

# Sweden - Media Landscape

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## Overview

The Swedish media model can be characterised as a democratic corporatist model, with, at least historically, a strong press, strong political parallelism, a high degree of professionalisation and a strong state role in media policy making. In recent

decades, however, the system has moved towards a more liberal direction.

The newspaper market has traditionally been dominated by subscribed local morning papers. Despite a steady decline in terms of printed newspapers, circulation is still relatively high compared to other countries. However, as audiences have increasingly migrated online, the nationally oriented press has gained momentum. Thanks to an unmatched online reach, tabloid newspapers, *Aftonbladet* and *Expressen*, attract a majority of the online advertising revenues of the domestic newspaper industry. In a similar fashion, the more quality-oriented morning newspapers, *Dagens Nyheter* and *Svenska Dagbladet*, have come to dominate the market for online newspaper subscriptions. This recent development not only illustrates the relative weakening of the local press in Sweden but also precipitates the appearance of class-related patterns of news usage in a country historically known for its egalitarian newspaper consumption.

Historically, there has been a strong relationship between political parties and the press. Beside the older liberal and conservative newspapers, social democratic newspapers and newspapers affiliated with the agrarian Centre party were launched during the first decades of the 20<sup>th</sup> century. The system with competing newspapers of different political orientation clashed with the market forces of advertising during the 1950s, and a press subsidy system was formed, aimed at maintaining the political diversity of the newspaper landscape. Thus, the system with a party press continued to be prevalent. Today, there are almost no ownership ties between political parties and newspapers. There are, however, a few independent and small online news sites with strong ties to political parties. Furthermore, an increasing number of local newspapers are owned by self-governed foundations, of which many have, at least indirect, ties to the political arena.

The journalistic profession has been strong since the 1960s when the first journalism courses started in Sweden. Most active journalists have been formally educated in journalism. The journalistic ideal is very clear: it is to be a watchdog, a third estate, in society. Even though strong cutbacks in journalism have occurred since the turn of the century, this ideal remains strong. In general, legacy media also support this ideal, and most journalists are autonomous in their profession.

In terms of active state policy, state subsidies have been given to economically weak newspapers since the early 1970s. The main aim of the subsidies has been to support weak papers in competitive markets. Today, state subsidies represent only a few percent of the total revenue of the press. There are also some indirect benefits for all newspapers, such as reduced VAT on printed newspapers (6 percent instead of the general one of 25 percent) and a general distribution subsidy. A proposal to also lower the VAT for digital subscriptions is currently being handled by the government. Public service broadcasting is still comparatively strong in Sweden, with a daily market share of roughly 1/3 of the audience for television and 3/4 for radio. There is a political debate going on about public service broadcasting, with regards to how broad or narrow the content should be. Still, it can be regarded as very broad in comparison to the content of public service broadcasting in other countries. The current broadcasting rights of the public service companies were established in 2014 and will be recommissioned in 2020.

## Media

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### Print

The Swedish newspaper market has traditionally been strong, but has declined in circulation and importance since the late 1980s. The number of newspapers has, however, been stable for decades. There are about 150 printed papers in Sweden, almost all with an online edition. Of those, however, about 60 are published only once or twice a week and have a low

circulation. Most newspapers are subscription-based, locally or regionally, with early morning home delivery. Almost all social groups read newspapers. Yet, since the turn of the century, a widening gap between young and old people has emerged: The old tend to hold on to printed newspapers, whereas younger people increasingly receive their news via social media. On the other hand, traditional newspapers have a strong presence online, including on social media platforms.

The Swedish print newspaper market can be divided into five main segments:

