


**NORDICOM**

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## The Nordic radio markets

Music, news, sports, storytelling, and real time information. Radio broadcasting was introduced in the early 20th century and started to gain popularity in the 1920s. Radio eventually became the most used medium for mass communication. In recent years, the concept of radio has changed with new technologies like the Internet and mobile phones. We have also seen that new forms of audio content, for example, podcasts and audiobooks, have become increasingly large competitors to the traditional radio about the listeners. In light of these changes in the landscape of audio media, this factsheet aims to shed light upon the regulation and structure of the broadcasted radio markets in the Nordics.

### Old and new forms of radio

Terrestrial radio includes all technologies used to broadcast content with radio waves. The part of the radio industry that transmits radio over the terrestrial network through Frequency Modulation (FM) and Amplitude Modulation (AM) is generally referred to as traditional analogue radio. While AM and FM radio is considered older forms of radio, Digital Audio Broadcasting (DAB) is a newer form of radio, also broadcasting on the terrestrial network. Satellite Radio and Internet Radio are as well newer forms of linear radio, while Podcasts are usually referred to as Internet audio-on-demand. Today, despite the emergence of digital and Internet radio technologies, traditional FM radio is still widely used, although several countries, especially in Europe, have regular services on DAB. Norway has already shut down its nationwide FM network, and Switzerland plans to shut of FM frequencies by the end of 2024. Deployment plans of DAB networks vary from country to country and depends on considerations like government policy, available frequencies, market requirements, and economic and technical considerations. Typical arguments for DAB have been that it is cheaper to run, it can offer more radio services for the same bandwidth, and it is a more energy-efficient platform compared with FM. Also, the sound quality of DAB is considered better, as the broadcaster can select quality, from high-fidelity signals for music to low-fidelity signals for talk radio. Some of the arguments against DAB are the costs of a transition from FM to digital and that all FM radio devices must be replaced, which means a large investment for the consumer. DAB also uses higher frequencies than FM, therefore there may be a need to compensate with more transmitters to achieve the same coverage as a single FM transmitter.

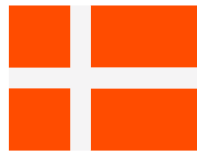
### Regulation of radio spectrum

The radio spectrum is divided into different frequency bands with ranges from 3 hertz to 3,000 gigahertz. Internationally, the availability of radio-frequency bands is regulated by the United Nations agency for information and communication technologies, the International Telecommunication Union (ITU). While the ITU is

responsible for allocating radio spectrum frequency bands on an international level, in Europe, the European Conference of Postal and Telecommunications Administrations (CEPT) cooperate and coordinate between European countries and at a national level, the National Regulatory Authorities (NRAs) are responsible for assigning the radio spectrum. This means that national radio spectrum is largely regulated on a national level, while ITU and CEPT are mostly concerned with technical parameters.

## Radio in the Nordic countries

Public service broadcasting is a global idea which has a strong tradition in the Nordic countries. It is a type of broadcasting that aims to serve the public interest, it is non-commercial, it is independent from the government or any political interests, and it is typically funded through public contributions such as taxes, licence fees, or grants. The public service broadcasters in the Nordic region include Danmarks Radio (DR) in Denmark, Yleisradio (Yle) in Finland, Ríkisútvarpið (RÚV) in Iceland, Norsk rikskringkasting (NRK) in Norway, Sveriges Television (SVT), Sveriges Radio (SR), and Utbildningsradion (UR) in Sweden. The Nordic public service radio channels were all established in the mid-1920s except in Iceland, which was established in 1930. Around 50 to 60 years later, commercial radio stations, financed through advertising revenue, were established in the Nordic countries. And since the beginning of the 21st century, with broadband Internet, online radio and podcasts have become a new way of producing radio outside the terrestrial network, and which does not require permission from media authorities. Today, most radio channels in the Nordic countries also stream online, either via their own websites or through other platforms. Many of the channels also produce podcasts, which makes it possible to listen to their content on-demand.



