



Advertising Revenue Survey 2010

Hungarian Television and Radio Market

8 March 2011

Advertising Revenue Survey 2010

- ▶ The data used to determine the size of the advertising market was provided by the members of MEME (including television and radio companies)
- ▶ The data was provided by 45 television channels and 4 radio stations
- ▶ 15 new television companies took part in the survey compared to the number of last year participants
- ▶ The data collection and analysis was performed by Ernst & Young
- ▶ All the data have been destroyed after the analysis

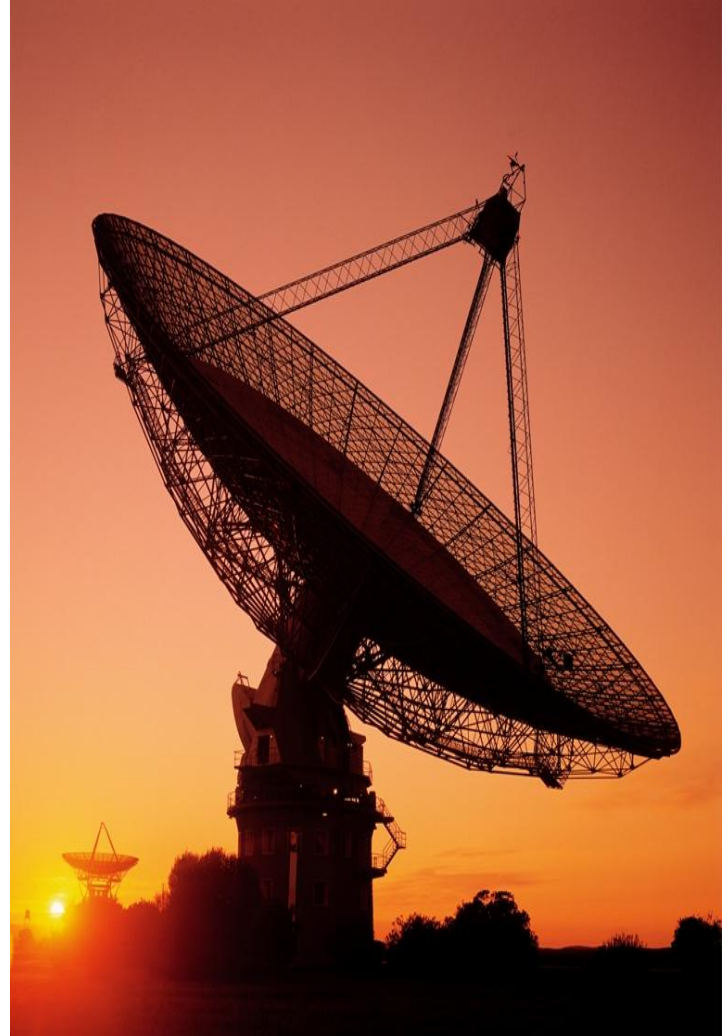
Data providers – Television channels

- ▶ Animax
- ▶ ATV
- ▶ AXN
- ▶ Cartoon
- ▶ Comedy Central
- ▶ Cool
- ▶ Deko
- ▶ Discovery
- ▶ Disney Channel
- ▶ DoQ
- ▶ Duna Tv
- ▶ Film+
- ▶ Film+2
- ▶ Filmmúzeum
- ▶ Fishing&Hunting
- ▶ Hallmark/Universal Channel
- ▶ Hálózat Tv
- ▶ Hír Tv
- ▶ LifeNetwork
- ▶ MGM
- ▶ Minimax
- ▶ Movies 24
- ▶ MTV Networks Magyarország
- ▶ MTV m1
- ▶ MTV m2
- ▶ National Geographic
- ▶ OzoneNetwork
- ▶ Poen
- ▶ Reflektor
- ▶ RTL Klub
- ▶ Sorozat+
- ▶ Spektrum
- ▶ Sport 1
- ▶ Sport 2
- ▶ SportKlub
- ▶ Sport M
- ▶ Story 4
- ▶ TV Paprika
- ▶ TV2
- ▶ TV6
- ▶ Viasat
- ▶ Viva
- ▶ Zone Club
- ▶ Zone Reality
- ▶ Zone Romantica

Data providers – Radio stations*

- ▶ Class FM
- ▶ Juventus Rádió
- ▶ Magyar Rádió
- ▶ NEO FM
- ▶ radiocafé 98.6

* Survey on data of 2009 was not conducted for radio stations in 2010.