- The metropolitan subscribed morning papers: dailies published in the three metropolitan areas of Stockholm, Göteborg and Malmö. The segment includes *Dagens Nyheter* in Stockholm, *Göteborgs-Posten* in Göteborg, and *Sydsvenskan* in Malmö. These are quality papers published seven days a week.
- The tabloids: two tabloid dailies published in Stockholm, *Aftonbladet* (the biggest Swedish newspaper) and *Expressen*, including its local editions in Göteborg (*GT*) and Malmö (*Kvällsposten*). Both newspapers are published seven days a week with a focus on entertainment, crime and sports, although they also feature debate on culture, opinion material and investigative journalism.
- The regional and local subscribed morning papers: all other papers published at least three times a week, with some of the biggest being *Helsingborgs Dagblad*, in Helsingborg, *Dalarnas Tidningar*, in Falun, and *Nerikes Allehanda*, in Örebro. Most papers in the group are published six or seven days a week, and those that are published seven days a week are usually only published online once a week (on Sunday).
- The low-frequency papers, comprising all general newspapers published once or twice a week, including both local papers in the metropolitan areas and small regional and local papers, all with small circulation. Newspapers in this group are, in general, completely dependent on the press subsidy system.
- Freely distributed newspapers form a group of their own, since their circulation is calculated differently from paid newspapers and based on distributed copies. The biggest newspaper in this segment is free daily *Metro*, distributed five days a week, with editions in Stockholm (launched in 1995), Göteborg (1998), Skåne/Malmö (1999) and nationwide (2004). Around 100 free newspapers are distributed weekly, and they form a very heterogeneous group: some have a standard as newspapers, others as ad sheets.

In addition, there is a limited number of national niche papers — eg the business daily *Dagens Industri* and the small Christian daily *Dagen*.

Since 2011, it has not been possible to provide a complete measure of the total printed circulation, as some of the largest newspapers have chosen to leave the common measurement system. It is still possible to measure readership, which has decreased dramatically during the last decade. 55 percent read a subscribed morning paper on an average day. This is 19 percentage points lower than ten years earlier. 44 percent only read the printed edition, 7 percent only the digital edition and 4 percent mix. The development for the tabloids is the opposite. 27 percent read a tabloid on an average day, whereas 20 percent only read online, 6 only in print and 1 percent mix.

As is the case in other countries around the world, the business models for the newspaper companies have become problematic. The online editions do not compensate for the decrease in advertising revenue from printed papers. The total advertising revenues of the newspaper market in 2015 was about 5 bn SEK (approximately €0.5bn). Compared to the year 2000, this is a reduction by half of the advertising revenues, and a decrease in the share of the total advertising market from 35 to 14 percent.

In the wake of the declining ad revenues and dropping circulation for printed newspapers, most Swedish newspaper companies have increased their efforts to attract digital subscribers. In 2016, approximately 22 percent of the Swedish population lived in a household with a subscription to a digital newspaper. Unlike the print market, which has traditionally

been dominated by the local press, the market for digital-only subscriptions has so far been dominated by the Stockholm newspapers *Dagens Nyheter* and *Svenska Dagbladet*, which have increasingly transformed their editorial profile from local newspapers for the capital region, to high-quality newspapers with a national reach. In 2016, *Dagens Nyheter* had some 75,000 digital-only subscribers nationally, whereas *Svenska Dagbladet* had 40,000. The most successful newspaper in terms of digital audience sales is, nevertheless, the tabloid *Aftonbladet*, whose so-called Plus service recorded some 250,000 paying members in 2016. *Aftonbladet* is rapidly on its way to becoming the first Swedish newspaper that gets a majority of its revenue from digital sales.

A first distinctive feature of the newspaper market in the 21<sup>st</sup> century has been the merger and acquisition of local newspaper companies. The eight largest newspaper groups account for around ninety percent of the total market revenues. The dominating actor in the newspaper market, in terms of revenues, is the Bonnier Group, which owns five of the largest newspapers in the country. The second biggest is Mittmedia, with 22 local newspapers, and third is the Swedish branch of the Norwegian Schibsted Group, with 2 titles, including *Aftonbladet*. A second typical feature of the Swedish newspaper market is foundation-owned newspapers, which, however, doesn't seem to affect the way the newspaper business is run.

The total market of other printed periodical publications in Sweden is hard to estimate. There are some 2,000 titles on the market, but most of them are very small. 350 of them are audited by the national magazine organisation. There are two main categories of magazines:

- Popular press, where the most successful magazines are about home and gardening
- Organisational press, where the most successful magazines are about general business issues

The readership of periodicals is rather stable, and around 25 percent of the population read some popular magazine on an average day, and, in an average week, half of the population read one. Organisational press has a lower readership, with around 10 percent readers on an average day and 30 percent in an average week. Sweden never had any strong political magazines, probably because of its strong daily press with extensive political coverage. The main publishers, such as the Bonnier and the Aller groups, have maintained their strong position in the magazine market. The magazine market is generally characterised by a large degree of ownership concentration.