### Denmark

#### **How is the terrestrial network for radio structured?**

In Denmark, Cibicom A/S,<sup>1</sup> owned by the European equity fund Agilitas Private Equity LLP, owns and operates the nationwide broadcasting networks which are used for distributing TV (DTT) and radio (AM/FM/DAB+). The multiplex where the digital radio channels broadcast are owned by DR and operated by Cibicom A/S.

In 2002, state-owned Danish Broadcasting Corporation, DR, started with regular services on DAB, alongside its FM services. Three years later, two commercial stations started to broadcast radio on DAB. In 2018, the Danish Parliament decided to switch off the FM network two years after more than half of digital listening and transition to DAB by 2023,<sup>2</sup> but only if digital listening reached 50 per cent, if DAB coverage was at least 99.5 per cent, and DAB radios were available and affordable for all listeners. While the DAB network covers 99 per cent of the population, FM is still the most used

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<sup>1</sup> [About Cibicom](#)

<sup>2</sup> [World DAB: Denmark - Current situation - History \(20.11.2020\)](#)

platform. According to statistics presented by The Danish Ministry of Culture in 2022<sup>3</sup> with statistics from 2021, 48 per cent of radio listening was on FM, 24 per cent on DAB, 18 per cent on the Internet, and 10 per cent on unknown platforms. The Media Agreement 2023–2026,<sup>4</sup> which outlines the most important media policy activities decided by the Danish government, does not mention a shutdown of FM radio.

### **Who issues broadcast licences for radio?**

To broadcast radio in Denmark, a programming licence from the Radio and TV Board (Radio- og tv-nævnet) is needed.<sup>5</sup> The Radio and TV Board is set up by the Ministry of Culture. They handle licences for both national and local stations, regardless of whether the station broadcasts on FM frequencies or DAB/DAB+. In addition, it also requires a frequency licence from the Agency for Data Supply and Infrastructure. A frequency licence will allocate a specific frequency for broadcasting without signal interference. The frequency licence is issued after the Radio and TV Board have issued the programming licence. Stations that only broadcast on cable or satellite do not need a licence, but they must register with the Radio and TV Board. Internet radio does not need to be registered. Also, DR is exempt from this requirement, as DR has its licence directly under the Radio and Television Act. The Act is handled by the Ministry of Culture.

### **Financing of public service radio**

DR was from the start funded by a media licence. From 1 January 2022, public service is financed via tax. That change took place on the basis of a media settlement which was adopted in 2018,<sup>6</sup> where it was decided to gradually phase out the licence payment towards 2022.<sup>7</sup> Between 2019 and 2021, DR was funded by both licence fees and taxes. Other income sources are a very small part of the total income (e.g., ticket sales for concerts and sales of radio programmes abroad). According to DR's report on the economy in 2022, DR had programme expenses totalling 3.4 billion Danish kroner (≈ 452 million euro), of which 23 per cent was spent on DR audio, 71 per cent on DR TV, and 6 per cent on DR.dk.

### **Does privately owned public service radio occur?**

Yes, Denmark has publicly funded but privately owned public service radio channels. As a part of the Media Agreement 2019–2023, Radio4 received a broadcasting licence for FM, DAB, streaming, and podcast for 1 November 2019–31 December 2027.<sup>8</sup> The public service assignment states, among other things, that they must broadcast news, culture, debate, entertainment, and sports to the entire population, with a focus on the regions that do not have their own regional public service radio channel, and that 10 per cent of the programme time must be in languages other than Danish. Another channel, Radio 24 Syv, operated as a public service channel between 2011 and 2019. Radio24 Syv's broadcasting licence, which was on DAB+, was not renewed when it expired in March 2019. However, when Radio Loud got its public service licence in September 2021,<sup>9</sup> they changed the name to 24Syv. The channel's broadcast licence, which is on DAB+, will not be renewed when it expires in March 2024.<sup>10</sup>

