

Summary

A comprehensive overview of today's media landscape in Sweden

The structure of the media landscape develops in interaction with the surrounding society, an ongoing process whereby the social, economic, political, and technological landscapes shape – and are shaped by – the media landscape. Since the millennium, digitalisation has been a major game-changer for the media industry as well as for its audiences. The publication *MedieSverige 2025* [MediaSweden 2025] gives the reader an up-to-date and broad overview of today's Swedish media landscape, and here is a short summary of MediaSweden 2025.

Technology

High mobile and broadband penetration

The availability and use of mobile telephony and data services, as well as fixed broadband, is high in Sweden. The amount of data traffic in mobile subscriptions has increased particularly in the 2020s. In Spring 2024, the average amount of data per mobile broadband subscription was 194 megabytes per month. Four years earlier, the corresponding amount of traffic was 55 megabytes per month. The share of households that choose to connect to fixed broadband also continues to increase. Between 2020 and 2024, the proportion of fixed subscriptions with speeds above 250 megabits increased from 31 to 51 per cent. (pp. 12–13).

In Autumn 2023, the penetration of households with fixed broadband with high actual speed (at least 100 megabits) was more than 80 per cent in 242 of Sweden's 290 municipalities – that is, in urban areas. But Sweden is a large country with long distances and large sparsely populated areas. Outside the municipalities' urban areas, access to a minimum of 100 megabits actual speed was significantly lower in terms of household coverage (pp. 16–17).

The largest operators on the market have been established in the market for a long time. The largest is Telia Company, with 28 per cent of fixed broadband and 32 per cent of the mobile subscription market. The second largest operator is Tele2, followed by Telenor (pp. 14–15).

Policy

Strong constitutional protection of media along with self-regulation

The regulation of the media in Sweden is firmly anchored in the constitution, the Freedom of the Press Act [Tryckfrihetsförordningen], and the Fundamental Law on Freedom of Expression [Yttrandefrihetsgrundlagen]. Along with the constitution and specific laws, for example, the Radio and Television Act and the Copyright Law, the Swedish media has a strong belief in self-regulation as a guarantee for freedom of expression and independence from the state. Systems of ethical codes, drawn up by the industry itself, are applied to journalism as well as advertising. The regulation of the media in Sweden is also within the scope of regulation on the European Union level, such as the Audiovisual Media Services Directive, the European Media Freedom Act, and the Digital Services Act – given that these are not in conflict with the Swedish constitution (pp. 20–23).

A reconstructed system for news media subsidies

In 2024, a new model for subsidies to news media providers was introduced. The support will benefit general news media outlets, regardless of platform, with a minimum of two journalists employed, and it will cover costs for editorial staff. There are criteria for good user engagement and cost accounting of needs required to receive the support. The previous support model was based on household coverage of subscribed newspapers, and a large part of subsidies went to cover newspaper companies' operating costs.

Subsidies to local news providers and underrepresented areas is prioritised in the new model, but national titles that benefit media diversity can also be granted funds. The total amount of support paid out is at the same level as the previous model. In 2023, the last year of the old model, 845 million Swedish kronor was granted in subsidies, and for 2025, the sum was 830 million Swedish kronor (pp. 26–29).

An analysis of which companies received support in 2023 (the old model) and 2025 (the new model) shows that it is still the large daily newspaper groups that receive a large share of the support funds. The largest newspaper group, Bonnier News Local, received the most support funds in 2025 (250 million Swedish kronor). National newspapers published one to two days per week decreased the most in the number that received support between the models. At the same time, a higher number of free newspapers and independent local news sites received funds in the new model (pp. 28–29).

Public service media, licensing periods, commercial radio, and TV

Sweden is known for having a strong and separate public service media. In Sweden, public service media consist of three companies, which are owned by a foundation. However, public service is regulated by the Swedish Parliament and licenced by the Government. Nowadays, the public service is funded by a fee which is based on income and collected as a tax. The Swedish Parliament then decides the size of the companies' funding. From 2020, the funding has increased by 2 per cent each year, and for 2025, the funding is 9,455 million Swedish kronor. A new licensing period for public service media will begin in 2026 last for eight years. During 2025, the terms of the licence will be established by the Swedish Parliament (p. 30).

For the last years, about 50 channels have been accessible via terrestrial TV. However, in the beginning of 2025, the Swedish company Boxer ceased broadcasting pay television channels via the terrestrial network. In practice, this change implies that only the free channels are accessible via terrestrial TV – SVT's four channels, TV4, and TV Finland (p. 32).

In contrast to terrestrial TV, which was digitised in the beginning of the twenty-first century, terrestrial radio is still primarily broadcasted using Frequency Modulation (FM) technology. This implies that the space is limited. However, there are channels broadcasting digitally via terrestrial radio using dab+ technology, but the range is limited to Sweden's three biggest cities and the North Bothnia.