Aggregation of advertising revenue data

- ▶ Net-net revenue – revenue after deducting discounts and commissions
- ▶ No barter revenue included
- ▶ No other revenue data were included (such as premium rate calls or text message charges, revenues from events or products with own brand)

Results

- ▶ Based on the calculation of Ernst & Young the total revenue of the **television** advertising market in 2010:

HUF 58 306 million

- ▶ The market share of the participating* **television** companies is cca. **98%**.
- ▶ The total revenue of the **radio** advertising market in 2010

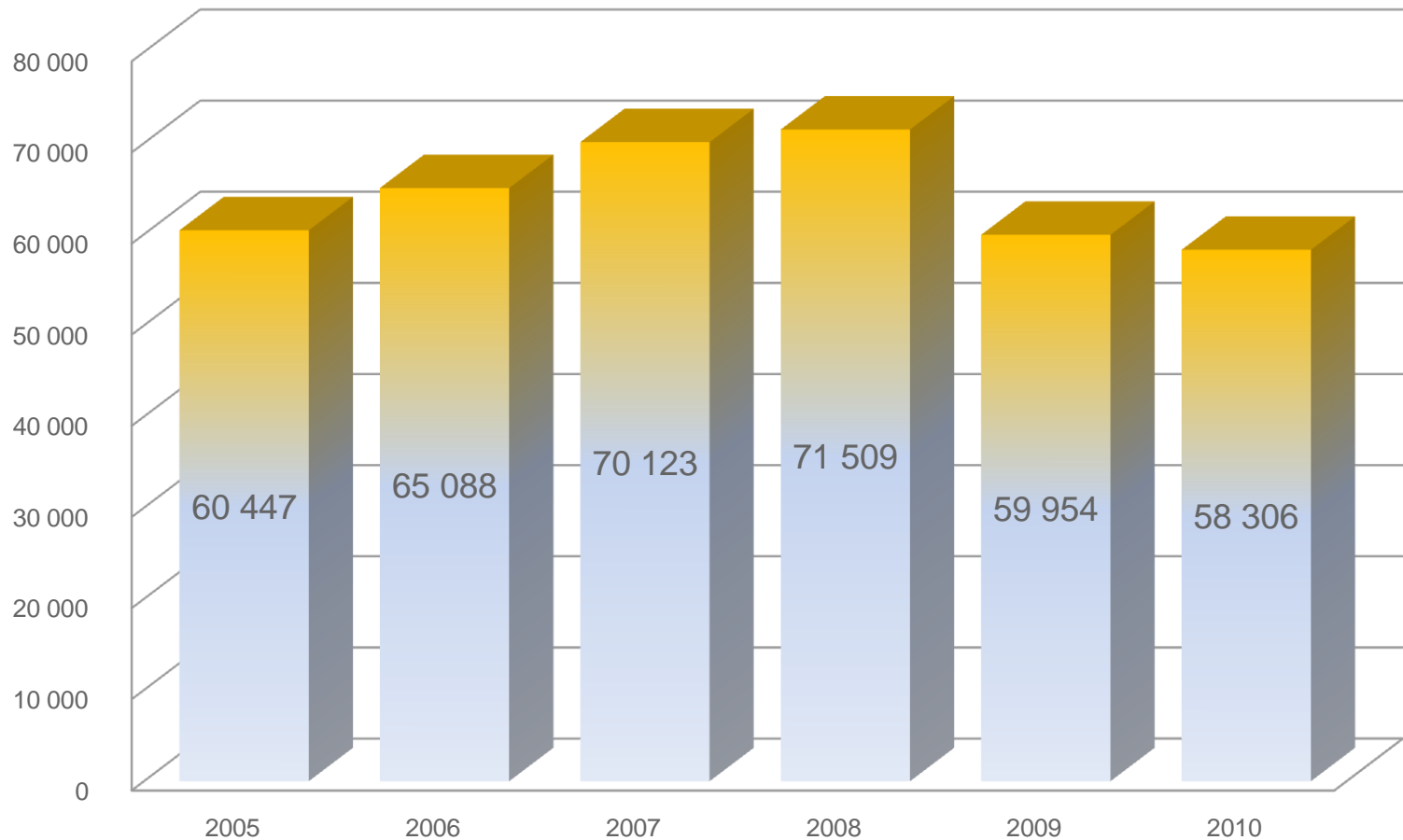
HUF 4 545 million

- ▶ The market share of the participating* radio stations is cca. **80%**.

* Based on the data provided by MEME

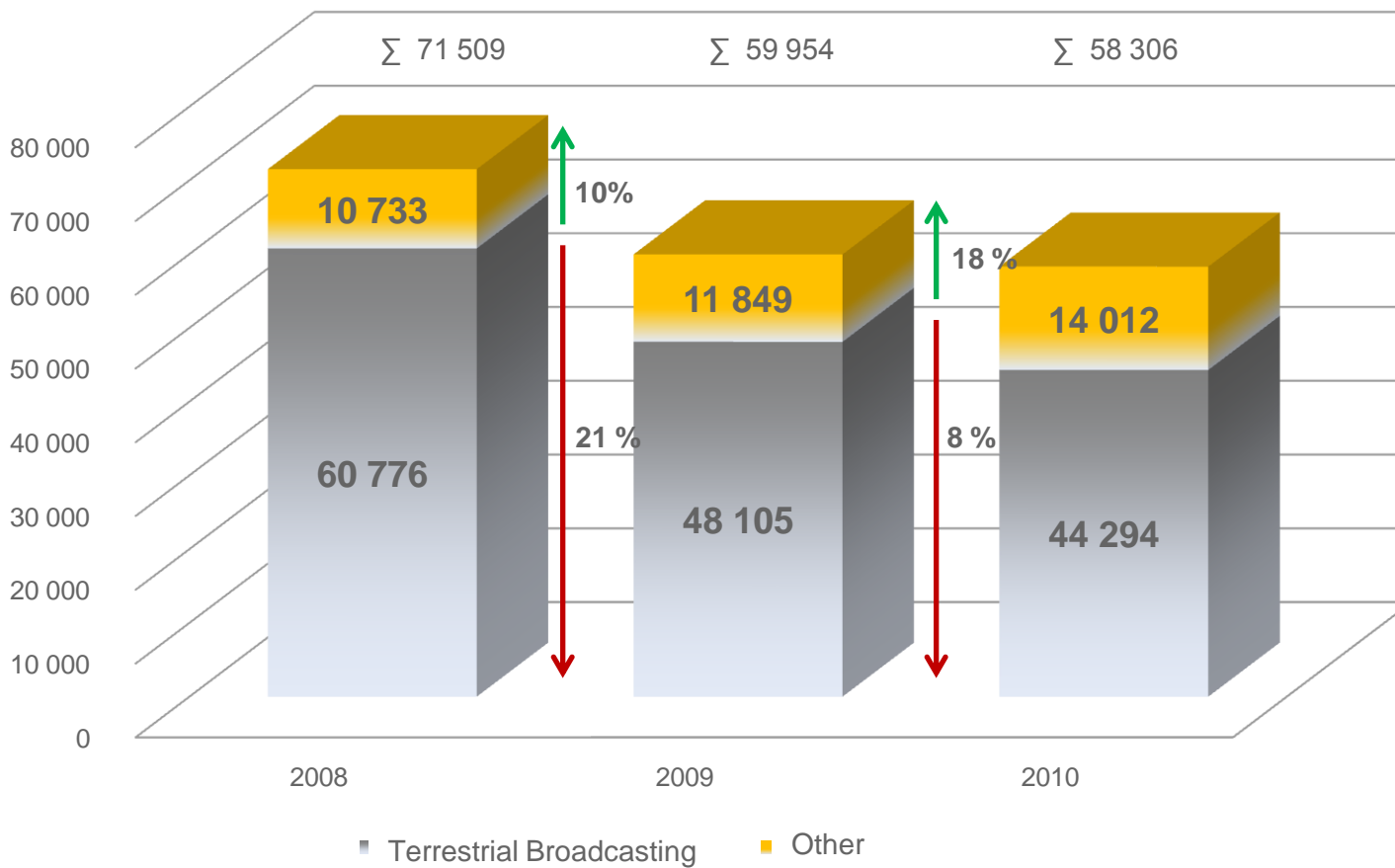
Segment data – Television 1/5.

