László Vértesy

Exploring the Media Industry

a Comprehensive Overview on Europe and Hungary

Gazdaságelemző Intézet
Institute of Economic Analysis
Budapest, 2020

László Vértesy

Exploring the Media Industry
a Comprehensive Overview on Europe and Hungary

DOI: 10.5281/zenodo.10465494

GEI

Gazdaságelemző Intézet
Institute of Economic Analysis

Printed in Hungary, Budapest

Table of contents

Exploring the Media Industry
a Comprehensive Overview on Europe and Hungary

In the ever-evolving tapestry of human communication, the role of media stands as a linchpin, weaving together narratives, disseminating information, and shaping the collective consciousness of societies. Our journey into the intricate world of media begins with a nuanced exploration encompassing its historical trajectory, the defining characteristics of "traditional" and "new" media, and a deep dive into the multifaceted landscape of the good press. This examination extends to the diverse array of stakeholders, participants, and actors contributing to information dissemination's intricate dance.

Venturing into the heart of media, we scrutinise the nexus of power and business that underpins this dynamic realm. As we traverse this terrain, we unravel the intricate web of influences, economic forces, and ethical considerations that shape the media industry. The symbiotic relationship between media and business becomes a focal point, elucidating the various dimensions that govern the industry's trajectory.

Shifting our lens towards the expansive terrain of the European Union, we draw upon the insights provided by the Eurobarometer 2017, Council Conclusions, and the Action Plan, crafting a snapshot of the media sector within this diverse political and cultural amalgamation. Our exploration navigates through the corridors of newspapers, radio, television, and the internet, delving into the transformative impact of digital platforms on the traditional media market. Within this panorama, the giants of media influence, Germany and the United Kingdom, emerge as key players shaping the narrative and consumption patterns.

We are further investigating Hungary, a country with a rich historical tapestry and a unique media evolution. A concise historical summary sets the stage for an in-depth analysis of media companies and the intricate distribution of the Hungarian media pie. Examining various media sectors, such as printed media, radio consumption, and television ratings, we unveil the intricacies of Hungary's media industry. The interplay between state and commercial media adds layers of complexity, contributing to the distinctive character of Hungary's media environment.

As we traverse the landscape of Hungarian media, a culmination of facts emerges, revealing the pulse and dynamics of this unique communication ecosystem. The summary will distil these insights, providing a comprehensive understanding of the media sector in Hungary. Join us as we navigate the twists and turns of media, unravelling its threads to comprehend the profound impact it wields at both the European and Hungarian levels.

I. Media, in general

The expansive realm of media serves as a dynamic force shaping societies, influencing perceptions, and driving the exchange of information in our interconnected world. As we embark on an exploration of Media in general, this comprehensive journey encompasses a nuanced understanding of its historical evolution, the distinctive traits characterizing "traditional" and "new" media, and a closer look at the concept of the "good press." Beyond mere conduits of information, media is a complex ecosystem with diverse stakeholders, participants, and actors, each playing a unique role in shaping the narrative of our collective experience.

To comprehend the intricate dynamics of media, we delve into a brief historical summary, tracing the roots of evolved communication tools. This retrospective lens illuminates the origins and lays the foundation for exploring the transformative forces that have propelled media into its contemporary state.

Distinguishing between "traditional" and "new" media becomes paramount in our quest for understanding. The study scrutinizes the defining characteristics, unravelling how technology, audience engagement, and content dissemination have evolved. This comparative analysis sets the stage for grasping the complexities of media's multifaceted landscape. Amidst the plethora of media outlets, the "good press" concept emerges as a focal point, shedding light on journalistic integrity, ethical practices, and the dissemination of credible information. This exploration delves into the media's responsibilities in shaping public opinion and fostering an informed citizenry.

Media wields considerable power beyond the content it delivers and operates as a business entity. The interplay between media, power, and business forms a crucial nexus, influencing the narratives presented and the economic forces underpinning the industry. Our investigation extends to examining key players, their roles, and the intricate relationships that define the power dynamics.

In unravelling the layers of Media in general, this exploration aims to provide a holistic perspective, offering a nuanced understanding of its historical, technological, and socio-economic dimensions.

1. Media

We use the concept of media narrowly. In most applications, *media* is used as a plural of *medium*. The word's popularity in references to the agencies of mass communication leads to the forming a mass noun, construed as a singular. Media, as the plural of "medium", refers to means or tools. Another meaning for media (plural mediae) also comes from Latin, from the voiced stops being regarded as intermediate between the tenues and the aspirates: a voiced.[1]

The medium, nowadays, often means "mediator", which is also confirmed by the designation "media" used in mass communication. Originally derived from the Greek μέσος (mésos) via the Latin "medius", and based on the first meanings in the dictionary, it denotes an entity that is in the middle or between other things, thus an intermediate body or quantity. Medium: something in a middle position; a middle condition or degree**:** mean. So medium can refer to a means of effecting or conveying something, such as a channel or system of communication, information, or entertainment; a publication or broadcast that carries advertising; a mode of artistic expression or communication; something (such as a magnetic disk) on which information may be stored; digital audio or video files available for playback or streaming; material or technical means of artistic expression (such as paint and canvas, sculptural stone, or literary or musical form).

In today's language, it often means "mediator", which is confirmed by the designation "media" used in mass communication, and nowadays, it even means an independent occupation: mediator, mediata (intermediary, advocate, mediator). In communication, media or medium refers to the tools and methods used to record and transmit information. The word media is often used as a synonym for various mass media (newspaper, television, radio, etc.), including in this study.

[1] "Media." *Merriam-Webster.com Dictionary*, Merriam-Webster, https://www.merriam-webster.com/dictionary/media.
"Medium." *Merriam-Webster.com Dictionary*, Merriam-Webster, https://www.merriam-webster.com/dictionary/medium. Accessed 4 Jan. 2024.

1.1. Brief historical summary

The evolution of the media industry throughout the 19th century can be categorised into three distinct phases:

The evolution of the media industry

Stage		Key factors
The Rise of Newspapers	1800-1880	Literacy Growth Technological Progress Sociopolitical Transformations
The Emergence of Mass Media	1880-1945	Photography Telegraphy and Telephone Cinema Radio
The Digital Revolution	1945-present	Television Satellite and Cable Television Computers and the Internet On-demand and Platform services

Source: own compilation

The Rise of Newspapers (1800-1880)

Johannes Gutenberg's invention of the printing press in the 15th century revolutionised the media industry, facilitating more efficient and cost-effective production of books and newspapers. However, it was not until the 19th century that newspapers truly transitioned into mass media, reaching a broad audience across Europe. The expansion of education and the emergence of a more affluent middle class led to increased literacy rates, fostering a heightened demand for reading materials, particularly newspapers. Advances in printing technology, affordable newsprint, and improved distribution networks enabled the large-scale production and dissemination of newspapers. Periods of political and social upheaval, such as the French Revolution, the Industrial Revolution, and the rise of nationalist movements, created a demand for information and debate—needs that newspapers adeptly fulfilled.[2]

By the mid-19th century, newspapers had become commonplace in European cities, catering to diverse political, social, and cultural interests. Newspapers became a powerful tool for political and social movements, contributing to shaping public opinion. The advent of telegraphy in the 1840s

[2] Chapman, J. (2005). *Comparative media history: An introduction: 1789 to the present*. Polity.

accelerated news dissemination, enabling near-real-time reporting. The 19th century witnessed the establishment of press agencies, such as Reuters (1851) and Agence France-Presse (1835).[3] These agencies played a crucial role in the dissemination of news on a global scale, creating a network for sharing information.

The Emergence of Mass Media (1880-1945)

The late 19th and early 20th centuries witnessed the rise of innovative media technologies that revolutionised information dissemination and consumption. Newspapers evolved into mass circulation publications, reaching a broader audience due to lower printing costs and improved distribution networks. The rise of sensational journalism and the use of illustrations helped attract a larger readership.[4]

The development of photographic technology in the 1830s enhanced newspapers by incorporating visual elements, making them more visually appealing and engaging. Expanding telegraph and telephone networks facilitated faster transmission of news, breaking down geographical barriers and connecting people across vast distances. The late 19th-century invention of cinema introduced a captivating form of visual storytelling, influencing global audiences through entertainment, education, and news. Early 20th-century developments in radio further transformed the media market, providing a direct and immediate form of communication to a broad audience.[5]

The growth of the media industry extended beyond news to include entertainment and cultural content. The popularity of serialised novels, theatre, and illustrated periodicals contributed to the development of mass culture. Magazines became a prominent medium for disseminating literature, fashion, and cultural trends. Specialised periodicals catering to various interests and demographics emerged, reflecting the diversity of readership.

Many European countries faced challenges related to censorship and control over media content, particularly during political unrest. Governments sought to regulate and control information flow through various means.

---

[3] Palmer, M., & Nicey, J. (2012). Social Media and the Freedom of the Press: a long-term Perspective from within International News Agencies (AFP, Reuters). *ESSACHESS Journal for Communication Studies*, *5*(1).
[4] Fourie, P. J. (2010). *Media studies: Media history, media and society* (Vol. 2). Juta and Company Ltd.
[5] Stöber, R. (2004). What media evolution is: A theoretical approach to the history of new media. *European journal of communication*, *19*(4), 483-505.

The Digital Revolution (1945-present)

In the latter half of the 20th century, we witnessed the rise of digital technologies that fundamentally reshaped the European media industry. The 1950s and 1960s saw the advent of television, bringing moving images and sound into European homes and offering a new source of entertainment, information, and social connection. Developments in satellite and cable television during the 1970s and 1980s expanded television's reach, offering more channels, diverse programming choices, and international content.[6] The 1990s ushered in the digital age with the rise of computers and the internet, giving rise to online newspapers, websites, social media platforms, and streaming services.[7]

Today, the media industry is characterised by the convergence of traditional and digital media. Newspapers, television, radio, and social media all play significant roles in informing and entertaining audiences. The industry grapples with challenges such as fake news, misinformation, and the impact of technology on privacy and data protection.[8] As the media market evolves, the European media industry adapts to new technologies and consumer habits, ensuring its continued significance as a vital source of information and entertainment for audiences across the continent.

[6] Küng, L., Kröll, A. M., Ripken, B., & Walker, M. (1999). Impact of the digital revolution on the media and communications industries. *Javnost-the Public*, *6*(3), 29-47.
[7] Sajithra, K., & Patil, R. (2013). Social media–history and components. *Journal of Business and Management*, *7*(1), 69-74.
[8] Striano, F. (2019). Towards “post-digital”. A media theory to Re-think the digital revolution. *Ethics in Progress*, *10*(1), 83-93.

Traditional vs. New Media

Aspect	Traditional Media	New Media
Nature of Content	Primarily analogue content, such as newspapers, magazines, TV, radio	Predominantly digital content, including online articles, blogs, podcasts, videos, and social media posts
Delivery Platforms	Print (newspapers, magazines), Broadcast (TV, radio), Outdoor (billboards), Direct mail	Online platforms (websites, social media, blogs, podcasts, streaming services)
Interactivity	Limited interactivity, typically one-way communication	High interactivity, encourages user participation and two-way communication
User Participation	Passive consumption of content	Active involvement in content creation, sharing, and discussions
Communication Model	Hierarchical, top-down communication model	Networked communication model, allowing for both top-down and bottom-up interactions
Accessibility	Physical distribution, regional or local focus	Immediate digital access, potential for global reach
Feedback Mechanism	Limited and delayed feedback	Immediate and direct feedback through comments, likes, shares
Production Time	Longer production timelines, especially for print and broadcast	Faster production cycles, real-time content creation and distribution
Format	Analogue formats like print, radio waves, and television signals	Digital formats, including text, images, audio, and video
Cost of Production	Often involves higher production and distribution costs	Varied cost structures with lower entry barriers for content creation on digital platforms
Monetisation Models	Traditional advertising, subscriptions, and sales	Diverse revenue streams, including ads, sponsorships, subscriptions, crowdfunding, and e-commerce
Content Longevity	Limited shelf life for print media, ephemeral nature of broadcasts	Indefinite digital lifespan, potential for content to remain accessible over time
Privacy and Control	Less control over individual content consumption and less emphasis on user privacy	Users have more control over content consumption, but concerns exist about privacy and data security
Examples	Newspapers, magazines, radio, TV	Social media platforms (Facebook, Twitter), online news websites, blogs, podcasts, streaming services

Source: own compilation

1.2. Characteristics of "traditional" media:

Traditional media, also known as "legacy media" or "old media," refers to the forms of mass communication that existed before the rise of the internet and digital technologies. Nowadays, the following mediums are labelled "traditional": "print" media and "broadcast" media, i.e. radio and TV broadcasts.

All delivered content to users in a linear story structure, i.e. they start telling and narrating a story from the beginning and stop at the end - and we read/watch/listen. Traditional media typically involves one-way communication, where information is disseminated from the media outlets to the audience. Through them, only a narrow circle of those called to do so (journalists, program editors) convey information to the public in this one-way process. It generally offers limited interactivity, as the audience often has little opportunity to directly engage with the content or provide feedback to the creators. It often relies on physical formats, such as printed newspapers and magazines, radio waves, or television signals. The traditional media follows a scheduled distribution pattern, with newspapers published at specific times, radio and television broadcasts airing at scheduled hours, and billboards featuring advertisements for limited periods.

Printed publications have been a staple of traditional media for centuries, providing in-depth coverage of news, features, and various topics. Sending printed materials directly to individuals or households via postal services has been a common method for advertising and communication. Printing newspapers, producing TV shows, or creating radio content involves elaborate production processes.

Many traditional media outlets operate on a scheduled release model. Newspapers have daily or weekly editions, TV programs follow a broadcasting schedule, and magazines often have regular publication cycles. The production process can be time-consuming. They include live events where information is conveyed through direct interaction, such as conferences, seminars, and public lectures. The outlets often have a local or national focus, serving specific geographic regions or entire countries.[9]

Traditional forms of **mass media**, such as print, broadcast, and outdoor advertising, have been around for centuries.[10] It is a primary source of infor-

[9] Rajendran, L., & Thesinghraja, P. (2014). The impact of new media on traditional media. *Middle-East Journal of Scientific Research*, *22*(4), 609-616.
[10] Sorlin, P. (2013). *Mass-media*. Routledge.

mation for people about current events, politics, entertainment, and other topics. It provides people with entertainment, such as movies, television shows, music, and video games. It is often used to persuade people to buy products,[11] support specific causes, or vote for particular candidates, and it can help to socialize people by providing them with information about different cultures and ways of life. The mass media has a significant impact on society, and it can shape public opinion,[12] set social norms and promote social change or even sexuality.[13] Nowadays, the blurring of the lines between traditional and digital media can be observed; traditional media outlets increasingly rely on digital platforms to reach their audiences.

1.3. Characteristics of "new" media:

All media were once "new media".[14] Nowadays, the term generally includes the following: social internet media, applications for mobile devices, smartphones, tablets, interactive television, and video-sharing channels.

The advent of new media has revolutionised how information is disseminated and consumed in contemporary society. As prominent examples, social media platforms have become powerful tools for communication, connecting people across the globe in real-time.[15] The digital nature of new media allows for a seamless and dynamic exchange of ideas, opinions, and creative expressions.

Moreover, the interactive nature of new media has shifted the traditional one-way communication model. Users are not merely passive consumers; they actively contribute to the content creation process, shaping narratives and influencing trends. This participatory aspect has given rise to diverse online communities with unique identities and discussions.

The digital format of new media also enables content to transcend geographical boundaries. Information can be accessed and shared instantaneously, breaking down barriers and potentially reaching audiences globally.

---

[11] Guo, F., Ye, G., Hudders, L., Lv, W., Li, M., & Duffy, V. G. (2019). Product placement in mass media: a review and bibliometric analysis. *Journal of Advertising*, *48*(2), 215-231.

[12] McCombs, M., & Valenzuela, S. (2020). *Setting the agenda: Mass media and public opinion*. John Wiley & Sons.

[13] Brown, J. D. (2002). Mass media influences on sexuality. *Journal of sex research*, *39*(1), 42-45.

[14] Gitelman, L., & Pingree, G. B. (Eds.). (2003). *New Media, 1740-1915*. Mit Press.

[15] Gitelman, L. (2008). *Always already new: Media, history, and the data of culture*. MIT press.

This global reach has profound implications for how news is disseminated, how cultures are shared, and how individuals connect in the modern era.

In essence, new media has ushered in an era of unprecedented connectivity, interactivity, and accessibility. It has transformed the traditional media industry, providing individuals with the tools to share their voices, connect with others, and participate actively in creating and disseminating content on a global scale.

They work like a database; the content editing is not linear, we can connect on and off at different points. They are characterised by interactivity. The flow of information is not one-way but mutual. Professionals can broadcast content to the masses, and practically anyone can publish anything. A characteristic of new media is that it spreads quickly. It is a young sector; it appeared in Hungary in the nineties, and today, there are more mobile phones than the number of inhabitants in Hungary. Internet access is also growing nicely: by 2019, it was already available in 83% of households. The rate of routine users is 76%, the seventh position at the EU level. (Over 90% in the Scandinavian countries, the Netherlands, and Germany.)

Fake news is also part of the new media. They are all made more often, and the target audience can hardly distinguish them from the original.[16] The "gateway drug" of fake news is anti-science.[17] Fake news is intentionally published scams, the purpose of which is to spread propaganda and mislead (disinformation).[18] The purpose of such articles is not to entertain but to gain political influence. This fake news can refer to deception, purchasing goods, or politics. Nevertheless, we come across crappy products that work wonders and even non-existent companies in some cases - the range is wide.

Fake news can take various forms, and it is crucial to recognize the different categories to understand better the challenges associated with misinformation. Here are several categories of fake news:

[16] Gelfert, A. (2018). Fake news: A definition. *Informal logic*, *38*(1), 84-117.
[17] Lazer, D. M., Baum, M. A., Benkler, Y., Berinsky, A. J., Greenhill, K. M., Menczer, F., ... & Zittrain, J. L. (2018). The science of fake news. *Science*, *359*(6380), 1094-1096.
[18] Tandoc Jr, E. C. (2019). The facts of fake news: A research review. *Sociology Compass*, *13*(9), e12724.

Categories of fake news

Misinformation	**False Information:** News that contains inaccuracies, misleading statements, or fabricated details. **Satire or Parody:** Content created for humour or entertainment but not always clearly labelled as such, leading to confusion.
Disinformation	**Deliberate Deception:** Intentional spread of false information with the aim of misleading the public. **Propaganda:** Systematic dissemination of information, often biased or misleading, to promote a particular political agenda or ideology.
Manipulated Content	**Photoshopped Images and Videos:** Altered visual content to convey a false narrative or misrepresent events. **Out-of-Context Information:** Presenting information without the necessary context leads to a distorted interpretation.
Clickbait	**Sensationalised Headlines:** Attractive or provocative headlines designed to grab attention but may not accurately represent the content.
Fabricated Sources	**Fake Experts or Witnesses:** Inventing authorities or individuals to support a false narrative. **Phoney News Outlets:** Creating fake news websites or social media accounts to mimic legitimate sources.
Biased Reporting	**Selective Reporting:** Choosing specific facts or events to create a biased narrative. **Spinning:** Presenting information in a way that favours a particular perspective.
Rumours and Hoaxes	**Chain Messages and Hoaxes:** Spreading false information through email, messaging apps, or social media, often in the form of chain messages.
Deepfakes	**Manipulated Audio and Video:** Using advanced technology to create realistic but entirely fictional audio or video content.

Source: own compilation

1.4. The good press

The characteristics of a good press are up-to-dateness, credibility, and publicity. It already existed in ancient times, almost as old as the invention of writing. The first written information, which explained the decisions and decrees of the Senate and the High Priest, was published irregularly in Rome as a bulletin. In the city forums (urbs, Rome) and provincial seats, the hand-duplicated sheet, the Acta Diurn a Urbis (Daily news of the city). From the historiography of that time, it is also worth highlighting the well-known expression *sine ira et studio,* which means "without anger and partiality/bias". It was formulated by the Roman historian **Tacitus** in Annales 1.1.

Sed veteris populi Romani prospera vel adversa claris scriptoribus memorata sunt; temporibusque Augusti dicendis non defuere decora ingenia, donec gliscente adulatione deterrerentur. Tiberii Gaique et Claudii ac Neronis res florentibus ipsis ob metum falsae, postquam occiderant recentibus odiis compositae sunt. Inde consilium mihi pauca de Augusto et extrema tradere, mox Tiberii principatum et cetera, ***sine ira et studio****, quorum causas procul habeo.*

Source: https://www.perseus.tufts.edu/hopper/text?doc=Perseus%3Atext%3A1999.02.0077

This introduction can be translated as follows:

But, while the glories and disasters of the old Roman commonwealth have been chronicled by famous pens, and intellects of distinction were not lacking to tell the tale of the Augustan age, until the rising tide of sycophancy deterred them, the histories of Tiberius and Caligula, of Claudius and Nero, were falsified through cowardice while they flourished, and composed, when they fell, under the influence of still rankling hatreds. Hence my design, to treat a small part (the concluding one) of Augustus' reign, then the principate of Tiberius and its sequel, ***without anger and without partiality****, from the motives of which I stand sufficiently removed.*

Source: https://penelope.uchicago.edu/Thayer/E/Roman/Texts/Tacitus/Annals/1A*.html

The quote is often used to remind historians, journalists, editors, etc. not to get carried away by emotion when writing about war or crime.[19] It is also the motto of the Czech Foreign Relations and Information Office and

[19] Deuze, M., & Witschge, T. (2020). *Beyond journalism*. John Wiley & Sons.

the Military Police of the Danish Army.[20] Its modern version is ***without fear or favour***.

Even before Gutenberg, there was a particular way of transmitting news information, the medieval newspaper, which was written by hand for the subscribers of the time, the wealthy citizens and aristocrats. The first European newspaper was published in Venice in 1566 under the name Notizie scritte (Written Notes). Of course, information costs money; the public reading of newspaper letters was an independent business activity. The town crier could be heard by paying for a gazetta.[21] The reader was respected since the majority could not read at that time.

Modern journalism appeared in the 19th century. The real breakthrough came with the appearance of large-circulation American newspapers at the turn of the century. One of the most successful writers of the time, the Hungarian-born American newspaper proprietor and editor Joseph Pulitzer (1847-1911), puts it this way:

*"**Our Republic and its press will rise or fall together**. An able, disinterested, public-spirited press, with trained intelligence to know the right and courage to do it, can preserve that public virtue without which popular government is a sham and a mockery.*

Source: The North American Review, May 1904

A cynical, mercenary, demagogic press will produce in time a people as base as itself. The power to mould the future of the Republic will be in the hands of the journalists of future generations."

Source: W. J. Granberg *The World of Joseph Pulitzer* (1965)

A newspaper should have no friends.

Source: Don C. Seitz Joseph Pulitzer: his life and letters (1926) Ch. 1

The next step is the formation of the journalist's job. There is no good press without good journalists; this is fundamental. Such offices were first known in Germany when enough demand for regular news management had already accumulated. The professional journalist pursues his/her activities for a salary by acquiring and recording data and information. Its tasks are,

[20] " Introduction stránka - Úřád pro zahradní styky a informace ". www.uzsi.cz.
" Militærpolitiforeningen i Danmark. Society of Military Police in DK". www.militarypolice.dk.

[21] Florentine coinage, gazeta according to some spellings, and hence the name of many newspapers

therefore, informative and publicistic in nature. The basis of information is news, while journalism is material belonging to freer opinion genres. The two often go together. A true journalist is distinguished from a scribbler and penman for hire by high-quality writing and adherence to ethics. The National Association of Hungarian Journalists (MÚOSZ), the Association of Hungarian Journalists, the Association of Hungarian Catholic Journalists and the Press Union have developed common ethical principles to maintain the morality of Hungarian journalism, which correspond to

- 1003/1993 on journalistic ethics at the 44th regular session of the Parliamentary Assembly of the Council of Europe. of its decision no. and
- the declaration of principle on journalistic behaviour adopted at the 1986 World Congress of the International Association of Journalists.

Journalistic ethics are based on the freedom of the press.[22] The obligation to inform the right to information is a fundamental right of citizens guaranteed by the constitution. The journalist has an ethical duty to protect and enforce the freedom of the press and the public in his daily work to fulfil professional tasks related to the flow of information; this is an internationally accepted standard.[23]

The **BBC** created the model of objective journalism and set an example for generations of journalists.[24] Working for the BBC was the glory itself; it was not difficult to identify with the organisation's ethos. Just as Great Britain does not have a written constitution, the BBC did not have a written professional code of ethics either. Of course, principles were laid down, impartiality and objectivity, but the decision was left to the BBC staff in all other issues that arose. However, the "spirit of the place" proved so strong that the system worked without written rules. The development of the "BBC con-

[22] Ward, S. J. (2019). Journalism ethics. In *The handbook of journalism studies* (pp. 307-323). Routledge.
[23] Berry, D. (2016). *Journalism, ethics and society*. Routledge.
Frost, C. (2015). *Journalism ethics and regulation*. Routledge.
[24] The BBC is a state- owned, quasi-independent British public service broadcaster, also the world's largest broadcaster. In the UK alone, it employs 24,000 staff and has a budget of £ 4 billion. Its operating costs are primarily covered by the television maintenance fee paid by British citizens.

sciousness" and the deepening of the attachment to the organisation were facilitated by the employment structure of the institution - quite unusual in market economy conditions.

The structure of the BBC's code of ethics

Section 1: BBC editing standards	Section 2: Use of the Guidelines	Section 3: Accuracy
Section 4: Impartiality	Section 5: Harm and Offense	Section 6: Fairness to Contributors and Contribution
Section 7: Privacy	Section 8: Report on crime and anti-social behaviour	Section 9: Children and young people as contributors
Section 10: Politics, Public Policy and Polls	Section 11: War, Terror and Emergencies	Section 12: Religious Content
Section 13: Reuse, Redemption and Perpetual Availability	Section 14: Independence from Outside Interests	Section 15: Conflict of Interest
Section 16: External Relations and Funding	Section 17: Contests, Votes and Interactivity	Section 18: The Law

Source: BBC's Editorial Values and Standards

The **BBC's Code of Ethics** is 220 pages long and is made up of chapters, which are divided into different sub-chapters.[25] Here, we can find all the information that people working in the media need to know. The most important ethical standards:[26]

- Except in some cases, the persons featured must also be identified by name in BBC programs.
- Archival material must be indicated with a separate caption or its use must be indicated in the text.

[25] Mills, T. (2020). *The BBC: Myth of a public service*. Verso Books.
[26] BBC code of conduct, BBC's Editorial Values and Standards https://www.bbc.co.uk/editorialguidelines/guidelines

- When reporting accidents and disasters, you must be thorough, enterprising, and sensitive. We must beware of deception and be considerate of the victims and their relatives.
- Special announcements by the authorities are usually broadcast on news programs.
- Even when making programs with influential people, the program's structure must be designed based on journalistic criteria. They must be treated calmly, politely, impartially and decisively. Unacceptable conditions must be rejected; if necessary, that person's inclusion must be cancelled.
- The general program requirements also apply to reporting on minority issues. Let us strive to listen to a wide range of speakers. Members of minorities should not always or predominantly be presented in minority roles. We never pay attention to skin colour, ethnicity, gender, age or limited abilities unless it is particularly important.
- The BBC should strive to serve all members of society equally. Therefore, it is necessary to know the sensitivities of social groups, which generally feel that they are mistreated or are subject to discrimination.
- If children are included, they must never be subjected to trials, they must not become ridiculous, and they must not exploit them. The child can only appear in the programs with the consent of the parents and the class teacher during school hours.
- The presenters, reporters and members of the program production staff are prohibited from having any kind of contact with the products and companies included in the program.
- Programs dealing with charities can only be reports and not calls.
- Contributors to BBC programs must be treated openly, honestly and politely. The BBC's editorial independence must always be preserved, but contributors must not feel that their interests are being disregarded, misled or forced to participate.
- At the BBC, the most important aspect of program production is impartiality. Based on the BBC's impartial programmes, the audience should not be able to assess the personal opinion of the reporter or presenter on the matter in question.

The **Code of Ethics of MÚOSZ** states that it is directly or indirectly based on the following four principles: honesty, independence, reliability and sensitivity.

- Article IX of the Fundamental Law of Hungary provides freedom of the press, the obligation to inform, and the fundamental right of citizens to information.
- Journalists have an ethical duty to protect and enforce the freedom of the press and the public in their daily work and to fulfil their professional duties related to the flow of information. "Every citizen is obliged to promote the full enforcement of the basic civil right of freedom of the press, even without the professional knowledge necessary for providing information."
- The authorities cannot consider the information as their own. Publicity of the operation of the institutions and its extension to the media is the legal basis of pluralism. The prerequisite for this is the freedom of expression, the right to information and the exclusion of censorship.
- Neither the publishers, the owners, nor the journalists can consider the information as their own because knowing it is a fundamental right of citizens.
- The profession of journalism comes with rights, obligations and responsibilities. Fact-finding can only be limited by the requirement of the truthfulness of the information, the fairness of the opinions, and the legal conditions for obtaining the information.[27]

The individual subfields also have elaborated ethical principles. Thus, for example, the ethical rules of news editing in television are defined around the world along the principles of the BBC's code of ethics or, in Hungary, the so-called **Visegrad protocol**. This results from a media conference organised by the British Embassy and BBC World Service Training Trust in Visegrad in December 1999. The voluntary media ethics code 28for the Hungarian electronic media (that is, not only TV) summarises the basic principles of independent information in twenty points.

The **rule of balanced information** can only be applied with the help of media ethics and professional standards, depending on the circumstances of the given situation. It cannot mean equality calculated to the second in the presentation of individual opinions, although the Hungarian media authority mainly considers the duration of publication when establishing balance. The

[27] https://muosz.hu/alapdokumentumok/etikai-kodex/

[28] Thorpe, Nigel James: The Visegrad Protocol. Edited version of the presentation given at the Média Hungary conference in 2000. In: Sükösd Miklós − Csermely Ákos (szerk.): A hír értékei. Etika és professzionalizmus a mai magyar médiában. Média Hungária könyvek, 2001.

legal tools cannot accurately measure the equal, unbiased treatment shown to the report's subjects, nor the tone of voice or gesticulation of the reporter asking the questions. By definition, it is not always possible to present all opposing views; during the editing, it is sometimes necessary to choose between the views represented with the relevant and necessary weight in a sufficient proportion (however, this cannot always mean presenting only the "dominant" views). Individual views, and not their representatives, must appear: in a given situation, the editor can choose from several representatives of a particular view, but in justified cases (for example, in the absence of a reporter coming from the opposite side), even the reporter or journalist can perform the task of balancing the different position display.[29]

Balanced information does not necessarily have to be realised in every single program; this would significantly complicate, for example, the production of informative magazine programs. In some cases, it is sufficient if, in the case of multi-part or regularly appearing programs, only balanced information is provided throughout the program series or the program stream on the given channel. According to some views, the current general requirement of balance should be significantly narrowed down in the near future, and it would be sufficient to require it only for public service or, at most, national channels with analogy terrestrial broadcasting.[30]

Act CLXXXV of 2010 on Media Services and Mass Communication, the information activities of media services must comply with Act CIV of 2010 Act on the **freedom of press and the basic rules of media content** (Smtv.). The linear media services that carry out information activities are obliged to provide balanced information about local, national, and European events of public interest, as well as significant events and controversial issues for the citizens of Hungary and the members of the Hungarian nation, in the informative and news programs they publish. The detailed rules of this obligation are established by law following the requirements of ensuring proportionality and democratic public opinion. The media service provider must respect human dignity in the media content it publishes. Self-serving and

[29] Koltay András: A média tartalmi szabályozásának alkotmányossága az új magyar médiaszabályozásban. Médiakutató 2011 ősz
[30] Gálik Mihály & Horvát János & Szente Péter (2003): Egy új médiatörvény alapjai (javaslat). In: Enyedi Nagy Mihály & Polyák Gábor & Sarkady Ildikó (szerk.): *Médiakönyv 2003*. Budapest: Enamiké.
Kertész Krisztina (2006): Kiegyensúlyozottság és pártatlanság az elektronikus médiában a Panaszbizottság 2004-es döntéseinek tükrében. *Médiakutató*, ősz.

harmful presentation of persons in a humiliating, vulnerable situation in media content is prohibited. It is forbidden to abuse the consent of the media content provider to publish a statement intended for public communication or to appear in the media content. The media content service provider is obliged to show the statement prepared for public communication to the person giving the statement or the person included in the media content - upon his request - prior to publication; it may not be disclosed if the data subject does not consent to the publication because it has been substantially changed or distorted by the media content provider, and this is detrimental to the person giving the statement or the person appearing in the media content. In the event of disclosure that is harmful to reputation or honour despite the withdrawal of consent, the relevant civil and criminal law rules shall be applied.

The media content

- may not violate the constitutional order.
- must not be capable of inciting hatred or incitement to violence against a nation, community, national, ethnic, linguistic and other minority or any majority, as well as a religious community or any of its members due to belonging to that community.
- content must not be suitable for excluding a nation, community, national, ethnic, linguistic and other minority or any majority, as well as a religious community.
- cannot be suitable for calling for the commission of a terrorist act.
- appearing in media services that may harm the mental, spiritual, moral or physical development of minors can only be made available to members of the public in a way that ensures, in particular by choosing the broadcast time, age verification, and the application of other technical solutions, that under normal circumstances minors cannot hear or see it. Measures to limit access must be proportionate to the degree of harmfulness of the content.

