# 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 2021* [*MediaSweden 2021*] gives the reader an up-to-date and broad overview of today's Swedish media landscape, and here are a few trends the publication notes.

### Audience moving to digital, slowly leaving traditional

Surveys show a growing share of the Swedish population turning away from traditional media – such as print and linear TV and radio – towards streaming services for audiovisual content, online radio, podcasts, and digital newspapers. There is 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) than younger people is the newspaper. The younger generations prefer streaming services, podcasts, and online social networks.

Looking at overall TV viewing (linear and time shift) regardless of device, it has been stable, with over 80 per cent of the population 9–79 years old watching TV (linear TV and timeshift) on an average day (p. 49). However, the audience is moving away from traditional linear viewing (from 71% in 2010 to 56% in 2020) (p. 47). Today, audiences can choose when, how, and where they want to watch TV through various services online. Watching TV online has increased over the past five years. More young people aged 15–24 watch TV online (65%) than linear TV (35%) (p. 49). The patterns are similar for radio listening (p. 53).

### Advertising market going digital

Digitalisation has created new streams for media financing and advertising investments, with investments in online advertising making up 58 per cent of the total Swedish advertising investments in 2019 (SEK 23 billion of SEK 41 billion) (p. 71). The advertising investments do not necessarily end up with Swedish media companies, however. Of the online advertising in Sweden, 78 per cent (SEK 16.5 billion) was invested in global search engines and social media networks (p. 73). This, of course, means that Swedish media lose revenues at the same time as they are competing to keep audience shares. Advertising investments in linear TV and radio are stable, whereas the newspaper industry is struggling; since 2000, its advertising revenue has dropped by 70 per cent. Thus far, the drop in print advertising has not been compensated for by the growth in online advertising revenue (p. 69).

### Concerns for local news

The fear is that the flow of money out of the national media market to foreign players will result in increased difficulties in financing content production, especially news

journalism (p. 25). During the twenty-first century, the newspaper market has continued making profits, but mainly by cutting costs. Nevertheless, newspapers that have long held advertising as their main source of revenue are inexorably experiencing tighter financial margins, less advertising turnover, and fewer readers. In response to this, the newspaper companies focus more on gaining revenues from their readers and subscriptions.

In Sweden, local and regional newspapers have been crucial media 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 2020, some 44 of Sweden's approximately 290 municipalities lacked regular local news coverage (p. 84).

## Media policy measures following suit

Media policy must react and adjust to the development as digitalisation creates new challenges for policy-makers. State media subsidies, aiming to strengthen democracy and freedom of speech, can be direct or indirect.

In 2019, a new government media support means was introduced to counteract the concerns over local news coverage. This support is platform neutral, as long as it is news media. One particular purpose of the subsidy is to support the establishment of local news journalism in blank spots. In addition, the funding of the existing operating subsidies for newspapers will be increased (p. 21). In 2020, support for covering newsroom costs was introduced. This support is also applicable to any news media, regardless of distribution technique or if it deals with written, audio, or audiovisual content. (p. 23)

## The Covid-19 pandemic and the Swedish media

The Covid-19 pandemic has had serious influence on the Swedish media. Surveys show an increase in news consumption during 2020. Audience preferences were mainly towards established news media, such as public service TV and radio, private TV channels (TV4), and newspapers (p. 61). Trust in these media also increased during Spring 2020 compared to Autumn 2019. In spite of the growing number of readers, listeners, and viewers of news, the news media lost advertising revenues. The government increased the support systems, both existing ones as one-time-only subsidies, to a total of SEK 1.4 billion, a SEK 700 million increase (p. 25).

## 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 2021* is the 14th volume in the series and is written by Ulrika Facht and Jonas Ohlsson at Nordicom, University of Gothenburg.