Total Television Advertising Revenue in HUF million



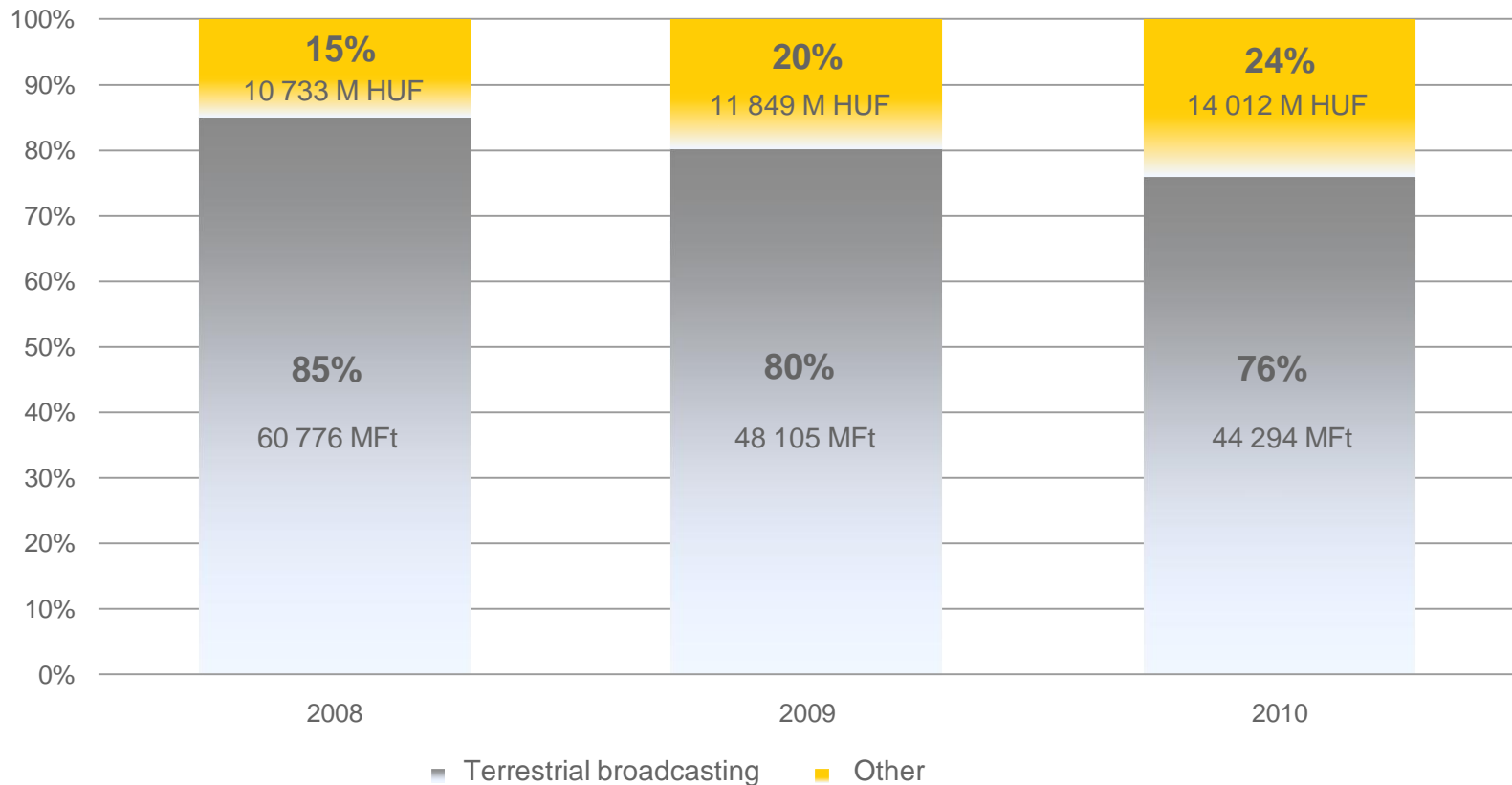
Segment data – Television 2/5.