Although a small language market, Sweden has traditionally had a strong book market, which, in the early 21<sup>st</sup> century, has been expanding significantly. About 27,000 books are sold annually. Fiction and books for children/youths are the most popular categories. About half of the books are sold in physical stores, and half online. One third of the population read books on an average day. Printed books are most common in terms of both sales and readership, and audiobooks and e-books have not had so much impact yet. The dominating Swedish book publisher is Bonnier, which owns a number of book publishing companies, including both fiction and non-fiction publishers.

## Radio

In the radio market, the public service company Sveriges Radio (Swedish Radio) is the dominant actor. It has 75 percent of the radio audience market. Sveriges Radio offers three national channels, *P1* (news, culture and public affairs), *P2* (classical music), *P3* (youth), and one regional channel, *P4*, which offers news and current-affairs programming in 25 regions. *P4* also contains some national programming, including news and sports. It is targeted at an age group of 40 plus and is the individual Swedish radio channel with the highest ratings (about 30 percent in 2015). Public service radio is financed by a license fee and advertising is not allowed.

Since the introduction of local commercial radio, in 1993, four Swedish networks with national ambitions developed, but later merged into two: *MTG Radio* and *Bauer Media* (previously *SBS*). All in all, there are about 100 local broadcasting licenses for

commercial radio, and Bauer Media controls around 75 of them.

On an average day, 70 percent of the population listens to radio, a figure which has been stable for decades. However, the time spent listening has decreased significantly over time, from 3 hours a day in the mid-80s to 2 hours a day in 2015. The development of mp3 and music streaming services, such as Spotify, is probably the explanation.

The private radio market has been under economic pressure from the outset. Stations have not attracted as large an audience as expected and their percentage share of media advertising has never been over 3 percent.

## Television

Swedish television initially developed as a public service monopoly. In 1969, a second channel was established. Commercial competition increased when cable networks began to distribute satellite channels. In 1987, the first Swedish satellite channel, *TV3*, began broadcasting from the United Kingdom. In 1992, public service radio and television was divided into two companies, one for radio and one for television. Further, there is a public service company dedicated to production of educational programs. In the same year, a commercial terrestrial TV channel, *TV4*, was permitted. *TV4* is owned by the Bonnier Company, whereas its main competitors, *TV3* and *Kanal 5*, are owned by Modern Time Group (MTG) and Discovery Communications, respectively. Bonnier, MTG and Discovery Communications control a significant share of the market for commercial television in Sweden, making the Swedish television market one of the most concentrated in Europe in terms of ownership.

In 2007, digital terrestrial television was fully introduced, making Sweden one of the pioneers of the new technology.

Public service television is organised by *Sveriges Television* (Swedish Television - SVT). It has traditionally been the main actor in the television area. It broadcasts through three main channels: *SVT1*, *SVT2* and *Barnkanalen* (*The Children's Channel*). *SVT1* is the more popular and broader channel, whereas *SVT2* is profiled as more specialised, as is *The Children's Channel*. The television market share for the three main SVT channels in 2015 was about 35 percent.

Today the main commercial television channel is *TV4* (with 20 percent of the TV market in 2015), competing primarily with a number of satellite channels, the biggest of which are *TV3* (5), *Kanal 5* (5), *Sjuan* (5), *TV6* (4) and *TV8* (3). Of the commercial channels, only *TV4* and *TV6* are so-called free channels, which, together with the public service channels, are available at no cost in the terrestrial net. *TV4* is the broadest commercial channel in terms of programming profile, whereas the others are almost exclusively oriented towards entertainment. In recent years, *TV4* has also moved in the direction of more entertainment-oriented programming.

A general feature of the commercial channels, as well as of the public service channels, is the division into a family of channels, a development in the direction of audience fragmentation. The Bonnier broadcasting group operates 24 channels aimed at the Swedish market, whereas MTG and Discovery Communications operate 22 and 13, respectively.

About 80 percent of all Swedes watch television daily. Average viewing time is about 120 minutes per day. In comparison to other European countries, the time spent watching traditional television is low in Sweden.

Since commercial television was introduced in Sweden at the beginning of the 1990s, the advertising market for broadcast television has expanded. In 2015, television advertising had a market share of about 17 percent.