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<sup>3</sup> [Danish Ministry of Culture: Radio and Podcast 2022 - PDF \(in Danish\)](#)

<sup>4</sup> [Danish Ministry of Culture: The Media Agreement 2023–2026 \(in Danish\)](#)

<sup>5</sup> [The Agency for Culture and Palaces: Programming licence from the Radio and TV Board \(in Danish\)](#)

<sup>6</sup> [Danish Ministry of Culture: The Media Agreement 2023–2026 \(in Danish\)](#)

<sup>7</sup> [DR's report on the economy in 2022 \(in Danish\)](#)

<sup>8</sup> [Radio 4: Public service assignment \(in Danish\)](#)

<sup>9</sup> [The Agency for Culture and Palaces: Letter to Radio Loud - PDF \(in Danish\)](#)

<sup>10</sup> [Danish Ministry of Culture: Media Agreement 2023-2026 - PDF \(in Danish\)](#)

### Stations and ownership

There are approximately 230 radio stations in Denmark, including national, regional, and local stations. DR operates six nationwide channels P1, P2, P3, P5, P6 Beat, P8 Jazz, and one regional channel, P4. P4 is found in ten regions where they produce their own local programmes but also broadcast jointly produced nationwide content. Among the commercial radio stations, the German multimedia conglomerate Bauer Media is by far the major owner, operating six nationwide FM channels and nine on DAB+. The private public service channel, Radio4, is operated under the auspices of Radio FM4 A/S, which is owned by seven regional media houses in Denmark and a single media house south of the Danish/German border.

### What do market shares look like in terms of listening time?

In Denmark, Kantar Gallup Denmark uses an electronic system/PPM to measure how many people are exposed to or listening to individual radio stations. Their panel includes people 11 years old and up. According to their surveys, the radio reached 77 per cent of the population daily in 2010, and ten years later, in 2020, radio reached 69 per cent of the population.<sup>11</sup> In a breakdown between public service radio and commercial radio, it appears, however, that it is the commercial radio channels that have primarily lost listeners.<sup>12</sup> Also, the time Danes spend listening to traditional radio has been decreasing.<sup>13</sup> Still, in 2021, more than three-quarters (76%) of the listening time on radio took place on one of Denmark's Radio's channels,<sup>14</sup> and 15 per cent of the total listening time was spent on one of Bauer Media's channels, where radio Nova is the biggest channel; 9 per cent of the total listening time was devoted to other radio stations.



## Finland

### How is the terrestrial network for radio structured?

Finland uses the FM band to broadcast radio. There is no interest for building a new, separate digital terrestrial network for distribution of audio content in Finland; DAB was rejected in 2005. However, more and more Finns are listening to radio on the Internet, and the public service radio channels and commercial national radio channels broadcasting on the FM networks are all available on streaming platforms. The Finnish Transport and Communications Agency, Traficom, is responsible for the frequency planning<sup>15</sup> of mass communications, and the terrestrial network for radio is mainly operated by Digita, owned by a global private investment company DigitalBridge. In 2022, twelve national radio networks operated in Finland, of which five were operated by Yle.<sup>16</sup> There were 16 subnational networks, of which 1 was

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<sup>11</sup> [Nordicom statistics: Daily radio listening in the Nordic countries, 2000–2021](#)

<sup>12</sup> [Danish Ministry of Culture: Radio and Podcast 2022 - PDF \(in Danish\)](#)

<sup>13</sup> [About DR: Media Development 2010-2022](#)

<sup>14</sup> [About DR: Mediadevelopment 2022 \(in Danish\)](#)

<sup>15</sup> [Traficom: Radio frequencies now and in the future](#)

<sup>16</sup> [Traficom: Frequency planning ensures the comprehensive coverage of radio and TV services throughout Finland](#)

operated by Yle, and approximately 60 regional and local networks operated by commercial actors, and 2 regional and local networks operated by Yle.

