



The Hungarian Advertising Association (MRSZ), its co-associations and partners  
Press release

**Figures show an obvious decline for the communications market in 2020:  
media spending shrank nearly 3 percent, while total communications  
spending plunged a very significant 16 percent  
- the revenues of all domestic communications “slices” went downhill -**

14 April, 2021, Budapest – The 2020 MRSZ Media Spending<sup>1</sup>, totaling HUF 240 billion, was down 2,8 % year-over-year. The total value of last year’s MRSZ Total Communications Spending<sup>2</sup> was HUF 401.9 billion, meaning a 15,8 percent fall from its size in 2019. The variation of the decrease is extreme in both types of spending between the different areas (between -2.9 and -80 percent), reflecting both the shared and the diverse difficulties faced by the players across the broad spectrum of the communications industry. The fall in the communications industry, which interrupted a steady growth experienced in a number of preceding years, was definitely due to the economic crisis caused by the coronavirus pandemic. The severity of the setback was mitigated in certain segments (1) by the popularity (2) of directing advertising spending towards global platforms, and by the temporary attenuating effect of the growth of public ad spending towards market players of specific fields in 2020. (3) In addition to government spending, certain measures taken by the cabinet also assisted some fields and industry players in improving their results. On the whole, we can reasonably say that all fields of the communications industry were making efforts to keep their businesses afloat by mobilizing their reserves, and putting creative innovations to work. Nevertheless, MRSZ and its co-associations have ‘fine-tuned’ the methodology behind the figures of the spending reports in some segments, so we hereby publish data adjusting retrospectively to 2016.

MRSZ President János Gulyás emphasised: *“The Covid19 crisis, which broke out last March, has had a highly negative effect on the entire communications industry. The effect was most pronounced in Q2 2020. - The market failed to recover even with the summer reopening and the less restrictive economic circumstances at the end of the year. All segments but one suffered significant losses (between -2.9% and -80%), both in the case of the media spending and the players involved in the total communications spending report. Digital was the only segment to produce a growth of +5.5% – albeit falling behind the growth of previous years –, which the segment owes to the increasing expansion of global platforms and their popularity that kept rising. At the same time, even within the digital segment, the amount of the advertising spends that went to domestic players also fell (by -0.2%) compared to 2019, but again, the lower shrinkage experienced by Hungary’s digital media - as seen in the entire media market - was enabled by the considerable increase in public ad spending. That being said, it is important to note that this intervention helped the various players highly unevenly. Some players benefited greatly, while for others, the measure was not helpful at all. All in all, the almost 3% decrease of the media spending and the losses of the total communications spending, totaling nearly 16%, suggest that it was not the worst case scenario that came true on an overall market level.”*

**The communications industry reacted to the crisis responsively and – retaining the very essence of the industry – creatively, but the “tightening of belts” cannot be maintained in the long run**

<sup>1</sup>The report summarising media spending is intended to provide a better assessment of advertisers’ investments regarding the costs of publishing in the media.

<sup>2</sup>With the report on total communications spending, we can have a broader view of the size and the changes of the totality of advertisers’ external marketing communications investments.

The effects of the state aids and government measures that benefited certain industry players, and helped some segments and players to stay alive, are also worthy of mention. MRSZ – in cooperation with its co-associations – either actively contributed to or played a leading role in achieving these goals.

President János Gulyás stressed: *“In spite of all the difficulties, we are happy to see that during the crisis that continues to this day, the whole communications industry mobilized its reserves, and reacted as responsibly as possible, taking cost-cutting measures and undertaking operative changes, while keeping its commitment to its employees. Nevertheless, it is no exaggeration to point out that the impact the crisis had on certain segments is nothing short of dramatic. Suffice it to mention the difficult times that the event marketing or the cinema industries have gone through. In the face of the crisis, however, the industry was able to preserve its essence, and react with creative innovations to the situation. With these innovations – also as [an engine of the economy](#)<sup>3</sup> – our industry provided considerable support to the running of the Hungarian economy even in this critical period. However, the highly disciplined practice of ‘belt-tightening’, applied by the communications industry, cannot be maintained in the long run”.*

**A supportive government policy more broadly extended to the sector would be much-needed.**

Although the communications industry welcomes the supportive measures the cabinet has taken so far<sup>4</sup>, it still considers it necessary that not only the most deprived segments or certain fields of the communications value chain should be propped up, and calls for implementing a more broadly expanded state aid policy so that the communications industry can play a genuine and effective role in restarting the economy.

