



A comprehensive survey provided by the Association of Hungarian Electronic Broadcasters (MEME)

Press Release

Conclusive findings of the Television Advertisement Cake Survey, 2022

The Hungarian television advertising market achieved a total revenue level exceeding HUF 74.5 billion in 2022, a result very close to the total of HUF 75 billion achieved by the sector in 2021. Commercial revenues yet again proved to be the main driving force behind the segment's strong performance.

Representing the most widely known form of traditional television advertising, the “commercial spot” advertising category had a particularly strong year in 2022: revenue levels increased by approximately 3%, providing reliability and predictability for advertisers. Revenues in this category exceeded a total of HUF 60 billion in 2022.

Representing innovative new advertising tools, the “commercial non-spot” advertising category successfully maintained its market position in 2022. This category has significant future market potential due to its many advantages when it comes to providing flexibility as well as innovative and creative solutions. Revenues in this category exceeded a total of HUF 4.6 billion in 2022.

Last year, less emphasis was placed on barter activities in the Hungarian television advertising market than compared to previous years. This resulted in a 26% decrease in revenues generated by these transactions in the television advertising market. Nonetheless, the overall revenue level for this category still exceeded HUF 1.3 billion last year.

The continuous steady year-on-year growth in spendings of the public sectors in television advertising observable throughout previous years did not continue in 2022. However, overall revenues realized from public sector spendings still exceeded a total of HUF 8.5 billion last year.

In 2022, the Hungarian television advertising sector achieved total revenues exceeding HUF 74.5 billion, consequently, the segment successfully maintained its exceptional position within the Hungarian advertising economy.

There are several traditional strengths uniquely identifiable for the television segment approaching it from an advertiser's perspective. Among these we find the capability to easily reach a wide range of audiences, the constant capability of providing high returns on advertising spendings, as well as providing much needed reliability for advertisers. All of the above mentioned attributes are practical guarantors of unique operational stability and resilience.

As a prime example of aforementioned stability and reliability, we concluded that "spot"-type advertising tools had a very strong year in 2022. The category performed exceptionally both with regards to revenues realized from commercial orders, as well as in terms of revenues realized from advertising spendings of the public sectors.

The "Commercial spot" ad category managed to keep a constant growth rate year-on-year since 2020. It even managed to keep growing in 2022, despite an already massive increase in overall TV advertising revenues in 2021, caused by the rapid rebound of the advertising market following the pandemic. The category managed to yet again grow by nearly 3% in 2022 compared to 2021. This steady growth rate represents the continuous trust of advertisers in traditional television advertising.

Nowadays, in the field of television advertising, "non-spot" type advertising tools effectively expand the range of tools available to advertisers with their diverse and creative solutions. In 2022, the "commercial non-spot" advertising category was able to maintain its previously achieved market position: revenues decreased only minimally, around 3% compared to the previous year. "Non-spot"-type advertising solutions shall deserve special attention in the future, as these modern and flexible advertising tools can not only further strengthen television advertising's unique ability to strengthen brand awareness, but can also help to better target advertisements. Furthermore, these tools can effectively promote implementation of future creative television advertising campaigns.

Following an overall exceptional year for advertising as a whole in 2021, a decrease in barter activities became apparent in the television advertising segment last year. In 2022, 26% less revenue was generated from these transactions within the television advertising market. The observed decrease in barter generated revenues, combined with a steady paced market growth, can be however interpreted as a positive sign of ongoing organic change taking place within the structure of the segment. This natural market evolution might even further enhance market predictability future wise.

Continuous growth witnessed in previous years in revenues generated by television advertising spendings of the public sectors slowed down in 2022. With the end of the COVID pandemic last year, public sector actors no longer needed to use television's unique ability to reach mass audiences to the same extent as during the years of the epidemic. However, this change in market dynamics was successfully counterbalanced by the parallel expansion of commercial order volumes in 2022.

We consider it to be a significant achievement that the Hungarian television advertising market segment was able to keep growing in 2022, despite an already massive increase in TV advertising revenues in 2021, caused by the rapid rebound of the market following the COVID pandemic.

As to conclude findings for the year 2022, it has been reiterated that the Hungarian television advertising sector still continues to be a true driving force behind the Hungarian advertising industry as a whole.

Television advertising continues to have an overall positive enhancing effect on other segments of the Hungarian advertising industry, it provides reliable market solutions for its advertisers, while at the same time it gradually progresses towards ever more flexible and creative advertising solutions to meet future challenges.



About the Survey

Altogether, 77 TV channels participated in the data reporting process in 2023. The television channels “Music Channel”, “HIT Music Channel”, as well as “Pesti TV” have ceased their respective business operations in 2022. The television channel “Match 4” has started its business operation in 2022.

The actual data used to determine the size of the television advertising market was provided directly by television channel operators, members of the Association of the Hungarian Electronic Broadcasters (MEME) and by relevant sales houses.

In line with the methodology used throughout the previous years, the data collecting process continued to focus on three main revenue categories: “spot advertising”, “non-spot advertising”, and “barter activities”. Additionally, also in line with the practice of previous years, reported revenues realized from “Community Facility Advertisements” (CFAs) were included in the survey.

Aggregated data does not contain estimates.

Data collection and analysis was performed by PwC Hungary.