## Digital Media

Many newspapers started web versions in the mid-90s or soon after. Today, almost all Swedish newspapers have digital

versions, however, they are usually not very profitable. Attempts to convert traditional readers into digital readers are increasing with the decline of printed newspapers. Several newspapers have started a Sunday edition of the paper as online only, in order to attract readers (and advertisers) to the digital edition.

The most popular online news medium by far is *Aftonbladet.se*, founded by the namesake newspaper, as early as 1994. With few exceptions, it dominates the local or regional newspaper market in all areas of Sweden. *Expressen*, the other tabloid newspaper on the market holds the number two spot in terms of national online reach. In terms of readership, it is evident that the two printed tabloids have gradually been replaced by the online versions. Thus, the increase in online readership has compensated for the decline in print circulation. Thanks to their strong online reach, *Aftonbladet* and *Expressen* are the only Swedish newspapers that have been able to increase their advertising sales in the digital era.

The reach of the two main television websites, *SVT.se* and *TV4.se*, is significantly lower than that of the national tabloids. However, Play-services and on-demand television, have increased dramatically since its introduction. Around 30 percent of Swedes watch on-demand television on an average day. The public service company SVT is the strongest in this market.

*Sveriges Radio* began podcasting in 2005. The most popular podcasts are, in general, the independent ones, but number 1 on the top list is a program from Sveriges Radio: *P3 Documentary*.

Advertising on the internet continues to surge, growing by an impressive 20 percent between 2014 and 2015. In 2015, the Internet's share of the total advertising market was almost 40 percent. However, most of this money is not transferred to traditional Swedish media online, but to international media companies. A special report was conducted in 2015 about the share of advertising that specifically financed journalism. In 2015, 25 percent of the Swedish advertising sales ended up with media companies involved in journalism. That was 12 percentage points lower than in 2008. All in all, news media companies in Sweden lost 4.1 bn SEK (€0.4bn in advertising revenues during this six-year period.

There have been initiatives to develop online media with no counterpart in print or broadcasting but, so far, few have succeeded. There are some independent sites on the market, but their financial position is generally weak. One obvious reason has been the problem of attracting advertising to online media. This also means that most newspapers still haven't been able to compensate for the decreasing print revenues with digital sales. Some local cases, nevertheless, indicate that there is a market potential for digital online news media in areas where the traditional printed press has cut down its presence.

## Social Networks

Internet penetration is high in Sweden, as in all the Nordic countries. About 95 percent of the population has access to the internet. Ownership of digital devices is widespread: over 90 percent own a computer, 75 percent own a smartphone and 60 percent own a tablet. The preconditions for internet use are thus advantageous.

Swedes use social media more than traditional media online, independent of the particular device used: 52 percent and 34 percent, respectively, on an average day. Facebook, Instagram and Youtube are the most used networks in general. Around half of the population has an account on Facebook. Regarding news, young people state that Facebook is their main supplier.

However, differences can also be seen among young people. Instagram is by far the most popular social media platform among children between 9 and 16 years of age, however, for older ages, Facebook dominates (with no option to answer Youtube on this question). Snapchat is also widely used, as well as Twitter, among youngsters.

Since Google and Facebook are international companies who not declare their revenue for specific country operations, it is hard to evaluate their exact impact. Both are on the list of the world's top-ten biggest media companies.

## Opinion Makers

Alongside traditional PR bureaus like JKL or Westander, digital opinion makers have appeared. According to blog lists, the most common topics are beauty, fashion, sports and food, written by and for young women. According to the Focus magazine, the top-hundred most important opinion makers is made up of a mix of, for example, CEOs, economists, ministers and party leaders.

Twitter is a powerful network for specific groups, such as journalists and politicians. Some Swedish artists have the most followers, particularly artists who have a strong presence in the societal debate. The singer Zara Larsson, comedian Soran Ismail, comedian and artist Jonas Gardell, and tv personalities Fredrik Wikingsson and Mark Levengood had the highest impact in 2015. Important issues for these artists are, among others, the importance of integration, the struggle for feminism and equality and the right to all kinds of sexual orientation.