---

#### **Retrospective data correction in the spending reports back to 2016**

“MRSZ and its co-associations intend the market numbers of the communications sector, published annually already for the twenty-first year now, to map and determine each year – as precisely as possible – the size of the market and provide data that are comparable over the long term and therefore suitable for analyses. **Recently, the data of certain segments have been adjusted. The corrections involve the numbers of earlier advertising spending reports, published in 2016, 2017 and 2018, as well as the media and total communications spending reports of 2019. We shall highlight these retrospective changes in the current data provision, and discuss ratios and the extent of the changes along those lines.**

***The adjusted 2016-2018 advertising spending reports and the 2019 media and total communications spending will be presented, along with our annotations in the annex, at the end of this press release.***

---

**The MRSZ Media Spending of 2020<sup>5</sup> amounts to HUF 240 billion, meaning a 2.8 percent shrinkage from the 2019 spending, and almost all of the segments included in the spending report fell between -3.8 and -59 percent.**

**In the past 5 years, the order of the media also present in the media spending report has not changed in spite of the corrections applying to previous years. The TOP three remained the same in 2020: (1.) Digital continues**

---

<sup>3</sup> According to the advertising economy impact study prepared by the Advertising Association with PwC in 2016, advertisements continue to be one of the best investments on the level of the national economy: Every HUF 1 spent on advertising contributes HUF 6 to economic performance.

<sup>4</sup> Media content producers and publishers were also included in the scope of those privileged with reduced contribution payment obligation, and the half-yearly building tax payment obligation, due on 15 September 2020, levied on outdoor advertising, was also abolished. In addition, according to the amendment of the Townscape Protection Act, the deadline for outdoor advertisers to remove their 14-m<sup>2</sup> billboards was extended until 31 December, 2023.

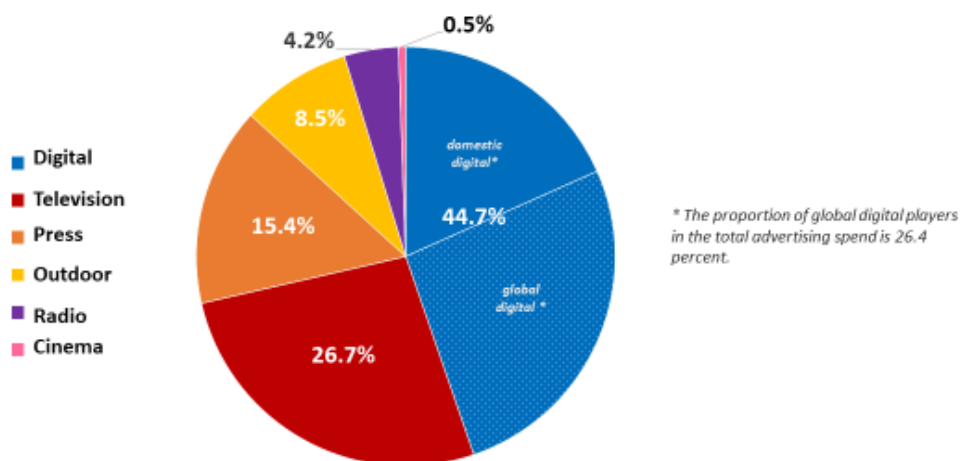
<sup>5</sup> The media spending report contains homogeneous data and only the advertising revenues realised by the media, according to entirely uniform factors, specifying the net spends without overlaps. It does not include any production costs. Barter include only non-media barter (goods barter). The media spending report consists of the following segments: Digital, Television, Press, Outdoor, Radio, and Cinema.

to be responsible for the largest slice of the spending chart (44.7%); (II.) the second largest slice belongs to **television** (26.7 %); (III.) **press** comes third (15.4%).

**The advertising revenues of almost all media segments declined significantly in 2020. Cinema suffered the greatest loss (-59%),** since it was beyond doubt one of the market segments most badly affected by the Covid restrictions in 2020. **The second biggest drop was experienced in the radio market (-11%).** In the media spending report, **the third hardest fall was taken by the segment of the press (-10.6%).** **Outdoor** came in fourth with a market contraction of -10.2 percent. And last, the television market also fell (-3,8%).

**The digital advertising market was the only one to achieve a modest growth:** Digital media – albeit at a rate far below the growth of previous years – was able to end the year with a 5.5 percent increase. The segment owes this result primarily to the undiminished popularity of global platforms, since **the digital advertising spends ending up in the hands of domestic players also showed a downward trend (-0.2%),** compared to 2019. The market shares of the global platform actors continued to increase in the digital sector in 2020, as a result of which 59% of advertising expenditures spent on domestic online advertisements in 2020 went to global players (the figure was 57% in 2019, 55% in 2018, 53% in 2017 and 51% in 2016).

