



NÉZŐPONT INTÉZET

THE HUNGARIAN MEDIA MARKET AND THE EVENING NEWS

May 2017

TELEVISION MARKET PRODUCING POLITICAL CONTENT

On the whole, the market of television channels producing political content in Hungary can be considered balanced. RTL Klub, a channel chiefly broadcasting material critical of the cabinet, airs a daily news programme from 6 p.m. Likewise, HírTV and ATV – two television channels with a critical approach to the government – also air several news programmes each day, similarly to the more government-friendly EchoTV.

The graph below shows the development of the average share of audiences on the market of Hungarian television channels in the final quarter of 2016. In the period of analysis, largely echoing annual averages, average audiences of television channels producing political content with an approach critical of the government was higher than those airing government-friendly material, meaning that contents critical of the cabinet reached far larger audiences.

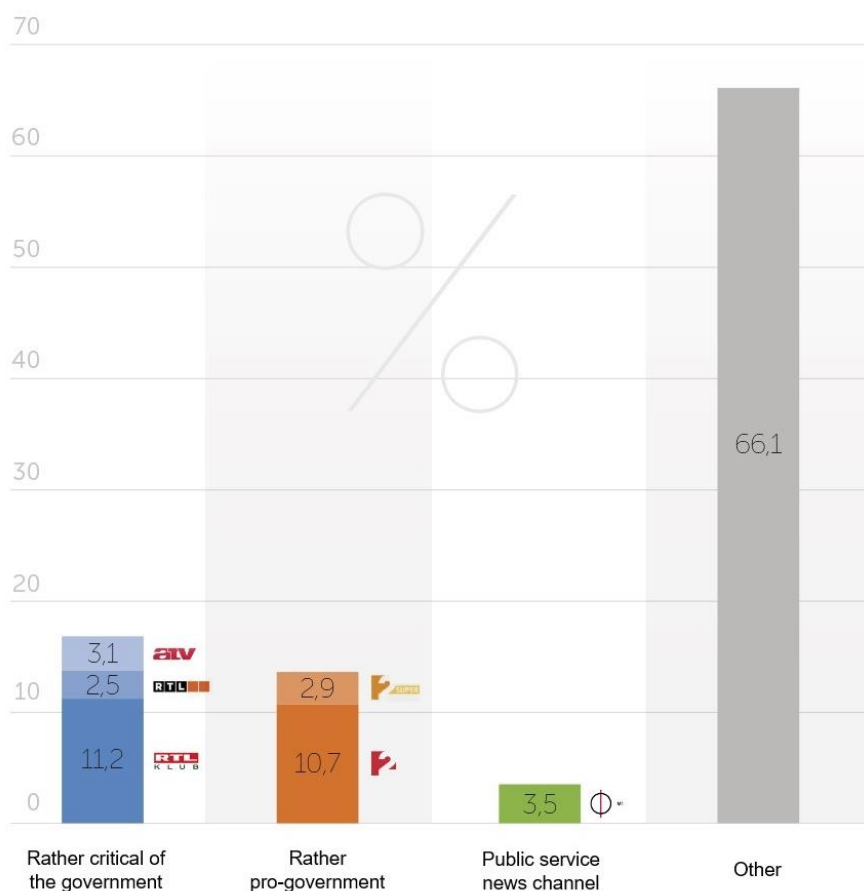
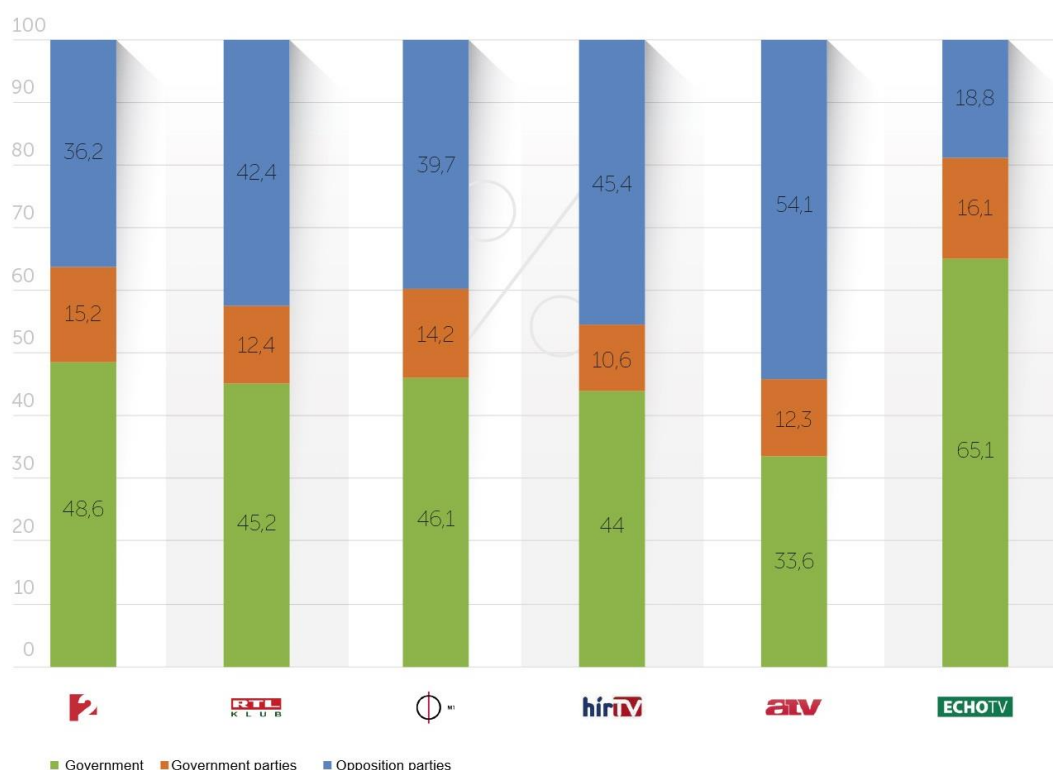