It is forbidden to present a minor in media content in a way that could significantly endanger their age-appropriate mental or physical development. Commercial notices appearing in media content must be easily recognizable. The balance of the information must be ensured – depending on the nature of the programs – within each program or in a series of regularly appearing programs. The employees of the media service provider who regularly participate as presenters, newsreaders, or correspondents in the programs providing news and political information may not add an opinion or evaluative explanation to the political news published by any media service program – except for the news explanation. The opinion and evaluative explanation attached to the news published in the program must be published separately from the news, indicating its quality and naming its author.

The **possibility of access** to an increased number of media – although it is constantly increasing with the rise of the Internet – is not universal. Moreover, the more significant amount does not necessarily bring with it a proportional distribution of the views they represent and the resulting balance.

Areas and Indicators of the Media Pluralism Monitor

Basic Protection	Market Plurality	Political Independence	Social Inclusiveness
Protection of freedom of expression	Transparency of media ownership	Political independence of media	Access to media for minorities
Protection of right to information	News media concentration	Editorial autonomy	Access to media for local/regional communities and for community media
Journalistic profession, standards and protection	Online platforms concentration and competition enforcement	Audiovisual media, online platforms and elections	Access to media for people with disabilities
Independence and effectiveness of the media authority	Media viability	State regulation of resources and support to media sector	Access to media for women
Universal reach of traditional media and access to the Internet	Commercial & owner influence over editorial content	Independence of PSM governance and funding	Media literacy

Source: Vassallo, L. (2020). Monitoring Media Pluralism in the Digital Era: Application of the Media Pluralism Monitor in the European Union, Albania and Turkey in the years 2018-2019.

The requirement of **pluralism** is one of the basic guiding principles of media regulation.[31] The term itself originates from the so-called third television decision of the German Constitutional Court, in which the judges distinguished between internal and external pluralism. Internal *pluralism* (which, according to the decision, obliges only public service media providers) requires the given service to create some balance in terms of the presentation of individual views in society in its programs as a whole so that the channel's programs are not biased in either direction, but still present the individual controversial (not necessarily political) issues, giving space for all positions to appear, and the program numbers should be diverse, meeting the needs of the broadest possible range of the audience - including the needs of minorities. According to external pluralism, all media service providers must jointly ensure the diversity of the presented views and the content offered and create a balance between them. So, although privately owned media providers are not burdened by internal pluralism, they must also collectively meet the pluralism requirement.

[31] Raeijmaekers, D., & Maeseele, P. (2015). Media, pluralism and democracy: what's in a name?. *Media, culture & society*, *37*(7), 1042-1059.
Vassallo, L. (2020). Monitoring Media Pluralism in the Digital Era: Application of the Media Pluralism Monitor in the European Union, Albania and Turkey in the years 2018-2019.

Society of Professional Journalists

CODE of ETHICS

PREAMBLE

Members of the Society of Professional Journalists believe that public enlightenment is the forerunner of justice and the foundation of democracy. Ethical journalism strives to ensure the free exchange of information that is accurate, fair and thorough. An ethical journalist acts with integrity.

The Society declares these four principles as the foundation of ethical journalism and encourages their use in its practice by all people in all media.

SEEK TRUTH AND REPORT IT

Ethical journalism should be accurate and fair. Journalists should be honest and courageous in gathering, reporting and interpreting information.

Journalists should:

- Take responsibility for the accuracy of their work. Verify information before releasing it. Use original sources whenever possible.
- Remember that neither speed nor format excuses inaccuracy.
- Provide context. Take special care not to misrepresent or oversimplify in promoting, previewing or summarizing a story.
- Gather, update and correct information throughout the life of a news story.
- Be cautious when making promises, but keep the promises they make.
- Identify sources clearly. The public is entitled to as much information as possible to judge the reliability and motivations of sources.
- Consider sources' motives before promising anonymity. Reserve anonymity for sources who may face danger, retribution or other harm, and have information that cannot be obtained elsewhere. Explain why anonymity was granted.
- Diligently seek subjects of news coverage to allow them to respond to criticism or allegations of wrongdoing.
- Avoid undercover or other surreptitious methods of gathering information unless traditional, open methods will not yield information vital to the public.
- Be vigilant and courageous about holding those with power accountable. Give voice to the voiceless.
- Support the open and civil exchange of views, even views they find repugnant.
- Recognize a special obligation to serve as watchdogs over public affairs and government. Seek to ensure that the public's business is conducted in the open, and that public records are open to all.
- Provide access to source material when it is relevant and appropriate.
- Boldly tell the story of the diversity and magnitude of the human experience. Seek sources whose voices we seldom hear.
- Avoid stereotyping. Journalists should examine the ways their values and experiences may shape their reporting.
- Label advocacy and commentary.
- Never deliberately distort facts or context, including visual information. Clearly label illustrations and re-enactments.
- Never plagiarize. Always attribute.

MINIMIZE HARM

Ethical journalism treats sources, subjects, colleagues and members of the public as human beings deserving of respect.

Journalists should:

- Balance the public's need for information against potential harm or discomfort. Pursuit of the news is not a license for arrogance or undue intrusiveness.
- Show compassion for those who may be affected by news coverage. Use heightened sensitivity when dealing with juveniles, victims of sex crimes, and sources or subjects who are inexperienced or unable to give consent. Consider cultural differences in approach and treatment.
- Recognize that legal access to information differs from an ethical justification to publish or broadcast.
- Realize that private people have a greater right to control information about themselves than public figures and others who seek power, influence or attention. Weigh the consequences of publishing or broadcasting personal information.
- Avoid pandering to lurid curiosity, even if others do.
- Balance a suspect's right to a fair trial with the public's right to know. Consider the implications of identifying criminal suspects before they face legal charges.
- Consider the long-term implications of the extended reach and permanence of publication. Provide updated and more complete information as appropriate.

ACT INDEPENDENTLY

The highest and primary obligation of ethical journalism is to serve the public.

Journalists should:

- Avoid conflicts of interest, real or perceived. Disclose unavoidable conflicts.
- Refuse gifts, favors, fees, free travel and special treatment, and avoid political and other outside activities that may compromise integrity or impartiality, or may damage credibility.
- Be wary of sources offering information for favors or money; do not pay for access to news. Identify content provided by outside sources, whether paid or not.
- Deny favored treatment to advertisers, donors or any other special interests, and resist internal and external pressure to influence coverage.
- Distinguish news from advertising and shun hybrids that blur the lines between the two. Prominently label sponsored content.

BE ACCOUNTABLE AND TRANSPARENT

Ethical journalism means taking responsibility for one's work and explaining one's decisions to the public.

Journalists should:

- Explain ethical choices and processes to audiences. Encourage a civil dialogue with the public about journalistic practices, coverage and news content.
- Respond quickly to questions about accuracy, clarity and fairness.
- Acknowledge mistakes and correct them promptly and prominently. Explain corrections and clarifications carefully and clearly.
- Expose unethical conduct in journalism, including within their organizations.
- Abide by the same high standards they expect of others.

The SPJ Code of Ethics is a statement of abiding principles supported by additional explanations and position papers (at spj.org) that address changing journalistic practices. It is not a set of rules, rather a guide that encourages all who engage in journalism to take responsibility for the information they provide, regardless of medium. The code should be read as a whole; individual principles should not be taken out of context. It is not, nor can it be under the First Amendment, legally enforceable.

SOCIAL MEDIA ETIQUETTE & ETHICS

Etiquette is the proper way to behave while **Ethics** studies ideas about good and bad behavior. Both combine into **Professionalism**, which is the skill, good judgment, and polite behavior expected from a person trained to do a job such as social media marketing. Because social media blurs the lines between our personal and professional lives it is useful to look at actions in social media from three perspectives: **Personal** (individual), **Professional** (current/perspective employee) and **Brand** (organization). How do we navigate a social landscape where our worlds collide and brands communicate like people in one-on-one conversations with consumers? **Before taking any social media action consider these questions (final applies to all):**

	Personal Social Action (As An Individual)	Professional Social Action (As A Current/Perspective Employee)	Brand Social Action (As An Organization)
1.	**Is it all about me?** (Spend time complimenting not just boasting)	**Does it meet the Social Media Policy?** (Know/follow employer/client requirements)	**Does it speak to my target market?** (Meets their wants and needs not yours)
2.	**Am I stalking someone?** (Don't be too aggressive in outreach)	**Does it hurt my company's reputation?** (Personal accounts represent your employer)	**Does it add value?** (Make it educational, insightful, entertaining)
3.	**Am I spamming them?** (Don't make everything self-serving)	**Does it help my company's marketing?** (Be an advocate for your brand in social)	**Does it fit the social channel?** (Fit environment, mission, policies/standards)
4.	**Am I venting/ranting?** (Do not post negative comments or gossip)	**Would my boss be happy seeing it?** (Even private accounts are never fully private)	**It is authentic and transparent?** (Don't hide or exclude anything relevant)
5.	**Did I ask before I tagged?** (Check before you tag people in photos)	**Am I being open about who I work for?** (Be transparent about financial connections)	**Is it real and unique?** (Don't use auto responses, or spam)
6.	**Did I read before commenting/sharing?** (Don't jump to conclusions)	**Am I being fair and accurate?** Criticism is constructive backed by evidence)	**Is it positive and respectful?** (Don't badmouth the competition/customers)
7.	**Am I grateful and respectful?** (Respond and thank those who engage)	**Am I being respectful not malicious?** (Don't post what you wouldn't say in person)	**Does it meet codes of conduct?** (See WOMMA Code of Ethics, etc)
8.	**Is it the right place for the message?** (Some messages should be given in person)	**Does it respect intellectual property?** (Get permission to post brand/client content)	**Does it meet all laws and regulations?** (See FTC Social Guidelines, etc)
9.	**Am I In the right account?** (Don't post personal info. on brand accounts)	**Is this confidential information?** (Do not disclose non-public brand/client info.)	**Does it meet the Social Media Policy?** (Follow your own organization's standards)
10.		**Have I listened twice as much as I am talking?** (We have two ears and one mouth for a reason)	

Source: Quesenberry Keith A. (2016): Social Media Etiquette & Ethics: A Guide for Personal, Professional & Brand Use

1.5. Stakeholders, participants and actors

The study uses a practical approach based on the fact that this market is about the media as maintaining and increasing power, i.e. its manufacturers and producers (character 1) all want to gain more influence and profit so that their various products (news, data, advertising, etc.) to reach the consumer/audience/voters as efficiently as possible (method) (actor 2).

In addition to market players, there are, of course, **professional players** (who are also market players), as follows:

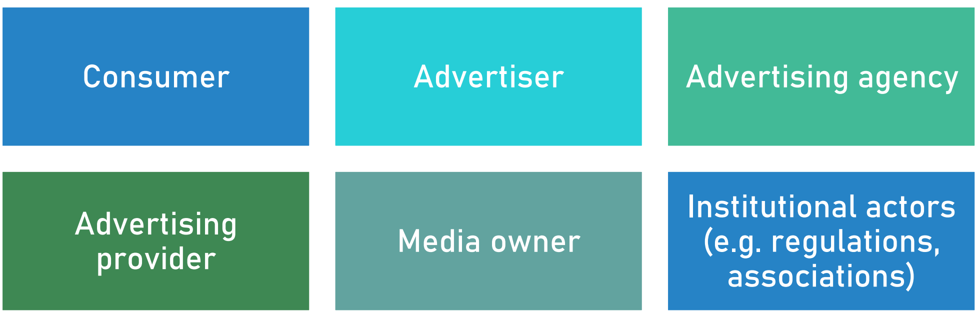
- **Communicator:** The communicator deals with reality; it can be anyone who undertakes to transmit information professionally on the communicator's side and does not necessarily have to be a member of the media organisation – for example, a spokesperson PR specialist.
- **Media personnel – gatekeeper:** Who wants to satisfy the audience's specific interests by delivering the information to the customer side (the audience). Media personnel (communicators) do not arbitrarily

decide what information reaches the public and what is included in the news. The media collects, evaluates, and selects information in order to deliver it to the public after processing it.

- **Audience:** Those citizens, group of people who are open to and interested in the near and far social problems of the world. The audience listens to the news based on their interests and waits for information.

In order to do this, the Act CIV of 2010 on freedom of the press and the basic rules of media content lays down the **rights of the audience**. Thus, everyone has the right to be properly informed about matters of local, national and European public life, as well as about events of importance to the citizens of Hungary and members of the Hungarian nation. The task of the media system as a whole is to provide reliable, fast and accurate information about these matters and events. In Hungary, a public service media service operates to preserve and strengthen national self-identity and European identity, national, family, ethnic and religious communities, nurture and enrich the Hungarian and ethnic languages and culture, and satisfy citizens' information and cultural needs.

The media one of the implementation areas of communication is the **advertising market,** whose actors are the following:[32]



Source: own compilation

There are many media workers, nearly half a hundred thousand in Hungary – the big division: those dealing with the content and those dealing with the technical part. The first are journalists and various content providers. The latter is the entire technical team, from engineers to IT specialists to mechanics. A mini-encyclopedia will help to find the way among the leaders of a large number of teams.[33] In no small measure, they are the journalists, with

[32] Bauer A. - Berács. J. (2006): Marketing. Aula Kiadó, Budapest.

[33]http://www.mediapiac.com/ki-kicsoda/

the inscription SAJTÓ in Hungary, but more often with the international name: PRESS. We can see this clearly in their clothes, cars and equipment. Despite the relatively small number of employees, the media sector is a strongly developing industry: its sales exceeded HUF 1,000 billion in 2005, more than the Hungarian construction sector![34] The source: roughly half of this comes from advertising.

[34] https://docplayer.hu/1251825-A-sajto-es-media-alapfogalmai-rendsere-ismeretek-a-mediarol.html 5 . page

2. The media: power and business

The media holds significant power and plays a crucial role in shaping public opinion, influencing societal discourse, and acting as a watchdog for those in power. Simultaneously, it operates as a multifaceted business, relying on various revenue streams to sustain itself. The media's dual role as a powerful influencer of public opinion and a business striving for economic success underscores its significant impact on societies and individuals. The interplay between media, power, and business has profound implications for the information sector and the broader socio-economic and political context.

The media: power and business

Power	Business
1. **Influence on Public Opinion:** The media has the power to shape public perceptions by framing issues, setting agendas, and influencing public discourse on political, social, and cultural matters. 2. **Political Agenda-Setting:** Media outlets have the ability to influence political agendas, bringing attention to specific issues and shaping the narrative around political events. 3. **Watchdog Function:** Acting as a watchdog, the media scrutinizes government actions, corporate behaviour, and societal trends, holding those in power accountable. 4. **Public Trust and Credibility:** The media's credibility and public trust are crucial for its influence. People often rely on the media as a source of information and analysis. 5. **Cultural Influence:** Media contributes to the shaping of cultural norms,	1. **Revenue Streams:** Media organisations rely on diverse revenue streams, including advertising, subscriptions, sales, and partnerships, to fund their operations. 2. **Advertising Industry:** The media serves as a platform for advertisers to reach target audiences, making advertising revenue a key component of the media business model. 3. **Digital Transformation:** The shift to digital platforms has transformed the media business, with online advertising, sponsored content, and digital subscriptions becoming increasingly significant. 4. **Subscription Models:** Many media outlets have adopted subscription models, offering premium content and services to subscribers as an alternative or complement to traditional advertising revenue. 5. **Media Conglomerates:** Large media conglomerates often own multiple outlets, including television networks,

values, and trends, impacting societal attitudes and behaviours. 6. **Social Media and Activism:** Social media platforms empower individuals to engage in activism, mobilize movements, and challenge established power structures.	radio stations, newspapers, and digital platforms, consolidating influence and diversifying revenue sources. 6. **Challenges of Monetisation:** The media industry faces challenges in monetizing digital content while maintaining quality journalism, given the proliferation of free online content and ad-blocker usage. 7. **Global Reach and Competition:** Digital platforms enable media organisations to reach global audiences, but they also face intense competition from both traditional and digital-only outlets. 8. **Media Ethics and Commercial Pressures:** The pursuit of profit sometimes raises questions about media ethics, as the need for high viewership or readership may impact the selection and framing of stories.

Source: own compilation

2.1. ...as power

In the history of humankind, the attraction of power is enormous. Moreover, the media is a part of power, not a small one. That is how it was for thousands of years, and that is how it is today. The branches of power were gradually refined with the development of the spirit. Adapted to the ancient conditions, Aristotle, Socrates and Cicero all noticed the masses' ability to be influenced by information, which practically did not change until the French Enlightenment. Montesquieu, in the spirit of laws,[35] had already written about the three branches of power, where legislation (parliament), execution (government), and justice (judiciary) must be separated from each

[35] Montesquieu: De l'esprit des lois Geneva , 1748 . First edition

other. In the Age of Enlightenment, three branches of power were distinguished, but since then, these have expanded, and a new, ever-growing **force** similar to the branches of power was created: the media (mass media).

Technical development and the spread of education – from the 19th century onwards – increasingly made appealing to the broad masses possible. At first, the so-called "penny press" reached all social strata. In the 20th century, the invention of radio and TV connected the masses to the flow of information. In parallel with these technical results, the demand for information increased. People expect and expect that, in theory, it is possible to inform them about the news of the wider world; this should also occur in practice. The concept of the right to information and the manipulation of information appeared. The rise of the media goes hand in hand with the atomisation of information. The media conveys more and more information to people, but this information is necessarily more and more fragmented and, in some cases, not even connected. The content providers spill the news; there is no consultation, and the individual has to choose from the dumping.

The media plays a crucial role in shaping public perception of events, issues, and individuals. It can influence how people understand and form opinions about the world around them through news coverage, commentary, and entertainment programming. This power can be used to foster informed debate, promote critical thinking, and encourage diverse perspectives. However, it can also be misused to manipulate, mislead, or sensationalize information for political or commercial gain. The media can significantly influence social norms and cultural trends. The media can shape how people perceive themselves and others by portraying certain lifestyles, behaviours, and values. This can lead to changes in consumption patterns, entertainment preferences, and even social attitudes. For instance, the portrayal of unrealistic body image standards in media can contribute to body image issues and eating disorders.

The **political and economic leaders** and decision-makers discovered the potential of mass communication, and from the very beginning, they did everything to dominate it with various means. Thus, the media became a power factor. According to many people, nowadays, this is the fourth branch of power, next to the legislature, the judiciary and the executive power, perhaps at the top of the order.[36]

[36] Chadwick, A., Dennis, J., & Smith, A. P. (2015). Politics in the age of hybrid media: Power, systems, and media logics. In *The Routledge companion to social media and politics* (pp. 7-22). Routledge.

The **modern democratic state institutions** can hardly be imagined without the media. A responsible citizen's decision (e.g. referendum) could only be made with sufficient information, and people can obtain information primarily from the media. That is why public figures and politicians try to get as much media coverage as possible to make their ideas, actions, and programs known to the public and influence the quantity and quality of outgoing news.[37]

What makes the media strong? Jürgen Habermas, the excellent German philosopher, gives an apt answer: it is not the media that has power, but the public created by the media.[38] Well, with a little exaggeration: whoever can control this has the power. Well-targeted opinion formation is the fastest and most effective way to power and even to keep it. Product advertising is another way of forming opinions, which is one of the most important keys to successful sales. It should not be underestimated, either.

The central element of power and the exercise of power is **legitimacy and legality**.[39] The Hungarian Smtv. defines some negative obligations, setting the basic "rules of the game" for debates conducted through the press, the respect of which is a prerequisite for conducting the debate. At the same time, the community has an interest in all viewpoints, including strong, sometimes offensive or disturbing opinions, i.e. freedom of the press - open debate - can only be restricted based on a sufficiently compelling reason citing the violation of human rights.[40] The Decision 46/2007 (VI. 27) of the Constitutional Court stated that:

"...if the broadcaster violates a right to a person, the person who has suffered a violation of rights decides whether to enforce his privacy rights against the broadcaster that committed the violation, for example, whether to file a lawsuit. Section 112 (1) and Section 136 (1) of the Media Act institutionalise a public administrative procedure in addition to this judicial process. The ORTT – acting on the basis of Section 3 (1) of the Media Act – does not decide on legal violations against individual legal entities in this public ad-

---

[37] Schiffrin, A. (Ed.). (2017). *In the service of power: Media capture and the threat to democracy* (pp. 1-8). Washington, DC: Center for International Media Assistance.

[38] Habermas, Jürgen (1962): The structural change of social public (Strukturwandel der Öffentlichkeit. Untersuchungen zu one Kategorie der bürgerlichen Gesellschaft, Neuwied , 1962)

[39] Rodríguez-Pérez, C. (2017). News framing and media legitimacy: An exploratory study of the media coverage of the refugee crisis in the European Union.

[40] Koltay András: A média tartalmi szabályozásának alkotmányossága az új magyar médiaszabályozásban. Médiakutató 2011 ősz

ministrative procedure. Section 3 (1) of the Media Act is a fundamental provision. Accordingly, during the administrative procedure, the ORTT is entitled to determine whether the broadcaster operates with respect for human rights and whether the topic, nature, and point of view of each of its programs do not violate the fundamental value of human rights."... "an important content element – among other things – is the individual's right to assert his or her subject rights before the various state bodies, including the court. However, the right to self-determination, as the right to general freedom of action, also includes the right to abstain from legal enforcement and non-action. Since this right serves to protect the autonomy of the individual, everyone is generally free to decide whether to use the constitutionally guaranteed means of enforcing their rights and legal interests, or whether to refrain from doing so" (1/1994. [I. 7.] AB decision).

The right to self-determination, therefore, also includes the right not to resort to legal action in the event of a violation of rights or to enforce their rights in any other way: "If the broadcaster infringes a person's right, the person who has suffered a violation of rights decides whether to take legal action against the broadcaster that committed the violation asserts his personal rights."

Advantages and disadvantages of Media Power

Aspect	Advantages	Disadvantages
Advancing Public Discourse	- Facilitates informed public discourse by providing information and diverse perspectives. - Raises awareness about critical issues.	- Risk of sensationalism and bias, leading to distortion of facts. - Selective coverage may skew public understanding.
Holding Power Accountable	- Acts as a check on those in power, holding governments and institutions accountable. - Exposes corruption and abuses of authority.	- Possibility of media manipulation or serving specific interests. - Media may be subject to political or corporate influence.
Cultural Influence	- Shapes cultural norms, values, and trends. - Provides a platform for cultural expression and diversity.	- Potential for cultural homogenisation and stereotyping. - Influence may perpetuate harmful ideologies or unrealistic beauty standards.
Global Connectivity	- Connects people globally, fostering cross-cultural understanding.	- Risk of misinformation spreading rapidly.

	- Allows for the dissemination of information on a global scale.	- Cultural imperialism concerns, as dominant media may overshadow local perspectives.
Empowering the Public	- Empowers individuals to voice opinions, participate in activism, and engage in societal change. - Provides a platform for marginalised voices.	- Spread of misinformation and 'echo chamber' effects may limit informed public discourse. - Online harassment and cyberbullying may thrive.
Promoting Education	- Serves as an educational tool, providing access to a vast range of information and resources. - Supports lifelong learning through news, documentaries, and educational content.	- Misinformation and fake news can mislead and confuse the public. - Information overload may hinder critical thinking.
Economic Contributions	- Generates revenue through advertising, creating job opportunities and sustaining media outlets. - Drives economic growth in the media and entertainment industry.	- Commercial pressures may compromise journalistic integrity. - Economic reliance on advertising may impact editorial independence.

Source: own compilation

2.2....as a business

Its role is enormous not only in politics but also in the economy and trade, as the media can be used to encourage people to consume certain items and use services. The rapid spread and relatively cheap nature of mass communication tools also contributed to the fact that these tools proved excellent for entertaining people.

There are **huge sums of money** moving around in the media, although, at first glance, it is unclear who pays for everything and how. The most important source of income for the media industry is the amount paid by advertisers for placing advertisements (billboards, radio and TV ads, newspaper ads, banners). This is the central part of the input. The media industry is a significant economic force, generating revenue through advertising, sponsorships, and subscriptions. This financial incentive drives innovation in media technologies, content creation, and distribution methods. The rise of digital media, social media, and online streaming services has transformed the way people consume media, creating new opportunities for businesses to reach their target audience. In Hungary (as everywhere in the developed world), the largest advertiser is the state itself - a third of all advertising spending is state orders.[41]

The media does not deal with consumer goods but with essential "goods" in a political sense: **information, ideologies, values and images**. Therefore, the operation of the media is regulated by state laws. In the market competition for the audience's attention (time, choices), not only does the laws of the market play a role, it is also strongly influenced by power relations.

The **rejection or attention of the audience** has always had a substantial impact on the activities of content providers. In modern online media, many activities (blogging, chatting, uploading, sharing) are based on the activity of the audience and communication with each other. Thus, the audience is no longer easily influenced (manipulated) everywhere and entirely at the mercy of news providers, but partially it is.

The state itself can own media companies. In general, a few radio and television channels are state-owned in each country, while the written press as a whole is mostly privately owned. State property means public property. The budget law regulates the amount needed to finance the state media voted annually by the parliament, which HUFs paid with taxpayers' funds.

The **democratically elected state bodies** (parliament, government) operate the public service media. Therefore, the public media must be balanced, credible and factual, i.e. it must present the different political views of the electorate and the currently important information – if appropriate, also about abuses of power – in accordance with reality. Furthermore, it must ensure cultural diversity, the presentation of audiovisual heritage and its enhancement with quality values.

The **commercial media** consists of privately owned media companies. Their purpose is mainly to achieve profit. As a content provider, their task is not to create value or any kind of quality cultural activity. Due to the constraint of maximum profit, the basic principle of commercial media is to increase the number of visitors so it avoids politically sensitive topics as much as possible, which divides the audience. However, its owners are sometimes connected to successful political groups, economic groups in government or opposition parties are switchable. To a certain extent, this also worsens their

[41] Albarran, A., Mierzejewska, B., & Jung, J. (Eds.). (2018). *Handbook of media management and economics*. Routledge.

competitive position, but it can help them obtain state advertisements, which can be decisive in terms of business success.

The **social media** is based on internet exposure. Content created or found by users can be shared, commented on and modified using portals and editing tools available on the Internet. Blogs, opinion sites, social networking sites and networks form this collaborative media. Social media is primarily based on interactions between people.[42]

Advantages and disadvantages of Media Business

Aspect	Advantages	Disadvantages
Financial Sustainability	- Enables media outlets to generate revenue and sustain operations. - Supports investment in quality journalism, production, and content creation.	- Commercial pressures may compromise editorial independence and lead to sensationalism. - Profit motives may prioritize audience engagement over informative content.
Job Creation and Industry Growth	- Creates employment opportunities in journalism, production, advertising, and related fields. - Contributes to economic growth through the media and entertainment industry.	- Job insecurity in an industry prone to market fluctuations and technological changes. - Consolidation may lead to job losses and reduce diversity in media ownership.
Innovation and Technological Advances	- Drives innovation in content creation, distribution, and audience engagement. - Encourages the adoption of new technologies for storytelling and communication.	- Rapid technological changes may pose challenges in adapting business models. - Potential for ethical concerns in the use of emerging technologies.
Diverse Revenue Streams	- Allows media outlets to diversify revenue through advertising, subscriptions, partnerships, and events. - Enables flexibility in responding to changing market dynamics.	- Over-reliance on advertising revenue can be vulnerable to economic downturns and shifts in consumer behaviour. - Subscription models may limit access to information for certain demographics.

[42] https://www.nkp.hu/tankonyv/tortenelem_8/lecke_06_050

Competitive Marketplace	- Fosters competition, driving media outlets to improve content quality and audience engagement. - Provides consumers with diverse options for news, entertainment, and information.	- Intense competition may lead to sensationalism and clickbait to capture audience attention. - Smaller, independent outlets may struggle to compete against large conglomerates.
Consumer Choice and Access	- Offers consumers a variety of choices in terms of content, formats, and platforms. - Enhances accessibility to information, entertainment, and news through various channels.	- Oversaturation of content may contribute to information overload and the spread of misinformation. - Digital divide issues may limit access to certain populations.
Global Reach and Impact	- Provides the potential for global reach, enabling media to influence international audiences. - Enhances cultural exchange and the sharing of ideas on a global scale.	- Cultural imperialism concerns as dominant media from certain regions may overshadow local perspectives. - Risk of content misinterpretation across diverse cultural contexts.
Community Engagement and Social Impact	- Facilitates community engagement and discussions on social issues. - Has the potential to drive positive social change through advocacy and awareness campaigns.	- Biases in media coverage may contribute to social polarisation. - Profit-driven motives may overshadow social responsibility.

Source: own compilation

For a brief **global outlook**, about 7.6 billion people currently live on our planet. Almost everyone has a relationship with the media. A hundred years ago, even radio was rare, TV was nowhere, and today, more than 4 billion people use the Internet, which means that more than half of the world's population is online. The world is changing.

Of course, parallel to the number of Internet users, the number of users of **social media platforms** is also growing rapidly, previously in North America and Europe, and nowadays, the most considerable growth can be seen in the countries of Central and South Asia. In another decade or two, there will not be saturation just because new devices and platforms appear.

Are we beyond the Gutenberg galaxy?[43] The current new type of media relationship of humanity is shown in the diagram below:

Source: Hootsuite.com

The world's most significant media concerns:[44]

The 20 largest media groups

1.	**Alphabet Inc. (Mountain View / USA)**	€67.588 billion
2.	**Comcast (Philadelphia / USA)**	€67.156 billion
3.	**The Walt Disney Company (Burbank / USA)**	€47.287 billion
4.	**News Corp. Ltd. / 21st Century Fox (New York/ USA)**	€33.907 billion
5.	**AT&T Entertainment Group (DirecTV) (El Segundo / USA)**	€31.811 billion
6.	**Time Warner Inc. (New York / USA)**	€25.343 billion
7.	**Viacom Inc./CBS Corp. (New York / USA)**	€24.474 billion

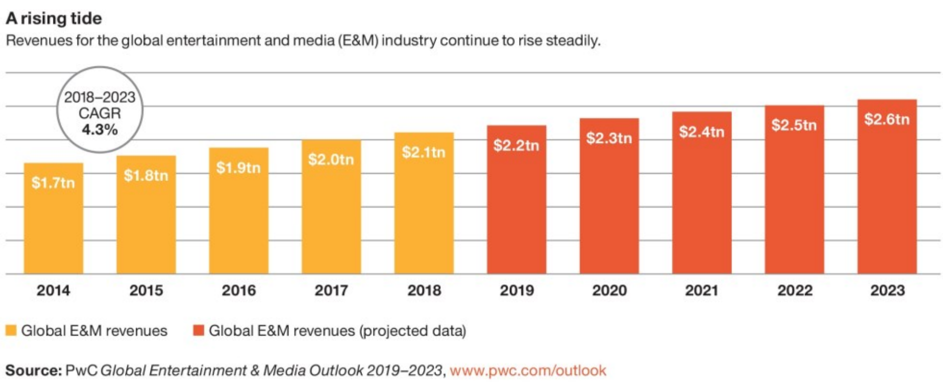
[43] It developed since the 15th century, with the advent of book printing, and the date of its end arose when electronic media appeared.
Lombardinilo, A. (2020). La simultaneità dei media. Rileggere The Gutenberg Galaxy. *Problemi dell'informazione*, *45*(2), 279-304.
Turner, S. (2016). From the Gutenberg galaxy to the digital clouds. *The American Sociologist*, *47*, 131-138.
Pereira, J. M., & Álvares, S. (2016). From the Post-Gutenberg Galaxy to the era of Sky-writing. *Nascer e Crescer*.
[44] Noam, E. M. (Ed.). (2016). *Who owns the world's media?: media concentration and ownership around the world*. Oxford University Press.

8.	Sony Entertainment (Tokyo / JP)	€22.917 billion
9.	Apple Inc. (Cupertino / USA)	€17.944 billion
10.	Altice Group (Amsterdam / NL)	€17.495 billion
11.	Bertelsmann SE & Co. KGaA (Gütersloh /GER)	€17.141 billion
12.	Cox Enterprises Inc. (Atlanta/USA)	€16.314 billion
13.	Facebook, Inc. (Palo Alto/ USA)	€16.159 billion
14.	Liberty Media Corp./Liberty Interactive / Starz (Englewood, CO / USA)	€14.857 billion
15.	Tencent Holdings Ltd. (Shenzen / China)	€14.765 billion
16.	Dish Network Corporation (Englewood, CO/USA)	€13.582 billion
17.	Thomson Reuters Corporation (New York / USA)	€11.004 billion
18.	Vivendi SA (Paris/ FRA)	€10.762 billion
19.	The Hearst Corporation (New York/ USA)	€9.644 billion
20.	Rogers Comm. (Toronto/CA)	€9.263 billion

Source: https://www.mediadb.eu/forum/daten-fuer-archiv/int-mk-2016.html

The industry's global development is also good: the global sales volume of the entertainment and media industry was about 2.1 trillion dollars in 2018, representing an increase of about 400 million dollars compared to 2014. He predicted an increase of around $2.6 trillion by 2023.

Global entertainment and media industry revenue



Source: PwC (2019): This time it is personal: The PwC Global Entertainment & Media Outlook 2019-2023

The report notes a shift in audience viewing behaviour, indicating a transformation rather than a new beginning. Although this change is challenging to categorize conclusively, media consumption is becoming more personalised yet paradoxically social. While individuals use devices like Apple AirPods for personal music enjoyment or watch private smartphone screens during public transit, a social dimension exists in contemporary consumption.

In 2018, ticket spending at movie theatres increased by 5.2% compared to the previous year and is expected to grow at a 4.3% Compound Annual Growth Rate (CAGR) until 2023. Cinemas invest in enhanced experiences responding to blockbuster films like Marvel's Avengers. The trend forecasts the popularity of luxurious screening facilities with increased ticket prices, offset by subscription schemes. Global live music revenue reached US$27 billion and is projected to grow at a 3.1% CAGR until 2023.

