



Press release of the Hungarian Advertising Association (MRSZ) and its co-associations

The summation of the Hungarian Advertising Association's figures of the 2021 spending in the media and communications market is now complete

24 March, 2022, Budapest – MRSZ's most important conclusions on the 2021 figures of the media and communications spending¹: (1) In spite of the fact that COVID still had a big influence on 2021, the media and communications market managed to close a year of growth, in absolute terms. (2) The obvious beneficiaries of this growth were global digital platforms (Google, Facebook etc.), whose figures increased by another 28.2 percent in 2021, compared to 2020 spending, which has resulted in a situation, where one third of the media spending in Hungary is already going to global digital players. (3) Advertising proceeds realised by domestic (creating content domestically, paying taxes domestically and run in accordance with Hungarian rules) were far more modest by comparison. In real terms, they wound up below the 2019, pre-COVID levels in 2021. (4) In contrast to 2020, government spending did not continue to grow last year, and even the higher levels of political communication – such as the communication related to the primary election last autumn – were unable to increase total spending significantly. (5) Defying expectations, neither the Olympic Games nor the UEFA European Football Championship, which was partly hosted by Budapest, generated any remarkable growth in communications spending.

MRSZ President János Gulyás emphasised: „*In spite of the fact that last year saw practically all sectors starting to soar in nominal terms, media and communications spending in 2021 fell short of the level of 2019 in real terms: In 2021, the overall performance of the domestic segments of media spending dropped by 0.2%, while communications spending by 11.1% in real terms, compared to 2019 figures. Neither should we overlook the fact that the COVID crisis, which began in 2020, stayed with us also in 2021, continuing to affect and aggravate the situation of the media market and most communications enterprises. The pace of growth of government advertising spending faltered last year, and even the intensification of political communication – for instance around the primary election – had no decisive influence on the figures. The most important finding of the summary is that global platforms grew much stronger again in 2021, and it seems obvious that global digital companies are the most powerful players of the domestic communications industry, already carving out more than one third of Hungary's media market. This raises fundamental questions in many respects, for example in relation to the future of edited contents, but – as it was addressed in a greater level of detail in our study titled [‘The influence of global platforms on Hungary's communications industry’](#), which we prepared in 2021, in collaboration with KPMG –, also with regard to the fact that global and local players do not have a level playing field. Instead, they compete in different legal and taxation environments.*”

Hardly had the advertising industry picked up some momentum in 2021, after the crisis inflicted by the pandemic diminished, when newer challenges are raising their heads in 2022. János Gulyás summarised the prospects for 2022 in the following way: “*The year 2022 is putting everybody to the test again: At the beginning of April, 2022, parliamentary election is going to be held in Hungary, and we are now turning in the home straight of the election campaign. The results of the election are going to have a strong influence on the 2022 media market. Also, a horrible war is being waged by an aggressor in our neighbourhood, and its consequences are already being felt (energy and food prices, HUF exchange rate and their effect on purchasing power). Although it is still*

¹ By presenting our annual market figures report, issued already for the 22nd time this year, MRSZ and its co-associations intend to capture and establish the size of the market, and supply data for long-term comparison, as well as material for analysis.

impossible to forecast its effects for 2022, it is sure to be a hard year not only for the communications industry, but also for the entire Hungarian economy. Furthermore, in 2022, we are also going to have to deal with numerous temporarily 'quiet' regulatory issues (e.g. the advertising tax has been suspended until the end of the year; the deferred deadline of the demolition of billboards is 31 December, 31 December 2023.)"

Moderate domestic and strong global growth in last year's communications market:

The proceeds of the domestic media fell short of pre-COVID levels in real terms, while the total of the marketing communications proceeds realised by the players of the communications industry were 10% below the 2019 level

In 2021, the advertising spending realised as proceeds in the domestic media segments² of MRSZ Total Spending³ (television, local digital content providers, press, outdoor, radio, cinema) was HUF 203.1 billion. In comparison with previous years' numbers, domestic media experienced a promising, albeit misleading growth last year (+15.6% compared to 2020, and +8.2 compared to 2019). In real terms⁴, all this boils down to the conclusion that in 2021, domestic media were still unable to reach the 2019 level of domestically realised proceeds of media-advertising (-0.2%). Global contenders of the digital segment achieved an enormous growth in the Hungarian market: global tech companies in 2021 pocketed 33.4% of the total media spending, and as high as 65.3% of the total online spending. (On a global level, 75% of online advertising spending and 40% of the total advertising spending end up on the bank accounts of giant tech platforms.)