## Sources

Print (a selection)

- [Aftonbladet](#)
- [Dagens Nyheter](#)
- [Expressen](#)
- [Forlaggare](#)
- [Helsingborgs Dagblad](#)
- [Metro](#)
- [Sveigestidskrifter](#)
- [Svenska Dagbladet](#)
- [Sydsvenskan](#)

Publishers

- [Bonniers](#)
- [Mittmedia](#)
- [Schibsted](#)

Radio

- [Sveriges Radio](#)

Television

- [Kanal5](#)
- [SVT](#)
- [TV3](#)
- [TV4](#)

Opinion makers

- [Jkl](#)
- [Jonasgardell](#)
- [Marklevengood](#)
- [Westander](#)
- [Zaralarsson](#)

## Organisations

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### Trade Unions

*Svenska Journalistförbundet* (The Union of Swedish Journalists - SJF) has about 16,000 members and is considered to be strong. The level of organisation of Swedish journalists is high, and SJF is the only professional organisation organising journalists. It is also responsible for labour negotiations.

### Journalist Associations

The Swedish Journalists Association is both a trade union and an association for journalists. Another organisation, *Publicistklubben* (The Publicists' Club - PK), is an organisation of publishers and journalists, interested in the ethical conduct of Swedish mass media.

### News Agencies

Sweden has one national news agency, *Tidningarnas Telegrambyrå* (*TT*), founded in 1921 after a merger of two competing agencies. It was organised as a co-operative agency owned by the Swedish newspapers to handle domestic and foreign news. During the last decade, *TT* has developed its services and introduced new areas of business. It also produces news for radio, television and Internet. Their photo bureau offers the main telephoto service.

There are also some minor agencies, mainly specialised in feature material on economic and cultural affairs.

### Audience measurement organisations

Newspapers annually measure circulation through TS Mediefakta (TS), even though some of the biggest papers have left the system, and measure reach three times a year, through TNS Sifo Research International (Orvesto). Both have been running for decades.

Television and radio are measured by people meters, radio by portable people meters. Television is measured by MMS (Mediemätningar i Skandinavien), and radio by TNS Sifo Research International. Reports are made public four times a year.

KIA Index measures Internet sites, but not all sites are connected to the system. The measurement unit for KIA is the number of unique web browsers, not individuals as in the other systems. KIA is run by the National Association of Advertisers.

In addition, several organisations measure reach and frequency for some or all media forms annually, the most important



being TNS Sifo Research International and Nordicom at the University of Gothenburg. Both organisations measure all media forms, TNS Sifo Research International measures each individual brand, whereas Nordicom, as a non-commercial organisation, measures the general use of each media form.

## Sources

- [Kia Index](#)
- [Mediemätningar i Skandinavien](#)
- [Myndigheten för press, radio och tv](#)
- [Nordicom](#)
- [Publicistklubben](#)
- [Svenska Journalistförbundet](#)
- [The SOM Institute](#)
- [Tidningarnas Telegrambyrå](#)
- [Tidningsstatistik](#)
- [TNS Sifo Research international](#)

## Policies

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### Media legislation

Media legislation is based on a strong tradition of press freedom. It is all regulated by a basic law, dating back to 1766. Freedom is granted for the content of radio and television by a parallel basic law, the Freedom of Expression Act. Additional laws regulate organisational and technical conditions. There are legal freedoms to establish sites and no restriction on content. Content on the Internet without a formal responsible publisher is governed by ordinary laws. The basic laws on press freedom also grant citizens access to public documents.

The general principles of broadcasting are presented in the Freedom of Expression Act. Details are explained in the Radio and Television Act. There is a licence for terrestrial broadcasting of television and for public service radio. It is issued by the government on the basis of a contractual agreement, normally for a period of five years. For the contractual period, certain specifications are presented, concerning, for example, news organisation, children's programming and the amount of Swedish productions, as well as terms of fairness and bias. Licence fees are decided by Parliament and finance public service broadcasting. Changing to a tax has been discussed, however, so far, no concrete proposal was put forward.

For general media policy issues, there is a strong consensus in the political establishment in favour of press freedom

### Accountability systems

The Swedish accountability system has a long tradition. The first rules, from 1900, concerned fairness in publishing. Gradually, the rules were extended, especially in the 1950s and 1960s, when a Press Ombudsman (PO) was established by the press organisations. In 1968, the Association of Swedish Journalists (SJF) decided on a professional code of conduct. The Press Council was established in 1916, originally as a 'Court of Honour' for editors and journalists.