## Media Spending 2020: HUF 240 billion



**The background behind the digital, television, press, outdoor, radio, and cinema slices:**

**In connection with digital advertising spending, István Sopov, President of IAB Hungary,** emphasised that: *“The situation brought about by the the pandemic in 2020 set people, as well as corporations and brands a major challenge. The use of digital devices and media gained new grounds in all areas of both our private and our business life, so even amid a dropping national economic performance, the amount spent on digital marketing and media increased in advertising, albeit at a rate that failed to keep up with that of previous years. The digital media market saw the share of domestic players shrink further, to around 41 percent, while the share of global actors rose to 59 percent.”*

**Sambor Ryszka, President of the Association of Hungarian Television Broadcasters (MEME),** thus summarised the indicators of the television market: *“Television advertising revenues in Hungary dropped 3.8 percent in 2020, to HUF 64.05 billion, as it was revealed by an analysis of Association of Hungarian Electronic Broadcasters (MEME) and consulting firm EY. While competitive market expenditures decreased by 5.9 percent last year, the share of public advertising spends increased by 11.4 percent, compared to the previous year’s. The economic processes caused by the coronavirus pandemic primarily held back the classic spot-type television advertising orders, whereas demand for other (non-spot-type) ad appearances, such as product placement or programme sponsoring, continued to increase.*

Based on aggregated data of broadcasters and sales houses, the Hungarian television advertising market, without taking media barterers into account, decreased by 3.8 percent or HUF 2.1 billion, compared to the 2019 results. The yearly analysis, which MEME and EY have now prepared for the 16th time, highlights that while the TV ad revenues coming from government spends increased by 11.4 percent, the total of the sums spent on the same by non-governmental (private) actors dropped by 5.9 percent.

In the spirit of transparency, MEME, backed by a consensus of the entire industry, decided to retrospectively take into consideration also the ads reported in relation to community facility advertising (TCR) for the past four years, when preparing the 2020 survey. Accordingly, the share of government contracts within television advertising spends increased by 14 percent to HUF 9 billion last year, while competitive markets accounted for 86 percent of the revenues, totaling HUF 53.69 billion.

Conventional TV-spots continued to be the most significant among commercial spends, however, their result shrank by 5.9 percent, to HUF 49.52 billion in 2020. At the same time, other types of non-spot ads in commercial spends increased by 4.2 percent, meaning total revenues of HUF 4.17 billion.

Just like in previous years, this year's MEME and EY's study again compiled broadcasters' results from barter transactions, which in 2020 decreased by 26 percent, to HUF 1.38 billion, meaning that total television advertising revenues, including barterers, hardly exceeded HUF 64 billion, which is a 3.8 percent drop year-over-year."

**According to Tibor Kovács, President of the Hungarian Publishers' Association (MLE):** "Press was able to keep its position in the media spending, with the total press revenues amounting to HUF 101.569 billion. The print advertising segment continues to be a serious factor, and in spite of the crisis situation caused by the virus, we can reasonably say that people still trust print sources the most, and the crisis further amplified this trend. In the crisis brought about by the pandemic, people have had more time to read, and hunger for news has reached unprecedented highs. Again, on account of the virus situation, the monetisation of online contents sped up in the market, thanks to which the revenues arriving from readers have appeared within the revenues structures of publishers.

Based on the MLE's summary, the "net-net" revenue (less agency and other discounts) of the **printed advertising market in 2020 amounted to HUF 36.851 billion. The total sales revenue of the press, including the HUF 53.218 billion obtained from newspaper distribution** and the online revenue reported in returns, amounted to **HUF 101.569 billion in 2020. The revenues related to digital contents, rising every year, continued to increase, so, in addition to their print revenues, publishers who filed returns also realised online advertisement revenues of HUF 11.500 billion:** this figure clearly shows that publishers own a significant share of the advertising in the online content provision market.

One of the most important findings of MLE's most recent industry research was that according to consumers, the greatest strengths of the print advertisements are that in general, they are not irksome, their contents' are relevant to the target group, they are useful, awareness-raising, rich in information content, and more trustworthy than the ads placed in any other types of media. **The critical situation caused by the virus further amplified this trend, since the demand for news consumption increased explosively, as – obviously – in a situation like this, everybody gets more hungry for information and news.** In this way, due to the pandemic, the public's trust in the press increased dramatically, and according to research, consumers trust print media more than any other medium, including digital news sources and social media platforms. If marketing experts want to help their clients build consumer trust, investing in print media is still an excellent option."