Whether individually or collectively, consumers are no longer content with passive consumption. AI-driven recommendation engines support their personalised worlds by delivering curated content. Empowered with the ability to curate their media market from diverse streaming services, consumers are rejecting pre-packaged options from cable and satellite providers. Although Over-the-Top (OTT) revenues may not match the spending of incumbent players, they are expected to surge at a 13.8% CAGR, doubling to reach US$72.8 billion by the end of the forecast period.

II. European Union

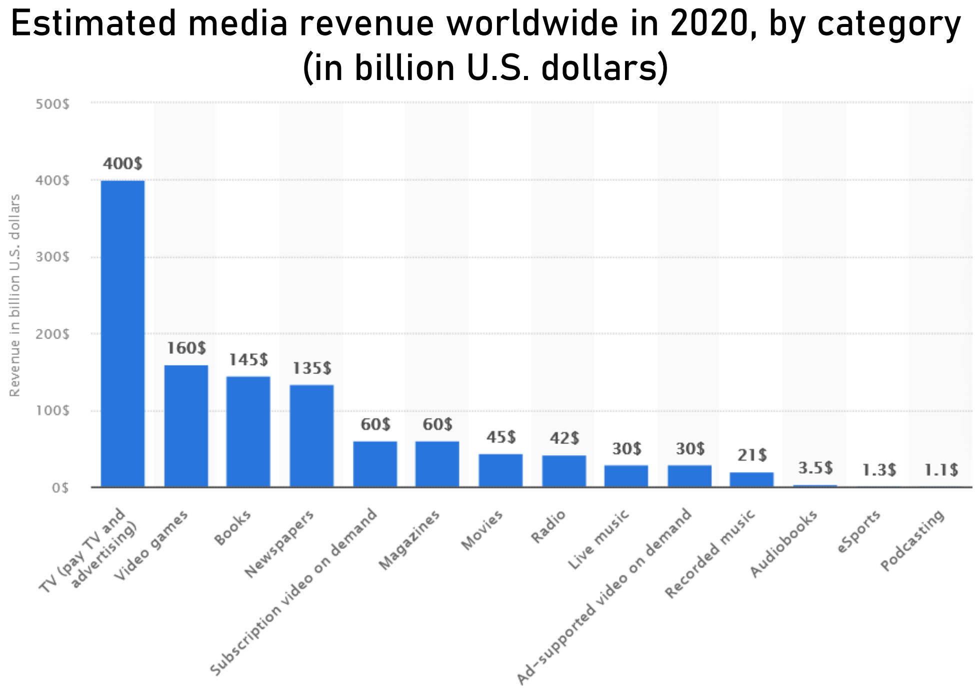
As we pivot our focus to the intricate European Union (EU) media industry, we explore a panoramic view of communication dynamics that transcend national borders. This section, dedicated to the European Union, serves as a lens through which we examine the converging forces of media, information dissemination, and cultural influences across member states.

This section begins with a snapshot, offering insights gleaned from the Eurobarometer 2017, an invaluable tool providing a pulse check on the media sector within the EU. Additionally, we delve into the Council Conclusions and Action Plan, which contribute a strategic dimension to our understanding of how the EU addresses and shapes media-related policies and practices.

Moving beyond broad strokes, our exploration drills into specific media sectors that collectively shape the EU's information market. The venerable institutions of newspapers, radio, television, and the burgeoning domain of internet and digital platforms all come under scrutiny. This in-depth analysis unveils the unique characteristics, challenges, and opportunities that define each sector, showcasing the nuanced ways in which diverse media platforms contribute to the European narrative.

Within this intricate tapestry, two towering figures emerge as the largest markets in the EU – Germany and the United Kingdom. These economic powerhouses command significant influence within the Union and wield considerable sway over media consumption patterns. Our exploration takes us into the heart of these media giants, dissecting their markets, exploring the dynamics of media ownership, and unravelling the subtle nuances that distinguish their media industry. In traversing the sector of the European Union's media sphere, our goal is to illuminate the interconnectedness of information flow, cultural influences, and the regulatory frameworks that govern this dynamic arena.

The primary sources of **global media revenue** in 2020 are anticipated to be pay TV and television advertising, collectively reaching an estimated 400 billion U.S. dollars by year-end. In contrast, although contributing less than five billion dollars combined, the audiobook and podcast sectors are experiencing the most rapid growth worldwide. Projections indicate a 25 % surge in the audiobook market, generating 3.5 billion dollars, while the podcast market is poised for a 30 % expansion, surpassing the one billion dollar mark for the first time.



Source: Marketline, EBSCO, Statista illustration

The global media industry generated $878.1 billion in 2016, with an average annual revenue increase of 1.6%. However, the growth rate is declining, indicating global saturation in the old media industry. The European media industry, on average, experienced a minimal increase in revenue, with a complete halt in its growth. The old media industry has reached a mature stage for the three Mediterranean countries under focus (France, Italy, and Spain). France showed no average revenue growth, Italy's revenue steadily declined (average -1.6% per year), and Spain had the worst performance with an annual decline of 2.9%. Spain experienced an exceptionally large fall in revenue (9%) in 2013. The correlation between global media industry revenue trends and European media industry revenue trends is weak (correlation coefficient 0.4145). France has a relatively weak correlation (0.2736), while Italy and Spain show very strong correlations in the opposite direction, indicating declining revenues in contrast to the global trend.[45]

[45] Lozić, J.; Ramljak, O.; Lozić, I. (2020). „Transformation of the media industries under the pressure of a postmodern society“. *3rd International Multidisciplinary Scientific Conference MIC – Vis*, pp. 493-508.

Media industry revenue (Global, Europe and Mediterranean countries) (US$ bill.)

	Global media		Europe		France		Italy		Spain	
Year	$ bill.	% Growth	$ bill.	% Growth	$ bill.	% Growth	$ bill.	% Growth	$ bill.	% Growth
2012	822,8		229,5	29,4	29,4		19,4		13,4	
2013	843,4	2,50%	228	-0,70%	28,9	-1,70%	18,7	-3,60%	12,2	-9,00%
2014	865,1	2,60%	228,6	0,30%	29,3	1,40%	18,3	-2,10%	11,9	-2,50%
2015	870,3	0,60%	229,7	0,50%	29,4	0,30%	18,3	0,00%	12	0,80%
2016	878,1	0,90%	230,6	0,40%	29,4	0,00%	18,2	-0,50%	11,9	-0,80%
Average		**1,60%**		**0,10%**		**0,00%**		**-1,60%**		**-2,90%**
r			0,4154		0,2736		-0,9739		-0,9037	

Source: Marketline, EBSCO, Statista illustration

Possible explanations for the decline in some countries there are a number of possible explanations for the decline in media industry revenue in France, Italy, and Spain. One possibility is that these countries were hit particularly hard by the economic recession of 2008-2009. This may have led to a decline in advertising spending and consumer spending on media. Another possibility is that the rise of digital media has disproportionately impacted these countries. Digital media platforms like Google and Facebook have captured a large advertising market share. This has made it more difficult for traditional media companies in France, Italy, and Spain to generate revenue. Finally, it is also possible that the decline in media industry revenue in these countries is due to factors specific to each country. For example, the French media industry has been facing challenges due to increased competition from foreign media companies. The Italian media industry has been affected by political instability and economic uncertainty. Furthermore, the Spanish media industry has been struggling to recover from the economic recession.

The **European media industry** underwent significant transformations in the decade between 2010 and 2020, reflecting the broader technological and societal shifts that marked the era. The rise of digital technologies, particularly the internet and mobile devices, revolutionised the media sector. Interactive online platforms, social media, and streaming services emerged as dominant players, challenging the traditional dominance of print and broadcast media. This digital transformation led to the convergence of different media sectors, blurring the lines between traditional and digital media.

The **traditional advertising models**, such as print and broadcast advertising, have faced increasing competition from digital advertising giants like Google and Facebook. This shift in advertising spending put pressure on traditional media companies, forcing them to adapt their business models and seek new revenue streams. Due to declining advertising revenues, media companies increasingly turned to subscription-based services like Netflix, Spotify, and Amazon Prime Video. These services offered on-demand access to a vast content library, appealing to audiences seeking flexibility and control over their media consumption.

The **data analytics** and **artificial intelligence** (AI) played a growing role in the media industry, enabling media companies to gain deeper insights into their audiences, personalize content, and optimize marketing campaigns. This data-driven approach transformed how media companies operated and interacted with their consumers. User-generated content (UGC) became increasingly prevalent as social media platforms and online communities fostered the creation and sharing of user-generated videos, photos, and text. This shift empowered individuals to become content creators, challenging the traditional gatekeeper role of media companies.

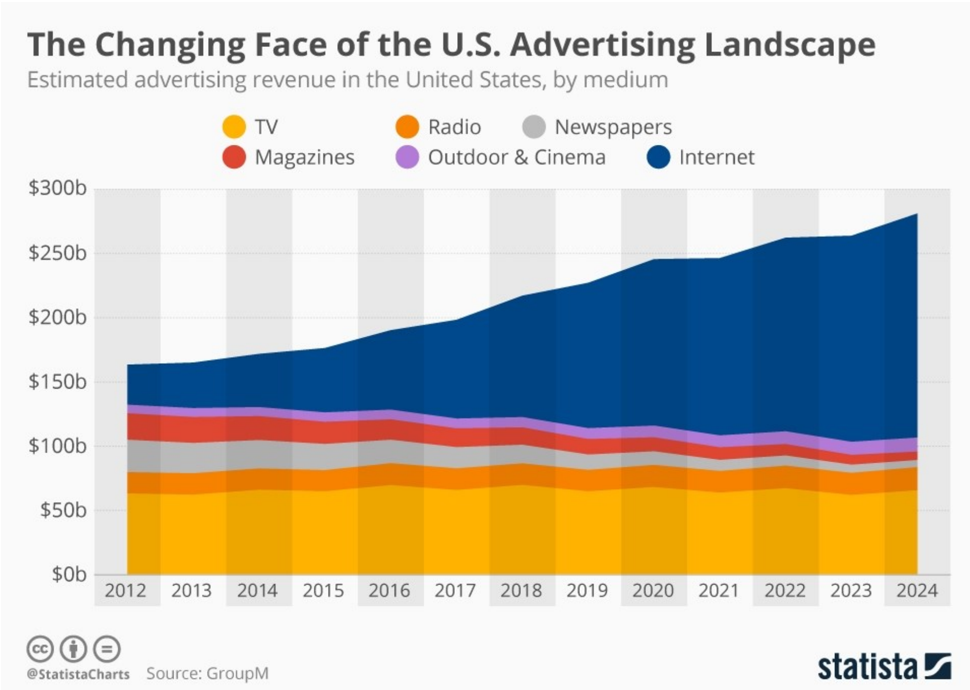
The **EU implemented various regulatory frameworks** to address the challenges and opportunities of the digital media sector. These frameworks aimed to protect media pluralism, promote competition, and safeguard consumer rights. The media industry in the EU is a significant economic sector, contributing to employment, innovation, and cultural diversity. The industry encompasses various activities, including publishing, broadcasting, telecommunications, advertising, and audio-visual content production.

Media industry revenue in the EU

	2017	2018	2019	2020
Audiovisual services	**77.960**	**80.253**	**82.088**	**81.521**
Public funding	21.040	21.164	21.422	21.571
Advertising TV	22.784	23.098	22.693	20.361
Advertising Radio	4.286	4.393	4.428	3.777
Pay-TV revenues	26.387	26.834	26.838	26.584
On-demand pay-revenues	3.463	4.763	6.708	9.228
Cinema gross box-office	**5.565**	**5.323**	**5.769**	**1.789**
Physical video (incl. taxes)	**2.052**	**1.614**	**1.403**	**1.066**
Retail	1.889	1.502	1.316	1.021
Rental	163	111	87	45
TOTAL	**85.577**	**87.190**	**89.259**	**84.377**
Growth		1,88%	2,37%	-5,47%

Source: European Audiovisual Observatory, Yearbook Database

The vision of the future clearly shows the expansion of the digital world. GroupM, one of the world's largest media companies, has published an estimate of how the American advertising market has developed in recent years. The report also points to important global trends and reveals the platforms on which advertisers spend the most money. America is slowly becoming the European path, along with the Hungarian market. The figure clearly illustrates the rise of the digital world in recent years:



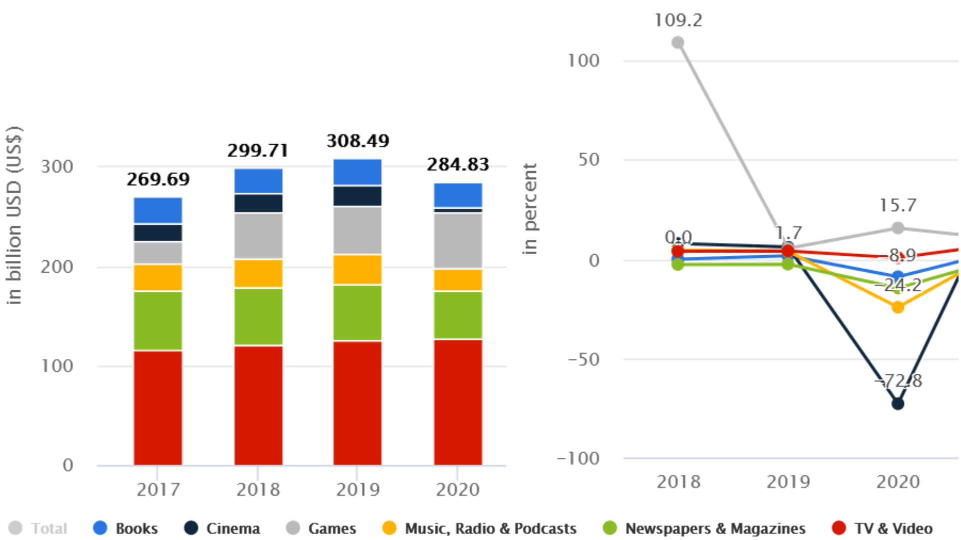
At GroupM, they expect that the American advertising market will continue to grow enormously in the next five years; the total annual revenues of 227 billion this year will rise to 281 billion dollars by 2024. It is not surprising that online advertising sales will bring the most considerable growth; according to experts, this advertising market segment may expand by up to 60 billion dollars in 5 years.[46]

[46]https://penzcsinalok.transindex.ro/hir/20191216-egyetlen-abra-arrol-hogyan-valtozik-a-reklampiac

3. Snapshot

Fueled by the expansion of mobile internet access and rising connection speeds, the proliferation of mobile and streaming devices is driving a consistent increase in the demand for various types of digital media. The significant transformation in the market is primarily influenced by the COVID-19 pandemic, which has led to a substantial surge in the demand for media and a push for digitalisation. Despite the likelihood of traditional media experiencing stagnation or decline overall, the growth in the Media market is predominantly attributed to the TV, video and games segments. This positive impact fuels additional growth, but it is anticipated that digital media segments will continue to dominate, even beyond the pandemic.

Revenue by Market in the EU (USD and %)

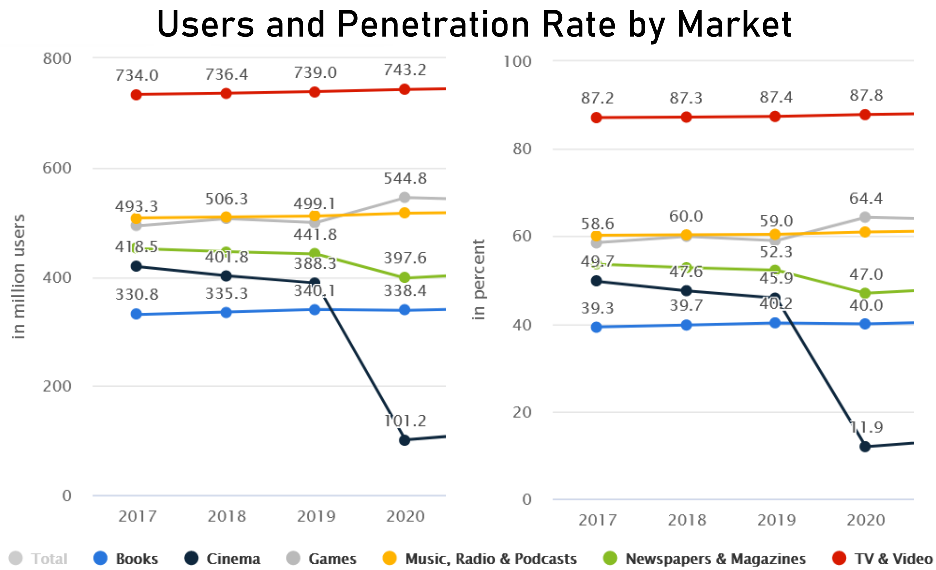


Source: Statista Media Market Insights, 2020

The chart shows that in recent years, there has been an increase in European media market revenues (from €270 billion to nearly €310 billion), with only a slight decline in 2020. In Europe, TV and video services still generate the most revenue, followed by newspapers and magazines, and almost equally by computer games, which are growing in share. Books, cinema, radio and music are increasingly taking a back seat.

With an international outlook, it is worth noting that while the USA continues to lead the market, Asian countries, in particular, exemplify how increasing prosperity creates a substantial demand for knowledge, culture, and entertainment. Video-on-demand, especially with Netflix as the current major player, is projected to sustain its growth trajectory. In the future, technological advancements and evolving media consumption patterns will align with increasing user demand, ensuring consistent growth.

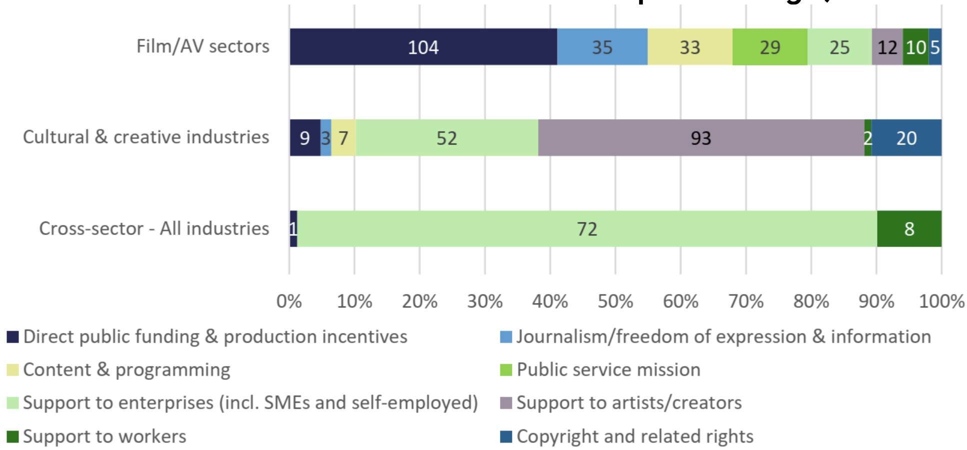
For example, the advent of the metaverse introduces an entirely new dimension to the media market, offering consumers accessibility and opening up new possibilities for consumption. Overall, a noticeable shift from traditional channels, such as print or non-digital media, to digital forms of media is observed within the Media market. This trend is expected to prevail across the entire market and in all regions.



Source: Statista Media Market Insights, 2020

The measures implemented at the national level have predominantly targeted specific areas, primarily focusing on supporting enterprises and workers in a sector marked by a significant presence of SMEs and freelancers. Nevertheless, national initiatives have also addressed diverse realms, encompassing direct public funding, production incentives, assistance to artists and creators, content and programming, journalism, freedom of expression and information, and copyright and related rights. The figure below illustrates a breakdown of the primary areas addressed by the measures across sectors based on a sample of 635 tracked measures in 41 countries.

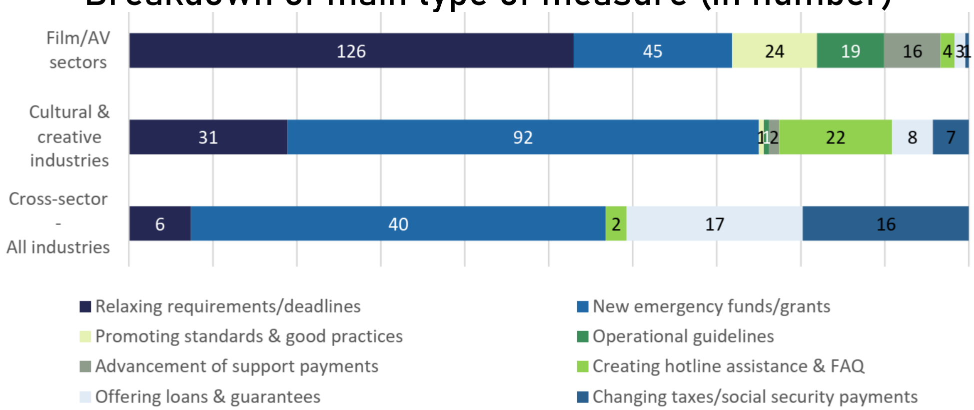
Breakdown of the main area concerned per sector (in number of measures and as a percentage)



Source: European Audiovisual Observatory (2020): The European audiovisual industry in the time of COVID-19, IRIS Plus 2020-2

The predominant share of measures observed nationally pertains to supporting enterprises, including SMEs and the self-employed. Following closely are measures associated with direct public funding, production incentives, and support for artists and creators. When delving into each specific sector, Figure 1 illustrates that a significant portion of the tracked measures within the film and audiovisual sector are connected to direct public funding and production incentives. Within the broader support category for cultural and creative industries, the measures most directly impacting the film and audiovisual sector are those supporting artists and creators.

Breakdown of main type of measure (in number)



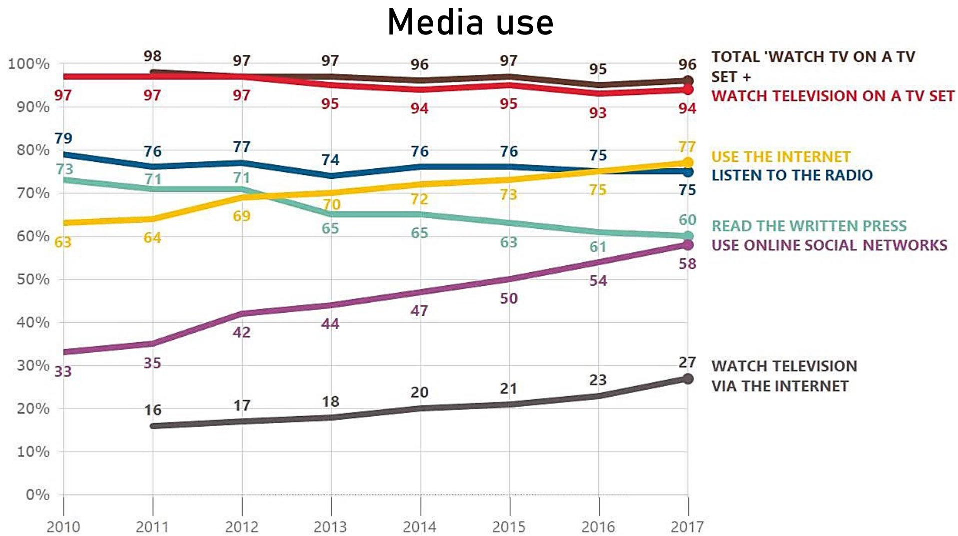
Source: European Audiovisual Observatory (2020): The European audiovisual industry in the time of COVID-19, IRIS Plus 2020-2

The figure illustrates that two measures were frequently implemented in the cultural and creative sectors, including the film and audiovisual sectors. These measures predominantly involved relaxing requirements and deadlines and establishing new emergency funds. Additionally, there were instances of granting loans and guarantees, although to a lesser extent. Specifically within the media sector, regulatory authorities commonly implemented measures to promote standards and good practices. These measures were often aimed at ensuring the public's access to reliable information on television and preventing disinformation on audiovisual media services and video-sharing platforms. Other regulatory measures focused on providing the public with diverse and high-quality programming and facilitating access to education and media literacy during periods of containment.

Broadcasters adapted their program offerings to fulfil their public information mission, and support measures were implemented to assist them during the crisis. These measures included considerations related to the payment of licenses and fees and, in some cases, adjustments to content and programming obligations. Sectoral measures were also enacted to safeguard creators and artists. Government-level support and initiatives through Collective Management Organisations (CMOs) were employed to aid members facing challenges. This support included expedited payment of royalties and establishing emergency and solidarity funds for vulnerable members. Interestingly, various measures emerged across all sectors to offer the public, businesses, and professionals free services. These included the creation of information platforms for available aid, providing free advice or training, telephone assistance, FAQs, and more. Furthermore, the industry actively urged public authorities to support the sector, advocating for concrete actions and, in some cases, providing direct financial support.

3.1. Eurobarometer 2017

The Internet and online social networks are the fastest-growing media used by European citizens. Television (watched on TV or online) remains the medium most used by European citizens: 84% watch it every day or almost every day, an increase of two percentage points since the Fall 2016 Standard Eurobarometer survey.

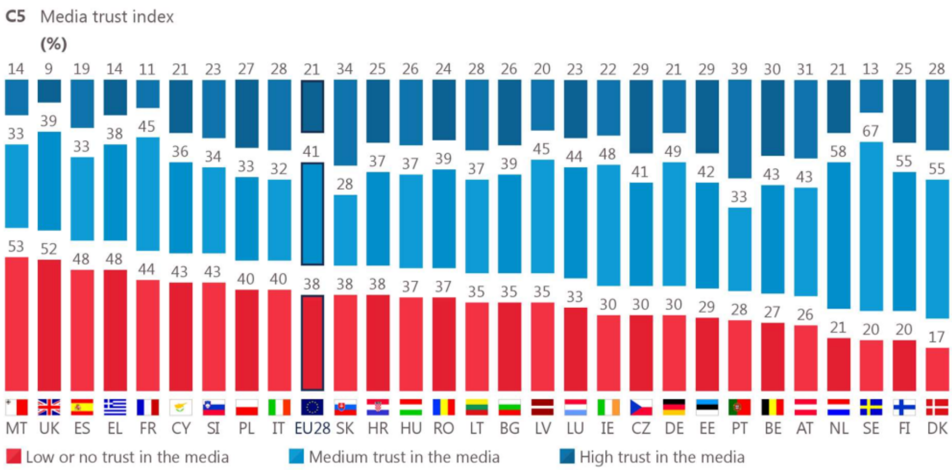


Source: European Commission, Directorate -General for Communication (2018): Media use in the European Union - Standard Eurobarometer 88 Autumn 2017

Television (watched on TV or online) remains the medium most used by European citizens: 84% watch it every day or almost every day, an increase of two percentage points since the Standard Eurobarometer survey in autumn 2016 **(**EB86). Television is mostly watched on television. The proportion of Europeans **who watch TV on** the Internet continues to grow: 27% watch it at least once a week. More than a tenth of them watch television on the Internet daily or almost every day (13%, +3 since autumn 2016). More than three-quarters of Europeans use the **Internet at least once a week:** 77% (+2 percentage points from autumn 2016, +14 percentage points from autumn 2010). Thus, The Internet has overtaken the radio in European citizens' media use: 75% of them listen to the radio at least once a week, the same as in the fall of 2016. The **written press is** next on the list: six out of ten Europeans read the written press at least once a week (60%, -1 percentage point since autumn 2016, -3 since autumn 2015 and -13 since autumn 2010). Online social networks are increasing: 58% of Europeans use them at least once a week (+4 percentage points from autumn 2016, +25 percentage points from autumn 2010). More than four out of ten Europeans do this daily or almost every day (42%).

The **media trust index** (created based on the scores of the five analyzed media) is the same as the autumn 2016 survey: a narrow majority of Europeans still have "moderate" trust in the media (41%, unchanged), just ahead of the proportion where the media trust "hardly or not at all" (38%, unchanged). Slightly more than ten respondents have a "high" degree of trust in the media (21%, unchanged).

Media trust index



Source: European Commission, Directorate -General for Communication (2018): Media use in the European Union - Standard Eurobarometer 88 Autumn 2017

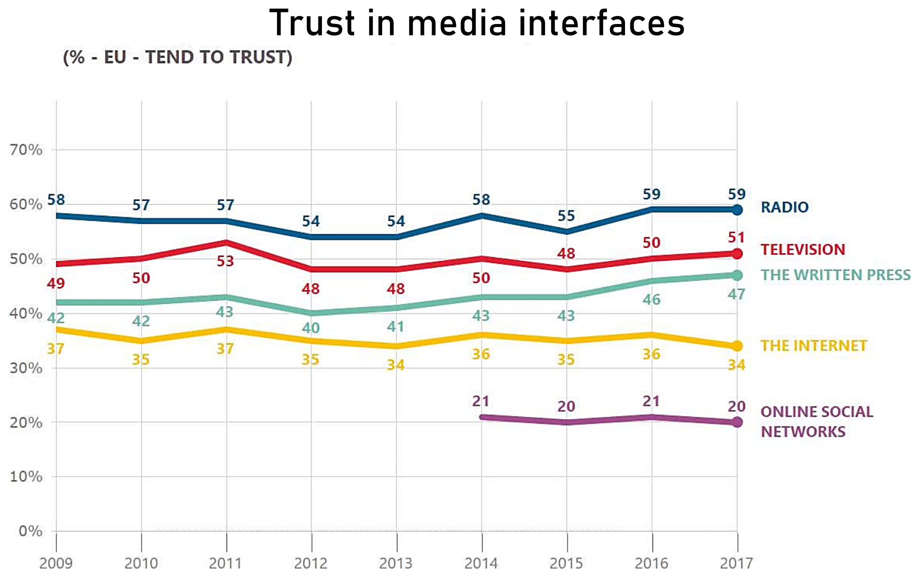
The majority of respondents give the media a "medium" level of trust in 16 EU member states (compared to 14 in autumn 2016). Portugal is the only member state where the majority trusts the media "very much". In ten Member States, the majority of respondents trust the media "hardly or not at all" (it rises to 11 if we add Hungary, where the same proportion trusts the media "hardly or not at all" or "moderately"). This proportion is exceptionally high in Malta (53%), the United Kingdom (52%), Greece (48%) and Spain (48%).

Trust in media interfaces by country

	Radio	Television	The written press	The Internet	Online social networks
EU28	59	51	47	34	20
BE	71	66	59	39	20
BG	50	61	37	45	37
CZ	64	56	48	50	29
DK	82	77	65	36	18
DE	71	63	56	29	15
EE	67	66	52	42	23
IE	71	63	50	34	16
EL	44	22	33	42	27
ES	52	36	40	34	22
FR	56	36	50	25	8
HR	53	46	47	42	32
IT	51	53	48	43	28
CY	54	45	39	32	27
LV	60	59	41	35	21
LT	60	58	48	45	27
LU	63	49	59	37	17
HU	49	55	43	49	32
MT	37	45	31	35	21
NL	76	64	71	31	13
AT	68	64	61	43	29
PL	54	45	39	46	33
PT	70	70	61	46	31
RO	53	61	46	37	28
SI	53	50	41	38	22
SK	61	57	49	42	28
FI	79	73	67	33	14
SE	84	74	62	17	8
UK	48	44	23	23	12

1st MOST FREQUENTLY MENTIONED ITEM
2nd MOST FREQUENTLY MENTIONED ITEM
3rd MOST FREQUENTLY MENTIONED ITEM

Source: European Commission, Directorate -General for Communication (2018): Media use in the European Union - Standard Eurobarometer 88 Autumn 2017



Source: European Commission, Directorate -General for Communication (2018): Media use in the European Union - Standard Eurobarometer 88 Autumn 2017

Europeans' trust in traditional media has slightly improved or stabilised. Radio is still the medium Europeans trust the most: 59% "rather trust" this medium, while 34% "do not trust" it. These results are unchanged since the fall of 2016 and are the highest since the fall of 2009. Slightly more than half of Europeans "trust" television (51%), an increase of one percentage point since autumn 2016, while 45% distrust (-1). Opinions about the written press are evenly distributed: 47% "rather trust" (+1 percentage point) and 47% "do not trust" (-1) this medium. Nevertheless, this is the highest level of trust since the fall of 2009 (trust in print media varied between 40% and 46% between 2009 and the fall of 2016).

While Europeans' trust in traditional media appears to improve, mistrust of the Internet and online social networks is increasing. Just over a third of Europeans (34%) say they "tend to trust the internet", a loss of two percentage points since autumn 2016, while mistrust is on the rise (+3% since autumn 2016 and +6 since autumn 2015). In the case of online social networks, the trend is the same: two out of ten Europeans "trust" them (20%, -1 percentage point), while 62% distrust them (+3 from autumn 2016, +9 from autumn 2015)

3.2.Council Conclusions and Action Plan

The European media strategy contains four relevant elements:

- Conclusions on media freedom and pluralism in the digital environment (2013)
- Colloquium on fundamental rights dedicated to media pluralism and democracy (2016)
- Conclusions on safeguarding a free and pluralistic media system (2020)
- Media and Audiovisual Action Plan (2020)

Conclusions on safeguarding a free and pluralistic media system

On 26 November 2013, the Council adopted Conclusions on media freedom and pluralism in the digital environment. Freedom and diversity of the media are fundamental principles enshrined in the Charter of Fundamental Rights of the European Union, playing a crucial role in upholding transparency and accountability within a democratic framework. Recognizing the challenges posed by these essential values in the digital era, European Union governments have collectively adopted resolutions to address these issues.[47]

The European Union has faced numerous challenges to media freedom and pluralism. These concerns hold significant weight for EU governments, whose international credibility depends on maintaining high media freedom. While the digital age offers increased avenues for freedom of expression and diverse opinions, it also introduces new complexities in how individuals access and evaluate information.[48] The agreed-upon measures include:

- ensuring the independence of audiovisual regulatory authorities in line with the EU's audiovisual media services directive, the regulatory framework for audiovisual media services;
- ensuring genuine transparency regarding media ownership;

[47] Conclusions of the Council and of the Representatives of the Governments of the Member States, meeting within the Council, on media freedom and pluralism in the digital environment - https://eur-lex.europa.eu/legal-content/EN/TXT/?uri=CELEX:52014XG0204(02)

[48] Klimkiewicz, B. (2016). Media pluralism and enlargement: The limits and potential for media policy change. In *The European Union and the culture industries* (pp. 81-104). Routledge.