In 2021, communications sectors (creative and media agency services, events, data-driven marketing, marketing research, PR, ambient), as part of the MRSZ communications spending, accounted for HUF 216.3 billion. In comparison with 2020, the year most affected by the pandemic, the segments of the communications spending showed an encouraging overall growth of 31.5% in 2021. However, the fact that the events market realised a 184.6% increase in 2021, after the segment hit rock bottom in 2020, is a strong distortive factor, since the growth in these sectors, in real terms, was only 26.4% from 2020 to 2021. In comparison with 2019, the segments of the communications spending, apart from those of media spending, showed an overall decrease of 2.7% in 2021, meaning that they did not even reach pre-pandemic levels. Moreover, the total of the marketing communications proceeds that went to the communications industry fell by 11.1% in real terms.

(NOTE: MRSZ and its co-associations have again "refined" the methodology behind the figures of their spending chart, so we now present adjusted figures back to 2019 for the individual segments. Accordingly, we shall compare 2021 figures to the adjusted 2019-2020 overall data.⁵)

The amount of the entire MRSZ Media Spending in 2021: HUF 304.9 billion:

Last year, the advertising proceeds of domestic media players totalled HUF 203.1 billion, which falls short of the 2019 level in real terms

The sum of the 2021 MRSZ Media Spending was HUF 304.9 billion, which means a 19.5% increase from the preceding year and a – somewhat smaller – growth (17.9%) compared to 2019. In 2021, there were no changes in the ranking of the leading positions of the MRSZ Media Spending, compared to the two preceding years: (1)

² The media spending chart provides a more accurate assessment of advertisers' investments in media publishing.

³ In the total media spending chart, from now (back to 2019), the aggregated figures of the domestic and global players active in the Hungarian digital market shall be presented in separate segments.

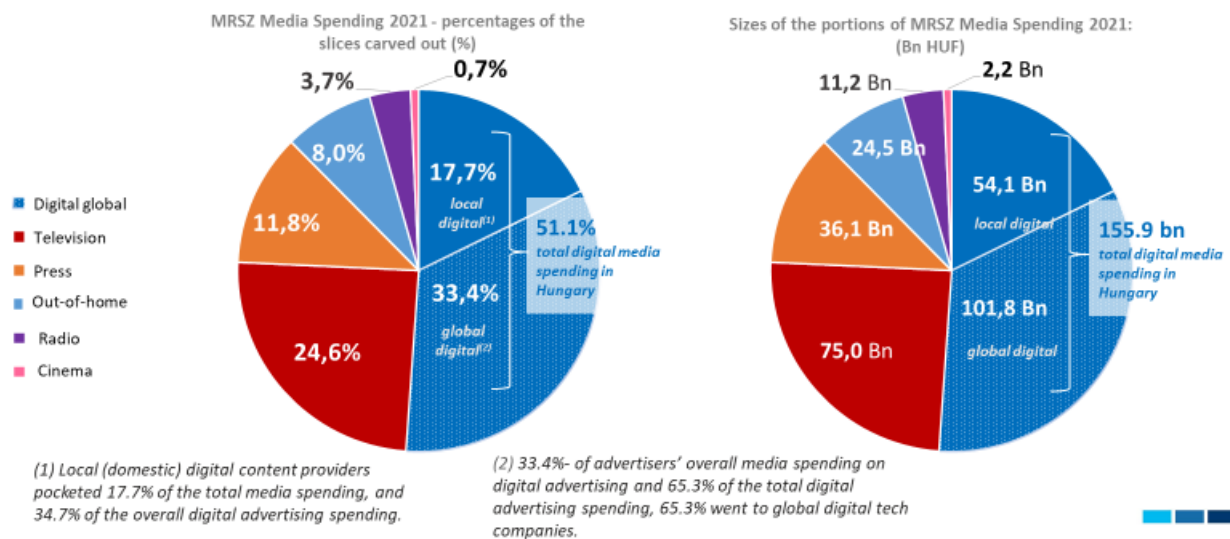
⁴ Taking into account the inflation rate over 2019 and 2020.

