

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

Press Release

Conclusive findings of the Television Advertisement Cake Survey, 2025

The television advertising market realized close to HUF 89.9 billion in total revenue in 2025, representing a 1.9% increase compared to the HUF 88.2 billion recorded in 2024. Just like in previous years, commercial advertising revenues remained the primary driving force of the Hungarian television advertising market in 2025.

The “Commercial Spot” advertising category, representing the traditional television advertising, delivered a solid performance in 2025. Revenues increased by 2.2% compared to the previous year’s performance, continuing to provide reliability and predictability for advertisers. Total revenues in this category exceeded HUF 76,1 billion in 2025.

The “Commercial Non-spot” advertising category, representing innovative and alternative television advertising solutions, showed a slight decline in 2025. Total revenues realized in this category amounted to approximately HUF 5.0 billion, reflecting a moderate 1.1% decrease compared to the previous year.

In 2025, revenues from public sector advertising spending increased to approximately HUF 7.7 billion, representing a 4.8% year-on-year growth. Within this segment, state community facility advertisement “CFA” revenues played a particularly important role, expanding by 6.3%.

Revenues from commercial barter transactions continued to decline. While barter accounted for approximately 2.1% of total television advertising revenues in 2020, its share decreased to 1.2% by 2025.

The domestic television advertising sector generated more than HUF 89 billion in advertising revenue in 2025. The traditional strengths of television advertising – broad reach, high return on investment and reliability – remain decisive factors for advertisers and continue to support the stability and resilience of the sector. In 2025, Spot-type advertising solutions further strengthened in both commercial and public sector orders.

The “Commercial Spot” category grew by 2.2% compared to the previous year, reflecting the stability of the sector and advertisers’ continued confidence in the effectiveness and favorable return on investment of television advertising.

In today’s television advertising market, “Non-spot” advertising solutions effectively expand the range of tools available to advertisers via diverse and creative formats. Although total revenues in this category declined moderately by 1.1% in 2025, non-spot solutions continue to play an important role in the advertising market.

“Non-spot”-type advertising solutions still deserve special attention, as these modern and flexible advertising tools can not only further strengthen television advertising's unique ability to enhance brand awareness, but they can also help advertisers to better target their advertisements. Furthermore, these tools can effectively promote implementation of future creative television advertising campaigns.

The development of public sector advertising revenues marked a turning point in 2025. While revenues from public sector spending declined in 2024, the sector generated HUF 7.7 billion in 2025, representing a 4.8% increase compared to the HUF 7.3 billion recorded in the previous year.

In 2025, the downward trend in barter revenues observed in recent years continued. Barter revenues accounted for 1.2% of total television advertising revenues, compared to 2.1% registered in 2020. The continuous decline in the share of barter-type revenues, alongside overall market growth, can be considered a positive development, reflecting the natural and ongoing structural transformation of the television advertising market towards greater predictability.

Distribution Revenues

Just like in previous years, PwC Hungary, on behalf of MEME, surveyed and estimated television distribution revenues in the Hungarian market in 2025. The estimates were based partly on data provided by MEME members and partly on an estimation methodology developed by PwC with the involvement of industry experts.

According to the survey results, distribution revenues amounted to HUF 77.0 billion in 2024, while in 2025 they reached HUF 78.5 billion, representing a 2.0% year-on-year increase. As a result, distribution revenues accounted for approximately 46.6% of the total television market (advertising and distribution revenues combined) in 2025.

In summary, the 2025 Hungarian television advertising market survey confirms that commercial categories continue to play a decisive role. While Spot-type advertising revenues continued to grow, a slight decline was observed in the Non-spot category.

The television sector continues to have a positive impact on the performance of the Hungarian media market, remaining stable and resilient, while continuously adapting its tools and operations to evolving advertisers' and consumers' needs via offering flexible and modern advertising formats.

About the survey

Advertising market survey

Following the practice of previous years, data collection for the 2025 television advertising market survey focused on three main revenue categories: Spot, Non-spot and Barter. In line with previous years, the report also includes revenues related to Community Facility Advertisements (CFAs).

A total of 76 TV channels participated in the data collection process.

To determine the size of the Hungarian television advertising market, data was provided by MEME members and sales houses based on their respective engagements.

The Advertising market survey does not contain expert estimates, only factual data. The data was analyzed and compiled by PwC Hungary.

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