- safeguarding journalists' rights to protect their sources and shielding them from undue political and economic influences;
- considering national contexts, preventing potential adverse effects from the undue concentration of media ownership.

Expressing support for the Green Paper titled "Preparing for a fully converged audiovisual world," EU governments urged the European Commission to continue supporting initiatives aimed at enhancing the protection of journalists and media practitioners; sustain support for the independent Media Pluralism Monitor, a tool designed to assess risks to media pluralism within the EU; promote collaboration among Member States' audiovisual regulatory authorities and advocate best practices concerning the transparency of media ownership.

Colloquium on fundamental rights dedicated to media pluralism and democracy

In November 2016, the European Commission organised a Colloquium on Fundamental Rights dedicated to Media Pluralism and Democracy. Looking ahead to the Colloquium, First Vice-President Frans **Timmermans** said: *"Free and pluralistic media are the backbone of our democratic societies. Without quality media, public debate cannot flourish. That is why we need to ensure that journalists can do their jobs in full freedom. Europe's citizens must be able to trust in the independence of the press if our democracies are to function properly."* Commissioner for Digital Economy and Society, Günther **Oettinger** added: *"Quality and fact-based journalism are essential to our democracies. We need the right environment for the media to do their work properly. We have recently proposed strengthening the independence of media regulators as part of the new EU audiovisual rules. I count on the European Parliament and Member States to support this proposal."*[49]

The Commission has evaluated the 2010 Audiovisual Media Services Directive (AVMSD) and, based on this assessment, has put forward the following proposals:

- **Responsible video-sharing platforms:** Platforms that curate and categorize a substantial volume of videos will be required to shield

[49] Promoting Media Pluralism and Democracy: Commission hosts second Annual Colloquium on Fundamental Rights (https://ec.europa.eu/commission/presscorner/detail/en/IP_16_3690)

minors from harmful content, such as explicit material and violence, and safeguard all users from content that incites hatred. The proposed measures include user-friendly tools for reporting and flagging harmful content and implementation of age verification or parental control systems. In addition to industry self-regulation, national audiovisual regulators will have the authority to enforce the rules, potentially leading to fines based on national legislation.

- **A stronger role for audiovisual regulators:** The revised Directive ensures that regulatory bodies are genuinely independent of governmental and industry influence, enabling them to effectively fulfil their role of ensuring that audiovisual media serve the best interests of viewers. The European Regulators Group for Audiovisual Media Services (ERGA), comprising all 28 national audiovisual regulators, will have its role defined in EU legislation.
- **More European creativity:** European TV broadcasters invest approximately 20% of their revenues in original content, whereas on-demand providers invest less than 1%. The Commission proposes that TV broadcasters should continue dedicating at least half of their viewing time to European content. On-demand providers must ensure at least 20% of European content in their catalogues.
- **More flexibility for TV broadcasters:** Responding to changing viewer preferences, the revised audiovisual rules provide more flexibility for broadcasters regarding the timing of advertisements. While maintaining the overall limit of 20% of broadcasting time between 7 am and 11 pm, broadcasters can now choose more freely when to air ads throughout the day, departing from the current restriction of 12 minutes per hour. Additionally, broadcasters and on-demand providers will have increased flexibility in utilizing product placement and sponsorship, with a requirement to keep viewers adequately informed.

These different measures are expected to have a positive economic impact on media service providers – mainly TV broadcasters – and increase their capacity to invest in audiovisual content. This is important for the competitiveness of the EU audiovisual industry.

Council conclusions on media freedom and pluralism

On 7 December 2020, the Council of the European Union adopted Conclusions on safeguarding a free and pluralistic media system.[50] Recalling the current policy context, especially during times of crisis, it is essential to have a sustainable (A), pluralistic (B), and trustworthy (C) media system. The COVID-19 pandemic has heightened the vulnerability of the media sector in the EU. This vulnerability stems from the collapse of its main sources of advertising revenues, coinciding with a significant increase in the demand for reliable information and content. Additionally, globalisation and digitalisation have created a media environment characterised by online platforms. These platforms now function as gateways through which a global audience gains cross-border access to a wealth of media content and services, competing for users' limited attention.

In response to these challenges, the Council urges EU Member States and the European Commission to take action to ensure the sustainability of the media sector by providing financial support and promoting new business models; protect media pluralism by promoting diversity of content and addressing the power of online platforms, and enhance the trustworthiness of media by promoting media literacy and fighting disinformation.[51]

The Council also welcomes the European Commission's initiative and the Member States to establish a European Media Forum to discuss current media policy issues. Member States should provide financial support to media outlets, mainly local, regional, and traditional media outlets. The Commission should work with Member States to develop a media financing framework that is fair and proportionate. Online platforms should be required to be more transparent about their algorithms and to give media outlets a fair chance to reach their audiences. Member States should invest in media literacy education to help citizens identify and resist disinformation. The Commission should strengthen Europe's media regulation to address the new challenges online platforms pose.

[50] Council conclusions on safeguarding a free and pluralistic media system 2020/C 422/08 - https://eur-lex.europa.eu/legal-content/EN/TXT/?uri=CELEX:52020XG1207(01)
[51] Parcu, P. L. (2020). New digital threats to media pluralism in the information age. *Competition and regulation in network industries*, *21*(2), 91-109.

European Media and Audiovisual Action Plan

In 2021, the European Commission will launch the Media and Audiovisual Action Plan (MAAP), which primary objective is to uplift European media and safeguard European cultural and technological independence during the Digital Decade. Pictured is a woman standing in front of various screens presenting streaming content.[52] This initiative concentrates on two key sectors: the news media sector, encompassing both printed and online press, radio, and audiovisual services, and the audiovisual entertainment sector, which includes cinema, TV, video streaming, video games, and innovative formats like virtual reality experiences. These sectors grapple with significant trends and challenges, particularly exacerbated by the COVID-19 crisis. In response, the European Commission aims to fortify the resilience of Europe's media and ensure its competitiveness on both European and global scales through a combination of investment and policy actions.

To achieve these objectives, the Communication revolves around three overarching themes, each comprising specific actions:

The actions include	
Recover: assisting audiovisual and media companies in navigating the current challenges by providing liquidity and financial support.	• providing an interactive tool to give European audiovisual and news media companies guidance on different sources of EU support; • boosting investment to foster European audiovisual production and distribution by strengthening equity investment in this area; • launching of a 'NEWS' initiative, which will bundle actions and support for the news media industry.
Transform: addressing structural issues; this theme aims to help the industry confront the green and digital twin transitions amidst fierce global competition.	• creating European 'media data space', to support media companies in sharing data and developing innovative solutions; • fostering of a European virtual and augmented reality (VR/AR) industrial coalition – to help EU media benefit from the advancement of this immersive media; • helping the industry become climate-neutral by 2050 by facilitating the exchange of best practices, and putting a stronger focus on environmental sustainability in Creative Europe MEDIA.

[52] https://digital-strategy.ec.europa.eu/en/policies/media-and-audiovisual-action-plan

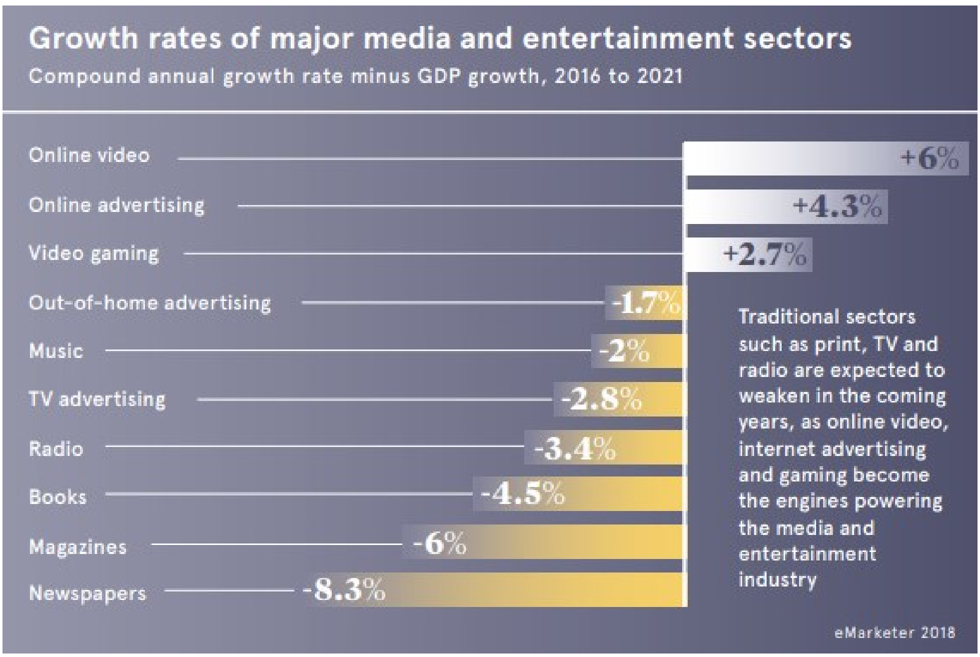
Enable and Empower: creating conditions for increased innovation while ensuring a level playing field and empowering citizens to access content quickly and make informed decisions.	• launching a dialogue with the audiovisual industry to agree on concrete steps to improve the access to and availability of audiovisual content across the EU; • fostering European media talent through mentoring and training, as well as scouting and supporting promising European media start-ups; • enhancing media literacy, aimed at empowering citizens, with a toolbox and guidelines for Member States regarding the new media literacy obligations of the AVMSD, and supporting the creation of independent alternative news aggregation services capable of offering a diverse set of accessible information sources; • strengthening the cooperation framework among European media regulators within the European Regulators Group for Audiovisual Media Services (ERGA).

Source: own compilation based on https://digital-strategy.ec.europa.eu/en/policies/media-and-audiovisual-action-plan

4. Media sectors

Throughout the present lifetime, the way how we consume media and entertainment has undergone significant transformations. For Boomers and Gen Xers, these shifts have been revolutionary. Both generations can recall a time before widespread computing when TV was dominated by the Big Three TV networks (NBC, ABC, and CBS), and staying informed relied heavily on newspapers and magazines. Even millennials have witnessed substantial changes in media consumption. They have experienced the emergence of social media, online news, streaming services, and digital video firsthand. Many can reminisce about their college gaining access to Facebook for the first time, the demise of Napster, and the peculiar sounds their 28.8k modem made as it struggled to download a single image file successfully. The contemporary media landscape is markedly distinct from earlier, and the forthcoming years are poised to introduce even more profound transformations.

Media Sector Growth



Source: Desjardins, Jeff (2018): Predicting the Future of Media and Entertainment (https://www.visualcapitalist.com/visualizing-future-media-entertainment/)

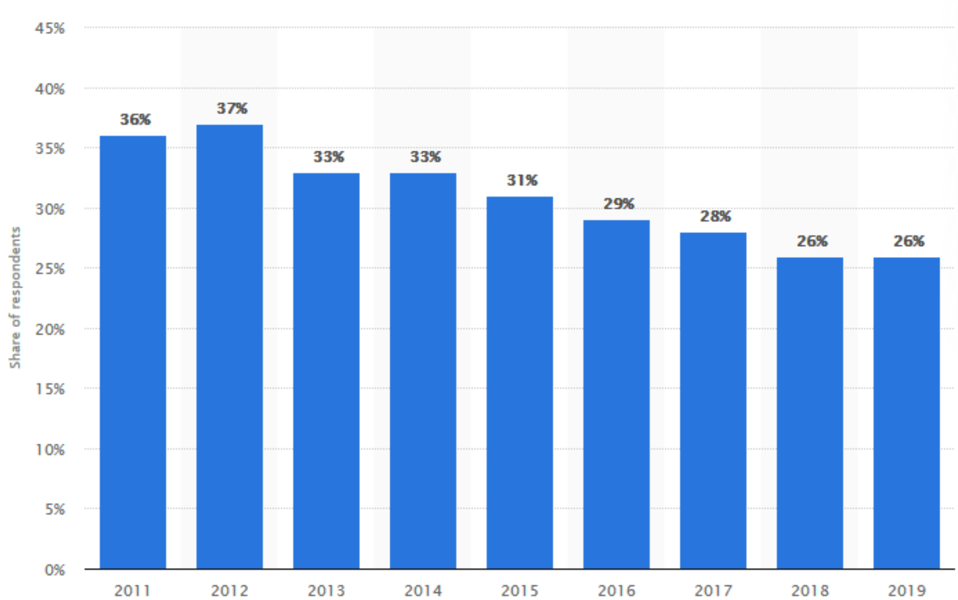
Online video (6.0%), online ads (4.3%), and video gaming (2.7%) are the only sectors growing at a rate faster than GDP growth. Online video is the fastest-growing sector, with a compound annual growth rate minus GDP growth of 6%. This is due to the increasing popularity of streaming services such as Netflix, Hulu, and Amazon Prime Video. Online advertising is also growing rapidly, with a compound annual growth rate minus GDP growth of 4.3%. More and more businesses are shifting their advertising budgets to digital channels. Video gaming is another growing sector, with a compound annual growth rate minus GDP growth of 2.7%; the increasing popularity of mobile gaming and the growing demand for high-quality video games for consoles and PCs.

In contrast, traditional sectors such as print, TV, and radio are expected to decline in the coming years. Print is the hardest-hit sector, with a compound annual growth rate minus GDP growth of -8.3%. This is due to the decline in print readership and the shift to digital advertising. TV advertising is also declining, with a compound annual growth rate minus GDP growth of -2.8%. The competition from online video and the fact that more and more people are watching TV through streaming services, which do not show commercials. Radio is also declining, with a compound annual growth rate minus GDP growth of -3.4%; the competition from online music streaming services and the fact that more and more people are listening to music on their smartphones.

4.1. Newspapers

Around four billion newspaper readers can be counted in the world, of which 1.3 billion consume digital newspaper content on various platforms. While print remains dominant, non-digital newspaper industry revenues are forecast to decline by 3 % in the five-year period to 2020, while digital newspaper revenues are expected to grow by 9.8 % over the same period. Accordingly, the popularity of the written press among the citizens of the 28 EU countries has decreased in recent years, and the prevalence rate of daily print media consumption fell from 37 % in 2012 to 29 %. Online newspapers have grown significantly over the past two decades. For example, in 1995, only five newspaper sites were available in Germany, while around 700 online offers have been found in recent years. The decline in newspaper usage also affected the industry's advertising income: newspaper advertising expenditures in the European Union fell from 22 billion euros in 2009 to 15.7 billion euros.

Respondents who read print media daily or almost daily in the European Union (EU 28) between 2011 and 2019

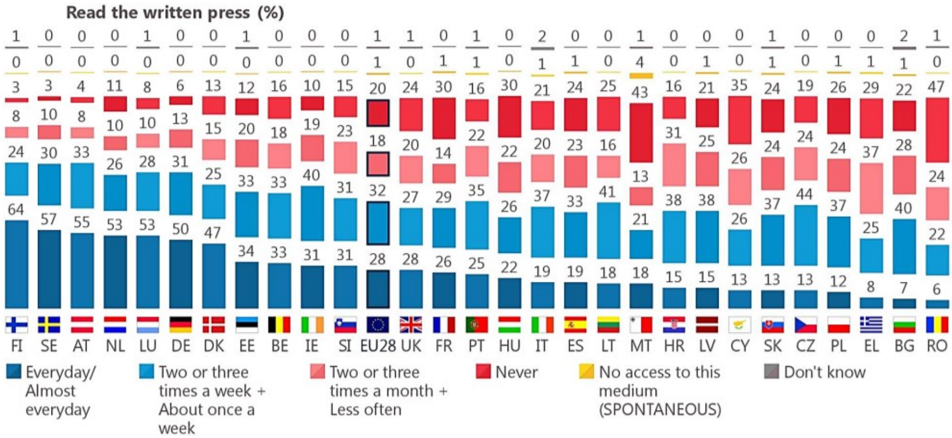


Source: https://www.statista.com/statistics/452430/europe-daily-newspaper-consumption/

In recent years, the number of people who read newspapers and magazines daily has decreased. In 2019, around a quarter of Europeans read print media every day. In 2012, 37 % did so. Why are Europeans turning away from newspapers and magazines? The answer may be that people no longer trust the print media. According to a recent survey, less than half of European citizens trust the written press. In some countries, the level of trust is even lower. In the United Kingdom, for example, only 15 % of respondents said they tend to trust the print media, while 29 % said the same in Greece. If people no longer get their news from print media, where do they turn? Many people seem to be looking for it online. In the EU, the proportion of citizens reading news online has increased yearly, and it is hard to see this trend changing soon.

The proportion of Europeans who read the written press every day or almost every day is 28%. This represents a decrease of one percentage point since the fall of 2016, five points since the fall of 2014, and ten points since the fall of 2010.

Read the written news



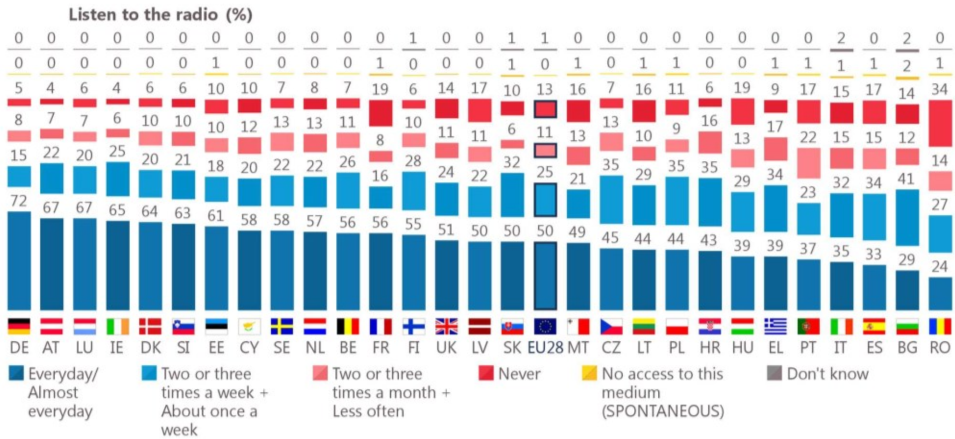
Source: European Commission, Directorate -General for Communication (2018): Media use in the European Union - Standard Eurobarometer 88 Autumn 2017

The differences between the Member States on this issue are very significant: less than 10% of respondents read the written press daily or almost every day in Romania (6%), Bulgaria (7%) and Greece (8%), while more than 60% a respondent does this in Finland. Daily or almost daily use of print media has decreased in 16 Member States since 2016, especially in Sweden (57%, -10 percentage points) and Lithuania (18%, -10), but has risen significantly in Austria (55%, +10). In the rest of Europe, newspaper consumption showed a similar downward trend. In Spain, the number of people reading daily newspapers decreased from 37.7 % in 1997 to 25.6 % in 2017, while in Germany, the number of newspapers sold decreased from 22.57 million in 2003 to 16.5 million in 2016. In France, however, 64 % of French citizens declared they were unwilling to give up print media in the next three years.

4.2. Radio

The proportion of Europeans who listen to the radio at least once a week has remained unchanged since 2016 at 75%. However, the proportion of those who listen to the radio every day or almost every day has increased by three percentage points (to 50%) since autumn 2016, after falling by six points between autumn 2014 and 2016.

Listen to the radio



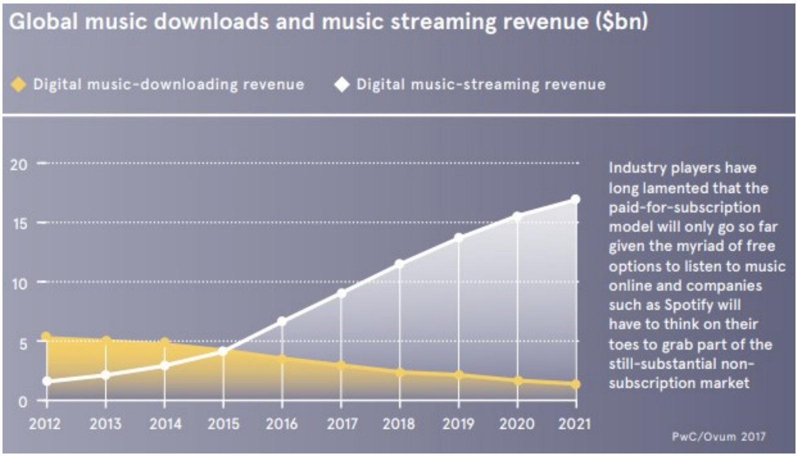
Source: European Commission, Directorate -General for Communication (2018): Media use in the European Union - Standard Eurobarometer 88 Autumn 2017

The daily or near-daily use of radio varies significantly between Member States. It is the least common in Romania (24% listen to the radio daily or almost every day) and the most common in Germany (72%). This practice has increased sharply since autumn 2016 in Cyprus (58%, +11 percentage points) and to a lesser extent in Germany (72%, +7), Luxembourg (67%, +7) and Austria (67%, + 7).

The digital music streaming revenue is growing faster than the digital music downloading revenue. This suggests that the music industry is shifting towards a streaming-based model. It could affect how music is produced and distributed in the future. Industry players are concerned that the paid-for-subscription model for music streaming will only go so far, given the myriad free options to listen to music online. Music streaming companies may need to find new ways to generate revenue in the future, such as through advertising or the sale of merchandise. The music industry is undergoing a significant transformation. The rise of music streaming services is changing how people listen to music, and the industry is shifting towards a streaming-based model.

How the music industry will evolve in the future remains to be seen, but the chart suggests that music streaming will play a significant role.

Music downloads

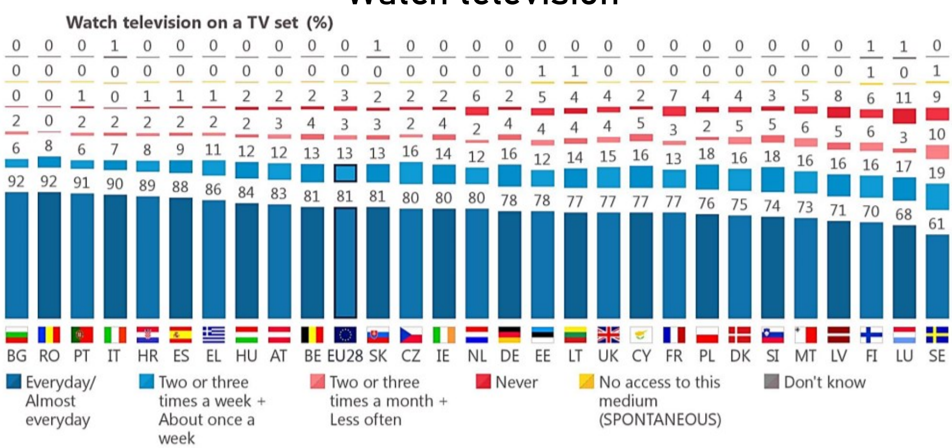


Source: Desjardins, Jeff (2018): Predicting the Future of Media and Entertainment (https://www.visualcapitalist.com/visualizing-future-media-entertainment/)

4.3. Television

In all EU Member States, the majority of respondents watch television every day or almost every day. The highest score was obtained in Bulgaria (92), the lowest in Sweden, where this practice is decreasing (61%, by -5 percentage points since the Standard Eurobarometer survey in the fall of 2016, and by -8 % since the fall of 2015).

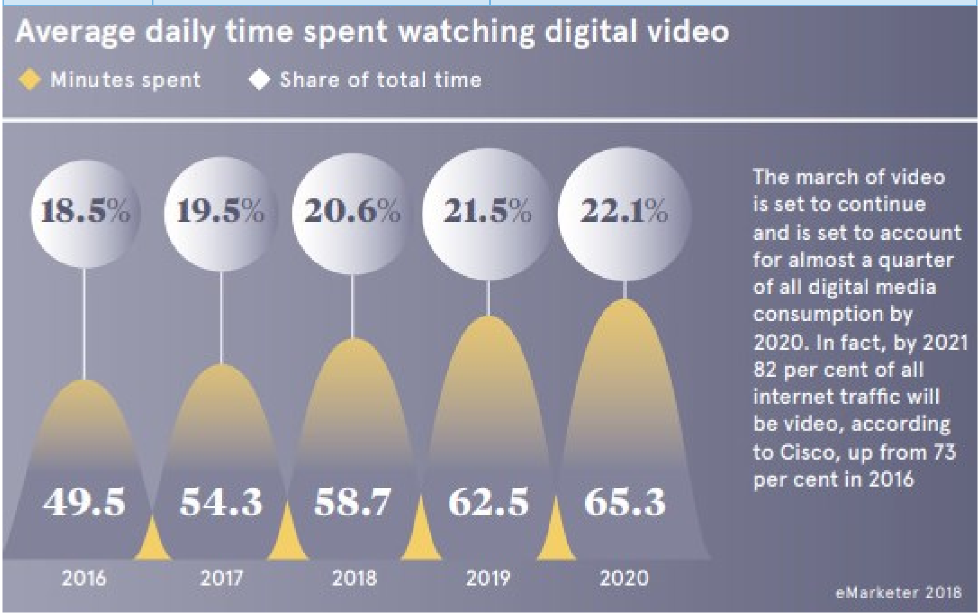
Watch television



Source: European Commission, Directorate -General for Communication (2018): Media use in the European Union - Standard Eurobarometer 88 Autumn 2017

Daily Minutes Watching TV vs. Digital Video

Year	TV (Minutes watched)	Digital Video (Minutes Watched)
2016	245	49.5
2017	238	54.3
2018	230	58.7
2019	222	62.5
2020	219	65.3

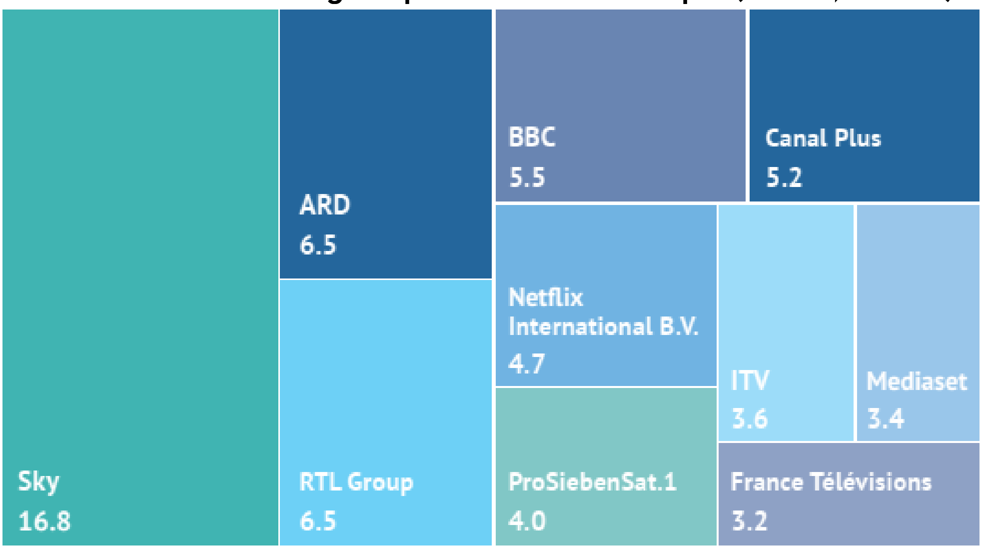


Source: Desjardins, Jeff (2018): Predicting the Future of Media and Entertainment (https://www.visualcapitalist.com/visualizing-future-media-entertainment/)

The average daily time spent watching digital video is increasing steadily. In 2016, people spent an average of 49.5 minutes per day watching digital video. By 2020, that number had increased to 65.3 minutes. This represents an increase of over 30% in just four years. Digital video makes up an increasingly larger share of all digital media consumption. In 2016 digital video accounted for 18.5% of all digital media consumption. By 2020, that share had increased to 22.1%. This means that digital video is now the most popular type of digital media consumption, surpassing social media and gaming. The march of video is set to continue, and digital video is expected to account for almost a quarter of all digital media consumption. It is likely due to several factors, including the increasing popularity of streaming services, the growing availability of high-speed internet, and the increasing number of devices people use to watch video.

In the UK (Sky, BBC, ITV in the top 10), Germany (ARD, RTL Group, ProSiebenSat.1) and France (Groupe Groups based in Canal Plus, France Télévisions) account for 62% of the top 100's total revenue. A different point of view appears when the emphasis is placed on the country or region of origin of the ultimate owners of the groups. In 2018, US-based companies controlled about 25% of the combined revenues of the 100 audiovisual groups active in Europe, compared to 15% in 2013. The figures are higher if only private groups are considered: 37% in 2018, at most from 25% in 2013. However, the majority of this share is owned by Comcast, the owner of the Sky pay-TV provider. Other US groups with significant holdings include Netflix, Discovery, Warner Media (AT&T), Viacom, Amazon and the Walt Disney Company.[53]

TOP 10 audiovisual groups active in Europe (sales, bill. €)



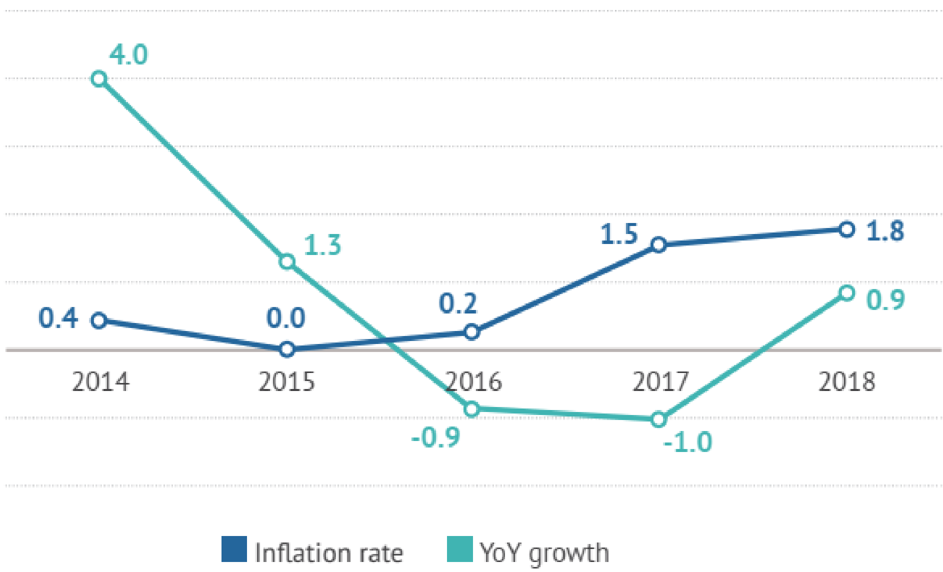
Source: European Audiovisual Observatory analysis of EBU/MIS, Amadeus and annual reports data

The weight of public service broadcasting (PSB) groups in national audience markets is decreasing. Between 2013 and 2018, the average audience market share of European1 PSBs decreased by 4 % and stagnated at 0.2% in the EU28. Regardless of their audience share, public service providers, like their commercial competitors, face increasing audience fragmentation due to the proliferation of digital television channels. Shifting audience tastes driven by increased video content on streaming platforms poses additional challenges to maintaining sharing. Differences in the level of funding are a

[53] Jäckel, A. (2019). *European film industries*. Bloomsbury Publishing.

key factor in explaining why public service audience rates in Europe ranged from 5% to 70% in 2018, with significant differences between the Nordic countries and some Baltic and Eastern European states.

Public broadcasters and average harmonised inflation

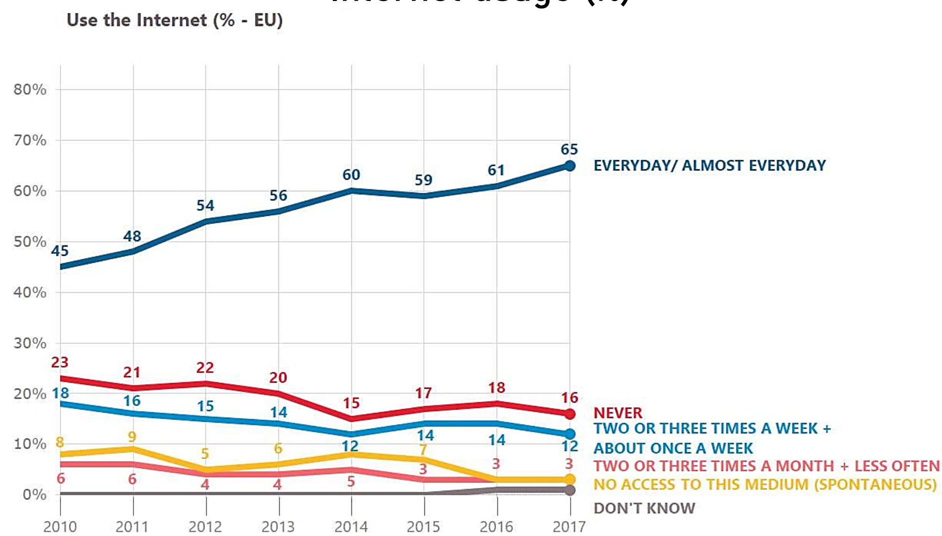


Source: European Audiovisual Observatory analysis of EBU/MIS, Amadeus and annual reports data

4.4. Internet - Digital platforms

The proportion of Europeans who use the Internet every day or almost every day has been growing almost continuously since the fall of 2010, and by a total of 20 % to 65 %. In the same period, the proportion of respondents who never use the Internet decreased by seven percentage points to 16%. The proportion of Europeans who use it two or three times a month or less has halved (3%), while the number of those who do not have access to the Internet has decreased by five percentage points (3%). Finally, only 1% of respondents said they could not access it (+1 percentage point since autumn 2010).