⁵ IAB Hungary has refined its methodology. For this reason, the updated digital data shall be presented retrospectively to 2019, and MaReSz (Federation of Hungarian Event Organisers and Suppliers) has also adjusted the advertising spending figures for 2020. In the total media spending chart, the figures of the domestic and global players active in the Hungarian digital market shall be presented in separate segments. The 2021 figures shall be presented in comparison with the adjusted 2019-2020 overall data.)

digital global, (2) television, (3) digital local, (4) press. (The local and global segments of the digital domain shall be presented separately, and retrospectively to 2019.) **Global digital media spending, which carved out the largest share of HUF 101.8 billion in 2021, closed the year with a 28.2% growth from 2020, and a 43.7% growth compared to 2019. Global digital companies are the biggest players of the domestic market: They hold a 33.4% share of the total Media Spending.**

Advertising proceeds received by domestic media players totalled HUF 203.1 bn in 2021

- The total of the MRSZ Media Spending in 2021: HUF 304.9 bn:



The digital segment has been constantly and dynamically growing in recent years, primarily due to the increasing penetration of global platforms: the total digital performance in 2021 grew by 27.3% from 2020, and by 37.3% in comparison with 2019. In 2021, already 65.3% of Hungarian advertisers' total spending on online advertising was pocketed by global market players (the same figure was 64.8% in 2020, 62.4% in 2019, 55% in 2018, 53% in 2017 and 51% in 2016). Television advertising spending amounted to HUF 75 billion in 2021, which is a spectacular 17.1% upturn in comparison with 2020, as the commercial market nicely counteracted the setback in 2020, with the television market showing a forward-leaning change of +12.6% even compared to the 2019 figure. Press advertising spending in 2021 totalled HUF 36.1 billion, which is a 2% decrease from 2020, but was still sufficient for the segment to retain its position in the Media Spending chart. In 2021, outdoor advertising spending was HUF 24.5 billion, which is a 20.1% increase from 2020. (7.9% growth compared to 2019.) The aggregate radio (RAME/HEROE) spending of 2021 totalled HUF 11.2 billion, which is a growth of 11.3% from the previous year, but still below the 2019 level. Out of the segments of Media Spending, cinema – albeit having the smallest share of the total spending – experienced the biggest rise: compared to 2020, a year stricken by the pandemic and movie theatre closures, the sector in 2021 reached a 69% growth, producing a HUF 2.2 billion performance. The cinematic year of 2021 started last July. For this reason, in spite of the fact that advertising in cinemas thrived in 2021, the annual total still lagged behind the pre-COVID yearly spending level of HUF 3.2 billion in 2019.

The background of global and local digital, television, print, outdoor, radio and cinema segments of the total media spending:

Commenting on digital advertising spending, Péter Novák, a member of the board of IAB Hungary, and the head of the Adex workgroup, pointed out: **“Based on IAB Hungary’s data⁶, the total of domestic digital advertising spending amounted to nearly HUF 156 billion in 2021. From the previous year, this is an outstanding 27% growth.**

*The recurring economic dynamics and the sharp rise of the importance of the digital world in the lives of individuals and companies alike have dominated the domestic digital advertising market. **All of its 4 principal domains – display (including social media marketing), search, listing and email marketing – have undergone a significant expansion.***

Similarly to international trends, the most dynamically growing segments of the domestic digital advertising market are programmatic advertising solutions (+75%), online video (+44%) and social media marketing (+38%). The latter continues to grow with a sustained momentum.

Digital audio advertising, a segment that has recently become up and running, also boasts significant growth (+42%), as well as the online job advertising market (+36%), which is particularly sensitive to economic developments.”