### **Who issues broadcast licences for radio?**

Yle does not need a broadcasting licence. Yle's operations are governed by the Act on Yleisradio Oy. Commercial Radio broadcasts in Finland requires both a programming licence and a radio licence. The programming licence refers to the content of the channel, and the radio licence refers to the technical aspects of the broadcast. However, analogue radio broadcasting that lasts less than three months can be carried out without a programming licence. These permits are granted by Traficom. The current operating permit period is for the concession period 2020–2029, with 70 FM programme concessions for commercial radio. For the programming licence, an application fee of 1,500 euro is charged, and radio broadcasters with a programming licence also pay an annual broadcasting supervision fee.<sup>17</sup> The supervision fee for national or similar operations is 6,000 euro, and for regional or local operations 600 euro for each radio programme set referred to in the licence.

### **Financing of public service radio**

The Yle tax, also known as the public broadcasting tax, is a Finnish tax collected to fund the operation of the country's public broadcasting company. The tax has been collected since 2013, when it replaced the television licence fee. The tax rate is income-based and corresponds to 2.5 per cent of a person's taxable income. The tax is mandatory for persons over 18 years of age as well as for organisations engaged in businesses and enterprises in Finland. The Åland Islands are exempt from the Yle tax. Taxpayers in the Åland Islands pay a corresponding media fee instead of the public broadcasting tax. Also, corporate entities that operate business or agriculture in the Åland Islands pay a media fee.

Yle does not report its costs per media form. According to the latest report from Yle on financing, their revenue amounted to 514.1 million euro in 2022.<sup>18</sup>

### **Does privately owned public service radio occur?**

There is no private public service radio in Finland.

### **Stations and ownership**

The radio market in Finland is a mix of public and commercial broadcasters. The state-owned public broadcaster Yle operates both television and radio channels. Yle has six nationwide radio channels, as well as several regional channels. However, Yle's board of directors decided to shut down the radio channel Yle Puhe no later than spring 2024. Two of the national channels are in Swedish, YLE X3M, targeted at a young audience and Yle Vega, with five local offices focusing on local news.

Bauer Media Oy and Sanoma Media Finland Oy are the two biggest commercial players on the Finnish radio market. Bauer Media Oy, part of the German Bauer Media Group, operates 16 radio stations and the digital listening services Podplay, RadioPlay, and RadioPlay Premium. Sanoma Media Finland Oy, part of the Sanoma Group, is active in newspapers, magazines, television, radio, and online and mobile media.

### **What do market shares look like in terms of listening time?**

In Finland, radio listening is measured by Finnpanel using diary surveys.<sup>19</sup> The panel consists of 21,000 individuals selected randomly from the Finnish- and Swedish-speaking population, excluding the Åland Islands. According to their National Radio

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<sup>17</sup> [Traficom: Setting up a radio station and radio broadcasting licences](#)

<sup>18</sup> [Annual report from Yle 2022 \(in Swedish\)](#)

<sup>19</sup> [Finnpanel: Radio listening in Finland 2022 - PDF 1.19 MB](#)

Survey, the daily reach of radio was 64 per cent in 2022. In 2010, the daily reach was 78. Commercial radio dominates the total daily reach over the public service radio channels. The commercial channels reached 41 per cent of the Finnish audience in 2022, while the public service channels reached 33 per cent.

When it comes to radio listening time in Finland, the share of listening time between commercial radio stations and public service radio in 2022 was 52 per cent for the Yle channels and 48 per cent for the commercial channels.<sup>20</sup> The average daily time spent on radio listening has been decreasing over the years. In 2010, the average daily listening time was 190 minutes and by 2022, this figure had decreased to 143 minutes. Among the commercial channels, Bauer Media Group had the highest share of total listening time, 22 per cent, and Nelonen Media, owned by Sanoma Media Finland, had 16 per cent. The public service channels share of listening time was 52 per cent.