Internet usage (%)

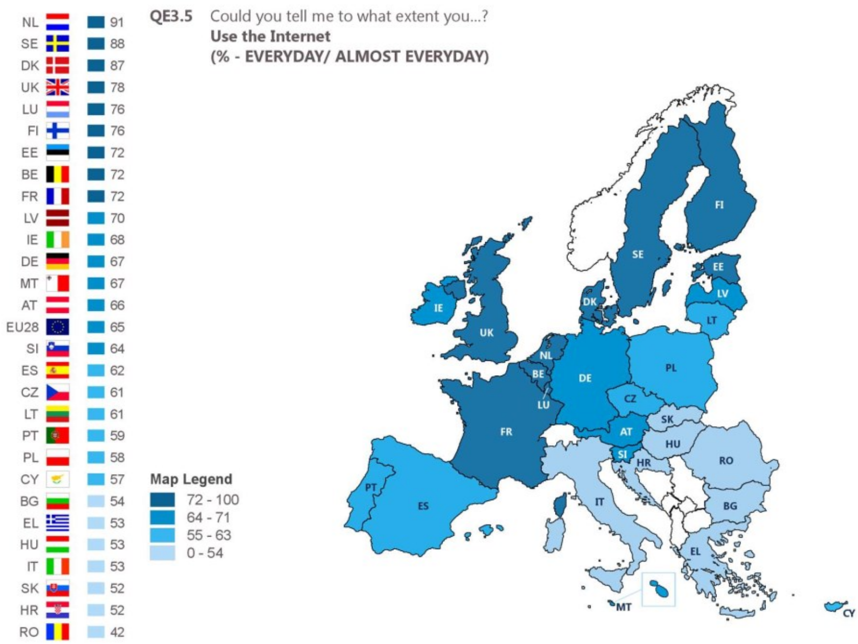


Source: European Commission, Directorate -General for Communication (2018): Media use in the European Union - Standard Eurobarometer 88 Autumn 2017

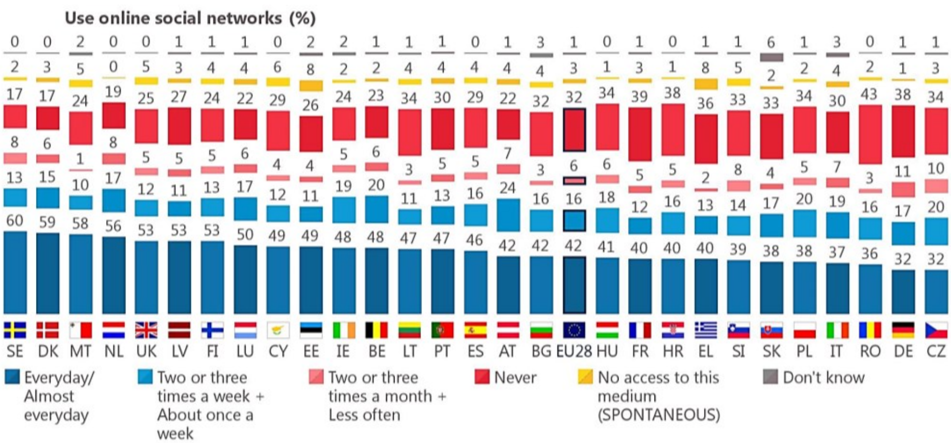
Internet usage still varies considerably between Member States: 42% of respondents in Romania use the Internet daily or almost every day, while in the Netherlands, this proportion is 91%. Daily or almost daily use of the Internet increased in 22 Member States, especially in Austria (66%, +10 percentage points), Germany (67%, +8), Poland (58%, +8) and Bulgaria (54%, +8). It decreased slightly in two Member States: Slovakia (52%, -2) and Ireland (68%, -1 percentage point).

More than four in ten Europeans say they use online social networks daily or almost every day (42%, +4 percentage points since autumn 2016). This ratio has been steadily rising in recent years, increasing by 24 percentage points between the fall of 2010 and the fall of 2017. Despite these developments, 35% of Europeans do not participate in online social networks: 32% never use them, and 3% spontaneously said they could not access them. Finally, 1% of respondents say they "do not know" to what extent they use online social networks.

Internet usage (daily)

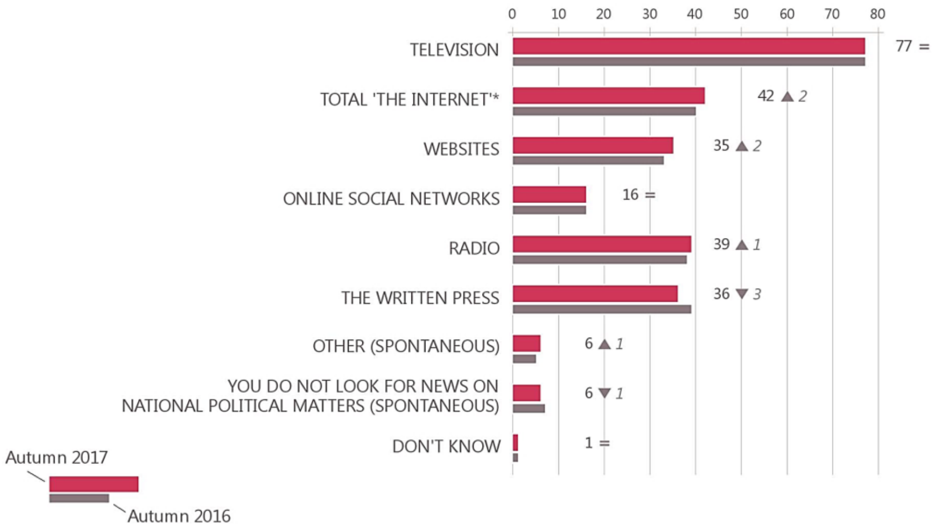


Use online social networks



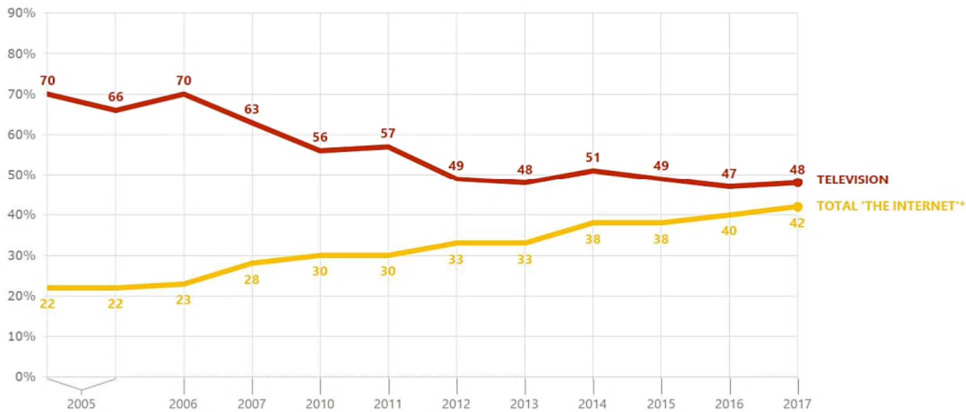
Source: European Commission, Directorate -General for Communication (2018): Media use in the European Union - Standard Eurobarometer 88 Autumn 2017

The Internet continues to gain ground among the preferred sources of national political news. Television is Europeans' preferred news source on national political issues (77%), with the same score as in 2016. The Internet remains one of the most popular sources of national news (42%, +2 percentage points since autumn 2016, +4 since autumn 2015 and +13 since autumn 2011). More specifically, the score for websites is increasing (35%, +2), while the score for online social networks remains low (16%), after increasing by three points between autumn 2015 and 2016. Radio (39%) has grown by one percentage point since the fall of 2016 and is now preferred over the print media, which continues to lose ground (36%, -3 and -5 since the fall of 2015).



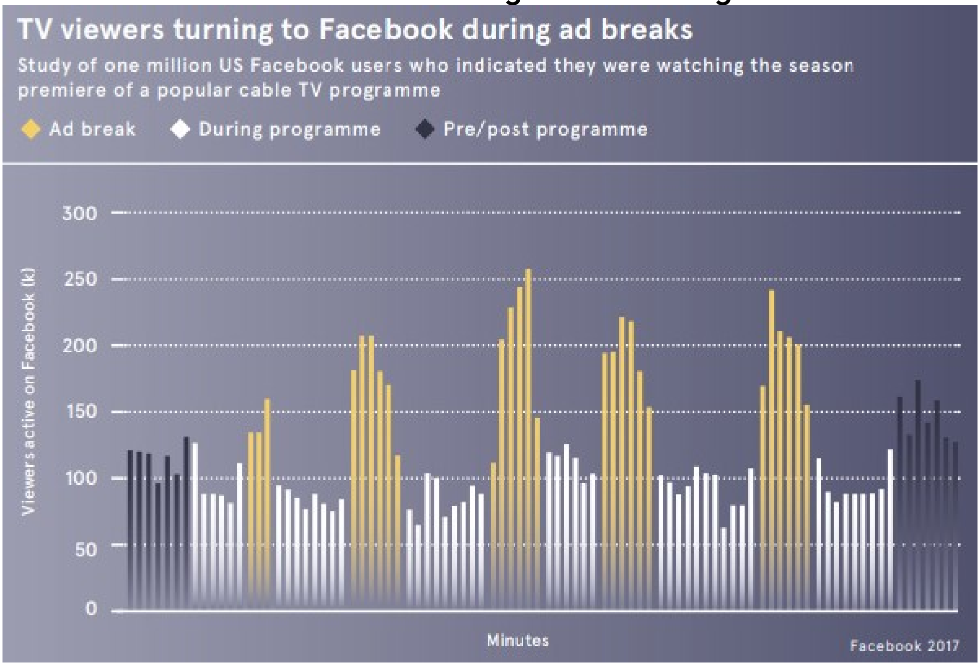
Source: European Commission, Directorate -General for Communication (2018): Media use in the European Union - Standard Eurobarometer 88 Autumn 2017

The gap between television and the Internet is narrowing, and the Internet is now in second place with a score of 42%, which means an increase of two percentage points since the fall of 2016. This growth confirms a deeper trend: the mention of the Internet. It has grown almost continuously since the spring of 2005, and in this period, it managed to rise by 20 percentage points.



The results of the online platforms differ from country to country among EU member states, showing that most respondents agree that "online social networks can make people interested in political affairs" in all Member States, from 46% in France to 83% in Sweden. Agreement with this statement gained significant ground in Spain (67%, +8 percentage points since autumn 2016) and Germany (54%, +6), but lost ground in Portugal (47%, -8). Most respondents also agree that "online social networks are a modern way of keeping up with political affairs" in all Member States, ranging from 45% in Portugal to 70 % in Ireland. This result has increased since autumn 2016 in Cyprus (65%, +7 percentage points) and Spain (69%, +6), but has fallen significantly in Portugal (45%, -11) and Estonia (52%, -9). Majorities agree that "online social networks are a good way to have a say in political issues" in 28 EU Member States, from 48% in Germany and the Netherlands to 66% in Ireland. This opinion gained ground in Cyprus (61%, +8 percentage points) and Germany (48%, +6), and lost ground in Sweden (59%, -6) and Estonia (53%, -6). The majority agree that "information from EU networks on political matters cannot be trusted" in 26 EU member states (compared to 25 in autumn 2016), led by Sweden (75%). A slight majority of respondents do not agree in Bulgaria (37% "disagree" versus 30% " agree") and Greece (39% versus 37%). Agreement with this criticism has increased significantly since autumn 2016 in several Member States: Spain (61%, +12 percentage points), Germany (52%, +11), Austria (57%, +9), Sweden (75%, +7) and United Kingdom (64%, +7). In Romania, disagreement with the criticism increased significantly (31%, +8).

Facebook during TV watching



Source: Desjardins, Jeff (2018): Predicting the Future of Media and Entertainment (https://www.visualcapitalist.com/visualizing-future-media-entertainment/)

The phenomenon of using Facebook while watching TV is quite common and reflects the evolving nature of media consumption in the digital age. Many individuals engage in multitasking by simultaneously using social media platforms like Facebook while watching television.[54] Users often use Facebook as a "second screen" to complement their TV-watching experience. They might share their thoughts, react to moments in real-time, or discuss the show with friends. With the rise of smart TVs, streaming services, and mobile devices, individuals have more options for consuming content. Facebook becomes a part of this multi-platform experience, allowing users to stay connected regardless of their device.

Facebook provides a social space where users can connect with friends, share opinions, and participate in discussions about the TV content they are watching. This social interaction enhances the overall entertainment experience. Live events, such as award shows, sports events, or popular TV shows, often generate significant activity on social media platforms. Viewers share

[54] Oviedo, V., Tornquist, M., Cameron, T., & Chiappe, D. (2015). Effects of media multitasking with Facebook on the enjoyment and encoding of TV episodes. *Computers in Human Behavior*, *51*, 407-417.

their reactions, memes, and comments in real-time, creating a sense of community engagement.

Users may encounter TV-related content on Facebook, such as trailers, reviews, or discussions, which can influence their TV-watching choices. TV networks and shows often maintain a presence on social media, including Facebook, to engage with their audience, share behind-the-scenes content, and provide updates. Viewers may follow these pages for a more interactive experience. TV networks and advertisers recognize the importance of social media. They may integrate social media campaign hashtags or encourage viewers to participate in discussions on platforms like Facebook to enhance the reach and impact of their TV commercials or promotional activities. TV commercials can be frustrating for many viewers, and using Facebook during these breaks can help pass the time.

While using Facebook while watching TV can be a convenient way to stay connected and entertained, it can also have some adverse effects. Spending time on Facebook can distract viewers from the TV show, leading to a poorer understanding of the plot and characters. The constant use of devices can lead to increased screen time and potential eye strain, sleep problems, and social isolation. The engaging nature of social media can lead to addiction and a fear of missing out (FOMO). Viewers may feel the need to constantly check their Facebook feeds, even during TV shows, which can disrupt their enjoyment of the show and their overall well-being.[55]

---

[55] Holz, C., Bentley, F., Church, K., & Patel, M. (2015, June). " I'm just on my phone and they're watching TV" Quantifying mobile device use while watching television. In *Proceedings of the ACM International Conference on Interactive Experiences for TV and Online Video* (pp. 93-102).

5. The two largest markets

In the vibrant landscape of the global media industry, two European powerhouses, Germany and the United Kingdom, stand as towering pillars, shaping the narrative of information dissemination, entertainment, and cultural expression. Renowned for their rich media traditions and innovative contributions, these nations have long been at the forefront of influencing global discourse. The media industries in Germany and the UK exhibit a dynamic blend of tradition and cutting-edge technology, reflecting the evolution of communication in the digital age.

5.1. Germany

Similar to other developed cultures, the German media is also based on the constitution. The Grundgesetz of the Federal Republic of Germany states: "Everyone has the right to freely express and disseminate their opinion in writing, orally, and visually, and to obtain information from accessible sources without hindrance. Freedom of the press, electronic and film information is guaranteed. Censorship does not exist…"[56]

The German **news media industry** is undergoing significant changes, marked by the rising importance of digital and new media and the widespread adoption of social networks. Despite these shifts, Germany maintains one of the most diverse traditional news media sectors. The newspaper publishing industry is grappling with a strategic crisis exacerbated by a sharp decline in advertising revenues during the economic crisis. However, well-established publishing houses remain crucial to the relatively stable print media market. Several large multimedia companies operate in the German media market, with notable players like Axel Springer Group and Bertelsmann. These companies – particularly Bertelsmann, a global giant – control parts of the domestic and international media markets. They play a vital role in integrating new technologies and media into traditional activities, seeking opportunities to maintain or improve their competitive positions.

Germany's TV and radio broadcasting markets are well-developed and intensely competitive, with ongoing technological and regulatory trends contributing to increased dynamism. Public broadcasting is strongly influenced

[56] Grundgesetz für die Bundesrepublik Deutschland, Article 5

by the Länder, aligning with their cultural sovereignty. Commercial broadcasting ownership is highly concentrated in Germany, attracting interest from both domestic stakeholders and global players. The German media market is concentrated. Due to the size of the country's population (83 million people) and its economic power, it is clearly the largest market in Europe. Based on annual turnover, the **ten largest companies** are:

1. **Bertelsmann AG:** The limited liability company is headquartered in Gütersloh, Westphalia. It likes to call itself the world's most international media company, as it has more than 50 subsidiaries worldwide.
2. **ARD:** Die ARD (Arbeitsgemeinschaft der öffentlich-rechtlichen Rundfunkanstalten der Bundesrepublik Deutschland) is the second largest media company in the world after the BBC. Main income: advertising, radio, TV.
3. **Axel Springer AG:** Germany's largest newspaper publisher with long-standing and influential media institutions.
4. **ProSiebenSat.1:** The core business is ProSiebenSat.1 Media Rt. The core profile is TV and the Internet. Since 2003, the tax network has been supervised by a group of international financial investors.
5. **Hubert Burda Media Holding GmbH & Co:** The Burda media concern is present in Germany, Central and Eastern Europe, Russia and Asia. It is headquartered in Offenburg but has publishing offices in Munich, Berlin and Hamburg.
6. **Verlagsgruppe Georg von Holtzbrinck:** Holtzbrinck Kft. publishing group based in Stuttgart, family business. It is present in more than 80 traditional and electronic media countries. Main profile: information, training, entertainment.
7. **Bauer Media Group:** Hamburg-based Heinrich Bauer Publishing House (Bauer Media Group) is dominant in the newspaper market. The main profile is the boulevard. It is present in 14 countries.
8. **ZDF:** The right-wing ZDF in Mainz is one of the largest TV companies in Europe
9. **Verlagsgruppe Weltbild GmbH:** The main strengths of the Augsburg publishing group are book publishing and book trading. He runs most of the bookstores in Germany. The company's e-commerce is growing spectacularly.
10. **WAZ Mediengruppe:** The company from Essen is involved in newspaper publishing. The range includes 38 daily newspapers and 108 magazines.

Germans spend about 219 min/day on television, split about evenly between public and commercial programmers. All regional public broadcasters commonly founded the ARD (Arbeitsgemeinschaft der Rundfunkanstalten Deutschlands) regulatory body and contribute according to their size to the nation-wide TV channel “Das Erste” (the first and oldest TV programme). In addition, they each independently organize a regional program (III Program) that offers regional content and more culturally and educationally oriented programming. The Second German Television ZDF (Zweites Deutsches Fernsehen) is based on the agreement ZDF-Staatsvertrag of all La¨nder (states) and is located in Mainz. ARD and ZDF jointly offer several specialised programs: Arte (together with France), 3Sat (together with Austria and Switzerland), Kika (for children), and Phoenix (events and documentation).[57]

According to the Entertainment & Media Outlook published by PwC, Germany's entertainment and media industry was worth around €37.7 billion in 2018, while the digital sector was worth almost €15.3 billion. The market segments with the highest turnover in 2018 were the book industry with around 9.13 billion euros; online advertising with around 7.96 billion euros, and the newspaper market (around 7.62 billion euros). Overall, the total sales of the entertainment and media industry in Germany are developing positively: in 2018, sales revenue of almost 53 billion euros was achieved. In comparison 2014, they achieved slightly less than 48.3 billion in sales. PwC forecasts further significant growth to 57.3 billion euros by 2023.

There is no general news media crisis in Germany, and newspaper readership continues to be high, reaching over 70% of the population. Despite efforts to pass a framing law for all regional press laws, press laws are still determined at the Länder level, and legislation is oriented toward the market competition model. Germany is a newspaper country. In 2013, the number of “independent editorial units” (meaning full publishing entities that produce all parts of a newspaper) for daily newspapers in Germany was 135, and the number of newspapers was 354. If local editions of all papers are included, there are 1512 different newspapers. Only a few numbers of national newspapers still appear in Germany: BILD, SüuddeutscheZeitung (SZ), Frankfurter Allgemeine Zeitung (FAZ), Welt, Frankfurter Rundschau (FR), Tageszeitung (Taz). They claim to be independent and “above parties”, but most cover a liberal and conservative spectrum. In terms of circulation

[57] Noam, E. M. (Ed.). (2016). *Who owns the world's media?: media concentration and ownership around the world*. Oxford University Press. - Germany

figures, the national newspapers account for 1.65 million. Another 4.47 million papers are sold on the street.[58]

German newspapers with the largest number of pages

Source: https://www.deutschland.de/de/topic/wissen/ueberregionale-zeitungen

The most important German newspapers:

- **BILD:** The BILD newspaper, with a circulation of 1.37 million copies per day, is the largest German tabloid of the Axel Springer publishing house. The Közlöny's online offer is also popularly clicked daily. Who likes news, gossip and sensationalism, bookmark Bild.de. www.bild.de
- **Die Zeit:** "Independent, liberal and often 'stuck between all the stools'": This is how Countess Dönhoff once described the Thursday weekly DIE ZEIT, which has enriched the German newspaper market since 1946. www.zeit.de
- **Frankfurter Allgemeine Zeitung:** Published in 1949 under the title "Newspaper for Germany". Conservative political view, left-wing

[58] Friedrichsen, M. (2017). Market structure and innovation policies in Germany. *Innovation Policies in the European News Media Industry: A Comparative Study*, 85-95.

feuilleton, liberal economic understanding - this is how the former head of the department of internal affairs, Friedrich Karl Fromme, once characterised the profile of the quality paper. The editors determine the line of the newspaper; there is no editor-in-chief. www.faz.net

- **Frankfurter Rundschau** "Independent - but not neutral": journalist Karl Gerold once defined the Frankfurter Rundschau (FR) profile this way. In the editorial office of the left-liberal newspaper, people have always felt it is their duty to promote the idea of the welfare state and civil rights. www.fr.de
- **Süddeutsche Zeitung:** Süddeutsche Zeitung (SZ) is a supra-regional daily newspaper with opinionated and independent journalism. www.sueddeutsche.de
- **Die Tageszeitung (taz):** the daily newspaper, contains "relevant information, intelligent entertainment and irritation". The left-wing paper, founded in Berlin in 1979, now represents a decisive voice in the German press market - even if the publisher went bankrupt several times. Readers love taz for his sharp tongue and sometimes snappy manner. www.taz.de
- **Die Welt:** the bourgeois-conservative newspaper "Die Welt" keeps its readers up-to-date with analysis and commentary on events in Germany and worldwide every day of the week. As soon as an article has been written for "Die Welt", "Welt Kompakt" or "Welt am Sonntag ", it will appear on the joint internet portal "Welt online". www.welt.de
- **deutschland.de:** a platform in nine world languages containing all the important news about Germany, where people can find out everything they need to know about the corona epidemic. In addition, deutschland.de offers information on many other topics: work, study, and language.

One of the big problems of German society is that there is no longer a healthy debate culture. Germans do not like arguments; they prefer to keep to themselves and do not want to get out of line; they do not want to look like an ugly German. This is true in big and small ways. Their politicians also behave like this on the political stage; they generously scatter taxpayers' money, give aid, and create financial foundations just to be liked.[59] An excellent example of this is the well-known musician from Mannheim, Xavier Popular vegetarian TV chefs Naidoo and Attila Hildmann have been belittled in the last couple of weeks, and their TV appearances have been cancelled because they voiced opinions that differed from the mainstream. Hildmann's own brand products were delisted and taken off the shelves by two department stores.[60]

The German media sector reflects a diverse radio market, tracing its origins to the 1920s and 1950s for television. Since the 1980s, a dual system has evolved, featuring public network channels and private stations. Currently, Germany has around 430 radio stations, predominantly local and regional, engaging in competition. Radio is popular, with daily consumption averaging 176 minutes and slightly over half from public service broadcasters. These broadcasters provide regional programs and two national radio programs, funded based on Länder-level agreements. The situation is diverse, with different regulations for non-commercial radio, including community stations, public access, and educational stations, varying by state. Internet activities complement standard radio programs, but public network broadcasters face challenges due to concerns about market competition distortion with private stations.

The advertising market in Germany

MEDIENKLASSE	Juli 2018 TEUR	2018 kum.* TEUR	2017 kum.* TEUR	2018 kum.* ANTEIL TEUR	2018/2017 ± %
ABOVE-THE-LINE	1.939.844	16.792.602	16.809.945	100,00	-0,10
ZEITUNGEN	354.992	2.757.397	2.740.087	16,42	0,63
PUBLIKUMSZEITSCHRIFTEN	222.499	1.805.887	1.862.380	10,75	-3,03
FACHZEITSCHRIFTEN	26.728	219.000	231.661	1,30	-5,47
FERNSEHEN	817.623	7.795.154	7.878.447	46,42	-1,06
RADIO	129.271	1.059.583	1.025.936	6,31	3,28
KINO	8.964	66.297	78.077	0,39	-15,09
INTERNET	162.325	1.398.152	1.492.073	8,33	-6,29
MOBILE	65.972	510.207	300.174	3,04	69,97
OUT OF HOME	151.471	1.180.924	1.201.110	7,03	-1,68

Source: https://www.wuv.de/medien/sommer_nagt_an_klassischen_medien

[59] Mikos, L. (2016). Digital media platforms and the use of TV content: Binge watching and video-on-demand in Germany. *Media and communication*, *4*(3), 154-161.
[60] https://magyarnemzet.hu/velemeny/manipulal-a-nemet-media-8105735/

5.2.United Kingdom

Similar to other countries, the main grouping here is TV, radio, newspaper and website; interestingly, Wikipedia also lists the music industry.[61] At the peak of media power, the state-owned controller and supervisor is the British Broadcasting Corporation (BBC). The BBC's biggest competitors are ITV Plc, which operates 13 of the 15 regional television broadcasters that comprise the ITV network, and the American global media conglomerate Comcast, which owns broadcaster Sky Ltd. The Trinity Mirror operates 240 local and regional newspapers and national newspapers such as the Daily Mirror and the Sunday Mirror.

National interim and daily newspapers

Title	Days of publication	Circulation	Established	Political orientation	Political party	Format
The Daily Telegraph	Daily	308,015	1855	Centre- right, conservative	Conservative Party	Broadsheet
The Sunday Telegraph	Sundays		1961			Broadsheet
The Times	Daily	417,298	1785			Broadsheet (1785 – 2003); Compact (since 2004)
The Sunday Times	Sundays	659,699	1821			Broadsheet
Financial Times	Daily	740,000	1888	Economically liberal	None	Broadsheet
The Guardian	Daily	130,496	1821	Centre- left	Labour Party	Berliner (2005 – 2018); Compact (since 2018) [25]
The Observer	Sundays	159,780	1791		None	Berliner (2006 – Compact (since 2018) [25]
The Guardian Weekly	Weekly		1919		None	Berliner (2005–2018) Compact (since 2018)
***i* [the]**	Daily	221,083	2010	Liberal, centrist	None	Compact
i Weekend	Saturdays		2017		*SO*	Compact
The Independent	SO		1986	Liberal, non-partisan	None [b]	Broadsheet (1986 – 2004) Compact (2003 – 2016) Online only (since 2016)

"i" is the name of the newspaper; supported by Sir Keir Starmer (Labour Party) to be Brexit Secretary

[61] Noam, E. M. (Ed.). (2016). *Who owns the world's media?: media concentration and ownership around the world*. Oxford University Press. – United Kingdom

The **newspaper market** structure in the United Kingdom is highly centralised, with the majority of news media based in the capital, London. Additionally, regional media outlets serve the three non-English nations and provide local newspaper and radio coverage nationwide. There are 11 major national newspapers in the United Kingdom, boasting a paid daily circulation of approximately 7.3 million nationwide. These newspapers are under the ownership of eight large multimedia companies, with the top four companies holding a market share exceeding 80%. Specifically, News UK contributes to one-third of the total circulation, the Daily Mail and General Trust accounts for 23%, and Trinity Mirror and Express Newspapers each hold approximately 13%.[62] A UK newspaper reading frequency survey found that 19% of adults read print newspapers daily, compared to 23% of digital newspaper respondents. Regarding the most popular reasons for print newspapers, 42 % of Britons believed that print newspapers received the best expert opinion. In 2016, the Daily Mail and The Sun were the national newspapers with the highest monthly circulation through their print and digital formats, reaching over 17 million and 13 million, respectively.

Television: There are five major national television channels: BBC One, BBC Two, ITV, Channel 4, and Channel 5, which are currently broadcasting digital terrestrial free-to-air signals, the latter three channels are funded by commercial advertising. Virgin Media provides the vast majority of digital cable television services with satellite television available from Freesat or Sky, and Freeview with free digital terrestrial television. The free-to-air digital service comprises two chartered public service broadcasting companies, the BBC and Channel 4, and two franchised commercial television companies (ITV and Channel 5). The entire country switched to digital in 2012 (from a previously analogue signal).

The public broadcaster in the UK is the BBC, and its funding is derived from a universal license fee. The BBC commands a total TV audience market share of approximately 33.3%, engaging about one-third of the overall TV viewership. The BBC operates several television channels in the UK and abroad. The BBC's international television news service, BBC World News, is broadcast worldwide. The primary free-to-air commercial public service broadcaster, ITV, holds a market share of approximately 25%, while the remaining viewership is distributed across numerous channels.

[62] Picard, R. G. (2017). Market structure and innovation policies in the United Kingdom. *Innovation Policies in the European News Media Industry: A Comparative Study*, 219-226.

Radio continues to be a significant media platform in the UK. The country boasts 25 national radio stations, 345 local radio stations, and 215 community radio stations, positioning radio as a robust local medium in numerous communities. The BBC's radio presence encompasses ten national radio stations, the World Service, regional stations in Scotland, Wales, and Northern Ireland (including those broadcasting in Welsh and Scots), and 30 local stations. As of mid-2009, the BBC held a 54.6% share of the radio audience, with commercial radio accounting for 42.7%. However, Local commercial radio boasts a broader reach than local BBC services. Global Radio, the largest commercial radio group with 33 stations, claims approximately 40% of all commercial radio listening, reaching 19 million listeners. The UK has been at the forefront of digital audio broadcasting (DAB), largely owing to the BBC's development and operation of DAB services. Presently, 48% of radio listeners use a DAB radio in their households.

In the UK, policies for media **innovation** heavily depend on market dynamics. However, government initiatives are in effect to encourage and stimulate innovation, research, and development across various industries, including the media sector. These measures encompass publicly funded programs at both the UK and national levels. They involve initiatives such as backing innovation networks and skill development, enhancing access to private funding, managing an innovation investment fund, offering incentives for research and development, providing public support through research councils and regional development agencies, refining the intellectual property framework, and allocating academic funding to enhance innovation and knowledge transfer.[63]

[63] Gibbons, J. (2020). Public confusion, digital media, social media, and fake news in the United Kingdom and Ireland. *Routledge Handbook of Environmental Journalism*.

III. Hungary

The exploration shifts its focus to Hungary, a country with a rich historical and a distinctive media industry that reflects its unique cultural and societal dynamics. The section commences with a snapshot that captures the essence of Hungary's media evolution, weaving a concise yet insightful historical summary that serves as the backdrop for our exploration. We delve into the annals of time to understand the emergence and evolution of media within the Hungarian context, providing a contextual foundation for the subsequent examination.

Our lens then zooms in on the present-day media market, where we dissect the roles and contributions of media companies that shape the narrative within Hungary. The Hungarian media pie, a metaphorical representation of the diverse media outlets and their share in the information dissemination spectrum, becomes a focal point of our analysis. Additionally, the Hungarian communication pie broadens our perspective, encapsulating all the communication channels that facilitate the exchange of information within the country.

As we navigate the Hungarian media, our exploration extends to various sectors constituting its dynamic ecosystem. From the traditional realm of printed media to the auditory realm of radio consumption and the visual medium of television, we unravel the nuances that define each sector. Exploring television ratings by TV stations provides insights into audience preferences, shedding light on the media consumption patterns within Hungary. The examination also encompasses the interplay between state and commercial media, exploring the diverse forces that shape Hungary's media narrative.

To enrich our understanding, we present key facts about the Hungarian media, providing a snapshot of statistical information, trends, and noteworthy developments. These facts serve as crucial signposts in our journey, offering quantitative insights into the vibrancy and challenges within Hungary's media sector.

6. Snapshot

The snapshot encapsulates key facets defining the country's rich and dynamic communication environment. It begins with a brief historical summary, a retrospective lens that traces the evolution of media within Hungary, laying the groundwork for understanding its contemporary form. Then, the focus sharpens on the key players – the media companies that wield influence and contribute to the diverse tapestry of information dissemination. Beyond individual entities, we delve into the metaphorical constructs of the Hungarian media pie, illustrating the amalgamation of various media outlets, each contributing its unique flavour to the overall communication spectrum.

6.1. Brief historical summary

The press essentially meant the printed version since the advent of European book printing until the 20th century. The first daily newspaper in Hungarian was published on June 1, 1848; it was Lajos Kossuth's Newspaper (Kossuth Hírlapja), edited by József Bajza.[64]

It was a luxury for a long time, and then, with the strengthening, enrichment and literacy of the citizenry, more significant copies were produced. The tools of the media began to change after the First World War; with the mass spread of radio, more and more people listened to news and other information. The spread was slow at first; radio sets were still so few in number during the Second World War that they could be collected relatively quickly. This was a paid service; even in the 1970s, the monthly fee was HUF 10, which was acknowledged and collected by the Magyar Posta. TV also appeared only in the 1950s, at first once a week and then several days, on only one channel. The big breakthrough came at the turn of the millennium; new devices started to appear in the 90s, and their mass distribution began at the beginning of this century.