Chart of major television channels based on average weekly audiences (Q4/2016; percentage points; Nielsen audience measurement figures)

ACTORS AND SUBJECT CHOICES FEATURING IN EVENING NEWS PROGRAMMES

Nézőpont Intézet regularly follows the content of flagship evening news programmes broadcast by the country's leading television stations. Based on our findings, it can be argued that the share of appearances between the government and the opposition is largely balanced on all major television stations, with opposition opinions featuring to the required degree in 2016.

At 54.1 percent, the share of opposition appearances at parity is highest on ATV, a station with a more government-critical standpoint. This far exceeds the one-third international standard, as reflected by the British and French model. Opposition parties' share of appearances is similarly high on the government-critical channels HírTV (45.4 percent) and RTL Klub (42.4 percent). RTL Klub is followed by M1, which featured a similarly high share of opposition appearances (39.7 percent). This figure was also similar on TV2's evening news programme (36.2 percent).



*Share of appearances among government, ruling party and opposition actors
(2016; annual breakdown; percentage points)*

At 65.1 percent, the share of governmental appearances is highest on EchoTV. Government actors appeared on programmes broadcast by M1, TV2, RTL Klub and TV2 in roughly similar proportions. At 33.6 percent, the share of governmental appearances at parity was lowest on ATV.