Television Advertising Revenue by Type of Television in HUF million Terrestrial Broadcasting vs. Other



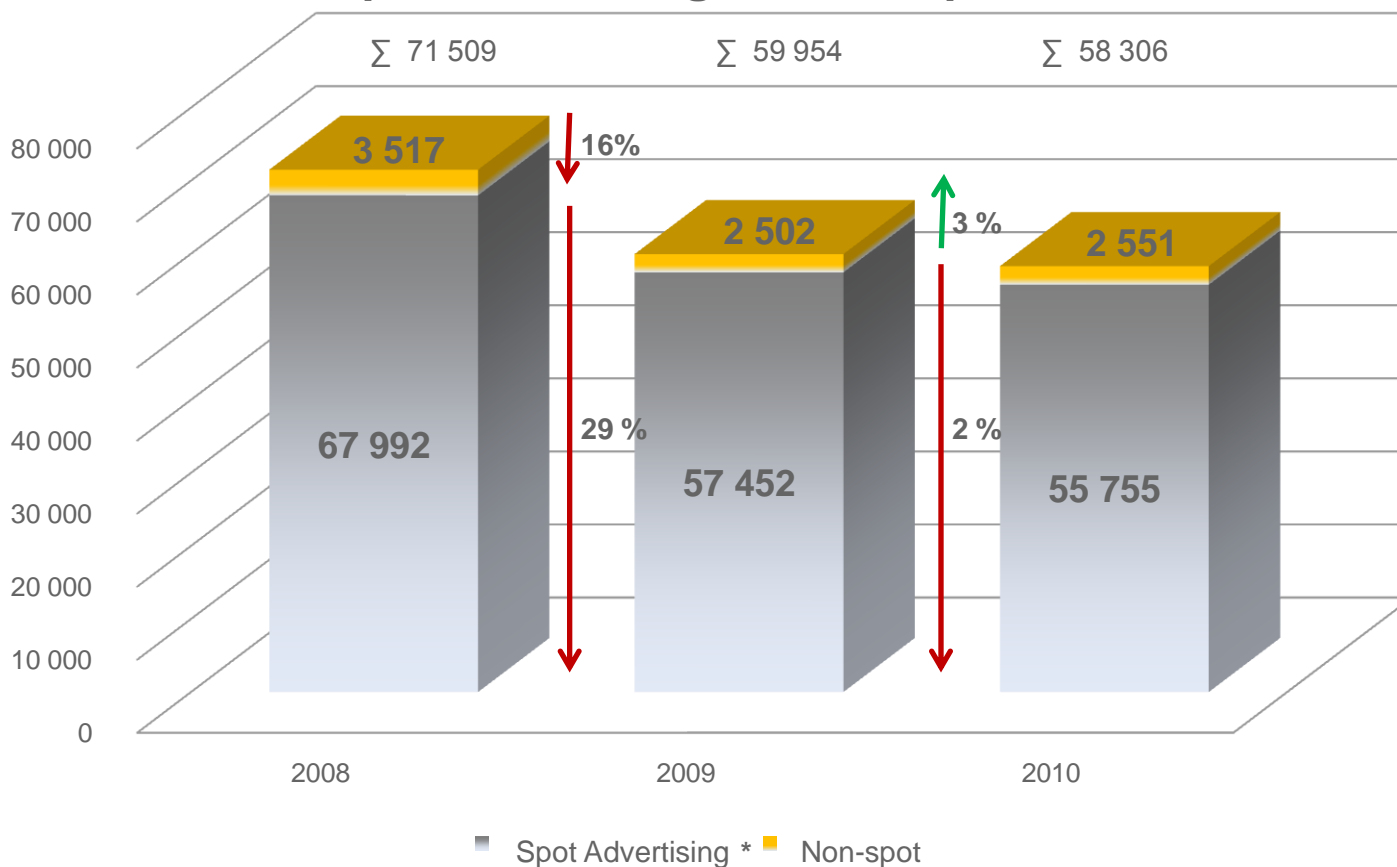
Segment data – Television 3/5.

