Hungarian Advertising Association[37], **the advertising market worth HUF 144 billion in 2013 more than doubled to HUF 305 billion by 2021**, which means a 78% increase in real terms.[38] In the same period, Hungarian GDP grew by around 30% in real terms, and even the sectors that performed particularly well only grew by 50-60%, according to the Hungarian Central Statistical Office (for example, the performance of trade grew by 49% and that of construction by 66%).

The **only break in growth** in the advertising market came in **2020**, when the closures due to the COVID-19 pandemic brought a general economic downturn and businesses advertised less.

Trends in advertising expenditure and GDP in real terms, 2013–2021 (2013=100)

Source: Hungarian Advertising Association and Hungarian Central Statistical Office



[37] https://mrsz.hu/kutatas/media-es-kommunikacios-torta/2021-mrsz-media-es-kommunikacios-torta

[38] Note: in this chapter, all spending data are given at the so-called net-net value, which is the usual advertising industry practice, so that the amounts actually paid (which are the advertiser's costs after deducting discounts) are shown, not the list price, from which even agency costs are to be deducted.

IN HUNGARY, THE RATIO OF ADVERTISING EXPENDITURE TO GDP HAS RISEN FROM 0.47% TO 0.55% OVER THE LAST EIGHT YEARS

The ratio of advertising spend to GDP, as measured by the MRSZ, has risen from 0.47% to 0.55% over the last eight years. This only applies to so-called ATL (above the line) expenditure — i.e. advertising in the media. While previous international comparisons[39] show that advertising expenditure as a share of GDP in developed market economies ranged from 0.8% to 1.2%, recent international trends[40] show that advertising expenditure as a share of GDP has started to decline over the last ten years, from 1.3% to 1% in the US and from 0.9% to 0.7% in Germany.

The main reason behind this process is that **the cost of advertising on the internet is much lower** than in traditional media. In the longer term, the rise of online advertising will therefore not only reduce the traditional media's share of the advertising pie, but also the overall advertising pie. The phenomenon goes far beyond the dimension of intra-industry competition or new product versus traditional product, as **the sucking away of advertising revenues can lead to the business failure of domestic content providers**. (As indicated in the previous chapter, the annual revenues of the domestic market leaders in the online segment are already dwarfed by the revenues of global multinational companies generated in the Hungarian market.)

So, if advertising expenditure in Hungary has increased by nearly 80% in real terms in the past 8 years, this has happened despite the rapid growth of internet advertising, which, based on international experience, has led to a shrinking of the overall advertising market.

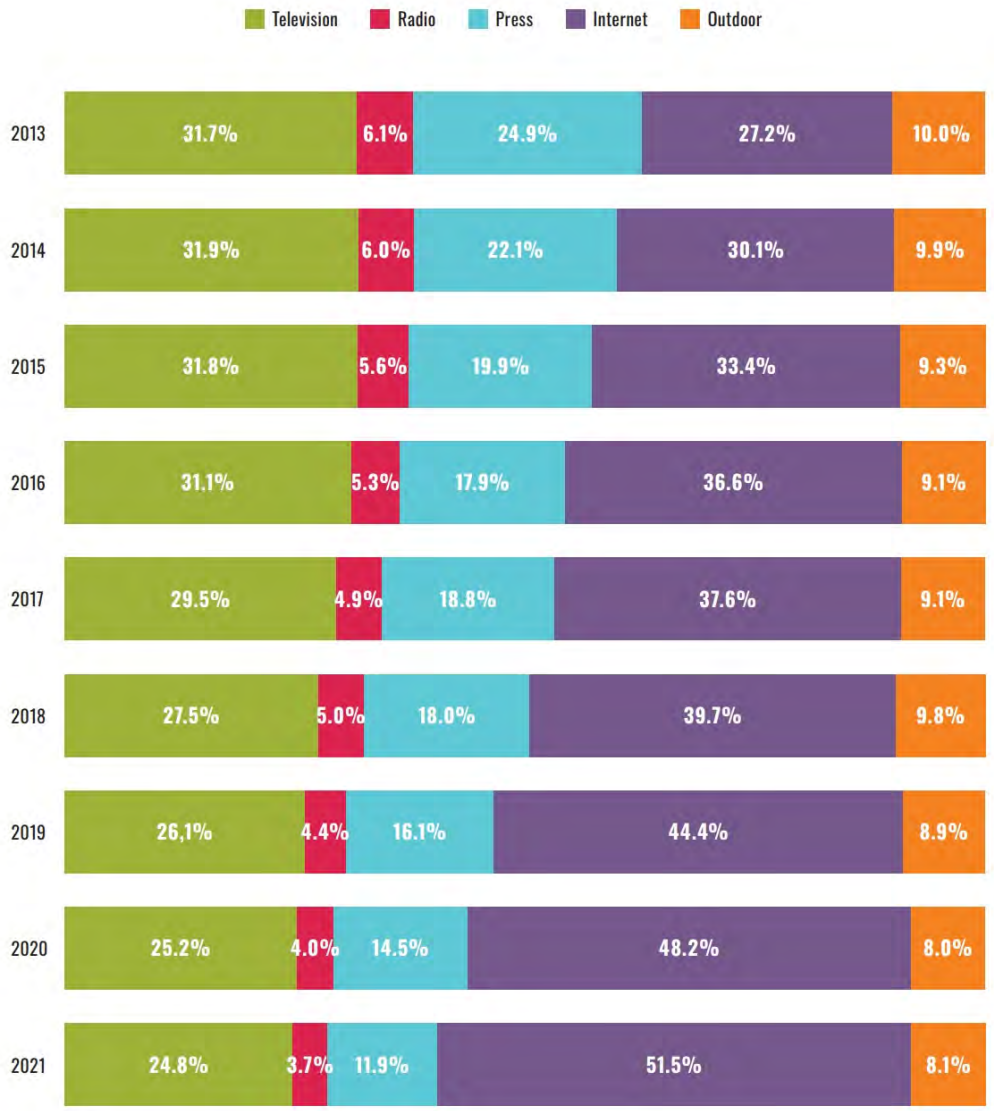
GLOBAL PLATFORMS GAIN AN INCREASING SHARE OF ADVERTISING REVENUES, PUTTING DOMESTIC CONTENT PROVIDERS IN AN INCREASINGLY DIFFICULT POSITION

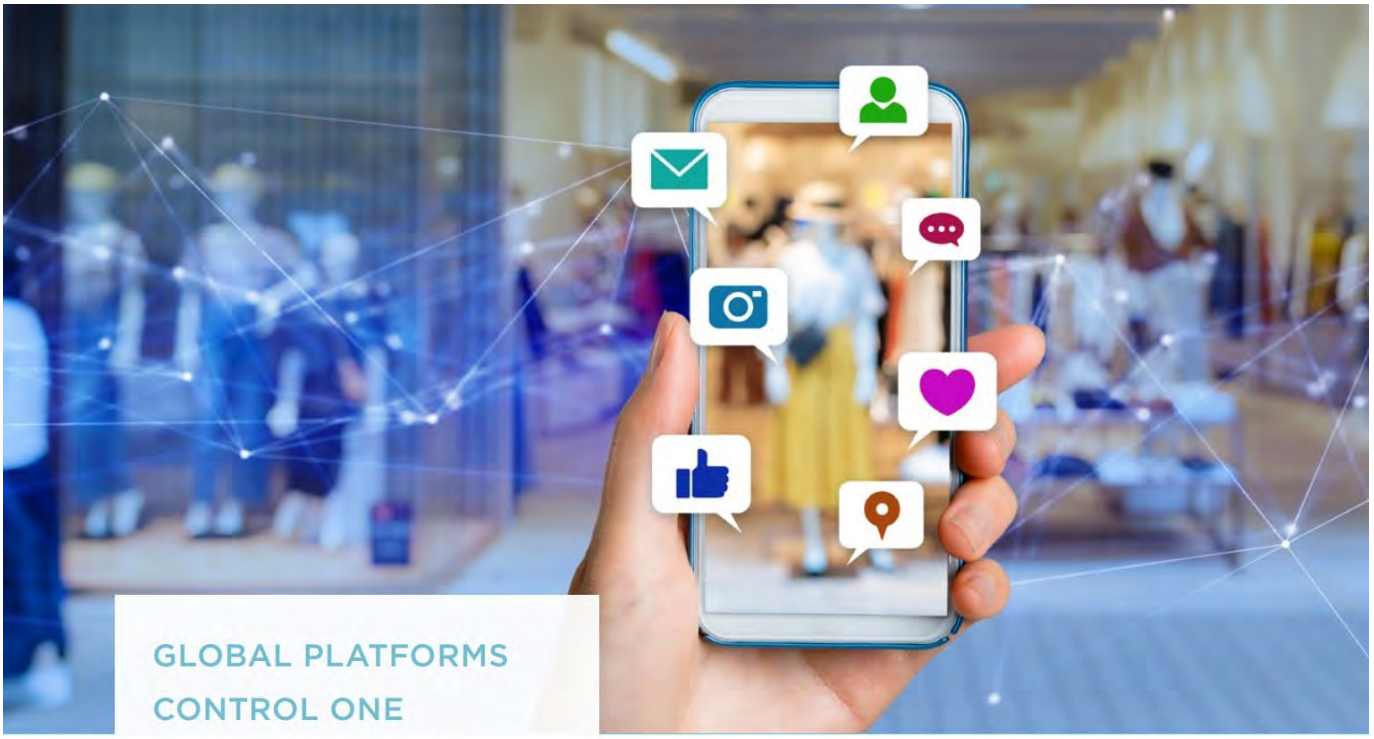
[39] See for example: van der Wurff, Richard—Bakker, Piet—Picard, Robert G. (2008): *Economic Growth and Advertising Expenditures in Different Media in Different Countries*, In: Journal of Media Economics, 21(1): 28—52.