**Bálint Hantosi, President of the Hungarian Advertising Association's Out-of-Home (MRSZ-OOH) Association explained:** „Last year, just like the entire communications industry, **spends in the OOH market also fell significantly.** The first months of 2020 (Q1) forecasted a good year. Compared to the same period in previous years (Q1), tool utilisation indicators and sales prices improved. **The advertising revenue of the OOH sector significantly decreased in 2020 Q2 as advertisers stopped and/or suspended their advertising campaigns. In**

**2020 Q3, campaign spending started, and exceeded the revenues in 2019 Q4, but even so, the total earnings of the outdoor sector decreased by HUF 2.3 billion (-10.2%), to HUF 20.4 billion.**

*OOH is a very important partner for companies that advertise various cultural and entertainment industry performances, events, and festivals. Not only did the crisis slowed performance in these sectors, but made the sectors grind to a halt in 2020. Even the facts that the most substantial commercial clients did not terminate their panels (and in many cases “only” decreased the number of appearances) and that most campaigns that were stopped in Q2 were rescheduled and not terminated could not compensate for this loss of income.*

**In April 2020, the MRSZ-OOH association and Scores Group conducted a study on a large sample (6000 participants, national, representative) on the effects of the ‘stay at home’ restrictions on outdoor advertising. The study shows that despite the restrictions, the majority of people are still going outside: 85% go to work or shopping on a weekly basis, and that means that they encounter outdoor advertisements. Since people leave their homes less frequently, the lower contact number means reach is expected to build up slower than usual. Calculating with half as many contacts, it can be determined that by the end of the month it will still reach 93% of the usual value.**

*On the whole, 2020 was really challenging for the OOH segment as well. It is very difficult to predict how long the current crisis situation will continue, or what can be expected until the end of 2021, but we can already see that the second and third waves of the pandemic did not cause a complete lockdown, as seen in the first wave, and the OOH market is expected to grow in 2021 (compared to 2020).”*

**Árpád Turi, President of the Association of Radio Media Providers (RAME) gave the following summary of the developments of the radio segment of the market: “The restrictions introduced because of the coronavirus pandemic affected, if not dramatically, the radio ratings as well in 2020. The fall in the number of listeners experienced in the period of the complete lockdown is definitely ascribable to the change in the morning listening behaviour, as the emergence of the abnormal daily consumer routines significantly altered listeners’ radio content consumption behaviour, as well. It is good news that media consumers observably still love radio, since the average ratings sprang back to normal levels almost instantly after the restrictions were lifted. This trend is still ongoing, and, what is more, in spite of the third wave, the ratings are still increasing slightly. All this gives new hope to radio experts.**

**In terms of sales returns from the market sector, the industry was dealt a much more severe blow in 2020. Clients’ reasonable switch to a more cautious communications strategy practically reduced the number of non-spot activities outside of on-air radio promotion to a minimum, while entire sectors sent their activities to hibernation or – at least – minimized their spending on communications, including radio ads, for several months.**

**In 2021, the industries that put their radio communications at the forefront traditionally are likely to address their target groups aggressively and proactively after the reopening, which we expect to have a positive effect on the revenues of both particular radio stations and the industry as a whole.”**

**Zsuzsanna Kiss, the Media Sales Director of Cinema City/New Age Advertising explained: “The media market share achieved by the cinema in 2020 can be regarded as a good result in view of the pandemic. The number of domestic film premieres and box office revenues were cut by half, since most movie theatres were closed for almost half-a-year. While 91 new films premiered last year, the same figure was 210 in 2019. It is estimated that because of the restrictive measures, the utilization of theatres was as low as 65 to 70%. The fact that blockbuster premieres have been postponed suggests to advertisers that they can expect strong movies that bring in the crowds for the second half of 2021 and 2022. Industry research predicts that cinema advertising has a huge potential after the reopening, and reopened theatres will be sold out. In countries where cinemas have already been reopened, the movie “Godzilla vs. Kong” has performed incredibly well at the box office, in spite of the restrictions. At the opening weekend, the movie became the top-grossing movie of the pandemic in North-American theatres, which is a very important piece of information for brand owners, as well as our advertisers.”**

**The size of the 2020 MRSZ Total Communications Spending<sup>6</sup> is HUF 401.9 billion. This is a 15.8 percent drop from the total communications spending of 2019.**

**Each segment of the total communications spending report suffered losses – and if we take a closer look at the sectors included only in the communications spending report, the downturn amounts to nearly 30 percent!**