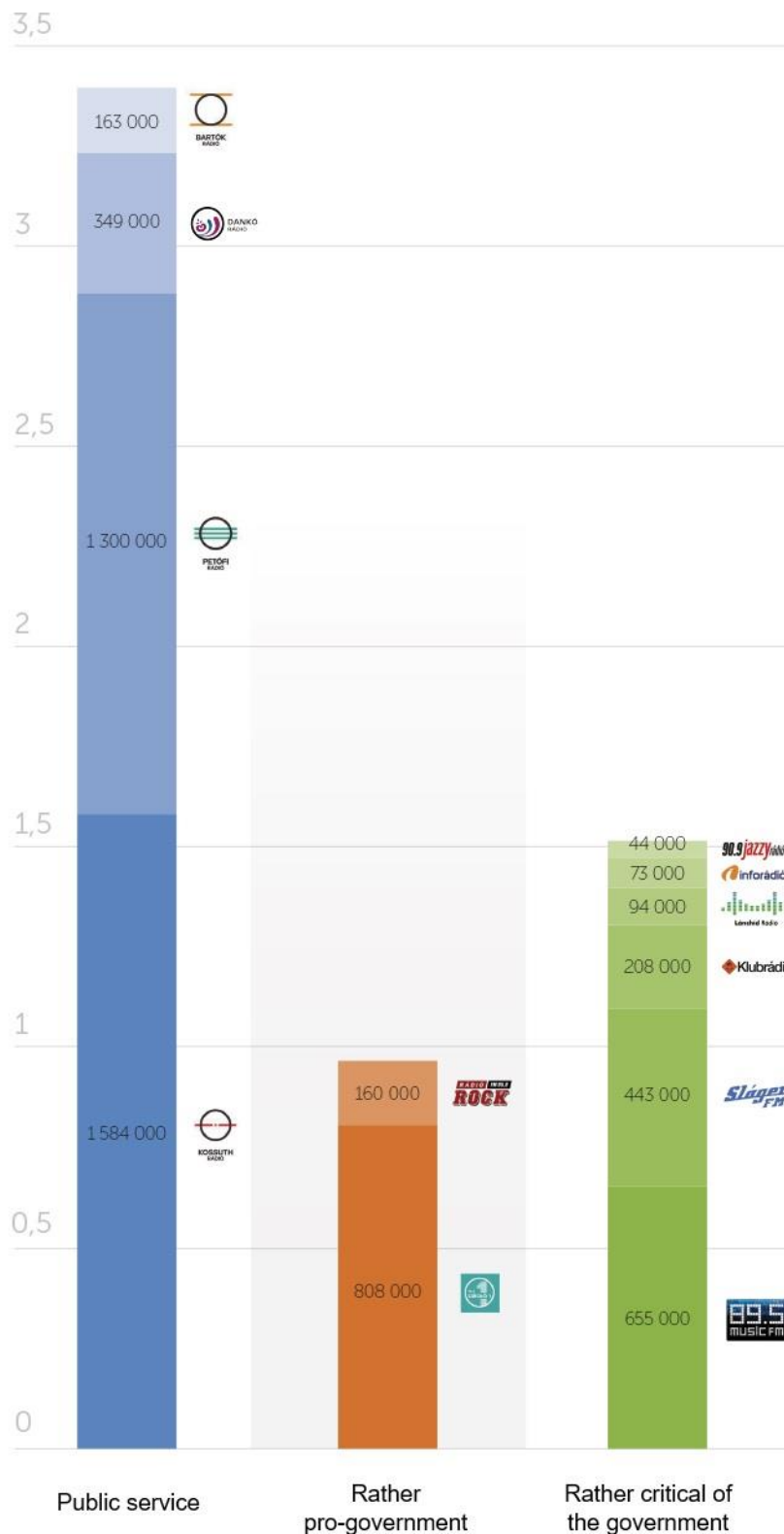
It should be pointed out that the choice of subjects RTL Klub's news programmes, which are more critical of the government, often differs from other channels and current events on the political agenda. Fact-finding reports, as well as recurrent issues separate from the political agenda but presented in a negative light from the government's viewpoint, are both common.

While TV2, ATV and even HírTV follow the development of the political agenda to a far greater extent, RTL Klub's news programme features issues disadvantageous to politicians representing ruling parties and businessmen associated with them on a daily basis.

RADIO MARKET

Like the market of television channels, the country's selection of radio broadcasters is similarly polarised. On the market of commercial radio stations, six can be considered critical of the government, while two are government-friendly. A further four stations are public service operators; among these, only Kossuth Rádió's main profile extends to the coverage of political issues. The remaining three public service broadcasters – Petőfi Rádió, Dankó Rádió and Bartók Rádió – air musical material aimed at various age groups.