[40] See: Mandel, Michael (2019): *The Declining Cost of Advertising: Policy Implications.* Progressive Policy Institute.

BREAKDOWN OF ADVERTISING EXPENDITURE BY MEDIA TYPE, 2013—2021

Source: Hungarian Advertising Association





GLOBAL PLATFORMS CONTROL ONE THIRD OF THE TOTAL ADVERTISING PIE AND TWO THIRDS OF THE ONLINE ADVERTISING MARKET

According to the Hungarian Advertising Association[41], the share of the online advertising market reached 51.5% in 2021, up from 27.2% in 2013, with **Facebook and Google accounting for around a third of the total advertising expenditure in Hungary**. The penetration of the two global giants is facilitated by the fact that the simple, automated and low-spend targeted advertising solutions offered by Google and Facebook can also be used effectively by small and medium-sized businesses, while TV and press campaigns predominantly prevail in the media mix of medium to large advertisers.

The **weight of online advertising in Hungary, which is close to 52%**, lags behind China, which has the most digitised advertising market, or the UK, which is second with 71% of online advertising[42], but is not significantly different from the global average, which is estimated at 53%[43].

While the MRSZ estimates that overall advertising spend by all domestic operators increased by 8% to HUF 203.1 billion from 2019 to 2021, **online domestic spend grew by 26.7% to HUF 54 billion, while the amount spent on global digital platforms increased by 44% to HUF 101.8 billion[44]**.

[41] https://mrsz.hu/kutatas/media-es-kommunikacios-torta/2021-mrsz-media-es-kommunikacios-torta

[42] See: WARC (2022): *UK Advertising's Adspend Review: The Pandemic Effect.*

[43] Dentsu (2022): *Global Ad Spend Forecasts.*

[44] https://mrsz.hu/cmsfiles/aa/df/MRSZ_2021_media_komm_tortak_20220324.pdf

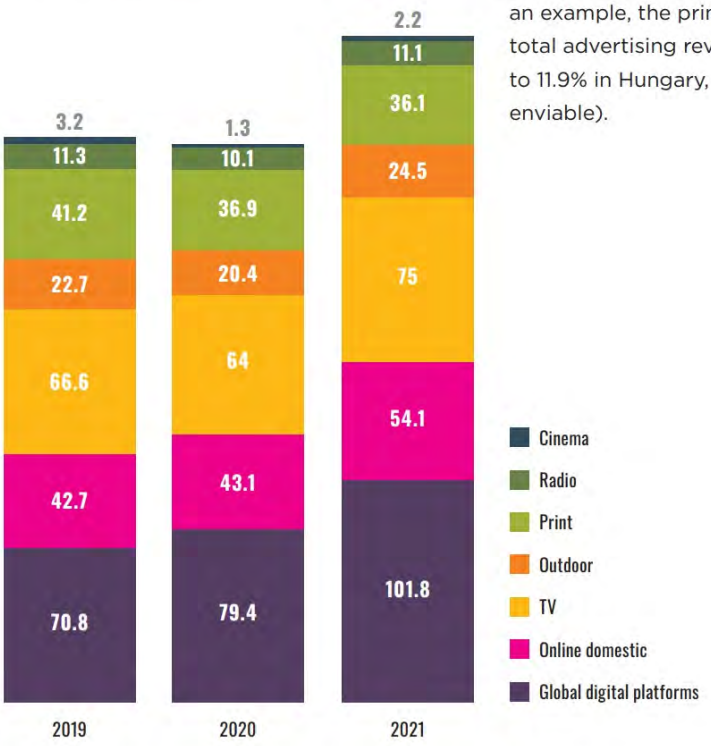
By the end of 2021, global platforms could therefore account for around one third of the total market and almost two thirds of the online advertising market. The so-called **listing market**, which is not a content service in the classical sense, is included in the revenues of both domestic and global operators, accounting for almost 40% of the HUF 54 billion ad spend of domestic operators, according to MRSZ estimates.

The rise of online advertising therefore also represents **a major shift in the traditional media market**, but its players are not equally disadvantaged by the spread of online advertising. **The main loser in this process is print media**: except for one or two years, print media advertising revenues have remained below 2013 levels in real terms and, following the drop in advertising revenues due to the pandemic, there has been no correction in this market in 2021.

As readership numbers continue to decline (consumers can access fresher and mostly free content online), advertising revenues are also shrinking (in the UK, cited earlier as an example, the print media received 6.1% of total advertising revenues in 2021, compared to 11.9% in Hungary, which may even seem enviable).

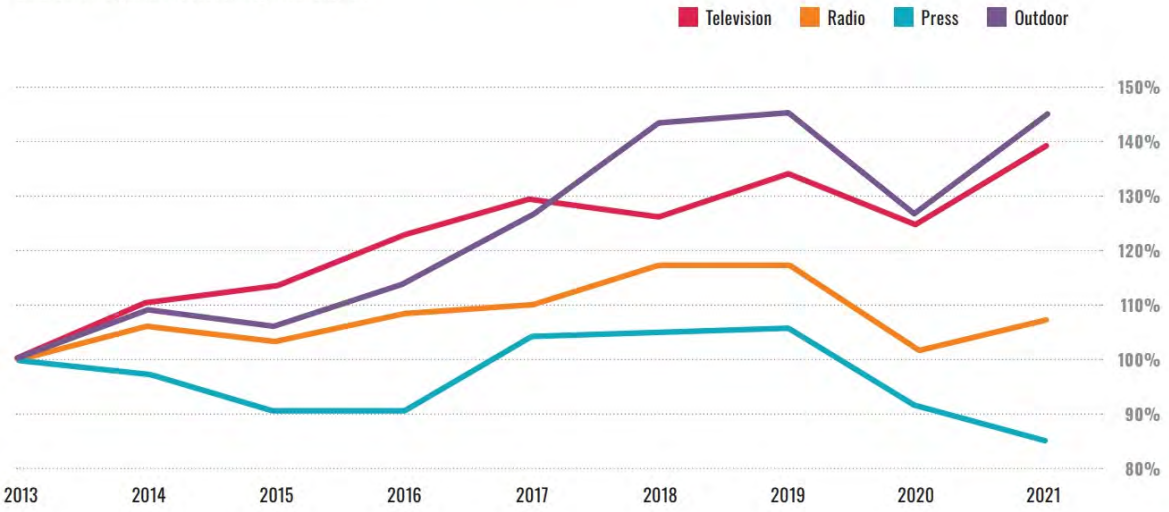
Advertising spend by media type in 2019—2021 (HUF billion)

Source: MRSZ Media Market 2021 (industry estimate) and: IAB 2021 ADEX segment level industry estimate



ADVERTISING EXPENDITURE IN REAL TERMS IN TRADITIONAL MEDIA TYPES, 2013—2021 (2013=100)

Source: Hungarian Advertising Association



The internet is not included in the figure above because, with an increase of nearly three and a half times in real terms (four times in nominal terms: from 39 billion to 156 billion), the change in revenues of other media would seem insignificant.

Radio has managed to maintain its revenues in real terms, but has not been able to benefit from the boom in advertising, making it a relative loser. At the same time, the **television and outdoor advertising** markets have increased their advertising revenues in real terms as well. Even their 40% increase in advertising revenues in real terms between 2013 and 2021 are dwarfed by the explosion in online advertising revenues, especially those linked to global platforms.

Despite low costs, the **advance of online advertising may be slowed** by the fact that recent marketing analysis[45] shows that **low-involvement consumer decisions** are unaffected by online advertising: ads on the internet are easy to ignore and consumers do so for routine purchases. For high involvement products (where consumers spend days or weeks searching for information and considering alternatives), online advertising works well.