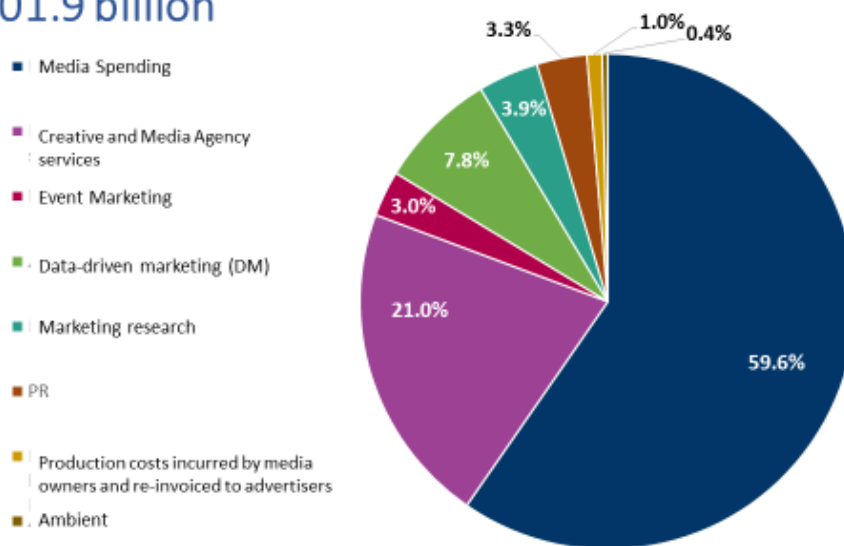
**As MRSZ President János Gulyás commented: “It is important to be aware that *the entire communications profession is on the verge of using up its reserves. The almost 16% reduction pointed out by the MRSZ Total Communications Spending Report illustrates well that the advertising industry – using its reserves and taking all the opportunities – reacted very well and in an exemplary manner, to the ‘brutal’ downhill trend in 2020 provoked by the Covid-crisis, which was in striking contrast to previous years’ dynamic growth. However, these efforts can only be kept up temporarily in all of the fields of the industry, since they are all hanging by a thread, and certain fields are already on the verge of collapse, in particular, the event, cinema and ambient etc. sectors. If we only consider the ‘additional’ areas of the total communications spending report, other than those present in the media spending, then the decrease is 29.7% in comparison with 2019, which means that the fields of communications outside of media segments, fell almost 30%.”***

**In the events market, lost sales returns amounted to over 80 percent for 2020. The ambient sector dropped by 47.9 percent in 2020. The primary cause is the cancelation of functions, cultural events and concerts. The size of the marketing research market in 2020 was HUF 15.9 billion. This is a significant, 19% decrease from 2019. The data-driven marketing (direct marketing) sector in 2020 was hit by a decrease of 18.3 percent, compared to the preceding year. The PR segment in 2020 decreased by 9 percent in comparison with 2019. Advertisers’ spending on creative and media agency services dropped by 2.9 percent on the whole last year, but even in the case of this less pronounced decrease, it can again be said that without the inclusion of the companies working primarily under government contracts, the decrease would be double-digit in the agency slice, as well.**

---

<sup>6</sup>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 re-invoiced to advertisers.

## TOTAL COMMUNICATION SPENDING 2020: HUF 401.9 billion



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

**MAKSZ (Association of Hungarian Communication Agencies) President Nikolett Blaskó** emphasized: *“Advertisers spent HUF 84.7 billion in 2020 on **creative and media agency services**, which is a **3% fall from the preceding year**. Although the **overall picture is less gloomy** than professional surveys and expectations suggested in the course of last year, **2020 in fact turned out the way it did because of the increasing amount of the advertising spends of public players**. In case of agencies working for non-governmental actors the decrease was double-digit for the creative side, and market-market players were also worse off on the media agency side than the overall figures suggest.”*

*“Year 2020 was spent, beyond doubt, in thrall of the Covid pandemic also for the **data-driven sector**. The well-scalable resources enabled rapid adaptation, which was much-needed, as the most badly affected industries (e.g. tourism, automotive) are also intensive users of the solutions of the data-driven sector. According to our survey, less badly affected or completely unaffected industries were hardly or not at all able to counterbalance their impact, so **we measured an 18 percent drop in spends, on the whole**. A similar development can be observed in the performance of channels. The over 20% decrease of the **digital and unaddressed mailing fields may be ascribed to the industries concerned, while in the case of addressed mail, the balancing effect of the spends related to government communications** was perceptible, resulting in the latter field experiencing only minimal drop compared to last year. As for our expectations, we basically hope for positive changes depending on the success of the pandemic management. In the post-Covid period, the current cost-optimized operation will be able to be re-scaled quickly and flexibly, so **we’ll hopefully see the first signs of the ‘rebound’ already in 2021**”, György Huszics, Vice-President of Data & Marketing Association (DIMSZ) said about the data-driven marketing (direct marketing) segment.*