Over the past years, two more government-friendly stations – KarcFM and Rádió1 – have entered the market of radio broadcasters. However, these do not have nationwide coverage; beyond this, it should be considered that Rádió1 is a music station featuring five-minute news programmes as its sole political content.



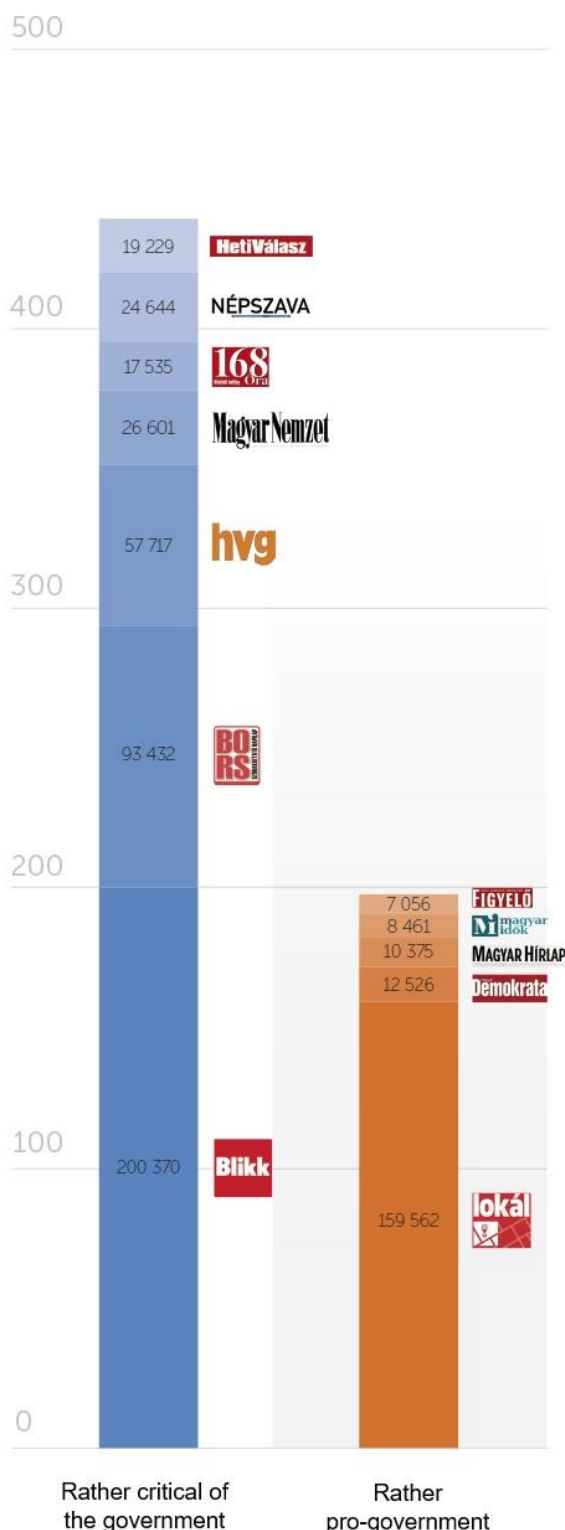
Major radio stations' average daily audiences among those aged 5 and above in the final quarter of 2016

(Source: Kutatópont, Q4/2016)