The development did not escape Hungary either. Today, more than 5 million people use different social media platforms, that is, more than half of the population. Moreover, 89% of Hungarian Internet users use the Internet every day. Following the trends, internet traffic on desktops and laptops also decreased in Hungary. People are spending more and more time on their

[64] Cushing, G. F. (1958). Jósef Bajza. The Slavonic and East European Review Vol. 37, No. 88 (Dec., 1958), pp. 99-112 Published By: Modern Humanities Research Association
Kósa, C. (2003). Kossuth újságot ír. *Kortárs*, (04), 70-79.

smartphones because they are fast, convenient and almost always at hand. The popularity of video content is perfectly connected to the growth of mobile usage. According to some surveys, nearly half of Internet users watch some online video every day. The most visited page is google.hu, the second is facebook.com.

Preliminaries

Hungarian newspaper literature got off to a difficult start: the Austrian imperial policy did not want competition from German-language newspapers, so censorship prevented its spread wherever possible. Between 1705 and 1711, Mercurius Hungaricus, the kuruc paper published by Antal Esterházy, was published; it was also in Latin. In 1780, the Magyar Hírmondó was published in Bratislava, edited by Mátyás Rát, already in Hungarian, but the paper only existed until 1788. In the reform era, at the initiative of István Széchenyi, Mihály Helmeczy started the newspaper Jelenkor in 1832, which he ran for seventeen years. Lajos Kossuth started Pesti Hírlap in 1841 and edited it until 1844. After the compromise, many newspapers that are mentioned or are still published to this day were started, such as Népszava, which has existed since 1877, initially a weekly and then a daily newspaper.

The Hungarian governments recognised the advantages inherent in the power of the media from the very **beginning;** between the two world wars, they selected the most capable people very well; so for example, from 1922, leveldi Miklós Kozma[65] became the head of the Hungarian Telegraph Office, who was also the head of the Hungarian Telefonhírmondó and from 1925, he was also the president of Hungarian Radio from its inception. The information was moderate and corresponded to the age's spirit; its nature was civil, without incitement. Sort of BBC principles, ahead of its time. He found excellent colleagues; for example, Ernő Szőts became the head of the Rádió's literary department, László Németh after his death, and László Cs. Szabó became the leader of the later emigration. They managed to involve writers such as Gyula Illyés, Dezső Kosztolányi, Gyula Somogyvári, Lajos Zilahy, Zsigmond Móricz, Lőrinc Szabó, etc. This is how demanding radio broadcasting was born, raising the cultural level of the masses. Of course, the news was filtered according to the needs of the current authorities, both on the radio and in the written press, especially harshly from 1944. The trade

[65] Before that, he was a hussar captain and a member of the Rongyos Gárda

quickly noticed the advertising opportunities provided by the media and used them successfully.[66]

Socialism

From **1950,** it operated under the name Hungarian Rádióhivatal (MRH), and from 1957 as part of the Magyar Rádió és Televízió Vállalat (MRTV). The goal was to control the company under the Communist Party. The miller is the same Gyula Ortutay, who later did the same with church schools. During the times of socialism, by definition, the Leninist path had to be followed; at first, the leading ideologist, József Révai, determined the direction. The newspapers also joined this line.[67] During the 1950s, the Hungarian Radio and the written press became mouthpieces of the Communist Party and steadily lost their credibility. In the events of 1956, the role of the media changed. Some of them stand by the revolution, others remain silent. However, they are united in the fact that it is difficult for them to find a new voice afterwards.[68] A new media element also appeared: television began broadcasting in 1957.[69]

Later, György Aczél became the cultural director. Although he rarely intervenes directly in the day-to-day management of the media, his apparatus provides the ideological reference point and monitors its compliance. The slogan and the cultural concept were based on the 3T policy categories: Támogatni, Tűrni, Tiltani; Promote, Tolerate, Ban.[70] The other leg of the media, advertising, is almost non-existent or hardly exists, but there is no reason to because the economic characteristic of socialism is the constant shortage of goods.

Since the **1970s,** the supervision has loosened a bit, but the authorities have remained firmly in control, knowing the value of the media. At the end of the 1980s, there was already a relaxation; during the regime change, the Radio's programs and management, according to some opinions, helped to create freedom of speech. Even more courageous is the stance of some

[66] Hargitai Henrik, Hirsch Tibor (n.d.): Médiatörténet
[67] Splichal, S. (2019). *Media beyond socialism: Theory and practice in East-Central Europe*. Routledge.
[68] 1956 a sajtó tükrében Kossuth Kiadó, 1989
[69] Ilkei Csaba: Újságírók, szerkesztők, sajtómunkások és az állambiztonság : 3. kötet 2020
[70] Bozóki, A. (2018). Counter-Cultural Pluralism: Informal Political Initiatives in Hungary in the 1980s. *Retrieved from Researchgate. Accessed August*.
Hock, B. (2019). Promote, Tolerate, Ban: Art and Culture in Cold War Hungary. *Critique d'art. Actualité internationale de la littérature critique sur l'art contemporain*.

monthly newspapers. So much so that, for example, János Kádár himself initiated the banning of the Tiszatáj magazine in Szeged.[71]

After the political changes

In the early **1990s**, however, the control of the mass media was once again the subject of political struggle. This is also the place to look for public media services.[72] The media war once again challenged the authority of Hungarian Radio. The political independence and expertise of the Radio's management have been debated ever since. The assessment of the national newspapers has also become mixed; some have been transformed, and many have ceased to exist. At the time of the system change, the governments also paid close attention to the media. For example, between 1994 and 1998, Gyula Horn asked Postabank to keep the Magyar Nemzet alive. Indeed, we were not yet a member of the European Union, but our prime minister wanted to maintain the appearance of press freedom in front of the "cultured West".[73]

Around the turn of the **millennium**, the process started to become clearer. With the rise of commercial taxes, the number of listeners to Hungarian Radio's taxes fell to a certain extent, especially among young people. The young listeners were only partially lured back by the renewal of Petőfi Rádió in 2007 (modern music). Currently, Magyar Rádió Nonprofit Zrt. (MR) is a state public radio station operating in Hungary today. His program can be heard 24 hours a day with terrestrial radio or via satellite and the Internet. His channels:

- **MR1, Kossuth Rádió:** the channel for news and public life. The radio's most popular program, the news magazine Krónika, is broadcast here every day at noon, at 3:00 p.m., from 5:30 p.m. and at 10:00 p.m.
- **MR2, Petőfi Rádió:** broadcasts light music and entertaining background programs. The most listened to Hungarian radio.
- **MR3, Bartók Rádió:** broadcasts classical music and literary works.
- **MR4,** The **Nationality Broadcasting** Channel, in an almost unique way in Europe, addresses all constituent minorities in their own mother tongue

[71] Buzinkay, G. (2018). *A magyar sajtó és újságírás története a kezdetektől a rendszerváltásig* (Doctoral dissertation, -).
[72] The concept of double service was invented by the founders themselves. In this way, it was possible to obscure what is otherwise clear.
[73] https://cimlap.blog.hu/#bloghu/medianaplo/2020/11/26/medianaplo_hornek_zsebeben_volt-e_az_ellenzeki_sajto

- **MR5, Parliamentary Broadcasts.** The live broadcast can be heard during the parliamentary session. During the remaining time, the MR1-Kossuth Radio FM program is played.
- **MR6, Dankó Rádió:** launched in December 2012, a channel with Hungarian sheet music, folk music and operetta.

Based on historical traditions, **the orientation of the Hungarian media is generally** liberal. The declared freedom of the press takes the situation in this direction. The past greatly influences today's map of this type, i.e. the four decades of subjugation, when essentially only the party press existed. Censorship disappeared with the system change, and the plebeian-urban debate that characterised intellectual life before (first in the Horthy era and then in the weakening dictatorship) appeared in journalism. The former is the popular-national direction; the latter is liberal, cosmopolitan, and internationalist. Just like the intellectual elite and political scribes, members of the Hungarian press were/are classified in these two camps, even if many of them wanted to stay in the middle. In some cases, their appearance is striking, but their attachment is definitely typical. Other political content is published by ATV, Klubrádió, HVG, etc., such as MTV, Kossuth Rádió or Magyar Nemzet. Hungary's folk-urban opposition disappears from time to time, reappearing in right-wing and left-wing colours. As everywhere in the world, in Hungary too, the right-wing embraces the people of small towns and cities, i.e. plebeians, while the left represents the multicultural layer of big cities, i.e. urban. In both cases, in the broadest sense of the word. The local press also adapts to this. Many say that it is a clash of Christian and Jewish cultures.

It is clear from the figure below that practically the entire adult population uses the Internet. What is lost among the oldest, poorest and least educated is made up in abundance by the age group under 18, which is how the ratio comes out; according to us, 80% of the Hungarian population uses the Internet.

Half of Internet users no longer get their information from traditional media but exclusively from the World Wide Web - it was revealed in a survey by the National Media and Communications Authority (NMHH). Almost 70 % of the elderly use the Internet as much as they watch TV. According to the announcement of the NMHH, in parallel with the spread of Internet use in Hungary, "traditional media and telecommunications", i.e. television, radio, print media and telephone calls, are in an increasingly difficult situation.

Source: Hootsuite.com

At the end of 2019, more than 7.7 million Internet users in Hungary browsed the Internet at least weekly. Half of the internet users do not use the traditional electronic and printed press for information at all or only a little - why? Entertainment, watching movies, videos, etc., and the Internet lead in a similar proportion: 46 % do not watch TV or only watch a little, preferring to spend their free time on the Internet.

Traditional **telephone calls** hold their own in the competition with the Internet; only a third of the respondents said that they primarily or exclusively look for others on the Internet. According to the summary, the loss of space of traditional media and telecommunications to the Internet is mainly related to the fact that more and more people are using the Internet with more and more confidence.[74]

6.2.Media companies

In 2018, the total sales revenue of the thirty largest media companies amounted to HUF 364 billion. It is almost double that of the entire Hungarian extractive industry, approaching the textile industry. That is, it is a huge market. In some areas (especially TV, film), they are particularly profitable businesses, with high average incomes and outstanding management salaries; in this respect, they come directly after the banking sector. The current gross

[74]Source: https://infostart.hu/belfold/2020/09/05/vesztesre-all-a-hagyoma nyos - media -az-internettel-szemben

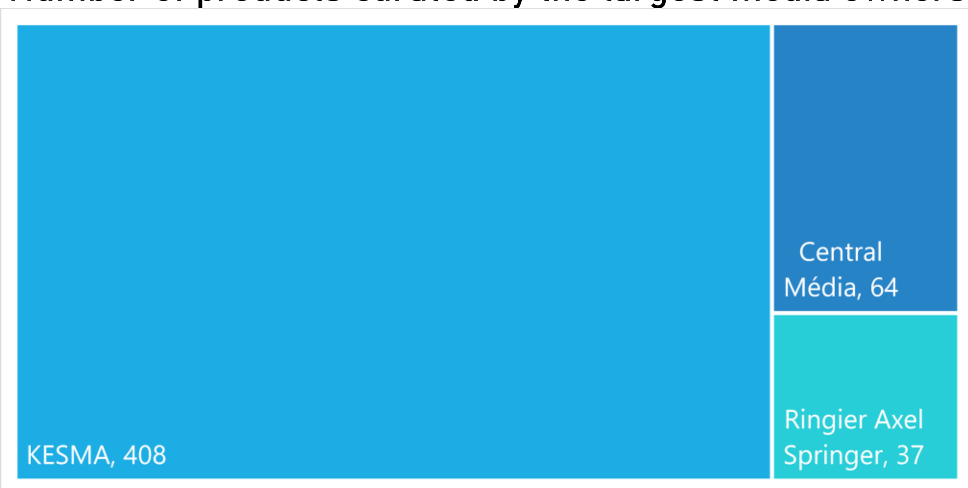
monthly salary of a "simple" TV announcer is HUF 1.74 million + allowances.[75] Who are the opinion makers? Here are the biggest ones in the Hungarian media market:

Revenue and profit after tax of the largest media companies in Hungary (1,000 forints)

Cégnév	2017		2018	
	Nettó árbevétel	Adózott eredmény	Nettó árbevétel	Adózott eredmény
Viacom International Hungary Kft. *	70 345 453	-5 735 986	81 046 628	-4 264 226
TV2 Média Csoport Kft.	34 506 529	-2 009 490	39 101 320	1 686 853
Atmedia csoport**	32 435 000	1 115 946	37 673 494	1 670 316
Magyar RTL Televízió Zrt.***	35 366 100	7 394 730•	34 401 570	2 572 080•
Mediaworks Hungary Zrt.	20 406 205	4 341 919	27 715 172	3 248 883
AMC Networks Kft.	18 240 843	-10 353 220	19 695 265	-2 400 938
Ringier Axel Springer csoport****	17 045 000	4 673 000	19 093 000	4 970 000
HBO Holding Zrt.	12 530 276	4 241 881	13 076 197	3 986 428
Central Médiacsoport Zrt.	11 100 533	1 754 793	12 280 583	535 100
Lapcom Zrt.	10 477 747	-636 106	10 155 018	835 893

Source: https://www.mmonline.hu/cikk/ezek-a-legnagyobb-cegek-a-hazai-mediapiacon/

Number of products curated by the largest media owners



The aim of the Central European Press and Media Foundation (Közép-európai sajtó és Média Alapítvány, KESMA) is to "provide authentic theoretical and practical answers to questions arising from the media's increased social responsibility" and it is far and away the market leader in terms of

[75] Parliamentarian Ákos Hadházy demanded the salary of Balázs Németh in connection with a political dispute. November 2020 data.

sales. The Foundation's objective is to support activities within the Hungarian mass media's print, radio, TV, and online sectors that contribute to cultivating values and reinforcing Hungarian national consciousness. Aligned with this, a central aim is to uphold the fundamental values outlined in articles IX and XI of the Fundamental Law of Hungary. This includes focusing on promoting local Hungarian media at various levels (county, city, district), ensuring its widespread dissemination to provide comprehensive information to local communities, and sustaining its community-building efforts. In line with these goals, we strive to enhance the vitality of Hungarian print media and foster structural collaboration with other media platforms. This collaboration is designed to ensure the enduring preservation of the cultural essence inherent in traditional Hungarian print media over the long term. Additionally, the Foundation aims to establish and maintain favorable conditions within and beyond the Carpathian Basin to support the media in offering credible solutions to the challenges arising from increased demand for social responsibility in the media. This encompasses issues related to the media's role, sustainability, and ethical considerations. The Foundation further commits to contributing through research, education, mentoring, and various organisational and community coordination activities, thereby playing a role in shaping a responsible and resilient media landscape.[76]

The Centre for Media Pluralism and Media Freedom (CMPF) was asked to assess whether the establishment of the KESMA in Autumn 2018 amounts to an element of additional risk for media pluralism in the country and whether this additional risk is quantifiable.[77] 13 media companies joined the foundation, without any form of compensation for the owners. Of such pro-government outlets, only the TV2 and Rádió 1 networks were not implicated in this merger when this research was carried out.[78]

In second place is the other flagship of pro-government media, the TV2 group, ahead of the RTL group, Ringier Axel Springer, and Central Média.[79]

---

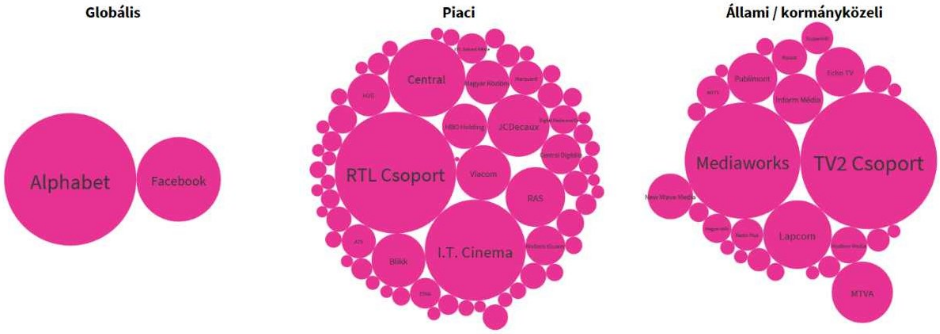
[76] https://cepmf.hu/#sectionGoals

[77] Brogi, E., Nenadic, I., Viola De Azevedo Cunha, M., & Parcu, P. L. (2019). Assessing certain recent developments in the Hungarian media market through the prism of the Media Pluralism Monitor.

[78] Polyák, G. (2019). How Hungary shrunk the media. European Centre for Press & Media Freedom.

[79] Polyák, G. (2015). The Hungarian media system. Stopping short or re-transformation?. *Südosteuropa. Zeitschrift für Politik und Gesellschaft*, (02), 272-318.
HVG August 20, 2020 p. 9

Distribution of the **top 100 media companies** in the media universe by ownership, the bubble size shows 2018 domestic revenues (including advertising, distribution and other revenues. Note: Alphabet and Facebook's Hungarian revenue is estimated.[80]



Source: Whitereport 2018

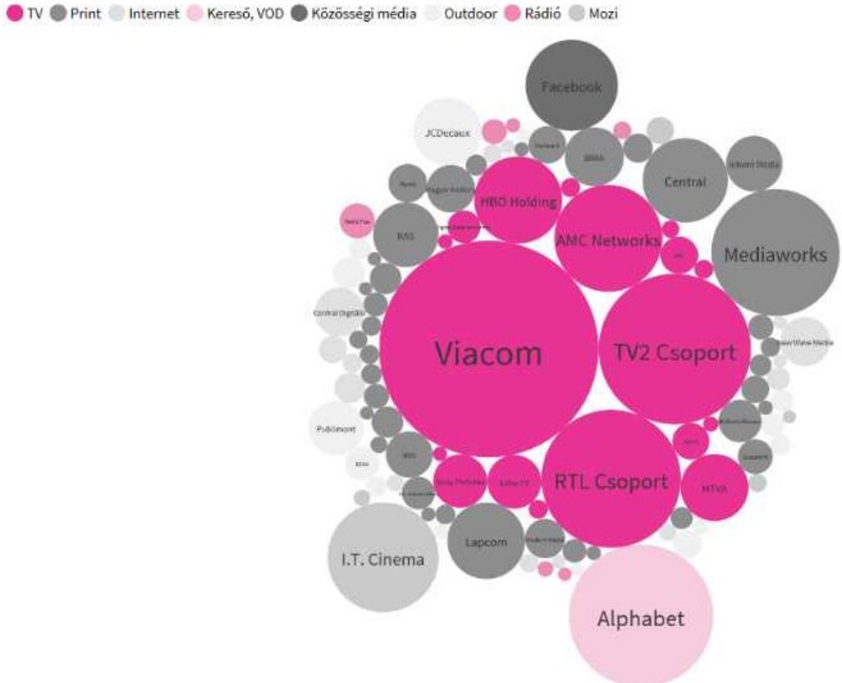
In 2018, the sales revenue of the top 100 media companies in Hungary without exports (i.e. domestic) was HUF 322 billion, according to Whitereport's June collection. Of this, HUF 272 billion belongs to media companies established in Hungary (advertising, distribution and other sales revenue combined). According to industry estimates, HUF 50 billion went to Alphabet (Google) and Facebook from Hungary.

The Whitereport's macro data is 1.8% of the annual net sales of the top 100 Hungarian media companies, showing an increase, including export revenues. In terms of domestic sales, the top 100 media companies show stagnation (-0.5%, which is also a change for the total of advertising, distribution and other sales).

Whitereport macro indicators with advertising, distribution and other revenues of the top 100 media companies, 2018 (collection closed: July 3, 2019; television and radio media providers, print and online newspaper publishers, cinemas and outdoor poster companies). Here are the most prominent media market companies in Hungary.

[80] https://media1.hu/2019/07/17/whitereport-jelentes-igy-halad-a-magyar-mediapiac-harom-vilagrendjenek-utkozete/

Media market companies by revenue



Source: Whitereport 2018

The top100 media company **media universe.** The bubble size is based on the 2018 annual net sales (including advertising, distribution and other sales). Note: Viacom, AMC and HBO, in the case of the export revenues arising from their regional central status, account for a significant part of their income; estimated revenue of Alphabet and Facebook in Hungary.

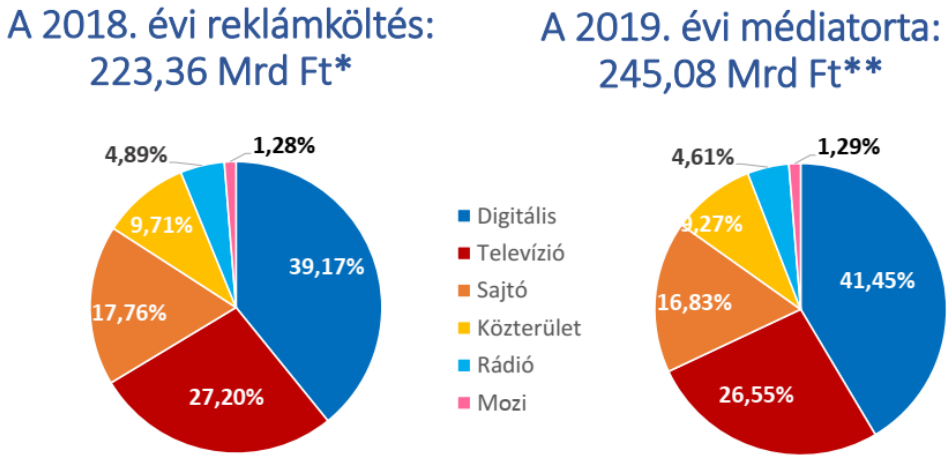
In 2019, audience and revenue fragmentation is the biggest challenge in the media market. For advertisers, this primarily means that the decrease in campaign reach of offline media must be compensated. However, according to the Whitereport, the solution to this would not be the current concentration of the advertising budget but the broadest possible mix of traditional and platform media. For traditional media companies, fragmentation means they have to deal with their competitive market in a broader sense than ever before. As the most drastic changes come from the technology side, digital transformation and investment in new platforms are vital, the report adds.[81]

[81] https://media1.hu/2019/07/17/whitereport-jelentes-igy-halad-a-magyar-mediapiac-harom-vilagrendjenek-utkozete/

6.3.The Hungarian media pie

The **media pie** aims to assess advertisers' investments in media advertising costs more accurately. The media cake contains homogeneous data, and only the costs appear in the media according to a completely uniform system of criteria. The size of the 2019 media cake was HUF 245.08 billion.

Advertising spending and media pie



Source: Hungarian Advertising Association: 2019 MRSZ Media and Communication Pies MRSZ Barometer research - 2020 industry forecast - May 2020

There was no change in the order of the media in the media pie concerning the segments also included in the advertising pies of the last 3 years (2016 / 2017 / 2018). Digital continues to take the biggest slice of the pie (41.45%). The second largest slice belongs to television (26.55%). The press is in third place (16.83 %). The data in the 2019 media pie also includes the merchandise in all segments. e took into account the segments of the 2018 advertising pie (compiled according to the previous methodology) included in the 2019 media pie: Digital, Television, Press, Public Space, Radio, and Cinema. Their advertising spending in 2018 totals 223.36 billion. The comparison base does not include data-driven marketing (direct marketing) and Ambient numbers.

Media pie – data (HUF and %)

	2018 advertising expenditure*	2018 pie	Change compared to 2017	2019 media pie**	2019 pie	Change from 2018
Digital	87.485 billion	39.17%	+13.98%	**101.591 billion**	41.45%	+16.12 %
Television	60.742 billion	27.20%	+0.85%	**65.073 billion**	26.55%	+7.13%
Press	39.667 billion	17.76%	+3.49%	**41.237 billion**	16.83%	+3.96%
Public space	21.681 billion	9.71%	+16.28 %	**22.710 billion**	9.27%	+4.74%
Radio	10.924 billion	4.89%	+9.51%	**11.301 billion**	4.61%	+3.45 %
Cinema	2.857 billion	1.28%	+15.00 %	**3.171 billion**	1.29%	+11.00%
ALTOGETHER:	**223.360 billion**			**245.080 billion**		

*We took into account the segments of the 2018 advertising pie (compiled according to the previous methodology) that are also included in the 2019 media pie: Digital, Television, Press, Public Space, Radio, and Cinema. Their advertising spending in 2018 totalled 223.36 billion. The comparison base does not include data-driven marketing (direct marketing) and ambient numbers, which we will publish in the communication pie from now on.
**The data in the 2019 media pie also includes the merchandise in all segments.
Source: Hungarian Advertising Association: 2019 MRSZ Media and Communication Pies MRSZ Barometer research - 2020 industry forecast - May 2020

All segments in the media pie showed growth between 3.45% - and 16.12%. The most considerable growth in 2019 occurred in the digital advertising market (16.12%). In the digital field, the increase in the market share of global platform players continued, so that in 2019, 57% of the advertising forints spent on domestic online ads went to global players. The second largest increase was produced by the cinema (11%) last year, but overall, thanks to the growing number of viewers, it has steadily grown over the past seven years. The growth of the television advertising market in last year's (7.13%) media pie does not only reflect the higher expenditures of the players in the competitive market, as the 2019 figure already includes the value of goods barter due to the change in methodology. The other segments grew by less than 5%:[82]

- Last year, the public area showed a significant increase (4.74%) compared to the previous year; since last year, it was not the appearance of new tax types that increased advertisers' spending.
- The press grew at a similar volume (3.96%) last year as it did in 2018.
- The rate of growth of the radio market also slowed down last year.

This time, the **biggest slice of the advertising pie** also went to the online media. In the 2018 advertising pie, all media types maintained their positions in the previous two years and achieved growth without exception. In 2018, **online** was still the most substantial market player, increasing its share of the pie from last year's 31.71 % to 33.57 %.

The Hungarian media pie can actually **be divided into three large slices.** Its antecedent is the change in the press surrounding the change of regime: instead of communist journalism, it is united with the free, its two main political branches: the urban and plebeian journalists. The third slice belongs to neutrals who write technical articles, create fairy tales, etc. The former two quickly find their place on the social palette: liberals appropriate the left, conservatives the right. This political division is still valid today and can be approached as pro-government and opposition press.

The trend today is that the Orbán governments have recognised the power of the media to generate power; consequently, many opposition sources have been made impossible, bought, etc. Today, there are really only four opposition mouthpieces left. Of the television stations, only ATV (and partially RTL Klub), of the radio channels is Klubrádió (its future is questionable due to the frequency license expiring in February 2021, according to its CEO, Richárd Stock, it reaches 2.5-3 million people and is regularly listened to by 300,000 people[83]), among the national political dailies Népszava,[84] and highly influential internet portals [85]the new Telex.hu, the successor to Index. (The old Index also exists; it was acquired for pennies after it was bled.) As of 2019, the sales revenue of Index Zrt. has decreased

[82] https://mrsz.hu/cmsfiles/d5/ce/MRSZ_media_komm_torta_2019_MRSZ_Barometer_2020.pdf
[83] HVG September 17, 2020 p. 15
[84] formerly the Hungarian Social Democratic Party, from 1948 until the political changes, the paper of the trade unions
[85] The distribution of page downloads, the five largest news portals: Index, origo, 24.hu, hvg.hu and 444.hu DKT – Gemius 2020/06

by more than 40% since 2015 to HUF 1.24 billion.[86]) Rankings can also be established based on the power of influence and familiarity: ATV, Club, Telex, Népszava. The basis of the order is twofold. On the one hand, regular use, and on the other hand, the time spent there.

The left-liberal press is trying to make a living. However, the economic crisis accompanying the coronavirus epidemic significantly worsened the chances. In vain, it reached historical peaks, the number of visitors to Internet sites, and advertising revenues plummeted. Furthermore, the life of the printed press is also made difficult by the closure of many outlets. Subscribers are not left behind, but occasionally, customers buy fewer cards in fewer places due to restrictions on going out. HVG writes.[87]

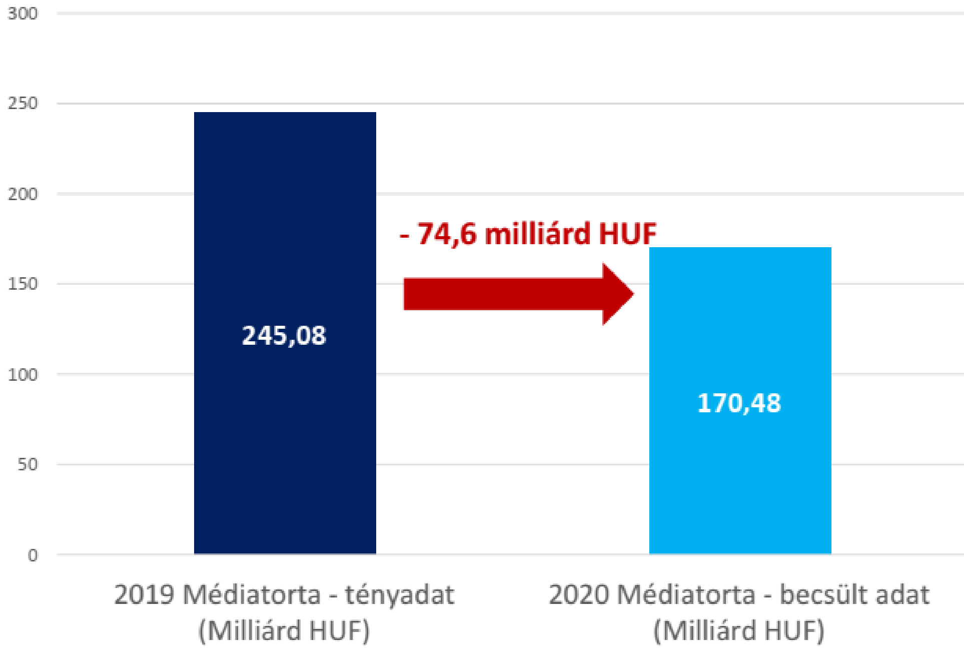
The media consumption of Hungarians over the age of 15 is generally as follows: 98% watch TV, 84% listen to the radio, 68% read daily newspapers, 61% weekly or monthly newspapers, 55% read books, 41 % watch videos, 37% watch DVDs, and 33% use the Internet. 42% of Hungarian citizens do not read a single book. They spend an average of 31 minutes daily reading newspapers, 4.5 hours watching TV, 5 hours listening to the radio and 77 minutes on the Internet.[88]

The numbers speak for themselves. Moreover, the trend shows the future: the importance of TV is decreasing, and IT is increasing. 80% of people over 60 choose TV, but only 30% of people under 40. Radio is primarily for travellers. The written press is increasingly marginal. The biggest problem is that only a quarter of the adult population believes that you can get to know the truth from the press [89]. In terms of rankings, the main element is cost. The radio is free for the consumer (listener), TV channels are usually paid for in a package, and almost all of them include ATV; the IT is also subscription-based, although it is available in more and more places via free wifi, and Népszava costs HUF 209 per track (monthly subscription fee HUF 5,450)

The effect of the recession forecasted as a consequence of the crisis on the total volume may decrease by 74.6 billion compared to the 2019 media pie this year: the media pie in 2019 may shrink from 245.08 billion to 170.48 billion in 2020.

[86] HVG June 25, 2020, 2-3 p.m. page
[87] HVG April 9, 2020 p. 19
[88] https://docplayer.hu/1251825-A-sajto-es-media-alapfogalmai-rendsere-ismeretek-a-mediarol.html
[89] HVG November 19, 2020 p. 22

Expected aggregated decrease in the media pie in 2020

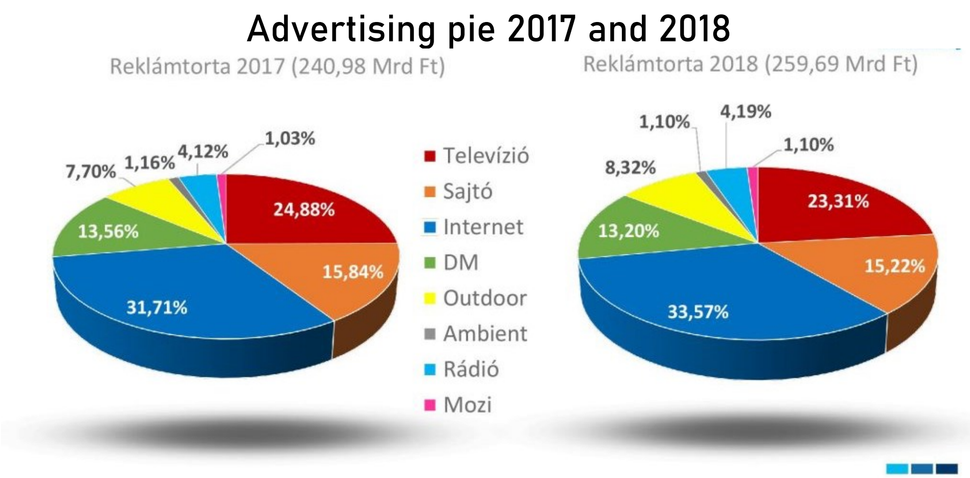


Source: Hungarian Advertising Association: 2019 MRSZ Media and Communication Pies MRSZ Barometer research - 2020 industry forecast - May 2020

6.4. The Hungarian communication pie

The share of the media in the Hungarian advertising market is outstanding. With the communication pie, the Reklámszövetség aims to create complete market data that reflects the size and changes in advertisers' total external marketing communication investments. The communication pie includes the following:

- the media pie;
- the two slices of the former advertising pie: Data-driven marketing (direct marketing) and Ambient;
- new segments: Creative and media agency services, Event, Marketing research (client-funded research), PR;
- production costs for media owners;
- includes net-net spending without overlaps.