Television Advertising Revenue by Type of Television in % Terrestrial Broadcasting vs. Other



Segment data – Television 4/5.

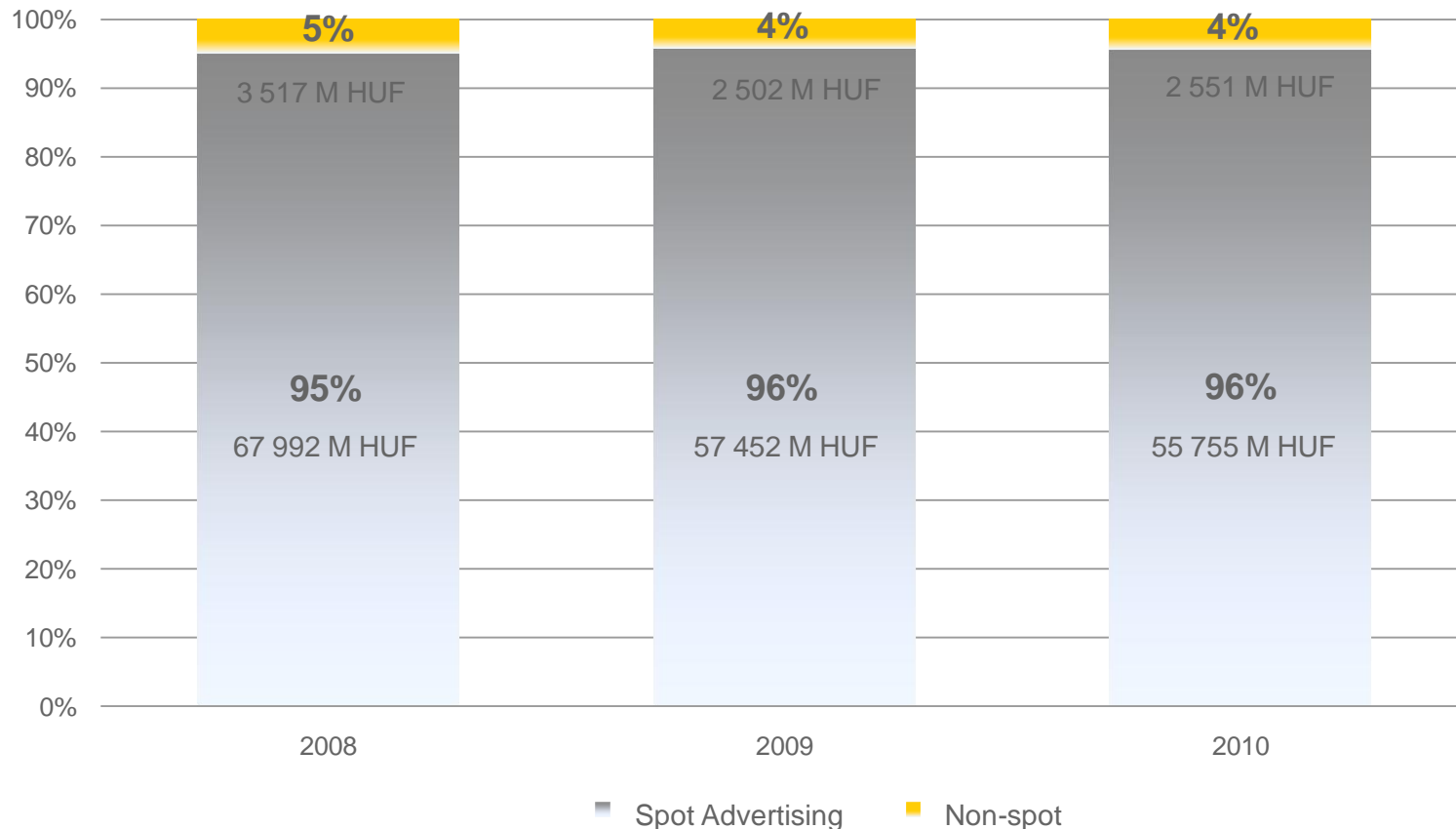
TV Advertising Revenue by Type of Advertisement in HUF million Spot Advertising vs. Non-spot