*“The size of the **marketing research market** in 2020 dropped significantly, **by 19 percent**, compared to 2019. To a minor extent, some changes in the estimation methodology also effected a modification of the data, but **the main causes can predominantly be attributed to the pandemic: The difficult economic situation forced certain clients to cut back on or put off their spending**. In case of one group of clients, **researches connected to the stopping work (e.g. customer surveys) became devoid of purpose, or were prepared in a much lower amount**. In addition, the number of **researches carried out using certain methods (test purchases, personal interviews) was cut down because of the impossibility of personal contacts**. In 2021, the restrictive measures of the first quarter continue to make it difficult to apply certain methods, and the harsher financial situation of certain groups*

of clients continues to call for more frugal spending. At the same time, the inevitable research of changed consumer behaviours may turn out to be an important research topic this year. All in all, the size of the market in 2021 is likely to be somewhere between the 2019 and the 2020 value.”, industry expert János Bacher pointed out.

According to **András Sztaniszláv, President of the Hungarian Public Relations Association (MPRSZ)**: *“In crisis communication, public relations specialists have a prominent role in ensuring seamless dialogue with employees, preserving public trust in corporations, as well as in ‘purpose-based’ branding. **The membership of MPRSZ, turning 30 this year, has grown significantly last and this year, and encouraged by our presence in last year’s the total communications spending report, numerous agencies sent us their precise data. We had to modify the size of the PR market, accordingly. Based on the figures, we estimate the value of the PR slice of the MRSZ Total Communications Spending at HUF 14.5 billion for 2019. As a result of the pandemic, the market shrank 9 percent according to our calculations, so we count on HUF 13.195 billion for 2020. The shrinkage being lower than 10 percent is definitely a positive trend (agency heads estimated it between 20 and 40 percent a year ago), which indicates that the role PR specialists play in building trust and amidst crises is gaining importance. Multiple processes will be at play in determining the size of the market this year: in the wake of the pandemic, we expect growth in the fields of brand building and value-based content production; with the general elections approaching, however, clients will also be inclined to wait things out in the case of a number of projects. Nevertheless, agency managers are hopeful, and almost all of the agency heads interviewed are expecting to expand their businesses this year, to a greater or lesser extent.”***

**Gábor Rókusfalvy, the vice-president of the Association of Hungarian Event Planners and Service Providers (MaReSz)**, highlighted: *“According to MaReSz’s event market survey, the number of events in 2020 dropped by 80 percent from the preceding year, and this trend will continue in 2021. Organisers were able to hold less than 20 percent of all canceled events online, and online events drive much lower profits than live events. **Lost sales returns came to over 80 percent for 2020. Companies either shrank or remained operational in a stand-by mode, while others were forced to shut up shop temporarily. Layoffs are common, mostly in businesses with small staffs. Because of the uncertainty experienced in the sector, qualified employees’ leaving the sector is also widespread. Due to the precarious situation, the majority of companies feel their futures are in jeopardy. Their reserves will not see them through the end of 2021, or they are already on the verge of insolvency. Adapting to the crisis, several companies opened new lines of services, in addition to taking cost-cutting measures. Not every company could take advantage of the social security contribution relief or the wage subsidisation programme, because of not having the right scope of activity or other eligibility problems.”***

**Károly Baráth, the president of the Ambient Association** added: *“Last year, spends in the ambient marketing market also fell significantly. In the ambient sector, the role of advertisements related to events, cultural events and concerts is very significant. Due to the cancelation of these events, the segment in 2020 decreased by HUF 1.3 billion (-47.9%), to HUF 1.5 billion. It is difficult to forecast how long the current critical situation will last, and when the recovery of the market can take place. **According to projections, the ambient market will also grow in 2021 (compared to 2020). If restaurants and nightclubs open during the summer, and events can be held again, reaching (or even exceeding) the spending levels of 2019 may be achievable.***

**Accessibility of the co-associations participating in creating the spending reports and the details of the segments:**

**Details of the 2020 figures for the digital market (IAB Hungary):**

<https://blog.iab.hu/2021/04/13/ismet-iab-cafe-a-reklamkoltesekrol/>

**Details of the 2020 figures for the television market (MEME):**

<https://www.memeinfo.hu/reklamtorta/2020-evi-reklamtorta>

**Details of the 2020 figures for the press market (MEME):**

<http://mle.org.hu/mediatorta-2020/>

**More information on 2020 outdoor and ambient figures (MRSZ OOH and Ambient Association):**

[https://mrsz.hu/cmsfiles/db/7d/Reklamtorta\\_OOH\\_Ambiente\\_2020.pdf](https://mrsz.hu/cmsfiles/db/7d/Reklamtorta_OOH_Ambiente_2020.pdf)