Source: Hungarian Advertising Association

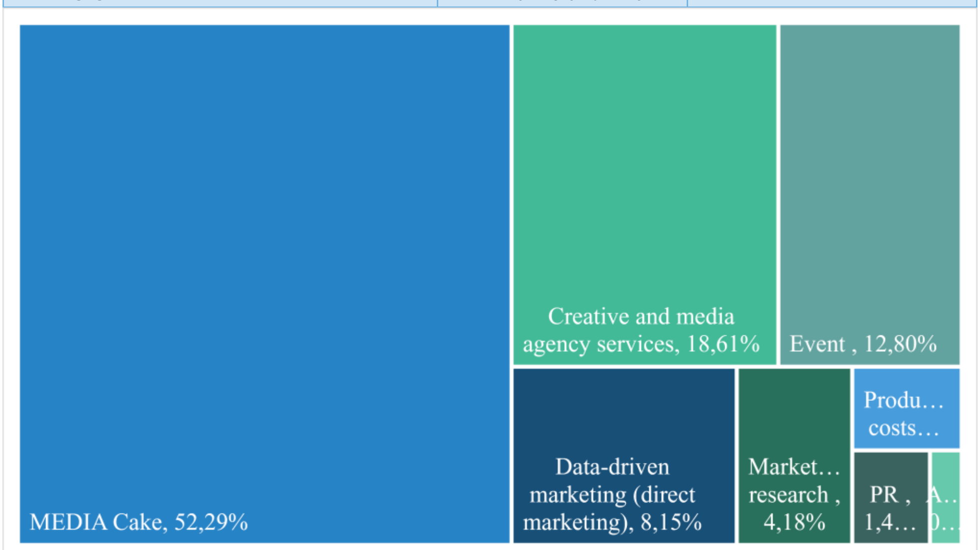
In the 2018 advertising pie, all media types, without exception, achieved growth. In 2018, online was still the most vital market player, and it will likely remain so in the coming years. In 2019, the advertising pie was 245.08 billion forints, and the spending in 2018 reached 223.36 billion forints, which means an increase of 9.73 %.[90] The size of the communication pie, which is debuting for the first time and includes the media pie, was HUF

[90] Bátorfy, A., & Urbán, Á. (2020). State advertising as an instrument of transformation of the media market in Hungary. *East European Politics*, *36*(1), 44-65.

467.96 billion. After the dynamic development in 2019, the Hungarian Advertising Association (MRSZ) expects a decline of more than HUF 160 billion in 2020 due to Covid-19.[91]

Communication pie

	2019. Communication pie	A slice of the communication pie
MEDIA PIE	245.080 billion	52.29%
Creative and media agency services	87.200 billion	18.61 %
Event	59.993 billion	12.80%
Data-driven marketing (direct marketing)	38.200 billion	8.15%
Marketing research	19.600 billion	4.18%
PR	7,000 billion	1.49%
Production costs applied to media owners and passed on to advertisers	8.725 billion	1.86%
Ambient	2.864 billion	0.61%
ALTOGETHER:	**467.96 billion***	



Source: Hungarian Advertising Association: 2019 MRSZ Media and Communication Pies MRSZ Barometer research - 2020 industry forecast - May 2020

[91]https://www.vg.hu/vallalatok/reklam-es-media/dramai-akar-38-szazalekos-visszeses-varhato-a-reklampiacon-2238883/

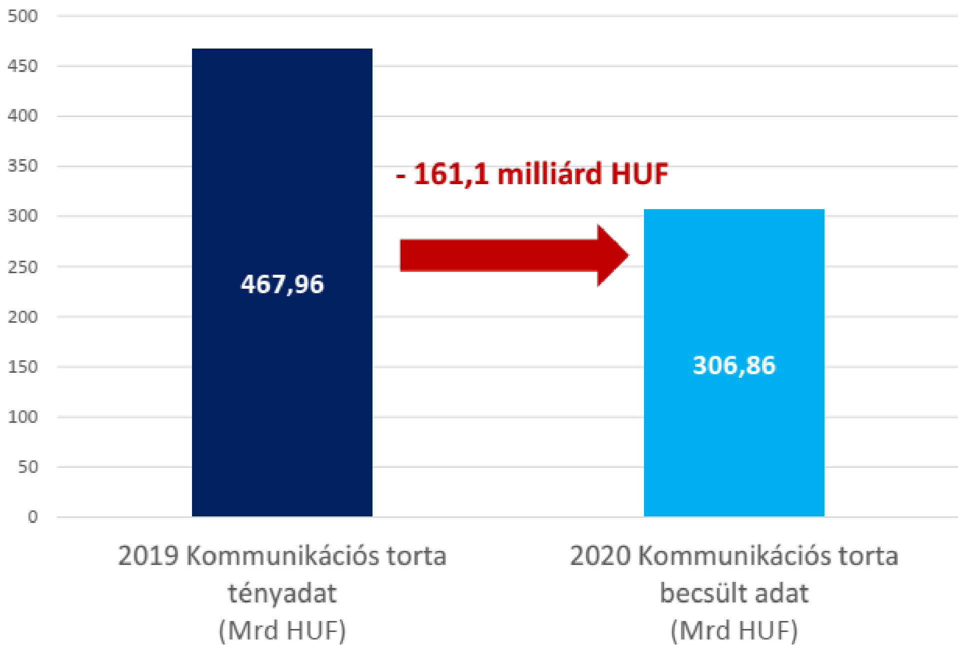
Marketing research has been a stagnant or minimally growing sector for the past 4-5 years, with revenues generated by research companies in 2019 broadly in line with previous years. The corporate events market saw a revenue increase of around 10% compared to the previous year. Growth in the **data-driven marketing** (direct marketing) sector continued in 2019 with an 11% increase compared to the previous year. Marketing research has been a stagnant or minimally growing sector for the last 4-5 years. This trend continued in 2019, with revenues generated by research firms broadly in line with previous years. The PR segment had a "good" year in 2019. Last year's PR market figure of €7 billion is based on a prominent expert (MPRSZ) estimate, as this is the first time the segment has published aggregated annual data.

Since March 2020, the coronavirus has significantly changed shopping habits, with more and more online purchases and a corresponding decline in traditional shopping. Online shopping naturally entails online advertising. Furthermore, from the point of view of our topic, this means that advertising is gaining strength in the online media market. Among the traditional advertising media, the advertising market in public spaces has grown the most; political ads dominate here, and it is not difficult to guess what kind of advertising demands the parties will make in the 2020 elections. This phenomenon occurs every four years, regardless of media performance. The impact of the recession forecasted as a consequence of the crisis on the total volume may result in a decrease of 74.6 billion compared to the 2019 media pie this year: The 2019 media pie may decrease from 245.08 billion to 170.48 billion in 2020, MRSZ staff believe.

The change is well illustrated by the fact that, while at the beginning of March 2020, an average of nearly 40,000 advertising spots were aired on Hungarian-language television channels, by the end of the month, this number had fallen to 30,000, according to a study by the National Media and Communications Authority (NMHH). The Media Council also accepted a study examining news programs' social diversity, revealing that women are still underrepresented in news programs. According to the NMHH study examining the transformation of the television advertising market in March 2020 due to the coronavirus epidemic, a downward trend can be demonstrated compared to last year: while in March 2019, the number of advertising spots ranged between 35 and 38.5 thousand per day, in 2020 this value dropped from nearly 40,000 at the beginning of the month to almost 30,000 by the end of the month. The development of the sector-level distribution of advertisements was basically characterised by the strong performance of sectors related to fast-moving consumer goods products (food, trade, medicinal preparations, beauty care, household goods). In contrast, others (leisure, financial institutions, services) declined significantly. The investigation covered 76 Hungarian-language television channels.[92]

What is the future of the media market? Based on the MRSZ Barometer, the expected decrease of the total communication pie in 2020 compared to the base year 2019 is HUF 161.1 billion. The communication pie (based on the forecasts of the market players participating in the research) may "dry up" from 467.96 billion in 2019 to 306.86 billion in 2020.

Expected decrease of the communication pie in 2020



Source: Hungarian Advertising Association: 2019 MRSZ Media and Communication Pies MRSZ Barometer research - 2020 industry forecast - May 2020

[92]https://www.mmonline.hu/cikk/drastíkan-csokkent-a-reklamszpotok-szama/

7. Media sectors

In the Hungarian media, the various sectors also play pivotal roles in shaping public discourse and disseminating information. Printed media stands as a traditional cornerstone, offering tangible and enduring content through newspapers and magazines. Listening to the radio adds an auditory dimension, providing timely news, engaging discussions, and curated playlists. TV station television ratings gauge audience preferences, influencing programming decisions and advertising strategies. Meanwhile, state and commercial media entities contribute diverse perspectives, reflecting the intricate interplay between government-backed information dissemination and privately owned outlets driven by market dynamics. In recent years, Hungary has undergone significant shifts in the ownership structures of media corporations. The aftermath of the 2008 economic crisis saw a 20% decline in the advertising market. The introduction of the media law in late 2010 created an uncertain regulatory landscape, prompting many foreign investors to divest their Hungarian assets, with some exiting the region entirely. In Hungary, domestic investors with political affiliations and strong connections to the ruling party often filled these vacated positions. This transition has redefined media ownership structures within Hungary and transformed the country's entire public sphere.[93]

7.1. Printed media

There are currently nine national newspapers in Hungary. Of these, six are political, one sports, one economic and three tabloid.

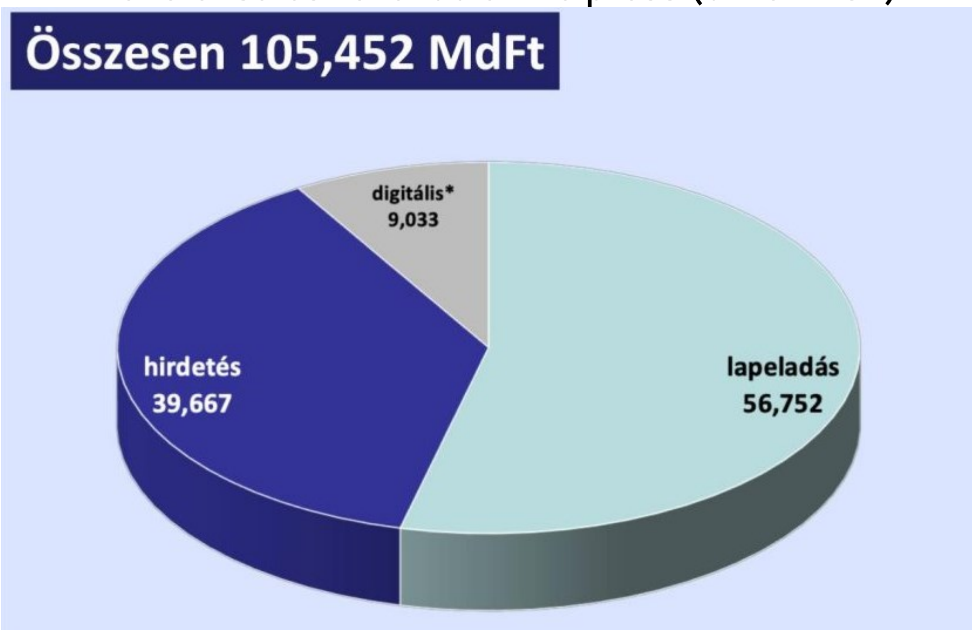
Title	Foundation	Publisher	Political ideology	Copy number	Thematics
Népszava	1877	XXI. Század Media Kft.	left, social democracy	20,122	politics, public life
Magyar Nemzet	2019	Magyar Idők Kiadó Kft.	right-wing, conservatism	n. a.	politics, public life
Magyar Hírlap	1968	Magyar Hírlap Publishing Ltd.	right-wing, conservatism	8 000	politics, public life
Blikk	1994	Ringier Axel Springer Hungary Kft.	left, liberalism	80,000	boulevard

[93] Urbán, Á. (2016). Recent changes in media ownership. *Mertek. eu*.

Bors	2007	Mediaworks Hungary Zrt.	right-wing	50,000	tabloid, politics
Ripost	2016	Mediaworks Hungary Zrt.	right-wing, conservatism	n. a.	tabloid, politics
Nemzeti Sport	1903	Mediaworks Hungary Zrt.	-	27,835	sports
Világgazdaság	1969	Mediaworks Hungary Zrt.	-	n. a.	economy, politics

Source: own compilation

The total sales revenue of the press (billion HUF)



Source: https://www.mediainfo.hu/hirek/article.php?id=51905

Based on MLE's summary, in 2018, the revenue of the "net-net" (reduced by the agency and other discounts) print advertising market increased again, amounting to HUF 39.667 billion. In 2018, the total sales revenue of the press, with 56.752 billion forints from newspaper distribution and the online income included in the declaration, was 105.452 billion.

In 2018, the media sector in Hungary exhibited stability compared to the previous year, with 61% of advertising revenue derived from daily newspapers and women's magazines. Notably, 90% of the sector's advertising revenue was generated by dailies, women's magazines, free weeklies, and advertising newspapers. Business-to-business (B2B) magazines and publications focused on business and public life also contributed to the advertising revenue. In online content, publishing companies declared a total of HUF 9.033 billion in online advertising revenue, highlighting their significant presence in the online content provider market. The Hungarian population's spending on daily newspapers and magazines amounted to HUF 60 billion, emphasizing the economic importance of the press market. With HUF 56.752 billion from newspaper distribution, consumer spending on print media is substantial. Readership research indicates that 78% of the Hungarian population aged 18-64 reads written content, with around 6.5 million readers engaging with printed media products. The revenue figures underscore the stability of the print market, with media companies shifting focus from the pre-crisis reliance on advertising revenue to a more consumer-centric approach, recognizing the value of reader engagement.

Globally, publishers are increasingly adopting user- and consumer-centric business models, evidenced by the growing revenues from audience engagement. While online revenues in Hungary continue to grow, the pace is slower than the global average, primarily due to the dominance of digital advertising revenues from tech giants. This underscores the need for Hungarian publishers to accelerate innovation, particularly in diversifying income sources and focusing on direct consumer revenue.

Brand	Publisher	Net revenue 2015 ('000 HUF)	Type of the owner
12 regional newspapers, Világgazdaság, Nemzeti Sport, magazines	Mediaworks Hungary Zrt	16 387 008	Hungarian investor (pro government)
magazines	Central Médiacsoport Zrt	7 894 384	Hungarian investor
Blikk, magazines	Ringier Axel Springer Magyarország Kft.	6 398 000	international investor
Bors, 2 regional newspapers	Lapcom Zrt	9 510 634	international investor
3 regional newspapers	Russmedia Kft	5 231 542	international investor
Népszava (daily)	Népszava Lapkiadó Kft.	580 016	offshore
Magyar Nemzet (daily)	Nemzet Lap- és Könyvkiadó Kft	2 225 301	Hungarian investor

Magyar Hírlap (daily)	Magyar Hírlap Kft	620 755	Hungarian investor (pro government)
Magyar Idők (daily)	Magyar Idők Kiadó Kft	872 202	Hungarian investor (pro government)
HVG (weekly)	HVG Kiadó Zrt	3 329 957	Hungarian investor
Figyelő (weekly)	MediaCity Kft	634 542 (until November 03, 2015)	Hungarian investor
Magyar Narancs (weekly)	Magyarnarancs.hu Kft	238 207	Hungarian investor
Heti Válasz (weekly)	Heti Válasz Kiadó Kft	878 658	Hungarian investor
168 óra (weekly)	Telegráf Kiadó Kft	417 886	offshore
Élet és Irodalom (weekly)	Irodalom Kft	189 280	Hungarian investor
Demokrata (weekly)	Artamondo Kft	306 891	Hungarian investor (pro government)
Lokál (free daily)	Modern Media Group Zrt	803 922 (from April 16, 2015)	Hungarian investor (pro government)
Lokál extra (free weekly)			

*Source: matesz.hu, Urbán, Á. (2016). Recent changes in media ownership. Mertek.eu.

7.2.Radio

Among the population aged 15 and over, Retro Rádió (1.5 million people) has recently become the most-listened-to radio station in the country, mainly broadcasting music from the 60s, 70s, 80s and 90s. This is followed by Petőfi Rádió (1.1 million listeners), where listenership increased thanks to the music of the dominant program time. Then Kossuth Rádió (1.1 million people) comes next, mainly among the elderly. Radio 1 has a daily reach of 1 million listeners. Sláger FM follows it with 324 thousand and Dankó Rádió with 198 thousand listeners. Bartók Rádió has 79,000 daily listeners, followed by Jazzy Rádió with 44,000 and InfoRádió with 35,000 daily listeners. Tilos Rádió reaches 11,000 people nationally on a daily basis. Best FM, Karc FM, Klasszik Rádió, Klubrádió, Magyar Katolikus Rádió, Manna FM, Mária

Rádió, Sláger FM, Sola Rádió, Trend FM did not contribute to the publication of the data. Here, we note that there are several types of surveys; depending on the client and the purpose, the data do not square with each other.

As for **local radio**, an example from Klubrádió: on average, 150-200 thousand people listen to Klubrádió every day and half a million tune in every week on its 92.9 frequency. Since 3-3.5 million people live in the area of the tax, they reach about 15 % of the capital's population, which is very significant. András Arató told Szabad Európam that there is also online listening, which varies between 3,000 and 10,000 depending on the time of day. Although Klubrádió does not publish the NMHH's listening figures, according to the CEO of the radio station, it is one of the most popular radio stations in Budapest: according to official figures, Rádió1 and Retró Rádió are listened to by 200,000 people a day, while Kossuth is listened to by 150,000 people a day.[94]

Retro Rádió (222,000 listeners per day) leads the **capital** in terms of average daily listeners, followed by Rádió 1 (203,000) and then Kossuth Rádió with 154,000 listeners. Petőfi Rádió reaches 117,000 people, Sláger FM 114 and Jazzy Rádió reach 24,000 people daily. InfoRádió has a listener base of 23,000 people, followed by Dankó Rádió (22,000 people) and Bartók Rádió (19,000 listeners). Tilos Rádio has eleven thousand listeners in Budapest.[95]

[94]https://www.szabadeuropa.hu/a/klubradio-radio-mediatanacs-nmhh-frequencia/30857420.html
[95]http://radiosite.hu/hallgatottsagi-adatok-2020-aprilis-junius/

7.3.Television

The TV2 became Hungary's most-watched channel in the first six months of 2020: according to Nielsen Audience Survey data, with an average audience share of 9.4 % for the entire day, TV2 overtook the competing channels in the 18-59 age group. Based on the viewership data, in the first half of the year, RTL Hungary's average viewer share was 21.7 % on a full day, while TV2 Group achieved an average of 10 % higher and closed with a viewer share of 23.8. Based on the Nielsen Audience Survey data, TV2 won the viewership competition with an average audience share of 9.4 % among the 18-59-year-olds, and RTL Klub came in second place with an average of 8.9 %. Examining the competition of the channel portfolios, the TV2 Group is also in the lead, but it is ahead of the competitor RTL Hungary by an even bigger margin. In the first half of the year, the average viewership share of RTL Hungary was 21.7 % on a full day, while the TV2 Group achieved an average of 10 % higher than this (23.8% Share). The measurable advantage in the 18-59 age group is also true for viewers between 18-49 and the entire population; that is, TV2 and the TV2 Group are in first place in all three priority target groups based on the viewing data for the first half of this year.

Television ratings by programs 2020. week 41

	Show	Channel	Viewers
1.	Dancing with the stars - Mindenki táncol	TV2	1 043 015
2.	Sztárban sztár	TV2	840 685
3.	Álarcos énekes	RTL KLUB	795 105
4.	Híradó	RTL KLUB	791 995
5.	Drága örökösök	RTL KLUB	778 426
6.	A mi kis falunk	RTL KLUB	770 421
7.	Tények	TV2	763 127
8.	Nyerő páros-mit bír el a szerelem?	RTL KLUB	673 956
9.	Tények plusz	TV2	637 548
10.	Fókusz	RTL KLUB	603 664
11.	Fókusz-ki van a maszk mögött?	RTL KLUB	597 845
12.	Remények földje	TV2	510 719
13.	Fókusz plusz	RTL KLUB	474 600
14.	Mintaapák	TV2	461 789
15.	Football	M4 Sport	458 924

Source: https://onbrands.hu/marka-es-trend/2020/10/televizios-nezettseg/televizios-nezettseg-2020-41-het

7.4. Independent, commercial and state media

At the same time as the political changes, the picture of the Hungarian media seemed and still seems to be emerging. Many previous newspapers from the "curse" have disappeared, and many new ones have been created. A small part of the former has been eliminated immediately, most of them gradually. For 40 years, they represented a unified position, which is also proven by the fact that the top part of the header of all daily newspapers was mandatory (!) with the exhortation: Proletarians of the world unite! (Demography proves that even the profane version was not realised.) The main ideological foundations of the socialist-communist media policy model were laid down by Lenin himself - recognizing the importance - when he included the basic functions of journalism in the triad of collective propagandist, collective agitator and collective organiser together. The post-socialist era also brought a reorganisation of the press. Mediums were born and ceased to exist and were transformed.

Media area 2010-2020

Media area	2010	2020
Commercial TV news audience (prime time, 1000 persons) TV 2 - Facts RTL Klub - News	 1395 706	 1576 692
Number of copies of daily newspapers sold (thousands)	1517	537
Daily reach of the five largest online news portals (thousands of people)	727	1782
i.e. number of daily downloads, million pages	5.4	14.1
TVs close to Fidesz that also produce public content	4	6
Independent TVs with public content	3	2
Portals close to Fidesz that also produce public content	5	33
Independent portals also producing public content	22	27
Daily newspapers close to Fidesz	2	25
Independent daily newspapers	25	2
advertising spending by governments (HUF billion)	95	302
Proportion of mediums with at least one-third public advertising revenue (%) all daily newspapers	2 0	44 72

Source: Atlatszo.hu, Kantar Media, MMonline.hu, Media1.hu, Gemius and HVG collection

In relation to state media broadcasting, Act CIV of 2010 on the Freedom of the Press and the Basic Rules of Media Content currently stipulates that public media services operate in Hungary for the purpose of preserving and strengthening national identity and European identity, national, family, ethnic and religious communities, cultivating and enriching Hungarian and minority languages and culture, and satisfying the information and cultural needs of citizens. It is also found in the law that linear media services that provide information are obliged to provide a balanced coverage of local, national, and European events of public interest, as well as events and controversial issues that are of importance to the citizens of Hungary and the members of the Hungarian nation, in the informational and news programs they publish. to inform. The detailed rules of this obligation are established by law in accordance with the requirements of ensuring proportionality and democratic public opinion. The media content must not be capable of inciting hatred or incitement to violence against a nation, community, national, ethnic, linguistic and other minority or any majority, as well as a religious community or any of its members due to belonging to that community.

Media consumption habits of Hungarian society

Media consumption habits in Hungary	%	Potential reach (main, 18+)
Consumes conservative, left-liberal and public service media	29.8	2,409,865
Consumes conservative and public service media, not left-liberal	4.6	371,993
Consumes conservative and left-liberal media, not public service media	43.5	3,517,755
Consumes left-liberal and public service media, not conservative	2.5	202 170
Consumes only conservative media	6.5	525,642
Consumes only left-liberal media	6.9	557,989
Consumes only public service media	1.6	129,389
Doesn't consume any of them	4.6	371,993
Consumes conservative media	**84.40**	**6,825,254**
Consumes left-liberal media	**82.70**	**6,687,779**
Consumes public service media	38.50	3,113,416

Source: Nézőpont Intézet (2020): Növekvő sokszínűség (Growing diversity)

The 95 % of the Hungarian adult population (approximately 7.7 million people) are regular media consumers. Among them, conservative media are followed by slightly more than 6.8 million, while left-liberal media are followed by almost 6.7 million, i.e. the camps of those who follow right-wing and left-liberal media are practically the same size. Almost 6 million

(5,927,620) people, i.e. at least 75 % of the electorate, are guaranteed to receive the views of each political side from the common set, i.e. those who are equally informed by the media of both sides.

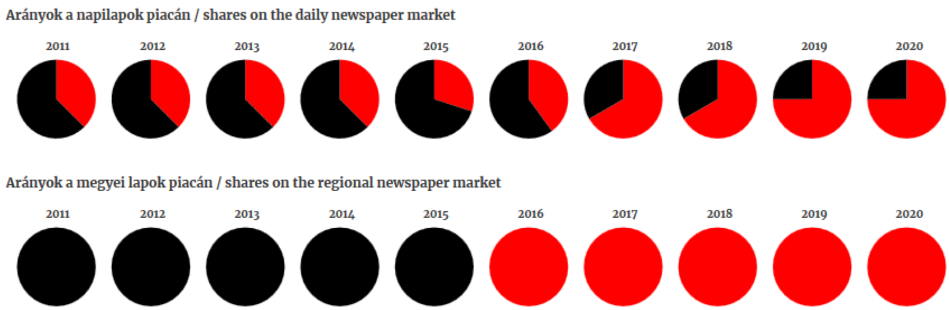
However, based on the available data, estimating the reach of the pro-government and non-government media is challenging. Estimating these proportions, at least approximately, is essential for at least two reasons: on the one hand, it is an important argument in EU debates on media pluralism and freedom, but we stress that these estimates are pretty scattered and should be read with caution - including ours - in the absence of official, more detailed data. On the other hand, they can also be used to estimate some kind of efficiency, as the pace and direction of expansion is frightening, but it is not always the same as how efficient it is.

An excellent example of the aforementioned **closures** is the situation of the national dailies, led by the flagship Népszabadság, the paper of the Hungarian Socialist Workers' Party, with the largest circulation in its heyday (800 000 copies at its peak in the 1970s, 37 000 copies at its closure in 2016).[96] It is true that with the emergence of IT, the written press, regardless of politics, declined almost everywhere; this is not a Hungarian phenomenon, it happened everywhere in the world.

The new era has not improved the situation of **rural newspapers and tabloids.** The number of copies kept falling and falling. The total number of copies of the county newspapers, which were once the backbone of the local media and now belong to Mediaworks, decreased by another 12% in 2019, but even the tabloids belonging to the target group could not improve, Bors and Hot! magazine readership also decreased by 7-8%, even though the government spends much money to keep the important media alive. The table below clearly shows that today, no newspaper has a circulation of more than 50,000, although at the turn of the millennium there were still more than 100,000. It is also clear how much the fall is even in a single year. In the majority of county newspapers, around half of the advertising revenue comes from state advertisements, but in 2019, [97]the share of revenue from tax forints also doubled in KESMA tabloid newspapers. Moreover, the rate is even worse for free online platforms: in 2019, the state-financed 69% of Mediaworks' portals.

[96] https://hu.wikipedia.org/wiki/N%C3%A9pszabads%C3%A1g

[97] The Central European Press and Media Foundation (KESMA for short, CEPMF for short) is a Hungarian foundation founded in 2018 . The government classified it as strategically important.



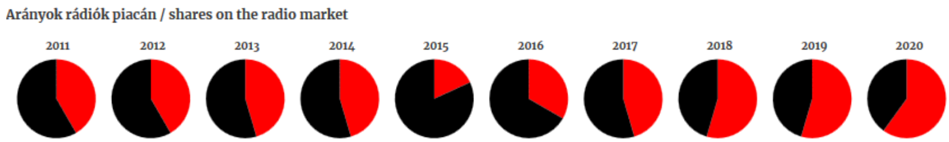
Source: https://atlatszo.hu/2020/08/07/grafikonokon-es-diagramokon-mutatjuk-hogyan-alakult-at-a-magyar-media-az-elmult-tiz-evben/ (black: not pro-government; red: pro-government)

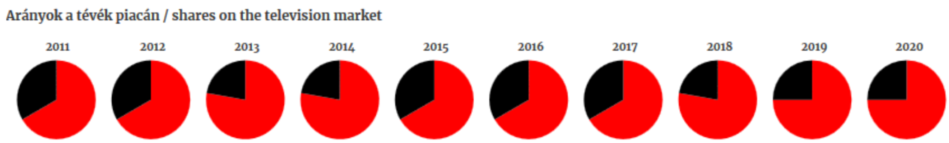
Number of copies of county newspapers

County	Page name	Purchased copy, end of 2017, 2018		Change
Bács-Kiskun	Petőfi Népe	14 118	12,546	-9%
Baranya	Új Dunántúli Napló	18 130	16,495	- 10%
Békés	Békés Megyei Hírlap	12,666	11,430	-10%
Borsod-Abaúj-Zemplém	Észak-Magyarország	33,255	30 141	-10%
Csongrád	Délmagyarország	31,631	26,907	-15%
Fejér	Fejér Megyei Hírlap	25,812	20,741	-20%
Győr-Moson-Sopron	Kisalföld	52,503	46,797	-11%
Hajdú-Bihar	Hajdú-bihari Napló	30,802	27,956	-10%
Heves	Heves Megyei Hírlap	7,756	6,806	-12%
Jász-Nagykun-Szolnok	Új Néplap	12,361	10,877	-12%
Komárom-Esztergom	24 Óra	8,626	7 333	-15%
(Dunaújváros)	Dunaújvárosi Hírlap	4,263	3 499	-18%
Somogy	Somogyi Hírlap	13,042	11,542	-11%
Szabolcs-Szatmár-Bereg	Kelet-Magyarország	36,797	33 391	-9%
Tolna	Tolnai Népújság	9,235	8,332	-10%
Vas	Vas Népe	34,761	31 124	-10%
Veszprém	Napló	26,918	22,257	-17%
Zala	Zalai Hírlap	33 116	29,285	-12%

Source: https://444.hu/2019/02/12/zuhan-a-megyei-lapok-peldanyszama

The role of the state is decisive. The government also paid 23% of the advertising revenues of the country's most listened-to radio station, Retro. Furthermore, to complete the picture, in addition to the HUF 75 billion annual support of MTVA, which operates public television, the state spends more than HUF 100 billion a year on the advertising market to strengthen the pro-government media.[98] In America, they say this: on the taxpayers' money.





Source: https://atlatszo.hu/2020/08/07/grafikonokon-es-diagramokon-mutatjuk-hogyan-alakult-at-a-magyar-media-az-elmult-tiz-evben/ (black: not pro-government; red: pro-government)

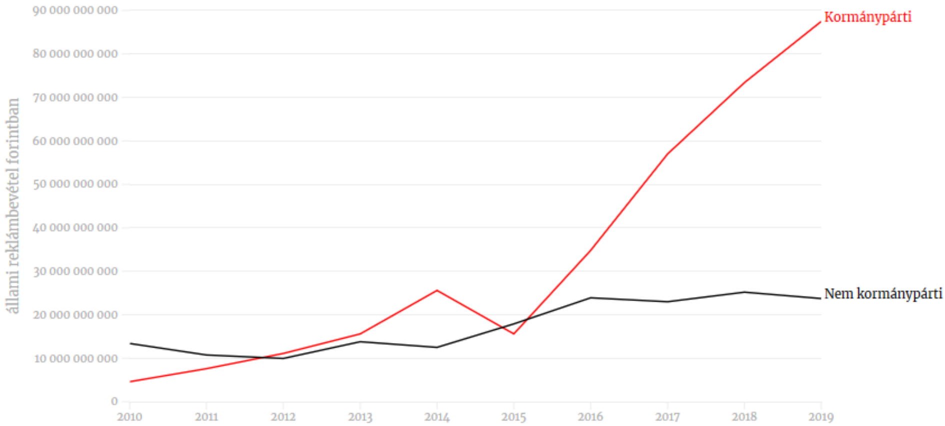
As a matter of business, since 2016, pro-government media have received an enormous amount of state advertising. By the end of 2018, this was HUF 73 billion at the list price, which means that nearly three-quarters of the money spent on advertising by the public sector ended up with pro-government media. At the same time, it is also worth noting that the amounts spent by non-government media also increased, which means that the dependence of the entire media market on state money also increased.

For many media, the **state advertising income** is extremely high, which means that we essentially support them with public money, or even pay their profits with public money. If more than 30 % of a medium's advertising revenue is provided by the state, we can already speak of significant governmental exposure/influence, but the online portfolio of Magyar Idők, Lokál, Figyelő or the then – Meszáros-owned – Mediaworks (mostly the online interfaces of county newspapers) the proportion of advertising revenue exceeded 60-70 %. It is also worth checking out the left -wing Népszava and the theoretically independent Inforádió. Such a high proportion of state

[98]HVG April 23, 2020 p. 14-15

advertising revenue can also be an indicator of indirect government influence.

Pro-government and non-government media companies state advertising revenue



Source: https://atlatszo.hu/2020/08/07/grafikonokon-es-diagramokon-mutatjuk-hogyan-alakult-at-a-magyar-media-az-elmult-tiz-evben/ (black: not pro-government; pro-red government)

8. Facts about the Hungarian media

The situation of the Hungarian media market is the subject of constant analysis and debate, not only within the country's borders, but also internationally. In 2020, the Médianéző Központ, part of the Fidesz-affiliated Nézőpont Intézet, published an analysis which examines the diversity of the Hungarian media market on a factual basis and presents it in ten points:[99]

1. Anyone can easily access all news sources in Hungary. The Hungarian media are easily accessible to anyone throughout the country, regardless of their attitude towards the government or their political affiliation: the printed papers are distributed by Magyar Posta, which has a nationwide network, and the major electronic media have nationwide coverage. The equipment availability of the Hungarian population is exceptionally high: 3.8 million households have 3.7 million television subscriptions; the number of internet subscriptions exceeds the country's population; 91 % of adults have a mobile phone, and 73 % also use it to surf the Internet.