[45] For example: van Ewijk, Bernadette—Stubbe, Astrid—Gijsbrechts, Els—Dekimpe, Marnik (2021): *Online display advertising for CPG brands: (When) does it work?* In: International Journal of Research in Marketing 38(2): 271—289.

Composition of the media mix of the top 10 sectors spending the most on ads in 2021

Source of the data: Kantar Media

Expenditure data show that **manufacturers of fast-moving consumer goods in Hungary also far outweigh television in their media mix**, while car manufacturers and banks prefer internet advertising. The figure above shows the structure of advertising expenditure in the top 10 spending sectors in Hungary in 2021. The map is generated by the **Multiple Correspondence Analysis** (MCA) data visualisation process and summarises the spending of 10 sectors (blue circles) in 6 media types (orange squares).

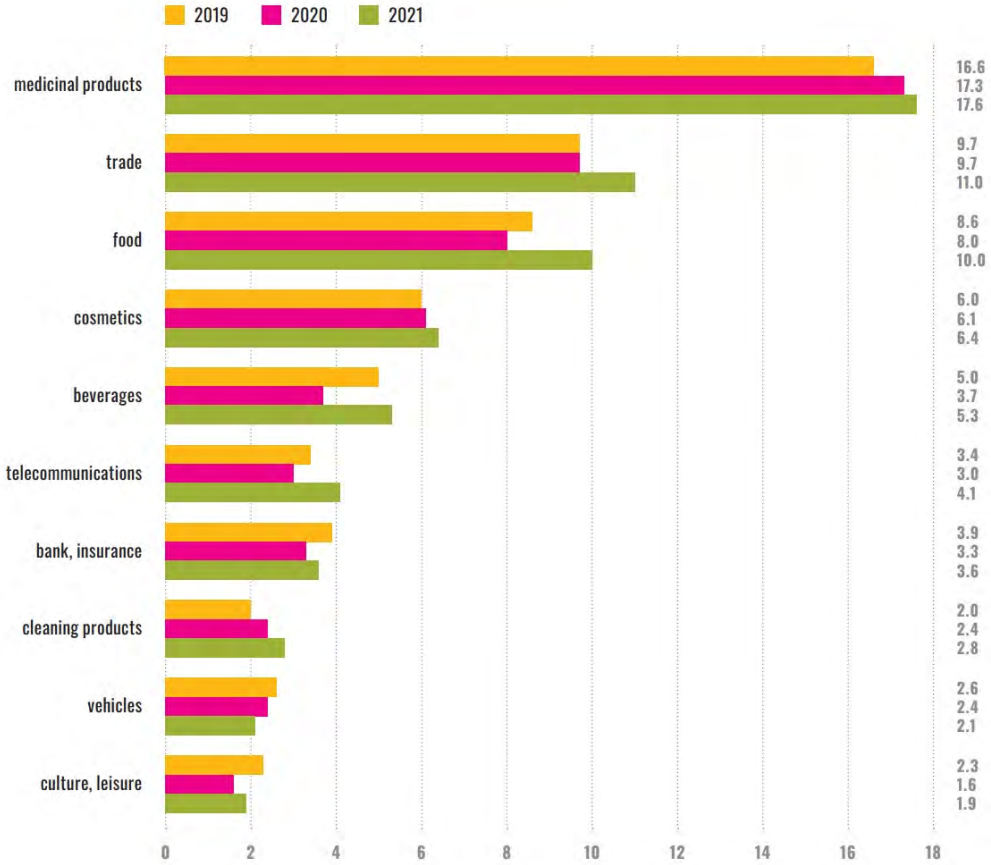
On the **map, the origin represents the average position**, i.e. if a sector is close to the origin, it indicates that the sector is allocating its spending to the different media approximately in line with the average. Likewise, if a medium is close to the origin, it is a sign that no advertiser is particularly overweighting or underweighting that medium, but that each sector is giving it roughly equal weight.

Television advertising was the least affected by the economic downturn in 2020 due

to epidemic restrictions (TV spending was down around 7% year-on-year, while ad spending in other traditional media fell by 13-14%). However, even the slight reduction in spending was not a general phenomenon: with those sectors (mainly pharmaceuticals and cleaning products) whose products were in greater demand during the pandemic even advertising more than before.

Television advertising spend of the top 10 sectors spending the most on ads (HUF billion)

Source: Kantar Media



SUMMARY AND CONCLUSIONS

1. According to the estimated data of the Hungarian Advertising Association (MRSZ), the HUF 144 billion **advertising market** in 2013 **have more than doubled to HUF 305 billion by 2021**, which means a 78% increase in real terms over eight years.

2. **The internet's share of the total advertising market (HUF 156 billion)**, which is growing faster than any other segment, **exceeded 50% of the total for the first time in 2021**.

3. At the same time, **the weight of the global giants has also increased significantly:** last year, Facebook (Meta Inc.) and Google (Alphabet Inc.) already received about one third of the total Hungarian advertising revenues, which amounted to HUF 102 billion (about 65% of the total online advertising revenues).

4. Of the **HUF 203 billion advertising spending received by domestic service providers, most was spent on TV advertising** (HUF 75 billion), followed by online advertising with HUF 54 billion, of which only HUF 33 billion went to content providers, as HUF 21 billion was spent with listing providers (typically advertising sites).

5. Although domestic advertising spending is growing dynamically, **print media and radio are not benefiting much**: the former (due to a steady shrinking of readership) is seeing a decline in advertising revenues in real terms, while the latter has only been able to maintain its previous revenues, leading to a decline in its share of a growing market.

6. **Online media has been the clear winner in recent years**, accounting for 52% of all advertising spending in 2021, and its share looks set to grow unabated in the short to medium term. However, the lion's share of revenues (nearly two-thirds in 2021) went to the two global giants, Facebook and Google. As a result, **domestic internet content providers are only secondary beneficiaries of this growth**. From a national economy point of view, global media are providing strong import competition in the domestic market: **in 2021, more than HUF 100 billion flowed out of the country in advertising fees to Facebook and Google alone**.

7. Of the "traditional" media, **television has so far weathered the rapid growth in online advertising spend the best**; as mass and cheap reach remains a priority for the manufacturers and retailers of fast moving consumer goods.

8. Global service providers can, even unintentionally, destroy the **online content industry of individual countries** over time with their dominant business presence. It is still difficult to assess how deep and how incurable the wounds are in the Hungarian content provider market, and the scope for regulatory intervention at the national level is limited, but this does not mean that it is not justified to make an accurate diagnosis of the current situation and to identify the **regulatory measures** that are **optimal** for Hungarian service providers – and thus for the media-consuming society – **in order to preserve the competitiveness of content providers**.

9. **Global platform providers and local players compete in a different legal environment** and are not or not equally subject to domestic regulations on content and advertising.[46]

10. **Two EU-level regulatory packages**, **the Digital Services Act (DSA) and the Digital Markets Act (DMA)**, are also of **key importance** in this respect.

[46] https://mrsz.hu/cmsfiles/ff/86/KPMG_MRSZ_Platform_Hatastanulmay_MediaDigitalHungary_20210616.pdf

Television

Radio

Print media

Online media

New media platforms

DIVERSITY IN MEDIA CONSUMPTION

Introduction

It is clear from the previous chapters that the **media consumption of the Hungarian population is diverse and varied, both in terms of the channels and platforms used and the content**. Of the abundance of content, entertainment content is the most dominant in terms of supply and demand across all media types. In the case of television, a whole range of sports, music and film channels compete for viewers' attention, while in the case of radio, the predominance of music stations is dominant, alongside a small number of news and current affairs or "talk" stations. In the case of the print and online press, although the number of media products (also) dealing with current affairs is relatively high, a high proportion of the readers/users of these media prefer to consume the more tabloid and entertainment topics.