Summarising the figures of the television market, Dr. Csaba Tóth, the President of the Association of Hungarian Electronic Broadcasters (MEME) explained: **“Television advertising proceeds rose spectacularly in 2021. With a 17.1 percent increase, the segment reached HUF 75 billion – as revealed by a joint analysis of the Association of Hungarian Electronic Broadcasters (MEME) and consulting company EY.**

According to the aggregate data of television companies and sales houses, commercial spending accounted for HUF 58.6 billion in the case of TV spots, and HUF 4.8 billion in the case of the non-spot forms of advertising (such as product placement and programme sponsorship). These two segments accounted for 87 percent of the total advertising spending. The value of the governmental advertising spending, including TCR (public service advertisements), was close to HUF 10 billion, which covers 13 percent of the entire market.

Based on the 17th joint survey by MEME and EY, the commercial market corrected the setback of 2020, thanks to which spot proceeds grew by 18.3 percent, and non-spot proceeds were up 14.7 percent, compared to the previous year. Meanwhile, government advertising increased by 9.5 percent.

Proceeds from goods barter in 2021 exceeded HUF 1.8 billion, but even without them, the advertising market expanded spectacularly, by 16.8 percent, to HUF 73.2 billion.”

According to Tibor Kovács, the President of the Hungarian Publishers' Association: *“Press kept its position in the total media spending, with the total proceeds of the press sector amounting to HUF 109.858 billion in 2021. In spite of the economic difficulties and sales restrictions brought about by the pandemic, printed press – albeit with a minor difference – retained its results achieved in the preceding year. Owing to the stabilisation of the number of print subscriptions and the acceleration of the processes of digitalisation, proceeds from readers also grew significantly.*

*Based on the summary of MLE, the **proceeds** realised by the “net-net” (less agency and other discounts) **print advertising market totalled HUF 36.123 billion in 2021. The overall revenue of the press sector, including the proceeds from print media distribution, totalling HUF 53.196 billion, and the reported online proceeds, amounted to HUF 109.858 billion in 2021.***

*The **proceeds related to digital contents, increasing every year, also grew significantly. In addition to advertisers’ print spending, the reporting media publishers also realised proceeds worth HUF 20.539 billion from online advertising spending.** This figure demonstrates the trend that publishers are carving out more and more important shares of the advertising segment of the online content industry, as well. All this leads us to the conclusion that people are reading more, and we anticipate that they will keep their new reading habits. **Another positive trend** is that the effects of subsidy programmes are already beginning to be felt. An increasing number of online editorial offices were able to monetise their contents, and their **proceeds from readers increased, bringing about a digitalisation leap.***

⁶ IAB Hungary has further improved its assessment methodology related to a part of the total digital advertising spending and adjusted its data retrospectively for the years 2019 and 2020.

Print media always played a special role in the composition of marketing channels, because their tangibility enables brands to establish meaningful physical contact with their consumers. It is very encouraging that the efficiency of ads published in papers and magazines has not changed at all over the past few years, and print media has remained an indispensable component of successful marketing communication.”

Bálint Hantosi, the president of the Hungarian Advertising Association’s Out-of-Home (MRSZ-OOH) pointed out: *“From 2019 to 2020, the drop in revenue, amounting to over 10 percent, which affected the entire communications industry, did not spare the domestic out-of-home (OOH) market, either. Positive trends were already visible in Q4 2020 in the OOH segment, which persisted throughout 2021.*

All in all, it can be stated that we have put the negative effects of the COVID-crisis behind us, and with its 20% growth, the domestic OOH sector has returned to its former glory, as its 2021 proceeds surpassed even 2019 levels.

Nevertheless, a closer scrutiny of the figures will reveal a somewhat less positive picture. The setback from 2019 to 2020 was very severe. Even the growth from 2019 did not reach the inflation rate for the 2 years under review, so the year 2021 did not come close to the proceeds of 2019 in real terms.

In addition to the thorough analysis of the figures, it is also important to emphasise that domestic out-of-home companies went out of their way to surmount the crisis and re-establish a pattern of growth for the sector. Market players spared no effort and energy to bring in new segments into the OOH market, and replace lost cultural and events communication with them.

We’ve still got a lot to do, as we are supposed to carry out a complex renewal in a negative external environment and an ever-increasing economic competition. While retaining the values of conventional instruments, digitalisation gains more and more importance in the domestic OOH market. The number of high quality digital devices with outstanding efficiency is growing exponentially every year, and they are carving out larger and larger chunks of the “conventional” out-of-home advertising segment.