PRINT NEWSPAPER MARKET

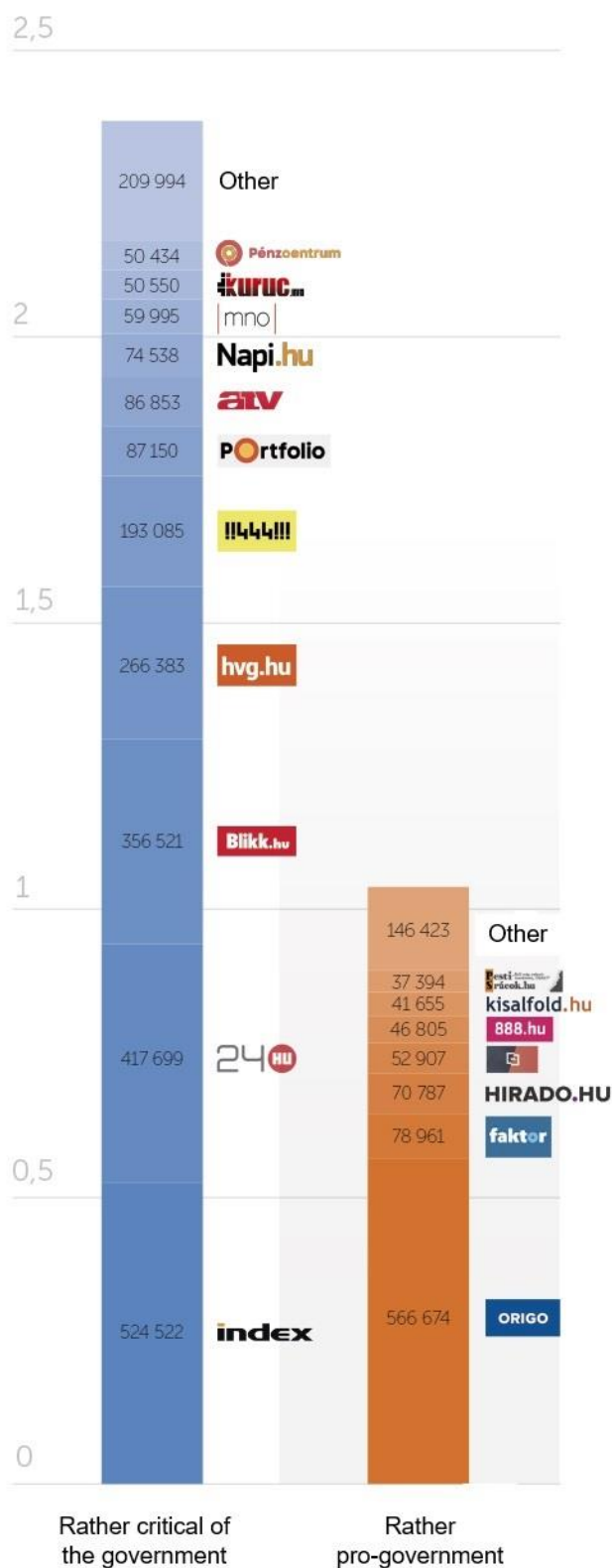
The market of nationwide print newspapers covers four newspapers critical of the cabinet and a further four following a pro-government editorial line, suggesting that this market segment can also be seen as balanced. On the market of weekly publications, however, only a single news magazine can be considered friendly to the government, while all other weeklies are critical of the cabinet.

With regard to the number of copies circulated, publications producing material critical of the government are far stronger. Lokál, disseminated free of charge, is the country's single large-circulation daily newspaper; however, the publication is largely devoted to tabloid content, with only a small proportion of it discussing politics. On the market of political periodicals, the status of publications critical of the government is both solid and outstanding, and their circulation figures exceed government-friendly papers' numbers by far.



Major print publications' number of copies

(Source: Hungarian Audit Bureau of Circulations; Q4/2016)



Online media surfaces' outreach (Source: Gemius, Q4/2016)

ONLINE SURFACES

Among the examined news portals, 21 produce content critical of the government, as opposed to the 14 portals pursuing a pro-government editorial line. Moreover, critical online portals' outreach far exceeds pro-government sites' readership, with the market leader Origo being the sole example of a pro-government news website with outstanding readership levels.

On the whole, it is clear that members of the electorate using the Internet to gather information on political events are likely to encounter content critical of the government due to chiefly pro-government online outlets being at major disadvantage both numerically and in terms of outreach.