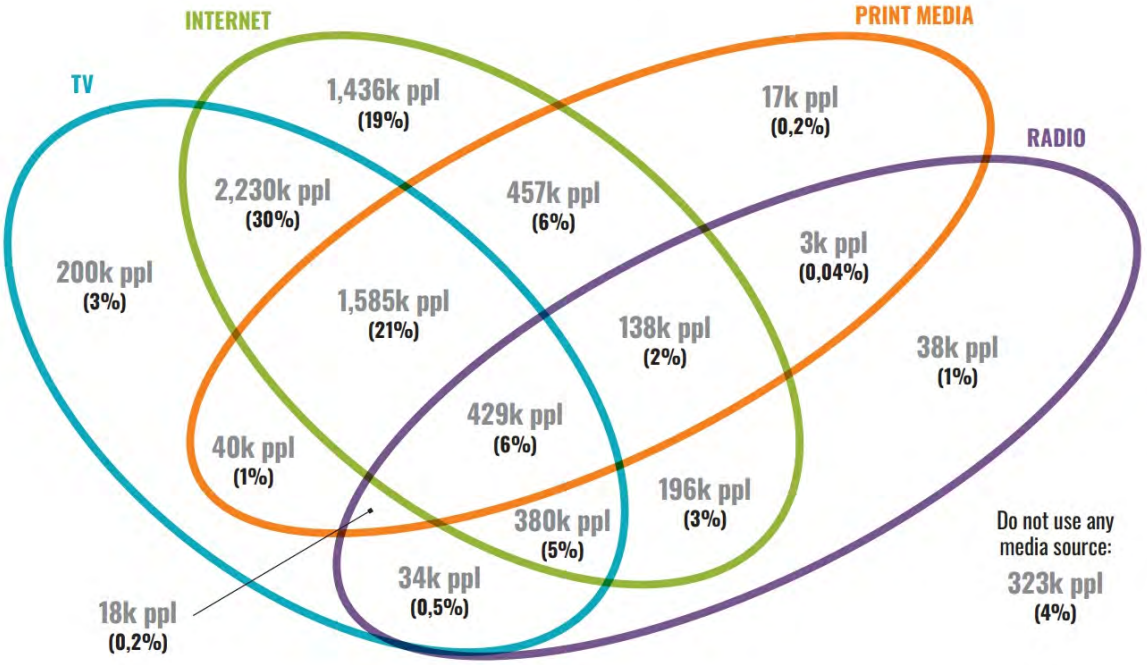
In addition to enforcing the legal requirements for entertainment content (e.g. age ratings), the NMHH also pays special attention to analysing the **sources from which the Hungarian population obtains its information, and the media it prefers when seeking news and information** – in other words, when exercising its right to diverse and credible information and to learn about current events in public life.

The Scores Group, M-meter and Kantar Hoffmann consortium have been conducting research on behalf of the NMHH since 2018 on **the news consumption habits of the Hungarian population and the media and devices used for this purpose**. Within this framework, experts use a complex methodology to integrate the results of several independent studies into a basic questionnaire specifically designed to investigate news consumption. The research sample is representative of the population aged 15–75, and the analysis includes a total of 5,000 interviews per year.

CROSS-USE OF MEDIA TYPES IN NEWS CONSUMPTION IN THE 15—75 AGE GROUP

Source: Scores Group, M-meter, Kantar Hoffmann

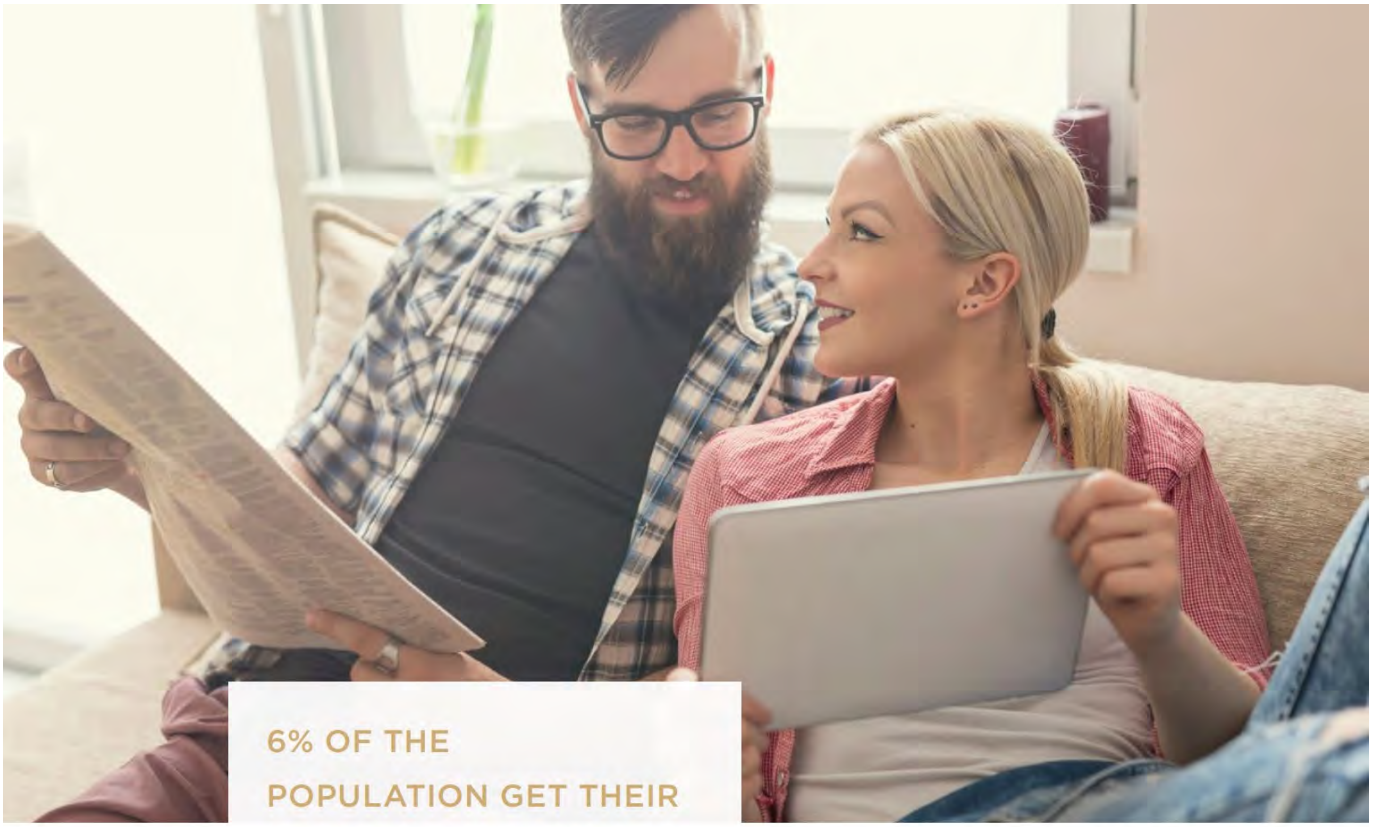
Due to the rounding used, the figures may differ from 100% to a minimum extent.



Cross-use of media types

The survey, which covers news consumption habits, shows that **a significant proportion of the Hungarian population obtains information from two to three different media platforms** on a weekly basis:

- 6% (around 430,000 people) of the surveyed Hungarian population aged 15—75 voraciously consume the news, as they regularly consult **all four types of media on a weekly basis**;
- a further 21% (more than one and a half million people) get their information on a weekly basis **from TV, the internet and the print media**;
- 5% are regular consumers of **TV/radio/internet**;
- the most prevalent combination of news consumption **is the group of people who watch TV and use the internet on a weekly basis**, at 30%;
- 6% use the **print media in addition to the internet** and
- 3% use **radio in addition to online** as a news source.



6% OF THE POPULATION GET THEIR INFORMATION FROM ALL FOUR TYPES OF MEDIA, WHILE 4% DO NOT GET ANY INFORMATION FROM ANY OF THEM

Overall, 6% of the 7.525 million people aged 15–75 years old use all four types of media, 28% use three and 41% use two as their news source. 23% receive their information from a single source, while **4% of the population, around 323,000 people, do not get any information from any media source at all**.

Compared to 16% in 2020, the share of people who get information **exclusively** from **online** sources **has increased** significantly **to 19%**, while the share of people who get information only from TV has decreased by two percentage points to 3%. Also, very few people use the print media (0.2%) and radio (1%) as their only sources of news. This also means that **the print media and radio alone are no longer able to exert a strong influence on public opinion**, as the vast majority of the population considers it important to be informed by other media as a complementary source of news.

The research also includes cross-consumption patterns by age group; in order to anticipate expected trends in news and information consumption, it is also worth analysing the news and information purpose media use of the 15–29 age group separately. The share of people who get their information exclusively from the print media and radio is negligible in this age group as well. **The share of people using the**

internet as their only source of news and information is increasing significantly: **35% in this age group** (19% of the total population). This indicates that younger age groups rely exclusively on the internet for news and information at almost twice the rate of the average 15–75 year old population.