**Details of the 2020 figures for the radio market (RAME / HEROE):**

[https://mrsz.hu/cmsfiles/f7/7f/Radios\\_piac\\_bevetel\\_2020\\_vegleges.pdf](https://mrsz.hu/cmsfiles/f7/7f/Radios_piac_bevetel_2020_vegleges.pdf)

**Details of the data-driven marketing (direct marketing) figures (DIMSZ):**

[https://dimsz.hu/wp-content/uploads/2021/04/202103-DIMSZ-DM\\_Szenzor\\_2020-2.pdf](https://dimsz.hu/wp-content/uploads/2021/04/202103-DIMSZ-DM_Szenzor_2020-2.pdf)

**Cinema 2020 summary and forecast for 2021:**

[https://mrsz.hu/cmsfiles/73/6c/Mozipiac\\_2020.pdf](https://mrsz.hu/cmsfiles/73/6c/Mozipiac_2020.pdf)

**Additional Information:**

*Hungarian Advertising Association, MRSZ OOH Association, marketing research, Ambient Association*

- Szilvia Fülöp, Secretary-General of MRSZ (+36 70-333-2555 / [fulop.szilvia@mrsz.hu](mailto:fulop.szilvia@mrsz.hu))

*IAB Hungary*

- Adrien Kenessey ([adrien.kenessey@iab.hu](mailto:adrien.kenessey@iab.hu))

*Association of Hungarian Television Broadcasters (MEME)*

- Natália Mihalik, Secretary (+36 30-2544-988 / [titkar@memeinfo.hu](mailto:titkar@memeinfo.hu) )

*Hungarian Publishers' Association (MLE)*

- Katalin Havas, Secretary-General (+36 30-474-9273 / [fotitkar@mle.org.hu](mailto:fotitkar@mle.org.hu) )

*Association of Radio Media Providers (RAME)*

- Árpád Turi, President([rame@rame.hu](mailto:rame@rame.hu) )

*Cinema City/New Age Advertising*

- Zsuzsanna Kiss ([zsuzsanna.kiss@newageadvertising.hu](mailto:zsuzsanna.kiss@newageadvertising.hu) )

*Association of Hungarian Event Planners and Service Providers*

- Eszter Zsigmond, Secretary General (+36 30-485-2778 / [titkarsag@maresz.hu](mailto:titkarsag@maresz.hu))

*Data & Marketing Association (DIMSZ)*

- Endre Somogyi, Secretary-General (+36 30-588-1344 / [somogyi.endre@dimsz.hu](mailto:somogyi.endre@dimsz.hu) )

*Hungarian Public Relations Association*

- Veronika Földes, Secretary (+36 30-397-4176)

*MAKSZ - Association of Hungarian Communication Agencies*

- Borbála Bende ([bori@maksz.com](mailto:bori@maksz.com))

## ANNEX Adjusted 2016-2019 figures

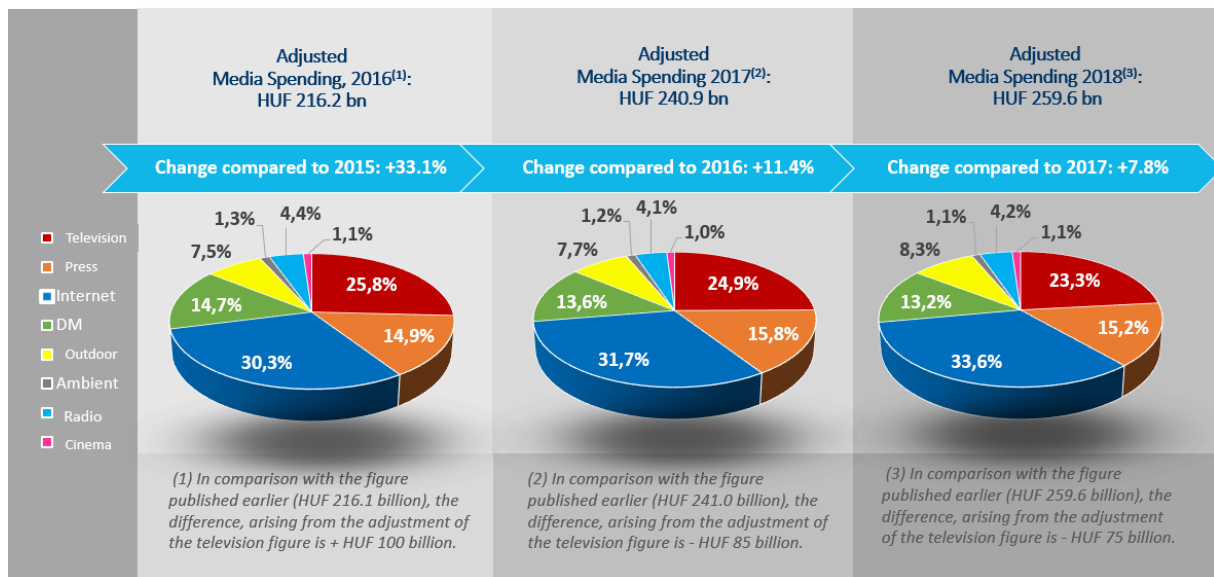
### Adjusted MRSZ Advertising Spending Report's 2016-2018 figures:

**MEME** (Association of Hungarian Television Broadcasters), in the spirit of transparency, and for data cleansing purposes, backed by the consensus of the television industry, decided to include in the data used for preparing the media and communications spending reports also the advertising revenues reported in relation to the government's community facility advertising, and correct the figures of the television segment retrospectively, back to 2016, accordingly.

In this way, the MRSZ Advertising Spending data published in 2016, 2017 and 2018, as well as the TV figures in the 2019 MRSZ Media Spending report have changed, modifying at once the total spending published earlier:

The data of further segments in 2016-2018 (with respect to the earlier advertising spending report) have remained the same as published earlier, and the "rankings" of individual media types in the advertising spending report has not changed either after the adjustments. Nevertheless – due to the adjustment of the TV data – the percentages of the media slices in the spending charts have changed in the 2016, 2017 and 2018 advertising spending reports, as well.

## Adjusted Advertising Spending, 2016-2018

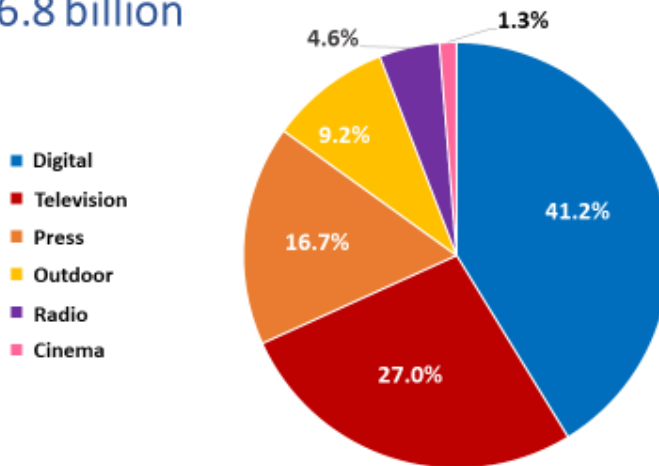


### Adjustment in the MRSZ Media Spending Report of 2019 - The amount of the corrected 2019 media spending

**HUF 246.8 billion:**

**MEME's methodological modification** has also affected the 2019 media spending report, in addition to the fact that **IAB Hungary** has also adjusted its digital figure for 2019. Their correction concerned the listings within the **real estate sub-segment**. These two corrections have resulted in a change of + HUF 1.7 billion in the media spending of 2019. Nevertheless, the order of the segments present in the media spending chart of 2019 has not changed.

## Adjusted Media Spending 2019: HUF 246.8 billion



\* In comparison with the figure published earlier (HUF 245.08 billion), the difference, arising from the adjustment of the Television and Digital figures is + HUF 1.729 billion.

### Adjustment of the 2019 MRSZTotal Communications Spending Report

- The amount of the 2019 total communications spending: HUF 477.2 billion

One of the causes of the change is the modification of the media spending figure of 2019, as a result of the TV and digital data adjustments. The other factor is that MPRSZ adjusted the methodology for compiling the figures for 2020: The figure published for the PR market is in large part based on expert estimates, as last year was the first time the segment had provided aggregated annual data. For this reason, there occurred another change in the PR figure for 2019 in the compilation of 2020 data: from the published PR figure (HUF 7 billion) the Public Relations figure for 2019 has been changed to HUF 14.5 billion. **These two corrections have resulted in a change of + HUF 9.2 billion in the total communications spending figures of 2019.**

## Adjusted Total Communication Spending 2019 : HUF 477.2 billion