It would be fairly difficult to guess what we still have in store for 2022 and subsequent years. It’s rather challenging to disregard external circumstances (COVID-19 pandemic, war in Ukraine), but recent years have shown the strength of the industry. The entire market has been able to develop even in the face of the toughest situation, and the OOH market is expected to grow in 2022, not only in nominal, but also in real terms.”

Árpád Turi, the President of the Association of Radio Media Providers (RAME) outlined the situation of the **radio market** as follows: *“In spite of the waves of the coronavirus pandemic and the related restrictive measures of a varying intensity, radio listeners proved again in 2021 that they look at the radio as their everyday ‘companion’, and that they refuse to give up listening to their favourite programmes even amidst changed circumstances. After the first lockdowns entered into force, daily and weekly audience ratings recovered straight away to their pre-pandemic levels in 2021, and in certain target groups and listening time slots, they even exceeded the levels before COVID.*

According to industry hopes, the positive listening trends of 2021 will persist in 2022, making the radio a successful platform for commercial partners’ communications activities.

The pandemic seated radios’ proceeds on a roller-coaster, but thanks to the hard, professional work and perseverance of the players of the industry, after the setback of the preceding year, radio broadcasters experienced significant increase in 2021, in both spot and non-spot proceeds, and overall, they almost repeated their pre-COVID 2019 performance.

The first quarter of 2022 the situation in Ukraine may have an important, unpredictable influence on the proceeds levels of the radio industry as well, and international sanctions, as well as the continuous fluctuation of the Euro’s exchange rate and other economic risks create an ever-changing environment for businesses, possibly having an effect on the financial performance of radios. The players of the industry can counterbalance negative trends by demonstrating, again and again, the efficiency, flexibility and agility of the radio as a medium, and taking customer service to even higher levels. The players of the industry are unanimous in hoping that the conflict gets closed as soon as possible, and that they will be able to concentrate on successful radio project again from the second quarter.”

Zsuzsanna Kiss, Media Sales Director of Cinema City/New Age Advertising explained: “The cinematic year of 2021 started at the beginning of summer, when movie theatres were permitted to reopen. Regardless, we had several weeks in 2021, when the numbers of moviegoers surpassed the figures of the same period of 2019, one of our most successful years, thanks to the screenings of such movies as Spiderman: No Way Home or 007 No Time to Die Thanks partly to this trend, the screenings of several films took place in November and December with advertising slots maxed out, resulting in a 69 percent growth for the cinema, compared to 2020. We had loads of great movies premiering last year, and we’re going to have even more of them this year. We are now counting on a full operational year, and films are still standing in line to be screened. To name a few, we’ll have Top Gun Maverick, the long-awaited Avatar sequel, or the new episodes of Doctor Strange, Jurassic World, Thor or the Minions.

Volume of the MRSZ Communications Spending in 2021⁷ HUF 524.2 billion –

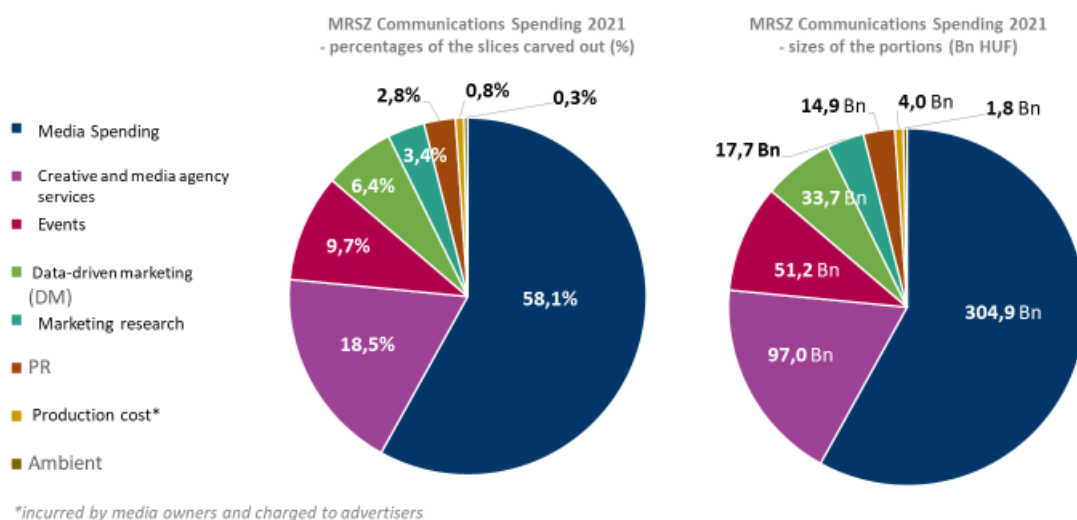
The advertising proceeds of⁸ communications sectors were HUF 216.3 billion. In real terms, the total of marketing communications proceeds decreased by 11.1% in comparison with 2019