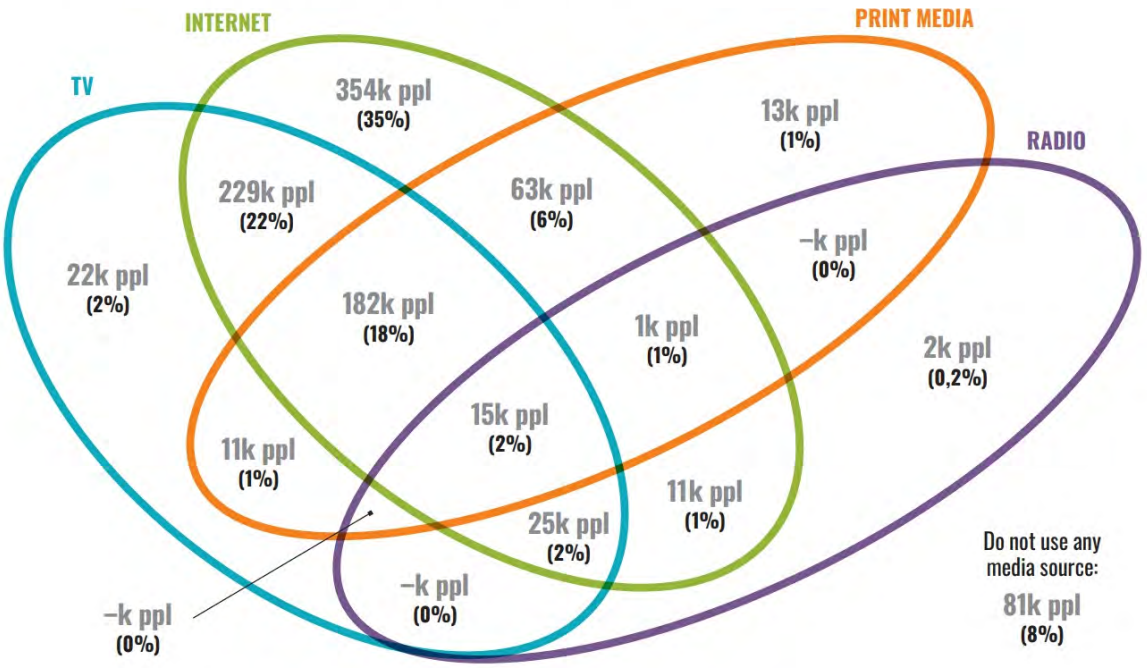
The share of people who follow both **TV and the internet** is 22%, and the share of people who use **TV, the internet and the print media** for getting information is 18%.

These three groups account for 75% of the total 15–29 age group, suggesting that **the internet is the primary medium for news and information consumption for younger people**, but that a larger proportion of them also need to supplement their online news consumption with other sources of information (typically television). 8% of the age group surveyed (81,000 people) do not use any media source for information (among the total population this indicator is only 4%).

CROSS-USE OF MEDIA TYPES IN NEWS CONSUMPTION IN THE 15—29 AGE GROUP

Source: Scores Group, M-meter, Kantar Hoffmann

Due to the rounding used, the figures may differ from 100% to a minimum extent.



Reach of television news programmes

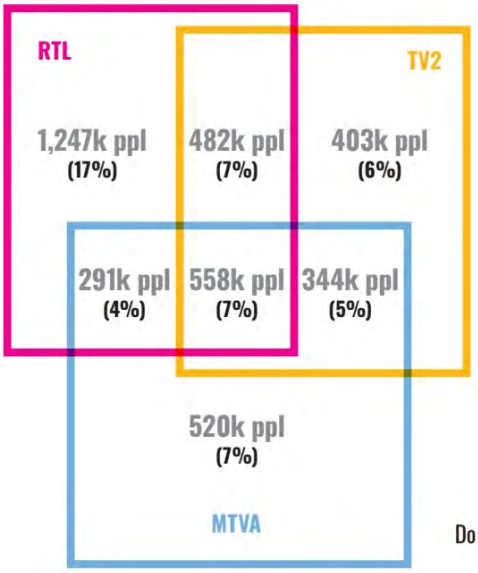
The diversity of respondents' information habits is also reflected by the section of the research that examined the viewership of the news programmes of individual television channels among the 15–75 age group. **Around half of the population regularly watches the news programmes of the three largest television media providers (RTL, TV2, MTVA)** (i.e. the other half of the population does not get any information from these television news programmes). **The cross-viewership of the news programmes examined increased**, while the viewership of the individual channels did not increase compared to 2020.

Around 7% of the total population can be considered **news lovers**: they consume news regularly on all three channels. Another 16% regularly follow news on at least **two channels** – 7% of them watch the two commercial channels, 4% watch RTL-MTVA and 5% watch TV2-MTVA. **More than half of the 30% of respondents who get their information from a single television news source only watch the news programmes of**

Distribution of TV news viewers and cross-use in the 15—75 age group, 2021

Source: Scores Group, M-meter, Kantar Hoffmann

Note: due to the rounding used, the figures may differ from 100% to a minimum extent.

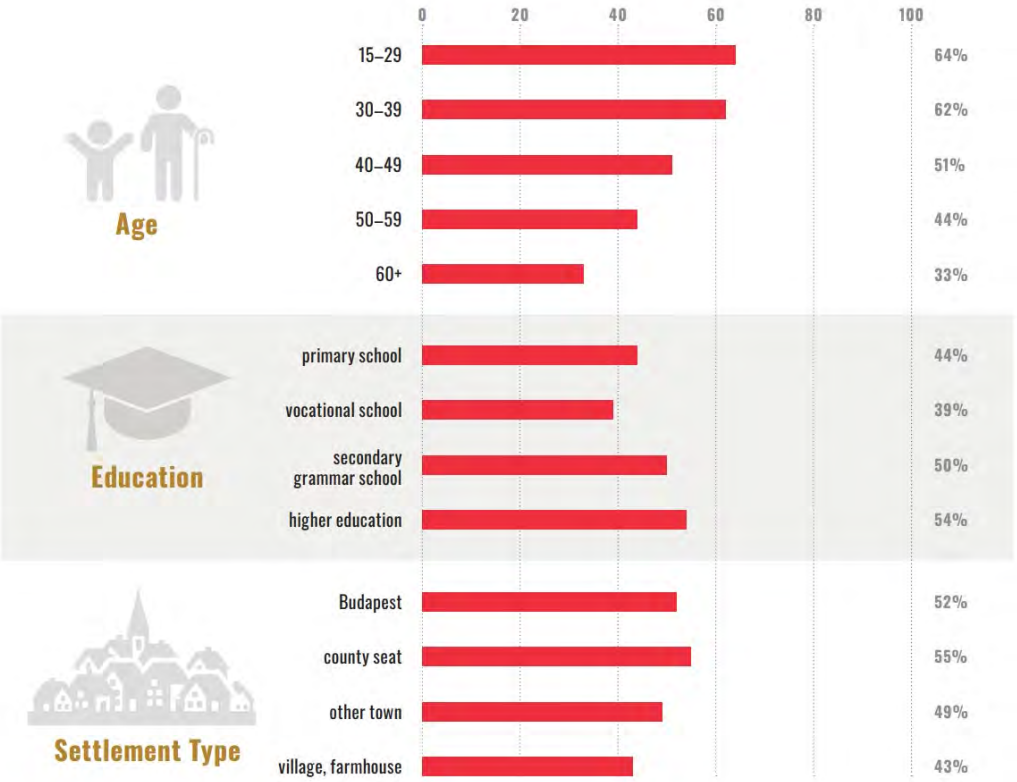


Do not watch television news: 3,680k ppl (49%)

HALF OF THE POPULATION AGED 15—75 WATCH TV NEWS PROGRAMMES REGULARLY; THOSE WHO GET THEIR INFORMATION FROM ONLY A SINGLE TV CHANNEL MAKE UP 30% OF THE TOTAL POPULATION; MOST OF THEM WATCH THE NEWS PROGRAMMES OF RTL KLUB

DEMOGRAPHIC CHARACTERISTICS OF PEOPLE NOT WATCHING TV NEWS

Source: Scores Group, M-meter, Kantar Hoffmann

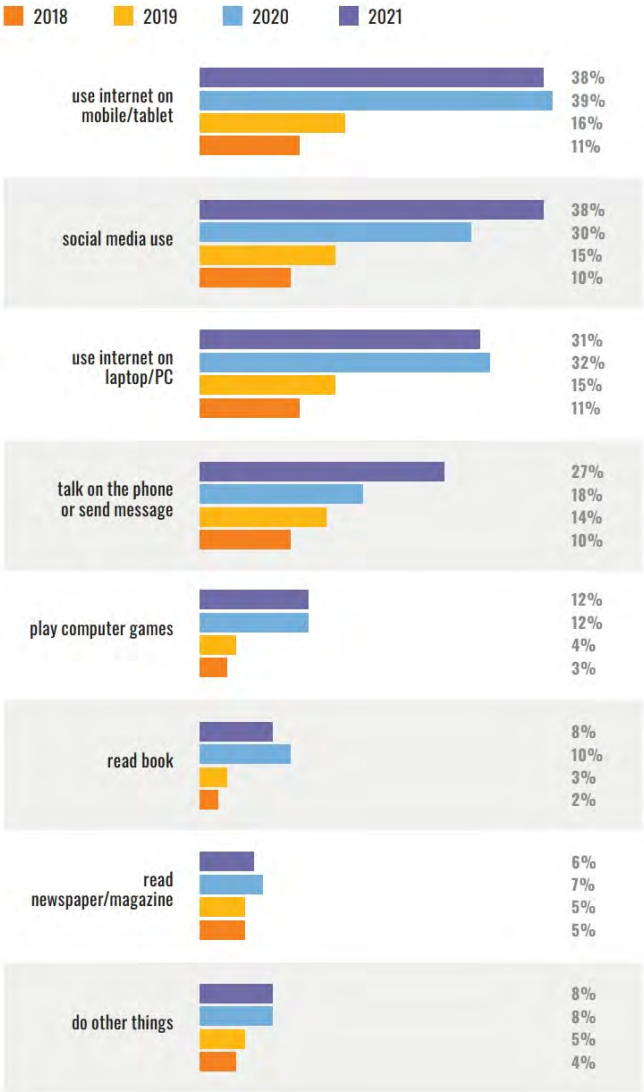


RTL. Overall, RTL's news reaches 35% of the total population and more than two thirds of TV news consumers.