2. Media market balance: the same number of people consume conservative and left-liberal media. 95 % of the Hungarian adult population (7.7 million people) are regular media consumers. Trust in the media corresponds to the EU average. The Hungarian media market is balanced: roughly the same number of people get their information from conservative (84 %, 6.8 million people) as from left-liberal sources (83 %, 6.7 million people), while the number of those who get their information exclusively from one type of media is relatively small.

3. Regardless of political values, Hungarian media are mainly owned by Hungarians. Parallel to the system change, foreign investors appeared and occupied a dominant position in the Hungarian media market for decades. Today, the majority of Hungarian-owned companies, 95 %, own the domestic media market. The German RTL Group and the Swiss-German Ringier -Axel Springer are the most critical foreign owners.

4. Since the change of government in 2010, the number of left-liberal media has continuously increased. Hungary's media regulation is liberal: anyone can freely and quickly establish a medium at any time; as a rule, the only condition for this is to register it with the National Media and Communications Authority – Nezőpont highlights in its latest analysis. In 2010, there were 33 left-liberal media outlets in Hungary; by 2020, their number

[99] Nézőpont Intézet (2020): Growing diversity. https://www.magyarhirlap.hu/belfold/20200930-tiz-teny-a-magyar-mediarol

had risen to 48: only four such media outlets were closed, while 19 new ones were created.

5. Left-liberal media are also profitable in Hungary. Hungary's most influential media companies are profitable, regardless of their relationship with the government. Only Magyar Jeti Zrt, which publishes the left-liberal 444.hu., cannot find a sustainable business model – now traditionally – underlined.

6. Journalists write freely, without taboos, on any topic and about anyone. Hungary's constitution and laws de jure guarantee freedom of the press and expression of opinion. The Hungarian media market de facto implements these freedoms even to the detriment of individual or community rights. The left-liberal weekly Magyar Narancs depicted Viktor Orbán with a Hitler moustache on its front page, the Népszava daily published a caricature of Christ, and the new-left online portal Mérce gave space to publicity calling for revolution. At the same time, the conservative media love to criticise the person and activities of György Soros.

7. The independence of the Hungarian media authority is also strong compared to EU practice. The media authorities of many European Union member states operate under governments' authority, often directly under ministries. On the other hand, the Hungarian National Media and Communications Authority and its Media Council are subject only to a pivotal law requiring a two-thirds majority in the Parliament, the president and members of which are elected by the legislature. The parliament and its own resources provide the media authority's budget, thus creating its independence from the government.

8. The Hungarian media authority sanctions conservative media more severely. The Hungarian media authority punishes conservative media more often and more severely than left-liberal media. Over two-thirds of the cases sanctioned by the independent media authority between 2012 and 2020 were right-wing, while less than one-third were related to left-liberal media. Conservative media had to pay 66 % (HUF 357 million) of the imposed fines, while left-liberal media had to pay only 34 % (HUF 183 million).

9. Government information and access to public interest data operate according to the practices of EU member states. Government information is provided to the public by the so-called Government Info, usually held weekly after every government meeting, which is a joint press conference of the Prime Minister and the government spokesperson lasting several hours, at which representatives of the left-liberal and right-wing media can freely ask any questions. Even in parliamentary systems, it is a rare possibility that members of parliament can directly ask the prime minister during the so-called immediate question hour of the parliamentary sessions on any topic, without sending the specific question in advance, to which the prime minister is obliged to answer personally. Access to data of public interest is guaranteed by law to anyone within a maximum of thirty days, which can be enforced through court.

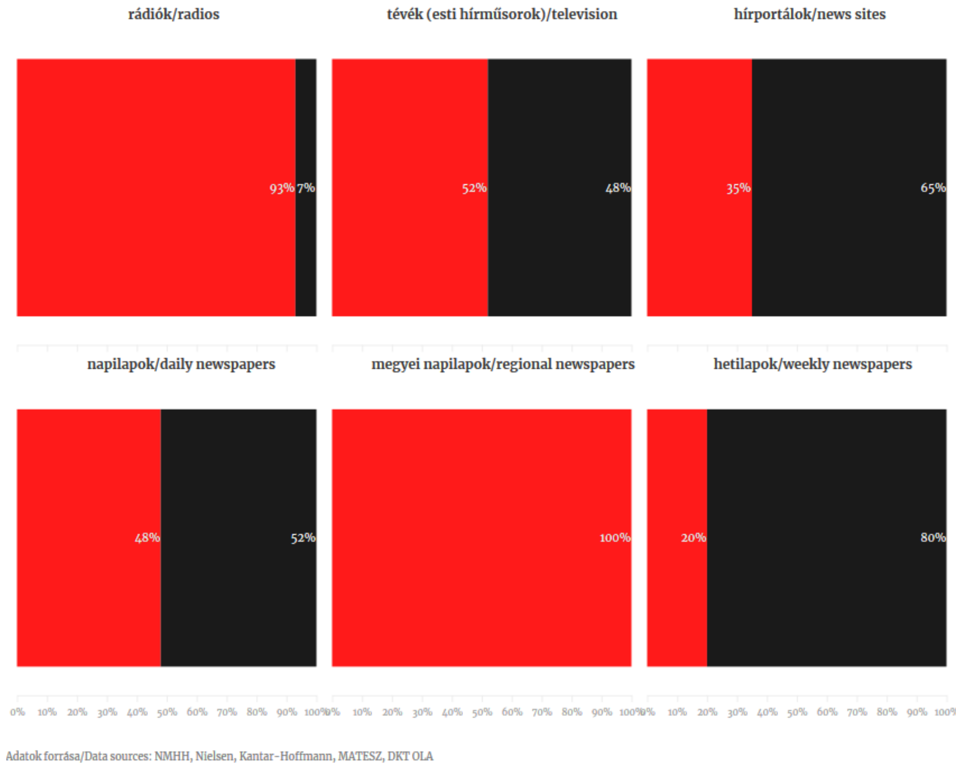
10. the public media favours the current government like many EU countries. The political bias of the public service media towards governments is subject to continuous criticism throughout the world and Europe; similar findings have been published in recent years regarding the public media of Germany, Italy, France, Italy, Greece or Spain. In Hungary, the police brutality against the nationwide anti-government demonstrations of 2006 was silenced by the public media at the time, giving space to the position of the socialist-liberal government but expressing critical opinions regarding the opposition. The analysis of the German and French public media content shows that in their programs, they prefer topics that correspond to the political goals of the reigning government.

It is worth adding to the findings that

Ad 1) There is no doubt that anyone can easily access all news sources in Hungary, but for most people - primarily due to financial reasons - free services remain, especially in the case of television, where the majority of channels belong to Hungarian Television.

Ad 4) It is also true that since the change of government in 2010, the number of left-liberal media outlets has been steadily increasing, but their share in the media pie is constantly decreasing. Fragmented pluralism hardly reaches consumers.

Proportion of access to pro-government and non-pro-government media

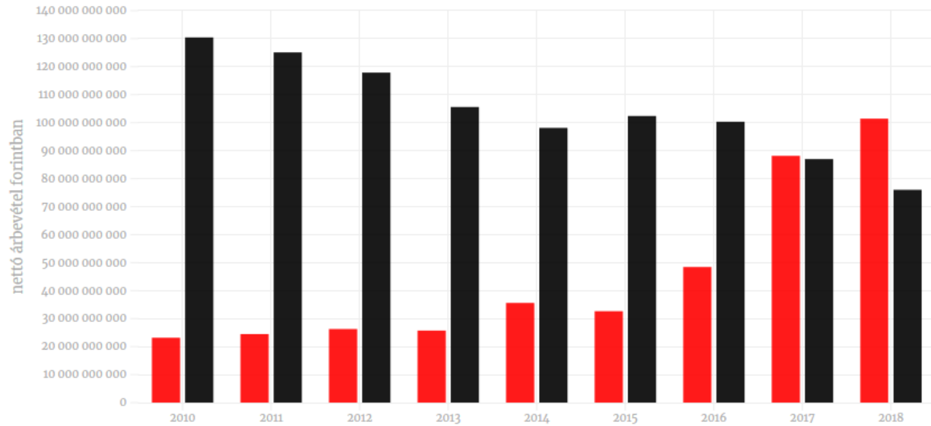


Source: https://atlatszo.hu/2020/08/07/grafikonokon-es-diagramokon-mutatjuk-hogyan-alakult-at-a-magyar-media-az-elmult-tiz-evben/ (black: not pro-government; red: pro-government)

The clear superiority of pro-government media can only be established in the radio market and county dailies, while in the market of news portals and weekly newspapers, at least in terms of total attendance and number of copies sold, non-government parties are in the majority. Neither side has a clear advantage in the market for television evening news programs and daily newspapers.

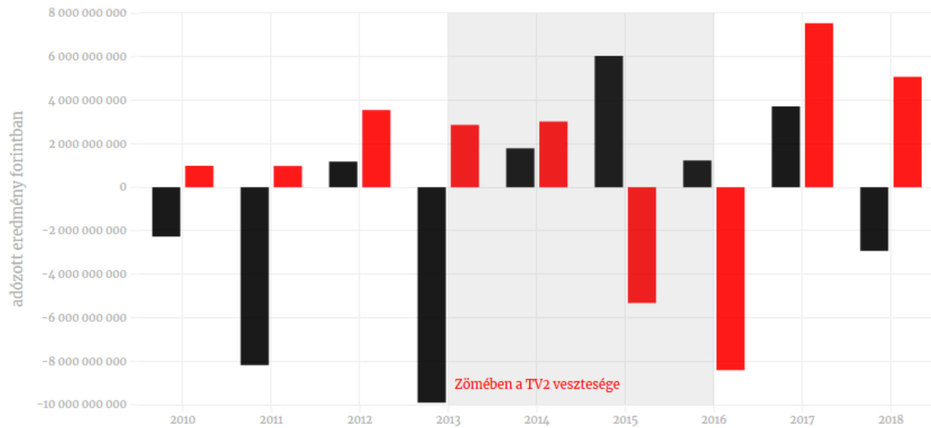
Ad 5) In Hungary, the left-liberal media are also profitable; however, the reorganisation is clear, the media revenue maintained by public money has increased fivefold in the last ten years.

The evolution of the sales revenue of pro-government and non-government news media companies



Source: https://atlatszo.hu/2020/08/07/grafikonokon-es-diagramokon-mutatjuk-hogyan-alakult-at-a-magyar-media-az-elmult-tiz-evben/ (black: not pro-government; red: pro-government)

The evolution of the after-tax profit of pro-government and non-government news media companies



Source: https://atlatszo.hu/2020/08/07/grafikonokon-es-diagramokon-mutatjuk-hogyan-alakult-at-a-magyar-media-az-elmult-tiz-evben/ (black: not pro-government; red: pro-government)

Media has long ceased to be considered a profitable investment, and news-based media is not even as much as other market segments, such as the poster market. Despite this, the news media part of the ruling party's media empire generated, if not huge, but clearly visible profits for its owners. The overall picture is worsened in both areas by the huge, inherited loss of the TV2 Group.

Ad 6, 9, 10) Journalists write freely without taboos on any topic and about anyone. An audio recording in the possession of Free Europe proves that it was said on public television: the government must be supported in the campaign, and those who do not like this should resign. In the previous part of our series of articles, with the help of our three sources, we showed how external influence spread to MTVA's foreign policy section and what topics were considered sensitive. During the campaign period, one of MTVA's leading editors speaks quite openly about the political expectations of the institution. According to F., " *in 2016, it was still possible to describe that the migrants trying to reach Europe would undertake the life-threatening journey at the cost of their lives* ", but this situation soon changed. Both S. and P. revived the fact that before the 2018 parliamentary elections, they told the foreign policy column that at least one "migrant material" was needed every day. What exactly does this mean? " *Definitely a material on the basis of which the viewers can form a negative image of people of foreign origin* ", gives a precise definition of P.[100] On the audio recordings, you can hear Balázs Bende, the head of the foreign affairs cabinet of the public media, and Zsolt Németh, the news director of M1. The latter talks about how to " fuck " an expert close to the government in the news materials.

Furthermore, Balázs Bende clarified that the institution "does not support the opposition coalition". He also states that those who cannot write the material according to expectations can even submit their resignation. The National Association of Hungarian Journalists also took a stand regarding the revealing audio recordings leaked from the public media. They demand the action of the media authority, the strict sanctioning of the editors and managers involved, the vetting of the public media and the development of safeguards for impartial operation. At the same time, they indicated that the Parliament would also have a role to play in the matter. According to the MÚOSZ, "the practice developed at the Hungarian public media, which operates with more than 100 billion tax forints per year and is considered the most expensive in Europe in terms of GDP, and has been thoroughly documented by Free Europe, is seriously illegal: it violates the current basic law, the laws on the operation of the press and public media, the Labor Code and the Criminal Code."

[100] https://www.szabadeuropa.hu/a/ortegstoi-utasitas-a-koztevenel-ebben-az-intezmenyben-nem-az-ellenzeki-osszefogast-tamogatjak-mtva-fidesz/30940923.html

Ad 8) The Hungarian media authority only imposes more severe sanctions on conservative media as a whole, mainly because they have gained considerable media control in recent periods. On the other hand, it is also worth mentioning that in many cases, the inexperience of the new, young generation, or the desire/compulsion of some to play a more "dedicated" role, takes on a thoughtless and offensive character.

Summary

The media industry in Europe and Hungary has undergone significant changes in the past decade. The rise of digital media has had a major impact on the industry, leading to the fragmentation of audiences and the emergence of new players. Additionally, media consumption has become increasingly mobile, with people accessing news and entertainment on their smartphones and tablets.

There is a continued growth of digital media, which is now the primary source of news and entertainment for people. This trend is expected to continue in the coming years and decades as more people adopt smartphones and tablets and new digital media forms, such as virtual and augmented reality, become more widely available. Traditional media outlets increasingly converge with digital media, creating a more unified media landscape. Social media has become a significant source of news and information, with users increasingly relying on social media apps for their daily media consumption. The rise of digital and social media has led to the fragmentation of audiences. This means that people are consuming news and entertainment from a wider variety of sources than they were in the past. This fragmentation is making it more difficult for media companies to reach large audiences with a single product.

The media industry is becoming more competitive as new players emerge from the digital space. These new players are challenging the traditional media companies, facing challenges such as declining advertising revenues and rising production costs. In order to survive in the competitive media landscape, media companies need to innovate. This means developing new products and services that appeal to audiences and finding new ways to monetize their content. The rise of social media and the internet has also increased the spread of disinformation and misinformation.

In addition to the above-mentioned main trends, the report also highlights some projections for the media industry's future in Europe and Hungary. Artificial intelligence is expected to have a significant impact in the coming years. AI can be used to automate tasks such as content creation, editing, and distribution and personalise media experiences for individual users. Data and analytics are becoming increasingly important in journalism as media outlets seek to understand their audiences better and deliver more relevant content. Subscription services are becoming increasingly popular. This is due to the fact that they offer viewers and listeners access to a wide variety of content without having to worry about advertising. Mobile media is expected to continue to grow in the coming years as more people own smartphones and tablets.

The media industry is at a crossroads and faces several challenges in the coming years, including the continued decline of traditional media, the rise of disinformation and misinformation, and the need to adapt to new technologies. Governments are increasingly regulating the media industry in an effort to address concerns about disinformation and misinformation. By embracing digital technologies, understanding audience preferences, and investing in innovation, media companies can navigate the changing landscape and emerge as leaders in the future of media.

Appendix

Key media subsectors

Sector	Characteristics	Key Examples
Print	Utilizes physical formats, such as newspapers, magazines, and books, to disseminate information and entertainment.	The New York Times, The Wall Street Journal, The Washington Post, Vogue, The Economist, Harry Potter book series
Broadcast	Transmits audio and video signals through radio waves or television signals to reach a wide audience.	NPR, BBC, CNN, Fox News, ABC, CBS, NBC, MTV, Netflix, Hulu, Disney+
Digital	Distributes content through online platforms, including websites, social media, and streaming services.	Google News, YouTube, Twitter, Facebook, Instagram, TikTok, Netflix, Spotify, Amazon Prime Video, Apple TV+
Out-of-Home	Utilizes physical displays, such as billboards, posters, and transit advertisements, to reach audiences in public spaces.	Times Square billboards, subway ads, bus ads, airport ads, sporting event ads
Publishing	Acquires, develops, and markets books, magazines, and other printed materials.	Penguin Random House, HarperCollins, Hachette Book Group, Macmillan Publishers, Simon & Schuster
Broadcasting	Owns and operates radio and television stations to broadcast content to audiences.	The Walt Disney Company, Comcast (NBCUniversal), Fox Corporation, ViacomCBS, AT&T (WarnerMedia), Sony Pictures Entertainment
Telecommunications	Provides infrastructure and services for the transmission of digital signals, including internet access, mobile phone service, and cable television.	AT&T, Verizon, T-Mobile, Comcast, Charter Communications, Google Fiber, Verizon Fios
Advertising	Creates and places advertisements to promote products, services, and brands to specific audiences.	Omnicom Group, Publicis Groupe, WPP, Dentsu, IPG

News	Gathers and disseminates information about current events and issues to inform the public.	The Associated Press, Reuters, Bloomberg, Agence France-Presse (AFP), BBC News
Entertainment	Provides content for amusement, relaxation, and enjoyment.	Movies, TV shows, music, video games, sports, theater, comedy clubs, amusement parks
Education	Delivers educational content through various media formats, including books, websites, videos, and podcasts.	Khan Academy, Coursera, edX, Udemy, TED Talks
Social Media	Provides platforms for users to connect, share content, and engage with each other.	Facebook, Twitter, Instagram, TikTok, LinkedIn, Reddit

Source: own compilation

Printed media in Hungary

County papers:

- 24 óra, MediaWorks – Komárom-Esztergom megye
- Békés Megyei Hírlap, MediaWorks – Békés megye
- Délmagyarország, Lapcom – Csongrád-Csanád megye
- Dunaújvárosi Hírlap, Pannon Lapok Társasága – Fejér megye
- Dunántúli Napló, MediaWorks – Baranya megye
- Észak-Magyarország, Russmedia – Borsod-Abaúj-Zemplén megye
- Fejér Megyei Hírlap, Pannon Lapok Társasága – Fejér megye
- Hajdú-Bihari Napló, Russmedia – Hajdú-Bihar megye
- Heves Megyei Hírlap, MediaWorks – Heves megye
- Kelet-Magyarország, Russmedia – Szabolcs-Szatmár-Bereg megye
- Kisalföld, Lapcom – Győr-Moson-Sopron megye
- Napló, Pannon Lapok Társasága – Veszprém megye
- Nógrád Megyei Hírlap, Nógrád Hírcentrum – Nógrád megye
- Petőfi Népe, MediaWorks – Bács-Kiskun megye
- Somogyi Hírlap, MediaWorks – Somogy megye
- Tolnai Népújság, MediaWorks – Tolna megye
- Új Néplap, MediaWorks – Jász-Nagykun-Szolnok megye
- Vas Népe, Pannon Lapok Társasága – Vas megye
- Zalai Hírlap, Pannon Lapok Társasága – Zala megye

Weekly papers:

- Magyar Világ
- 168 Óra
- Állás és Karrier
- Evangélikus Élet
- Élet és Irodalom
- Élet és Tudomány
- Figyelő
- Hetek
- Heti Válasz
- Helyi Théma
- HVG (Heti Világgazdaság)
- Jelen
- Képes Sport
- Keresztény Élet
- King (Közélet Ingatlan Gazdaság)
- Magyar Demokrata
- Magyar Fórum
- Magyar Hang
- Magyar Narancs
- Magyar Nők Lapja
- Mandiner
- MiNap
- Nők Lapja
- Pesti Est
- Pesti Műsor
- Reform
- Szabad Föld
- Tallózó
- Új Ember
- Vasárnapi Hírek
- Vasárnap Reggel
- Zöld Újság
- Zsaru

List of sources

- “Media.” Merriam-Webster.com Dictionary, Merriam-Webster, https://www.merriam-webster.com/dictionary/media.
- “Medium.” Merriam-Webster.com Dictionary, Merriam-Webster, https://www.merriam-webster.com/dictionary/medium. Accessed 4 Jan. 2024.
- 1956 a sajtó tükrében Kossuth Kiadó, 1989
- Albarran, A., Mierzejewska, B., & Jung, J. (Eds.). (2018). Handbook of media management and economics. Routledge.
- Bátorfy, A., & Urbán, Á. (2020). State advertising as an instrument of transformation of the media market in Hungary. East European Politics, 36(1), 44-65.
- Bauer A. - Berács. J. (2006): Marketing. Aula Kiadó, Budapest.
- BBC code of conduct, BBC's Editorial Values and Standards
- BBC's Editorial Values and Standards
- Berry, D. (2016). Journalism, ethics and society. Routledge.
- Bozóki, A. (2018). Counter-Cultural Pluralism: Informal Political Initiatives in Hungary in the 1980s. Retrieved from Researchgate. Accessed August.
- Brogi, E., Nenadic, I., Viola De Azevedo Cunha, M., & Parcu, P. L. (2019). Assessing certain recent developments in the Hungarian media market through the prism of the Media Pluralism Monitor.
- Brown, J. D. (2002). Mass media influences on sexuality. Journal of sex research, 39(1), 42-45.
- Buzinkay, G. (2018). A magyar sajtó és újságírás története a kezdetektől a rendszerváltásig (Doctoral dissertation, -).
- Chadwick, A., Dennis, J., & Smith, A. P. (2015). Politics in the age of hybrid media: Power, systems, and media logics. In The Routledge companion to social media and politics (pp. 7-22). Routledge.
- Chapman, J. (2005). Comparative media history: An introduction: 1789 to the present. Polity.
- Conclusions of the Council and of the Representatives of the Governments of the Member States, meeting within the Council, on media freedom and pluralism in the digital environment - https://eur-lex.europa.eu/legal-content/EN/TXT/?uri=CELEX:52014XG0204(02)

- Council conclusions on safeguarding a free and pluralistic media system 2020/C 422/08 - https://eur-lex.europa.eu/legal-content/EN/TXT/?uri=CELEX:52020XG1207(01)
- Cushing, G. F. (1958). Jósef Bajza. The Slavonic and East European Review Vol. 37, No. 88 (Dec., 1958), pp. 99-112 Published By: Modern Humanities Research Association
- Desjardins, Jeff (2018): Predicting the Future of Media and Entertainment (https://www.visualcapitalist.com/visualizing-future-media-entertainment/)
- Deuze, M., & Witschge, T. (2020). Beyond journalism. John Wiley & Sons.
- European Audiovisual Observatory (2020): The European audiovisual industry in the time of COVID-19, IRIS Plus 2020-2
- European Audiovisual Observatory analysis of EBU/MIS, Amadeus and annual reports data
- European Commission, Directorate -General for Communication (2018): Media use in the European Union - Standard Eurobarometer 88 Autumn 2017
- Fourie, P. J. (2010). Media studies: Media history, media and society (Vol. 2). Juta and Company Ltd.
- Friedrichsen, M. (2017). Market structure and innovation policies in Germany. Innovation Policies in the European News Media Industry: A Comparative Study, 85-95.
- Frost, C. (2015). Journalism ethics and regulation. Routledge.
- Gálik Mihály & Horvát János & Szente Péter (2003): Egy új médiatörvény alapjai (javaslat). In: Enyedi Nagy Mihály & Polyák Gábor & Sarkady Ildikó (szerk.): Médiakönyv 2003. Budapest: Enamiké.
- Gelfert, A. (2018). Fake news: A definition. Informal logic, 38(1), 84-117.
- Gibbons, J. (2020). Public confusion, digital media, social media, and fake news in the United Kingdom and Ireland. Routledge Handbook of Environmental Journalism.
- Gitelman, L. (2008). Always already new: Media, history, and the data of culture. MIT press.
- Gitelman, L., & Pingree, G. B. (Eds.). (2003). New Media, 1740-1915. Mit Press.

- Guo, F., Ye, G., Hudders, L., Lv, W., Li, M., & Duffy, V. G. (2019). Product placement in mass media: a review and bibliometric analysis. Journal of Advertising, 48(2), 215-231.
- Habermas, Jürgen (1962): The structural change of social public (Strukturwandel der Öffentlichkeit. Untersuchungen zu one Kategorie der bürgerlichen Gesellschaft, Neuwied , 1962)
- Hargitai Henrik, Hirsch Tibor (n.d.): Médiatörténet
- Hock, B. (2019). Promote, Tolerate, Ban: Art and Culture in Cold War Hungary. Critique d'art. Actualité internationale de la littérature critique sur l'art contemporain.
- Holz, C., Bentley, F., Church, K., & Patel, M. (2015, June). " I'm just on my phone and they're watching TV" Quantifying mobile device use while watching television. In Proceedings of the ACM International Conference on Interactive Experiences for TV and Online Video (pp. 93-102).
- Hootsuite.com
- http://radiosite.hu/hallgatottsagi-adatok-2020-aprilis-junius/
- http://www.mediapiac.com/ki-kicsoda/
- https://444.hu/2019/02/12/zuhan-a-megyei-lapok-peldanyszama
- https://atlatszo.hu/2020/08/07/grafikonokon-es-diagramokon-mutatjuk-hogyan-alakult-at-a-magyar-media-az-elmult-tiz-evben/ (black: not pro-government; red: pro-government)
- https://cepmf.hu/#sectionGoals
- https://cimlap.blog.hu/#bloghu/medianaplo/2020/11/26/mediana-plo_hornek_zsebeben_volt-e_az_ellenzeki_sajto
- https://digital-strategy.ec.europa.eu/en/policies/media-and-audiovisual-action-plan
- https://docplayer.hu/1251825-A-sajto-es-media-alapfogalmai-rendsere-ismeretek-a-mediarol.html 5 . page
- https://infostart.hu/belfold/2020/09/05/vesztesre-all-a-hagyoma nyos - media -az-internettel-szemben
- https://magyarnemzet.hu/velemeny/manipulal-a-nemet-media-8105735/
- https://media1.hu/2019/07/17/whitereport-jelentes-igy-halad-a-magyar-mediapiac-harom-vilagrendjenek-utkozete/

- https://mrsz.hu/cmsfiles/d5/ce/MRSZ_media_komm_torta_2019_MRSZ_Barometer_2020.pdf
- https://muosz.hu/alapdokumentumok/etikai-kodex/
- https://onbrands.hu/marka-es-trend/2020/10/televizios-nezettseg/televizios-nezettseg-2020-41-het
- https://penzcsinalok.transindex.ro/hir/20191216-egyetlen-abra-arrol-hogyan-valtozik-a-reklampiac
- https://www.bbc.co.uk/editorialguidelines/guidelines
- https://www.deutschland.de/de/topic/wissen/ueberregionale-zeitungen
- https://www.magyarhirlap.hu/belfold/20200930-tiz-teny-a-magyar-mediarol
- https://www.mediadb.eu/forum/daten-fuer-archiv/int-mk-2016.html
- https://www.mediainfo.hu/hirek/article.php?id=51905
- https://www.mmonline.hu/cikk/drastíkan-csokkent-a-reklamszpotok-szama/
- https://www.mmonline.hu/cikk/ezek-a-legnagyobb-cegek-a-hazai-mediapiacon/
- https://www.nkp.hu/tankonyv/tortenelem_8/lecke_06_050
- https://www.statista.com/statistics/452430/europe-daily-newspaper-consumption/
- https://www.szabadeuropa.hu/a/klubradio-radio-mediatanacs-nmhh-frequencia/30857420.html
- https://www.szabadeuropa.hu/a/ortegstoi-utasitas-a-koztevenel-ebben-az-intezmenyben-nem-az-ellenzeki-osszefogast-tamogatjak-mtva-fidesz/30940923.html
- https://www.vg.hu/vallalatok/reklam-es-media/dramai-akar-38-szazalekos-visszeses-varhato-a-reklampiacon-2238883/
- Hungarian Advertising Association: 2019 MRSZ Media and Communication Pies MRSZ Barometer research - 2020 industry forecast - May 2020
- Ilkei Csaba: Újságírók, szerkesztők, sajtómunkások és az állambiztonság : 3. kötet 2020
- Jäckel, A. (2019). European film industries. Bloomsbury Publishing.

- Kertész Krisztina (2006): Kiegyensúlyozottság és pártatlanság az elektronikus médiában a Panaszbizottság 2004-es döntéseinek tükrében. Médiakutató, ősz.
- Klimkiewicz, B. (2016). Media pluralism and enlargement: The limits and potential for media policy change. In The European Union and the culture industries (pp. 81-104). Routledge.
- Koltay András: A média tartalmi szabályozásának alkotmányossága az új magyar médiaszabályozásban. Médiakutató 2011 ősz
- Kósa, C. (2003). Kossuth újságot ír. Kortárs, (04), 70-79.
- Küng, L., Kröll, A. M., Ripken, B., & Walker, M. (1999). Impact of the digital revolution on the media and communications industries. Javnost-the Public, 6(3), 29-47.
- Lazer, D. M., Baum, M. A., Benkler, Y., Berinsky, A. J., Greenhill, K. M., Menczer, F., ... & Zittrain, J. L. (2018). The science of fake news. Science, 359(6380), 1094-1096.
- Lombardinilo, A. (2020). La simultaneità dei media. Rileggere The Gutenberg Galaxy. Problemi dell'informazione, 45(2), 279-304.
- Lozić, J.; Ramljak, O.; Lozić, I. (2020). „Transformation of the media industries under the pressure of a postmodern society“. 3rd International Multidisciplinary Scientific Conference MIC – Vis, pp. 493-508.
- McCombs, M., & Valenzuela, S. (2020). Setting the agenda: Mass media and public opinion. John Wiley & Sons.
- Mikos, L. (2016). Digital media platforms and the use of TV content: Binge watching and video-on-demand in Germany. Media and communication, 4(3), 154-161.
- Mills, T. (2020). The BBC: Myth of a public service. Verso Books.
- Montesquieu: De l'esprit des lois Geneva , 1748 . First edition
- Nézőpont Intézet (2020): Növekvő sokszínűség (Growing diversity)
- Noam, E. M. (Ed.). (2016). Who owns the world's media?: media concentration and ownership around the world. Oxford University Press.
- Oviedo, V., Tornquist, M., Cameron, T., & Chiappe, D. (2015). Effects of media multi-tasking with Facebook on the enjoyment and encoding of TV episodes. Computers in Human Behavior, 51, 407-417.
- Palmer, M., & Nicey, J. (2012). Social Media and the Freedom of the Press: a long-term Perspective from within International News Agencies (AFP, Reuters). ESSACHESS Journal for Communication Studies, 5(1).

- Parcu, P. L. (2020). New digital threats to media pluralism in the information age. Competition and regulation in network industries, 21(2), 91-109.
- Pereira, J. M., & Álvares, S. (2016). From the Post-Gutenberg Galaxy to the era of Skywriting. Nascer e Crescer.
- Picard, R. G. (2017). Market structure and innovation policies in the United Kingdom. Innovation Policies in the European News Media Industry: A Comparative Study, 219-226.
- Polyák, G. (2015). The Hungarian media system. Stopping short or retransformation?. Südosteuropa. Zeitschrift für Politik und Gesellschaft, (02), 272-318.
- Polyák, G. (2019). How Hungary shrunk the media. European Centre for Press & Media Freedom.
- Promoting Media Pluralism and Democracy: Commission hosts second Annual Colloquium on Fundamental Rights (https://ec.europa.eu/commission/presscorner/detail/en/IP_16_3690)
- PwC (2019): This time it's personal: The PwC Global Entertainment & Media Outlook 2019-2023
- Raeijmaekers, D., & Maeseele, P. (2015). Media, pluralism and democracy: what's in a name?. Media, culture & society, 37(7), 1042-1059.
- Rajendran, L., & Thesinghraja, P. (2014). The impact of new media on traditional media. Middle-East Journal of Scientific Research, 22(4), 609-616.
- Rodríguez-Pérez, C. (2017). News framing and media legitimacy: An exploratory study of the media coverage of the refugee crisis in the European Union.
- Sajithra, K., & Patil, R. (2013). Social media–history and components. Journal of Business and Management, 7(1), 69-74.
- Schiffrin, A. (Ed.). (2017). In the service of power: Media capture and the threat to democracy (pp. 1-8). Washington, DC: Center for International Media Assistance.
- Sorlin, P. (2013). Mass-media. Routledge.
- Splichal, S. (2019). Media beyond socialism: Theory and practice in East-Central Europe. Routledge.

- Stöber, R. (2004). What media evolution is: A theoretical approach to the history of new media. European journal of communication, 19(4), 483-505.
- Striano, F. (2019). Towards "post-digital". A media theory to Re-think the digital revolution. Ethics in Progress, 10(1), 83-93.
- Tandoc Jr, E. C. (2019). The facts of fake news: A research review. Sociology Compass, 13(9), e12724.
- Thorpe, Nigel James: The Visegrad Protocol. Edited version of the presentation given at the Média Hungary conference in 2000. In: Sükösd Miklós − Csermely Ákos (szerk.): A hír értékei. Etika és professzionalizmus a mai magyar médiában. Média Hungária könyvek, 2001.
- Turner, S. (2016). From the Gutenberg galaxy to the digital clouds. The American Sociologist, 47, 131-138.
- Urbán, Á. (2016). Recent changes in media ownership. Mertek. eu.
- Vassallo, L. (2020). Monitoring Media Pluralism in the Digital Era: Application of the Media Pluralism Monitor in the European Union, Albania and Turkey in the years 2018-2019.
- Vassallo, L. (2020). Monitoring Media Pluralism in the Digital Era: Application of the Media Pluralism Monitor in the European Union, Albania and Turkey in the years 2018-2019.
- Ward, S. J. (2019). Journalism ethics. In The handbook of journalism studies (pp. 307-323). Routledge.
- Whitereport 2018