* Total revenue of Viasat is included in Spot Advertising

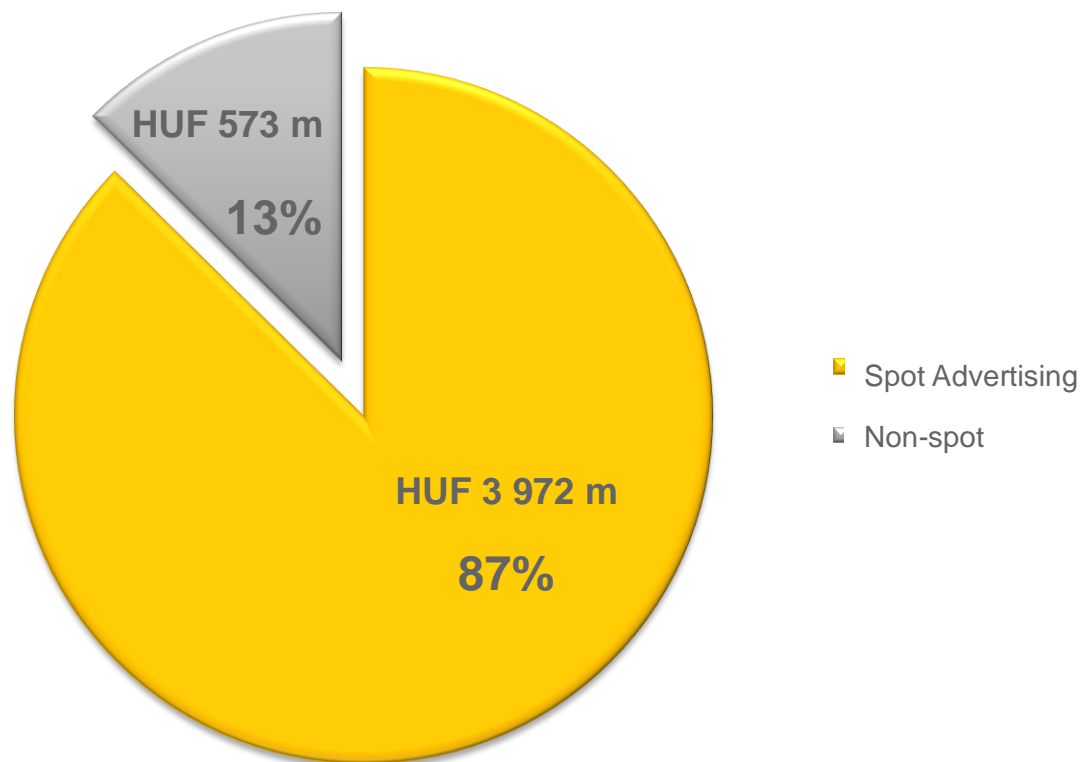
Segment data – Television 5/5.

Television Advertising Revenue by Type of Advertisement in % Spot advertising vs. Non-spot



Segment data – Radio

Radio Advertising Revenue of HUF 4 454 million
by Type of Advertisement in %
Spot Advertising vs. Non-spot



Summary

Advertising Revenue (HUF million) and % Change compared to 2009 Data					
		2008	2009	2010	Change Compared to 2009 Data
	Total Advertising Revenue – Television	71 509	59 954	58 306	-3%
	Total Advertising Revenue - Radio	7 081	0	4 545	N/A*
TV	Terrestrial Broadcasting	60 776	48 105	44 294	-8%
	Other	10 733	11 849	14 012	18%
	Spot Advertising	67 992	57 452	55 755	-3%
	Other - Sponsorship	3 517	2 502	2 551	2%
Radio	Spot Advertising	5 594	0	3 972	N/A*
	Other - Sponsorship	779	0	573	N/A*

* Radio market survey was not prepared for 2009



Thank You for Your Attention!