Based on the **socio-demographic composition of those who do not watch television news at all**, a highly qualified urban stratum, typically under 40, emerges as the most receptive to innovation and usually at the forefront of its adaptation. This, together with data showing that young people are turning away from television, suggests that, unless there is a significant change in trends, television will gradually decline as a source of information and news, and be replaced by the internet.

CONCURRENT USE OF DEVICES: OTHER ACTIVITIES REGULARLY CARRIED OUT WHILE WATCHING TV

Source: Scores Group, M-meter, Kantar Hoffmann



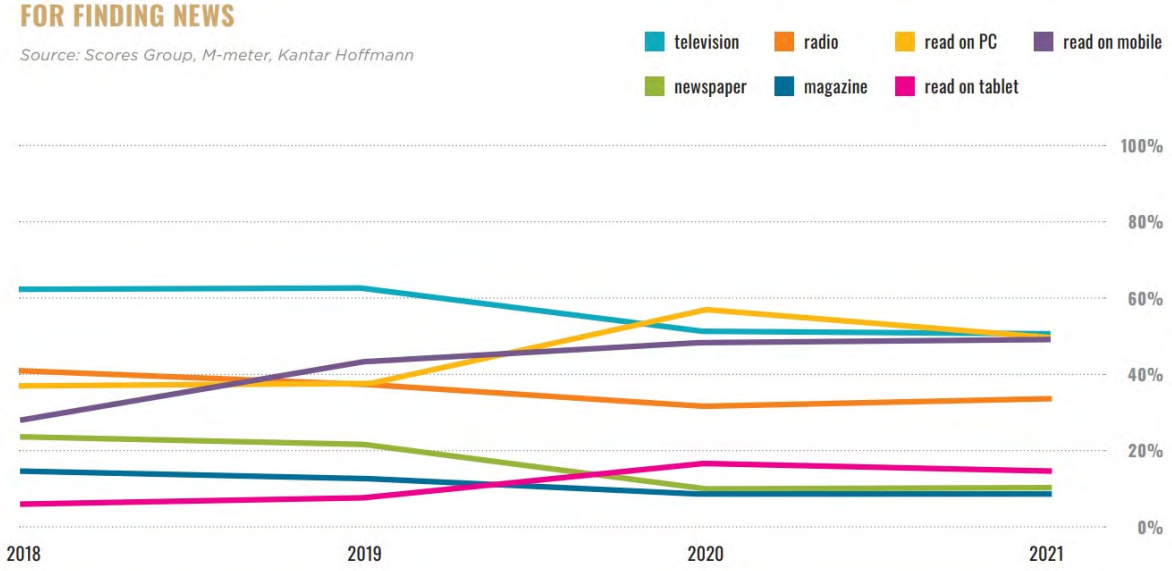
Device choice and multi-screen use

An analysis of the patterns of concurrent use of devices shows that **multi-screen use is increasing year on year and exclusive TV viewing is becoming less common**. The rise of online media is not only reducing offline media use, but is increasingly occurring alongside it (for example, the proportion of people who surf the internet or use social networking sites on a smartphone or tablet while watching TV, has more than tripled in recent years). **This phenomenon has made the decline of television as a news source less noticeable for the time being.**

When asked **which device they turn to first when looking for news**, television is still the most popular choice, but trends suggest that the near future will see TV being overtaken by mobile phones, with mobile news consumption overtaking television. Responses show that there is already no significant difference between PC, mobile and TV, which used to dominate this area, with **the mobile platform showing the most dynamic growth**.

THE MAIN CHANNELS FOR FINDING NEWS

Source: Scores Group, M-meter, Kantar Hoffmann



SUMMARY AND CONCLUSIONS

1. **Almost three quarters of the Hungarian population get information from two or three different media platforms** on a weekly basis, using some combination of the internet, TV, print media and radio as a source of information.

2. The vast majority of those who get their information from a single source (19% of the total population) get it exclusively from the internet, **while 4% of the population do not get any information at all from any media source** and do not look for news.

3. **The 15—29 age group relies exclusively on the internet** for news and information **at almost twice the rate** of the general population.

4. About half of the population regularly watches the news programmes of the three main television media service providers (RTL, TV2, MTVA); 7% watch news programmes on all three channels and 16% regularly watch news programmes on two channels; **more than half of the 30% of respondents who get their information from a single television news source only watch the news programmes of RTL.**

5. **The other half of the population who do not consume television news programmes at all** are typically under 40, highly qualified urban dwellers.

6. All this foreshadows the **gradual decline of television in its role as an information and news medium**, giving way to the internet as the main information medium.

7. **Multi-screen device use is increasing year by year** and exclusive TV viewing is becoming less common among respondents.

8. **When looking for news, television is still the first choice for most people**, but mobile phones are expected to dethrone TV in the near future.

The Role of the NMHH In The Media and Communications Markets

Act CLXXXV of 2010 on Media Services and Mass Media established the National Media and Infocommunications Authority as an independent, convergent regulatory authority to enable it to address the challenges of globalisation, digitalisation and technological development in the supervision of the communications and media markets.

Market surveillance requires the NMHH to take stock of and have an accurate knowledge and understanding of the market players and the services they provide to Hungarian citizens in Hungary on a regular basis. In a convergent and global media market, however, the NMHH's responsibility goes beyond the identification and analysis of the submarkets and market players under its direct responsibility: it must be alert to new services, processes and international regulatory efforts that have a significant impact on the evolving media market conditions. From the emergence of new global platforms, the proliferation of on-demand and streaming services, and changing media consumption habits to changes in data protection and copyright regulation, the Authority needs to monitor a range of factors that shape the media market to varying degrees.

The EU's Audiovisual Media Services Directive has added new markets to the scope of regulation in response to the challenges of the online environment, demonstrating that the protection of public interest objectives in the online world is as important as in the traditional media environment. The EU legislative

[47] Since the fields of communications and media, (i.e. the means of transmitting information and the content) are no longer sharply separated, the supervisory tasks are also performed by a convergent institution, the National Media and Infocommunications Authority (NMHH). (https://nmhh.hu/kozerdeku-adatok/tevekenyseg-mukodes)

[48] Directive 2010/13/EU of the European Parliament and of the Council of 10 March 2010 on the coordination of certain provisions laid down by law, regulation or administrative action in Member States concerning the provision of audiovisual media services (Audiovisual Media Services Directive)

[49] the video-sharing platforms and social media platforms

processes on digital markets and digital services, which are still underway at the time of writing this report, are essentially rewriting the legal framework for the functioning of the online market.

THE NMHH AIMS TO ENSURE THAT THE PUBLIC INTEREST OBJECTIVES SET OUT IN MEDIA REGULATIONS ARE ALSO ENFORCED IN THE ONLINE ENVIRONMENT

Even in the current regulatory environment, the NMHH is already doing its utmost to ensure that the public interest objectives set out in the regulations are also enforced in the online environment. The Authority has been operating an online information and assistance service for reporting illegal content or content harmful to minors since September 2011. The Internet Hotline staff will initiate an investigation into the legality of the content complained about with the content or hosting service provider concerned on the basis of the complaints. In the case of content potentially harmful to minors, service providers are reminded to use appropriate warning signs and identifiers. They also provide complaint-handling assistance for new media services, such as social media platforms.

In addition to its market surveillance and regulatory activities, the NMHH has also played a key role in developing media literacy and media awareness for many years. The Internet Roundtable for Child Protection, which started its operation in 2014, is a 21-member advisory body that aims to promote the protection of minors online and support the work of the President of the NMHH. To this end, it develops position papers and recommendations on the promotion of child-friendly internet use, the effective use of filtering software and raising media awareness among children and their parents.