In Sweden, the licences for commercial radio (FM and dab+) as well as terrestrial TV is distributed by the Swedish Agency for the Media. During the current licence period for terrestrial commercial radio, there are three licences for broadcasting nationally, and 35

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regional licences. The national licences are held by Bauer Media (Mix Megapol), Viaplay Radio (Rix FM), and NRJ Sweden (NRJ). A great share of the regional licences is held by these three companies as well (p. 30). As was the case for public service media, new licensing periods for commercial radio and terrestrial TV will start during 2026 (pp. 32, 34).

Audience

Audience moving to digital, slowly leaving traditional

For several years, results from surveys have shown that a growing share of the Swedish population is turning away from traditional media – such as print and linear television and radio. Today, a majority use streaming services for audiovisual content, online radio, podcasts, and digital newspapers. There is still a significant generation gap in the use of online and legacy media; the only online media that is in use more among older (45+ years old) than younger people is the newspaper. The younger generations prefer streaming services, podcasts, and online social networks. Digital platforms are today used more for watching television and reading newspapers than linear or print formats, although linear radio is still more popular than digital platforms, streaming, and podcasts.

Looking at television viewing, the pattern of audiences moving away from traditional linear viewing has been cleared the last few years. Today, audiences can choose when, how, and where they want to watch television through various services online. Since 2021, on a regular day the Swedish population watches television online more than linear television. However, there is a gap between different age groups here as well. Among older age groups, at least three out of four watch linear television every day, whereas the corresponding result among people younger than 45 was barely 30 per cent (p. 51). The patterns are similar for radio listening (p. 55).

Overall, trust in media is at a high level in Sweden. Since 2000, the proportion trusting radio and television is about 55 per cent, whereas the corresponding number for daily press is about 35 per cent. However, the level of trust is varied among different media sources, and between different subgroups. When looking at trust in news media, about four in five Swedes have trust in the news media. News media are more frequently trusted by older people and the political left-leaning (p. 67).

A vast majority of Swedish households' media budgets goes to access costs for mobile and Internet services. And while roughly three out of four Swedes have access in the home to a paid-for TV-streaming service, one in two have access to a subscribed newspaper (pp. 41, 43).

Advertising

Advertising market going digital

Digitalisation has created new streams for media financing and advertising investments, with investments in online advertising making up 74 per cent of the total Swedish advertising investments in 2023 (36 billion of 49 billion Swedish kronor) (p. 73). However, the advertising investments do not necessarily end up with Swedish media companies. Of the online advertising in Sweden, 73 per cent (25.4 billion Swedish kronor) was invested in

global search engines and social media networks (p. 77). This, of course, means that Swedish media lose revenues at the same time as they compete to keep audience shares. Advertising investments in linear television have fluctuated slightly during the last years, but the newspaper industry is struggling – since 2005, its advertising revenue has dropped by 79 per cent. Thus far, the drop in print advertising has not been compensated for by growth in online advertising revenue (pp. 75, 79).

Structure

A media landscape with few players in each field

The Swedish media market can be described as quite consolidated with only a few market players per sector along with strong public service broadcasters. By far the largest company in terms of turnover is Spotify (152 billion Swedish kronor in 2023), a global audio streaming company; their main turnover comes from international markets, and only 3 per cent can be attributed to the Swedish market. Second largest is Telia Company, the established telecom that owned the largest commercial television company, TV4 Group. In February 2025, Telia announced that the TV4 Group was sold to the Norwegian media conglomerate Schibsted. The fifth largest media company, Viaplay Group, with main activities in television and radio, has switched ownership as well. Since 2023, French Canal+ and Czech investment company PDF are the largest shareholders of Viaplay (the company is listed). Furthermore, the largest publishing media company in Sweden is Bonnier, owned by the Bonnier family. In 2023, its turnover was 23 billion Swedish kronor. Bonnier is the largest owner in the Swedish newspaper market and the Bonnier Group is a major operator in magazines and book publishing, both in Sweden and the international market. In 2024, Bonnier acquired a handful of newspapers in Finland (pp. 82).

Increasing news deserts

In Sweden, local and regional newspapers have been crucial for the production and distribution of local news and debate. There are concerns that the newspapers' reduced revenue and scope will affect citizens' access to local news. In 2024, some 42 of Sweden's approximately 290 municipalities lacked regular local news coverage. That is a further decrease in coverage since 2022 (p. 88).

About *MedieSverige*

MedieSverige is rich in data from a variety of sources. The report targets students, teachers, researchers, and journalists, as well as decision-makers and everyone who wants to learn more about the development in the Swedish media market. *MedieSverige 2025* is the 16th volume in the series and is written by Ulrika Facht and Elisabeth Falk at Nordicom, University of Gothenburg.