Last year’s MRSZ Communications Spending totalled HUF 524.2 billion, which is 24% higher than the 2020 level in the pandemic, but the total was up only 7.2% compared to the last pre-Covid year, 2019.

In the Communications Spending, apart from the creative and media agency services and PR, all the other four sectors showed a decline in 2021 in comparison with 2019, ranging between -9.5 and -37.7%.

Total of MRSZ Communications Spending in 2021: HUF 524.2 billion

- Total communications spending was up 24% from 2020 -



⁷ The total communication spending chart contains net-net expenditures without overlaps. It includes the media spending figure; data-driven marketing (direct marketing), ambient; creative and media agency services (including productions run through agencies), events, client-financed marketing studies, PR, as well as the production costs incurred by media owners and charged to advertisers.

⁸ creative and media agency services, event, data-driven marketing (DM) marketing research, public relations (PR), ambient

On creative and media agency services, advertisers spent HUF 97 billion in 2021. The magnitude of the loss in turnover in the event sector, which amounted to 70% from 2019 to 2020 decreased in 2021 in comparison to the pre-pandemic year of 2019. The events sector reported proceeds worth 51.2 billion for 2021, which is equivalent to 85% of the proceeds (HUF 60 billion) of the pre-COVID year of peace, 2019. The size of the data-driven marketing (direct marketing) sector was HUF 33.7 billion in 2021. After the 2020 setback caused by the pandemic, an improving trend was already perceptible in 2021 (8% growth), but the proceeds going to the data-driven marketing sector still fell short of pre-pandemic figures. From July 2021, Hungarian Post quit the unaddressed advertising mail distribution market. We will be able to evaluate the results of the resulting realignment in our 2022 survey. In 2021, the consolidated total of the marketing research market was HUF 17.74 billion. This means an 11.8 percent growth from last year. Public relations (PR) spending in 2021 totalled HUF 14.9 billion, which is a 12.7% increase compared to 2020, and 2.6% higher than the 2019 pre-pandemic figure. The ambient sector had revenues totalling HUF 1.8 billion in 2021. Although proceeds grew in comparison with 2020 (by 19.6%), but were still far lower than the 2019 figure (HUF 2.9 billion).

The background of the creative and media agency services, events, data-driven marketing (direct marketing), marketing research, PR and ambient segments:

Nikolett Blaskó, the President of the Association of Hungarian Communication Agencies (MAKSZ) pointed out: *“On creative and media agency services, advertisers spent HUF 97 billion in 2021, which is a considerable growth of 15% from the preceding year. The segment owes this growth to a strengthening marketing and communication activity of market advertisers and brands, contrary to what was experienced in 2020.*

György Huszics, Vice-President of Data & Marketing Association (DIMSZ) commented on the data-driven marketing (direct marketing) segment as follows: *“After the 2020 setback, caused by the pandemic, an improving trend was already perceptible in 2021 (8% growth), but the proceeds going to the data-driven communication sector still fell short of pre-COVID figures. Rather, they should be considered as signs of the expected “bounce back”.*

From July 2021, Hungarian Post quit the unaddressed advertising mail distribution market. We will be able to evaluate the results of the realignment in our 2022 survey. The market of digital solutions was able to grow 15 percentage points, further strengthening (66%) its leading position in the total data-driven spending.

What can give cause for hope are a higher level of confidence in outsource market services, a strengthening focus on contact centres and the need for renewal, as well as the fact that customer service related to the increasing e-commerce activity still has room for enhancement in the coming period.”