Also in 2014, the NMHH launched the first media literacy education centre in Hungary, the Magic Valley Media Literacy Education Centre *(Bűvösvölgy)* in Budapest, and it has set up similar centres since then in Debrecen and Sopron. In these centres, children aged between 9 and 16 can learn new skills for understanding and using media through experiential learning and personal experience. In the Magic Valley, the young generation has the opportunity to gain comprehensive knowledge of how the media work, understanding their positive and negative influences.

Afterword

ON THE IMPORTANCE OF BASING OPINIONS ON DATA

This report attempts to provide as complete a picture as possible of the Hungarian media situation, the radio and television market, print and online media and new media platforms.

Our aim has been to contribute to debates on the media market in Hungary, which are often shaped by biases, assumptions, impressions, feelings and – not infrequently – political motives.

We believe that these debates can only be fruitful if they are based on facts and data. We trust that the report reflects the diversity of the Hungarian media market, as well as the undoubtedly important problems that exist in relation to it.

It is worth looking at how this diversity translates into the language of numbers. Of course, such a summary presents methodological difficulties, as rapid social and technological changes mean that the concept of media is continuously changing. In the global media sphere it is increasingly difficult to create categories that have explanatory power. Into what categories should we put Hungarian and foreign language video-sharing channels, social media live streams, the increasingly popular area of podcasts, or over-the-top and streaming services? These questions must also be raised by legislators and fields of study dealing with the media, partly with a view to future media regulation. In this report we have tried to adopt a descriptive approach based on the current regulatory environment.

There are over 7,000 print newspapers and more than 3,000 online-only content services registered in Hungary, as well as 165 radio stations and 527 television channels. These figures alone suggest a high level of diversity, but if we look behind them we also find a media landscape characterised by wide geographical distribution, a broad range of content and complex socio-demographic indicators.

Diversity is not only a feature of the media content on offer, as consumers of news are also clearly accessing multiple sources, often through parallel media formats, and the importance of online news services is continuously growing. The use of multi-screen devices for news consumption is

rapidly increasing, with smaller screen mobile devices – such as tablets and mobile phones – gaining ground. Consumers are increasingly seeking digital sources alongside their offline media counterparts – a trend that foreshadows the further growth of online services.

The most watched TV news shows are broadcast on RTL Klub, TV2 and public service media, but television's formerly dominant role in providing news is gradually being assumed by online platforms. We also need to acknowledge that a negligible number of people access news from a single source. A separate section of this report focuses on the diversity of news consumption as a fundamental asset of the Hungarian media system. It is also worth noting the data on cross-consumption of news, which shows that, in the 15–75 age range (7,525,000 people in Hungary), two types of media are used by 41%, three types by 28%, and all four types by 6%. The four types are television, radio, the internet and print media.

Our report makes it clear that the range on offer in the Hungarian media market is broad and varied. I trust that we have also shown that news consumption – which is crucial for the functioning of democratic institutions and for public debate – is far from one-dimensional. This runs counter to some simplistic assertions, which reveal a paternalistic view of the media audience and which ignore the fact that people interested in public affairs typically obtain news from a variety of sources and platforms.

The NMHH sees this diversity as an asset that not only needs to be preserved, but further enhanced. To this end, since its creation, the Media Council of the NMHH has operated a multi-level funding system. Media service providers can apply for funding to cover their operating costs, to purchase equipment and to produce programmes. Over the past ten years, the Media Council has disbursed nearly 4.5 billion forints for overheads, more than 1 billion forints for equipment procurement, and more than 7.5 billion forints for programme production. It has therefore provided a total of 13.5 billion forints for the operation of the Hungarian media system.

Our report summarises the data and surveys available in 2019–21. In the future, we intend to publish the report annually, in order to assist those interested in the rapidly changing trends in the colourful world of the media, and – using it as a kind of kaleidoscope – to help them form their opinion of Hungarian media. See you next year!

Károly Szadai
Member of the Media Council of the National Media and Infocommunications Authority

Definitions

ADVERTISING SPEND MONITORING
Measurements of advertising market expenditure based on different criteria.

AGE GROUP
The different age groups specified for the different content consumption measurements (e.g. people aged 15–29).

AMR (AVERAGE MINUTE RATING)
An indicator of average viewership used in television measurements, showing the average number of viewers per minute of a programme or time slot within a given target group.

ARIOSZ
Ariosz Kft. was founded in 2003 in Hungary. The company carries out market research and data mining activities, as well as related research, analysis and business consulting.

ATS (AVERAGE TIME SPENT)
A metric used in radio listening surveys to measure the average number of minutes a listener has listened to the radio within a given target group.

BROADEST READERSHIP
An indicator used in print media measurements to show how many people have received at least one issue of the last 12 issues of a certain print media product.

CATCH-UP TV
A television broadcasting service attached to digital television services that makes a stored programme flow available for viewing for a specified period of time.

CIRCULATION

Number of copies distributed free of charge and sold (based on subscription or by sale).

COMMERCIAL MEDIA SERVICES

Profit-oriented media services, the provider of which finances itself primarily from the advertising market and/or from distribution revenues.

COMMUNITY MEDIA SERVICES

Community media services are intended to serve or satisfy the special needs for information of and to provide access to cultural programmes for a certain social, national, cultural or religious community or group, or are intended to serve or satisfy the special needs for information of and to provide access to cultural programmes for residents of a given municipality, region or reception area; or, in the majority of their transmission time, such programmes are broadcasted which are aimed at achieving the objectives of public media services.

CONNECTING INTO A NETWORK/NETWORKED OPERATION

The interconnection of two or more media service providers or two or more media services providing linear radio media services, for the simultaneous or virtually simultaneous broadcasting of the same programme or programme flow.

CONTENT PROVIDER

A service provider, the primary objective of which is to present a variety of content to consumers, or a provider of any media content.

CORD-CUTTING PHENOMENON

The transformation of media consumption habits in such a way that media consumers no longer subscribe to traditional linear services, but instead consume on-demand, streaming content or use video sharing sites or online games.

CROSS-MEDIA

The media service provider provides several types of media at the same time, such as on-demand media services or digital press products in addition to traditional linear media or print media, and is therefore interested in several types of media services. At the same time, the media service provider may also produce or publish content, or offer a linear media service or content available on the internet.

DIGITAL MEDIA PLATFORMS

Platforms for different media that allow the real time and/or delayed transmission of images, sound and/or data over the internet. These include video sharing platforms (Youtube), computer games (Fortnite), music sharing (Spotify) or social media platforms (Facebook).

DKT

The Digital Audience Measurement Council, an organisation that measures and evaluates traffic to online media sites in Hungary (www.dkt.hu).

EXTENSION OF THE RECEPTION AREA

In the case of terrestrial radio broadcasting, the Media Council may grant a permit for the extension of the service provision entitlement for media services of the same nature located within a maximum distance of 70 kilometres. The extension of the reception area does not create a new entitlement; the media service provider must broadcast the same programme flow over the entire reception area throughout the entire transmission time.

FOD (FREE ON DEMAND)

On-demand audiovisual media service consisting of a pre-selected programme offer, provided free of charge to users, having a commercial policy, financed exclusively from advertising revenues.

FREQUENCY

State-owned analogue limited resource, which is the basis of terrestrial broadcasting transmission technology.

GEMIUS

Internet audience measurement company operating in Hungary and several countries in Central Europe. It collects audience data and composition of mobile app contents and consumers and video and audio streaming contents. It is a collaborating partner of the Digital Audience Measurement Council.

JURISDICTION OF THE HUNGARIAN MEDIA AUTHORITY

The National Media and Infocommunications Authority (NMHH) has jurisdiction over media services provided and press products published by media content providers established in Hungary.

KANTAR HOFFMANN—SCORES GROUP

Kantar Hoffmann – in its present form – has been conducting market research in Hungary since January 2011. The consortium has been carrying out the national radio and television TGI consumer measurements since March 2015.

LINEAR MEDIA SERVICES

The media services provided by a media service provider that allow for the simultaneous watching or listening to programmes on the basis of a predetermined programme schedule.

LISTING MARKET

An online advertisement where the advertiser pays a search engine or online shop operator to have their advertisement appear at the top of the results of searches by consumers or as a featured ad.

LIVE STREAMING SERVICES

Content streaming over the internet that allows the user to follow an event or programme in real time, “live”.

LOCAL MEDIA SERVICES

The media service with a reception area covering the annual average population of a maximum 100,000 people or a maximum 500,000 people within a city.

MAINSTREAM MEDIA

A collective term for the media services or media providers with the highest global reach.

MATESZ

Hungarian Distribution Control Association (in Hungarian: Magyar Terjesztés-ellenőrző Szövetség), the self-regulating professional association of the Hungarian print media market. Its objective is to verify the circulation figures in a credible and transparent way.

MEDIA ACT

Act CLXXXV of 2010 on Media Services and on the Mass Media.