Today, three sets of rules form the basis of the media accountability system in Sweden:

- The publicity rules (the rules of good journalistic practice): these rules regulate the fairness of reporting, respect of privacy, the rights of interviewees, the right to reply, the treatment of pictures and so forth. These rules are the oldest part of the code of conduct.
- The rules of professional journalism: these rules deal chiefly with the journalist's professional conduct and concern the integrity of journalists, humiliating assignments, acquisition of material, relations with news sources and so forth. These rules are the code of conduct of the SJF.
- The guidelines of editorial advertising: these cover the relationship between advertising and editorial content. They state that news should be judged by news value, not by advertising value. Advertising must not look like editorial pages. These rules were initiated by The Association of Newspaper Publishers (TU) in 1970.

All the rules are voluntary and initiated by independent organisations, in order to prevent legislation. The rules of good journalistic practice, which are regarded as the most central, are supervised by the Press Council and the Press Ombudsman, and the rules of professional journalism by a special committee appointed by the board of SJF. There is also a special council for co-operation in the field of media accountability.

## Regulatory authorities

Swedish media policy is a matter of government and is handled by the Ministry of Culture. The main authority is *Myndigheten för press, radio och tv* (the Authority for press, radio and television), which distributes the subsidy to the daily press, as well as grants licenses for commercial television and radio. The broadcasting licenses of the public service companies are granted directly by the government.

For cable and satellite television, no licence is needed, but all broadcasters have to register their activities. It is also possible to register internet sites at the Authority for press, radio and television, for legal protection.

*Post-och telestyrelsen* (The Swedish Post and Telecom Agency - PTS) is a government organisation that monitors electronic communications and postal sectors in Sweden. It covers telephony, the internet and radio. The agency works with consumer and competition issues, efficient utilisation of resources and secure communications. PTS supervises telecom operators to ensure that competition is functioning, works with analyses of market trends and allocates the operators with number series.

## Sources

- [Myndigheten för press, radio och tv](#)
- [Post-och Telestyrelsen](#)
- [Pressens Opinionsnämnd](#)

## Education

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### Universities and schools

Three university departments in Stockholm, Gothenburg and Sundsvall traditionally dominate Swedish journalism education,

including postgraduate studies, even though the character of the programmes varies somewhat. All in all, there are about 20 three-year courses in journalism in Sweden. At some universities, it is possible to study a one-year course in journalism after completing a BA with another major. Some universities also offer an MA in journalism.

All journalism education in Sweden involves a mix of theory and practice. Students on almost all courses spend one full semester at an editorial office, with salary. Beside the full traineeship semester, shorter training periods are common.

## Professional development

Evaluations conducted among the three dominant BA courses shows that most (70-80 percent) of the students work as journalists one year after completing their education. Permanent employment is, however, uncommon compared to other sectors in society. A growing share of journalists works as freelancers, or combine journalism with other jobs. Change of profession has also become more common, especially among women. Over the last 5-10 years, significant cutbacks have occurred in editorial offices, which has directly affected the job market for new journalists.

## Sources

- [Mid Sweden University](#)
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- [Stockholm University](#)
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- [University of Gothenburg](#)

## Conclusions

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### Conclusion

Sweden has traditionally been more of a newspaper than television country. Today, it is a very digital country. The internet penetration, in general, is almost 100 percent, and smartphones are also widespread. Most people have access to the internet in their pockets 24/7.

There have been few major political controversies in Sweden when it comes to media policy, but when competition has increased through the advent of new digital actors, the private media companies have raised their voices in the debate and demanded transfers from public service to companies that serve local journalism. The subsidy system is now under debate, which seems to have moved from a focus on the financial needs of media companies to a focus on the information needs of citizens.

The business models for legacy media are under severe pressure. Advertisers leave, and newspaper companies try to charge the audience for their content in a new way. It is, however, hard when the public has become accustomed to free content online. Even though a lot of the media content in social media derives from legacy media, nobody pays for it.

The gap concerning media consumption between young and old people has increased over the last decade, and this trend seems likely to continue. People over 50 tend to hold on to traditional media in parallel with their use of digital media,

whereas young people use legacy media to a very low extent, except when it appears in their general digital flow.

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