In 2021, the consolidated total of the marketing research market was HUF 17.74 billion. This means an 11.8 percent growth from last year. Organic growth out of the total growth is worth 7.6 percentage points. The remaining 4.2 percentage points come from the increase of the number of monitored market players.

PMSZ President Andre Kassai explained: *“After the considerable drop experienced in 2020, we were hoping that the trend would be reversed by 2021, and we would see some modest growth in the research market, which might not reach pre-pandemic levels, but would still allow us to be cautiously optimistic. Luckily, the figures justified our expectations.”*

Impetus Research leader János Bacher added: *“Although the sales revenues of research companies grew in comparison with the preceding year, the dynamics of the growth was not very powerful, and organic growth hardly exceeded the inflation rate. The pandemic did not hinder significantly the application of the methods of data collection, like it did in 2020, so the players of the segment did not encounter such limitations. The growth – which can still be considered as sluggish – is ascribable to an increase of limited dynamics of the market needs.”*

Hungarian Public Relations Association (MPRSZ) President András Sztaniszláv said: *“PR continued to strengthen in the communications mix. In addition to conventional advertisements, story-based communications and a more and more powerful engagement of various stakeholders in brand communication all promote campaigns and longer-term programmes with a PR approach. Conventional PR agencies are serving their clients with a slowly*

but surely expanding portfolio of services, and agencies specialising primarily in advertising, creative and marketing communications are increasingly getting to resort to PR-driven solutions.

This is indicated by last year's figures, where specifically PR-related proceeds grew by 12.7% with a 6.8% increase in general sales revenues.

We can see that brands are turning towards value-based communication. More and more stakeholder contacts are characterised by a dialogue-based bidirectional communication – this clearly means the strengthening of our field of profession, PR.

It is great to see from an economic point of view that conventional PR agencies can stand at their clients' disposal with a wider portfolio of services and larger budgets. Also, the appearance of PR-type tasks in conventional marketing agencies is clearly indicative of the strengthening of the PR segment in the communications mix.

Gábor Rókusfalvy, Vice-President of the Association of Hungarian Event Planners and Service Providers

emphasised: "The situation of the event sector started to improve gradually after the restrictions were lifted last May. The real reopening began at the end of summer, which was then followed by a strong autumn. This is mainly due to the fact that in these months, numerous events that had been previously called off or put off were held by the organisers after all, and some of the end-of-year events were also brought forward. The autumn was really busy for conference tourism as well, primarily in terms of minor, domestic events. On an international level, the activity was less hectic, which can primarily be ascribed to the travel restrictions in force. From November, because of the worsening epidemic data, another wave of cancellations started, the first step of which was the prohibition of healthcare events. Although the holding of business events was not restricted, the spread of the disease convinced clients to postpone their internal corporate events and partner parties. This was the case mainly in companies with multinational headquarters. Based on the difficulties experienced, it can be concluded that the significantly shortened order lead-time makes life for the professionals working in the event segment highly unpredictable. Clients prefer to wait out, and decide on holding or cancelling a particular event in the last minute, which poses a huge challenge to event organisers and service providers. Tight deadlines also make it difficult for these companies to find sufficient personnel to serve the guests of the event, as the sector is suffering from an acute labour shortage. Since 2020, the number of people making career changes has increased significantly, whom companies have difficulty enticing back to the world of events.

All in all, we can conclude that the situation improved from 2020 to 2021, since far more events were organised than in the first year of COVID, but events agencies still fell short of 2019 levels. Due to the rise of human resources and other costs, the 10-15% annual growth potential in sales returns will not be realistically achievable for a long time, but companies trust that the proceeds realised in 2019 will already be attainable, or may even be surpassed in 2022."

Károly Baráth, the President of the Ambient Association added: "By 2020, clients' spending in the ambient market, a segment that had previously developed very dynamically, fell short of all forecasts. 2021 showed that the worst is already behind the segment, and its 20% growth ranks it among the top performing sectors of the domestic advertising market. It is important to note, nevertheless, that even this significant growth was unable to propel the ambient sector back to its pre-crisis levels, which can be attributed to advertisers' worries about recurring COVID restrictions and potential lockdowns. The trend and its direction are great, making us hopeful about achieving significant growth in the coming years.

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