MEDIA SERVICE PROVIDER

The natural or legal person who or which has editorial responsibility over the composition of the media services and determines their contents. Editorial responsibility means liability for the actual control during the selection and compilation of the media content, not necessarily leading to legal liability for the media service.

MEDIA SERVICE PROVISION RIGHT

Linear media services provided by a media service provider established in Hungary may be provided after notification and registration by the NMHH, except for terrestrial radio media services, which may be provided on the basis of winning the tender procedure announced and conducted by the Media Council and the conclusion of a public contract or a provisional public contract.

In the case of a linear television media service, the registration of the media service may be initiated by its future media service provider at least forty-five days before the start of its activities.

In the case of linear radio media services, media services may be provided on the basis of winning the tender procedure announced and conducted by the Media Council and the conclusion of a public contract.

In the case of on-demand media services, media service providers are subject to a requirement of notification.

MULTI-SCREEN

Multi-screen device usage, where content is also consumed – in addition to the main device – on additional devices at the same time. For example: while watching the television news, the viewer also reads news online.

NATIONAL MEDIA SERVICE

The media service, in the reception area of which at least fifty percent of the population of Hungary resides.

NEW MEDIA PLATFORMS

Services other than traditional media (TV, radio, print media) that require internet access (e.g. on-demand media services, social media platforms and video sharing platforms).

NIELSEN AUDIENCE MEASUREMENT

Nielsen Médiakutató Kft. (formerly AGB Hungary Kft.) has been conducting television audience measurements in Hungary since 1992.

NOK

National Readership Survey (NOK), audience measurement of the print media carried out by Media Meter–Kantar-Hoffmann.

ON-DEMAND MEDIA SERVICES

The media services where, the user may, at their own request, watch or listen to the programmes at any time of their own choice, selected from a catalogue of programmes compiled by the media service provider.

ONLINE CONTENT SERVICES

(Edited) textual, visual, audio or multimedia content or information that is accessible to all or a group of internet users.

ONLINE NEWS PORTAL

Internet content that, in terms of its definition, meets the requirements of online press products, and in terms of its content, publishes current, constantly updated, usually daily news that are capable of attracting the interest and attention of the general public, and typically include national or county news sites.

ONLINE NEWSPAPER

Online content that, in terms of its definition, meets the requirements of online press products, and in terms of its content, it is usually organised around a single topic or genre, for example: gastronomy portals, motoring magazines, angling magazines.

ONLINE PRESS PRODUCT

The entirety of online newspapers and news portals, i.e. the combined set of these two categories.

ONLINE RADIO STATIONS

Linear radio stations operating on the internet.

PAYWALL

A paid site or pop-up, normally used to restrict access to news content, or where the user can subscribe to or buy content.

PODCAST

On-demand audio content that users can access individually via the internet on any device (mobile phone, tablet, laptop, etc.) and listen to by online streaming or downloading.

POP-UP

Pop-up windows on websites aimed to draw the visitor's attention.

PRESS ACT

Act CIV of 2010 on the Freedom of the Press and on the Basic Rules Relating to Media Content.

PRESS PUBLICATION

The individual issues of daily newspapers or other periodicals, online newspapers or news portals, which are offered as a business service, for the content of which a natural or legal person has editorial responsibility, and the primary purpose of which is to deliver textual or image content to the general public for information, entertainment or educational purposes, in a printed format or through any electronic communications network. Editorial responsibility means liability for the actual control during the selection and compilation of the media content, not necessarily leading to legal liability for the press product. Business service means an independent service provided on a commercial basis i.e. regularly, for profit and subject to risk taking.

PRINT MEDIA PRODUCTS

All print media products available for distribution in Hungary, including those that do not qualify as printed press products.

PUBLIC CONTRACT

Analogue linear radio media services using state-owned limited resources may be provided subject to winning a tender announced and conducted by the Media Council and entering into a public contract.

PUBLIC SERVICE MEDIA SERVICES

Audiovisual, radio, news agency and internet media services provided by a public service media service provider that are intended to serve or satisfy the special information needs of and provide access to cultural programmes for a certain social, national, cultural or religious community or group, or are intended to serve or satisfy the special information needs of and provide access to cultural programmes for residents of a given municipality, region or reception area, or, in the majority of their transmission time, such programmes are broadcasted which are aimed at achieving the objectives of public media services.

RCH (REACH)

In the case of radio audience measurements, the size of the audience reached by a given radio station on an average day, in thousands of listeners;

in the case of television audience measurements, the number of TV viewers in a given quarter of an hour who watched the programme concerned for at least one minute, or those who watched TV for at least one minute in the given quarter of an hour.

The indicator is expressed as a percentage of the total population (RCH %).

REAL USERS

The number of domestic internet users who visited the given website during the period under review.

RECENT READERSHIP

When measuring print media products, it shows how many people have read the given print media product within the time interval corresponding to the periodicity of the print media product.

RECEPTION AREA

In the case of media services provided through terrestrial radio broadcasting transmission and media service distribution via satellites, accessible without the payment of a subscription fee, the size of the population residing in a geographically identifiable territory in which the level of the effective signals of the broadcasting transmission service transmitting the programme flow and the calculated level of interference protection reach the minimum values stipulated in the recommendations of the International Telecommunication Union; or

in the case of media services provided through other transmission systems for media service distribution accessible without the payment of a subscription fee, the product of the number of households connected to the transmission system and the average number of persons living in a single household as defined by the Hungarian Central Statistical Office; or

in the case of media services accessible in return for a subscription fee, the product of the number of households subscribed to that media service or to the media service distribution containing that media service and the average number of persons living in a single household as defined by the Hungarian Central Statistical Office.

REGIONAL MEDIA SERVICES

The radio media services, the reception area of which exceeds that of the local media services, however less than half of the country's population resides within the reception area of such services.

REGISTERED PRESS PRODUCT

The NMHH's press product register consists of two parts: one for printed press products and one for online press products and news portals.

According to the definition provided in the Media Act, daily newspapers or other periodicals ("printed press products") and online newspapers or news portals ("online press products") qualify as press products.

SMALL COMMUNITY MEDIA SERVICES

In the case of stereo reception, the local linear radio community media services operating in a reception area covering a geographical area corresponding to a circle with a maximum radius of one kilometre from the transmitting station.

SOCIAL MEDIA PLATFORMS

Interactive Internet-based online community platforms that allow users to build an online community and publicly share, shape or respond to user-generated or other content.

STREAMING

Online data transmission technology that allows users to consume video and/or audio content without downloading the original files in their entirety.

SVOD (SUBSCRIPTION VIDEO ON DEMAND)

On-demand audiovisual media services where users pay a subscription fee for online access to the programme offer compiled by the provider. (Colloquially, it is most often called a streaming service.)

TARGETED ADVERTISING

A targeted advertising solution where different ads are shown to consumers of the same content. Consumers can be targeted based on different data, such as place of residence, age, gender or any other data that the platform placing the ad has information about.

TERRESTRIAL BROADCASTING

Broadcasting on state-owned frequencies.

TGI (TARGET GROUP INDEX)

The Target Group Index (TGI) is the world's most important international consumer survey, started in Britain in 1969. Today, the survey is carried out in more than 65 countries on six continents. TGI was first published in Hungary in 1998.

TIME SHIFTING

Also known as time-shift TV. It means the ability to pause the live (linear) transmission and play it back later, with a time-shift.

TVOD (TRANSACTION VIDEO ON DEMAND)

On-demand audiovisual media service where users are required to pay a fee for each piece of content (one by one) they access from the programme offer compiled by the provider.

VIDEO SHARING SERVICES

An independent economic service, as defined in Articles 56 and 57 of the Treaty on the Functioning of the European Union, provided on a commercial basis – on a regular basis, for profit, by taking economic risks – where the primary purpose of the service or the primary purpose of a separable part or an essential function of the service is the distribution to the public, via an electronic communications network, of programmes or user-generated videos for information, entertainment or education purposes, for which the video-sharing platform service provider has no editorial responsibility, and which are organised by the video-sharing platform service provider, for example by automatic means or algorithms, in particular by means of displaying, tagging and sorting.

VIEWS

A measure of the number of web page views (contacts) for the content under review.

VISITS

A measure of the number of visits to a website, showing the number of visits to the site shorter than 30 minutes (it restarts after the visit reaches 30 minutes).

VOD (VIDEO ON DEMAND)

An on-demand audiovisual service or media service where the user can watch audiovisual programmes at a time of his/her choice on the basis of a pre-selected programme offer.

WHITEREPORT DATABASE

An online cross-media database of television, radio, print media, online newspapers and platforms, as well as cinemas and public display types in Hungary, based on independent sources, searchable by, among other things, genre, region, frequency, operator, operator type and operator owner, updated quarterly, with time-series data. The database also provides financial data of media operators, with annual updates and time-series data, for the market as a whole, for submarkets by media type or separately for specific operators.

Notice

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