## Iceland

### **How is the terrestrial network for radio structured?**

Iceland uses FM radio broadcasts for terrestrial radio. The state-owned national public service broadcasting service, RÚV,<sup>21</sup> also owns the terrestrial network for radio. RÚV operates two nationwide radio stations, plus a classical music radio station transmitted on DAB. Alongside the public service stations, there are also several nationwide commercial radio stations, plus some regional and local stations catering to listeners in specific areas and communities. All the channels transmit on FM. In addition, all are streamed over the Internet and are therefore receivable nationwide.

There are currently no plans to implement DAB radio in Iceland.

### **Who issues broadcast licences for radio?**

The Icelandic Media Commission, Fjölmiðlanefnd,<sup>22</sup> an independent public authority under the Ministry of Culture and Business Affairs, issues broadcasting licences in Iceland. The committee issues temporary broadcasting licences to applicants who fulfil certain requirements or conditions. To obtain a broadcast licence for radio, a permit is also needed from the Electronic Communications Office of Iceland (ECOI).<sup>23</sup> The ECOI is an independent body under the ultimate direction of the Ministry of Commerce and Culture.

### **Financing of public service radio**

The financing of public service media in Iceland takes place with a mixed strategy.<sup>24</sup> The main source of funding is a special tax introduced in 2009. The tax is included in the annual state budget. The amount is fixed and every person between 18 and 70 years old and with a certain level of income pays the same sum. Also, legal entities are

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<sup>20</sup> [Statistics Finland: Radio and audiomedias](#)

<sup>21</sup> [RÚV About RÚV](#)

<sup>22</sup> [The Icelandic Media Commission, Fjölmiðlanefnd \(in Icelandic\)](#)

<sup>23</sup> [Electronic Communications Office of Iceland \(ECOI\)](#)

<sup>24</sup> [Iceland: A small media system facing increasing challenges - PDF](#)

eligible to pay the tax. The tax contributes to around two-thirds of RÚV's revenues, while advertising accounts for the rest. According to the annual report for 2022,<sup>25</sup> the income from advertising amounted to 2.4 billion Icelandic krónur (≈ 16 million euro), and income from public service amounted to 5.1 billion Icelandic krónur (≈ 34 million euro). RÚV does not report its costs per media form.

### **Does privately owned public service radio occur?**

There is no private public service radio in Iceland.

### **Stations and ownership**

In 2021, there were 23 radio stations in Iceland, including national, regional, and local stations. Apart from the two nationwide radio stations Rás 1 and Rás 2, RÚV also operates the radio channel RONDO on Digital Video Broadcasting (DVB) as well as on the Internet. Iceland also has two commercial channels, Bylgjan and FM95,7 operated by the telecom and media company Sýn, and which broadcast nationwide FM radio. In addition, Sýn also operates five quasi-regional stations with a national penetration of 65–70 per cent. Another private media company is Árvakur, which runs the radio channel K 100 and publishes Iceland's oldest newspaper, *Morgunblaðið*, and an online news site, mbl.is.

### **What do market shares look like in terms of listening time?**

Gallup Iceland measures radio listening with the electronic system PPM. The population of their panel is 12–80 years old. According to their surveys, radio reach has seen some fluctuations over the years. But the main trend is rather a reduced reach for radio. Also, the listening time for radio in Iceland has decreased successively throughout the 2000s. In terms of radio listening time, the market shares are divided between RÚV and Sýn hf. The public service radio RÚV had 55 per cent of the market shares in October 2023. Of the two major public service channels, Rás 2 had about one-third of the market. The most popular channel operated by Sýn hf is Bylgjan, with a 27 per cent market share. Bylgjan is also the oldest privately run radio station in Iceland.



## Norway

### **How is the terrestrial network for radio structured?**

In Norway, the terrestrial network is based on DAB. The development of a nationwide DAB network for radio began in 1993, and in December 2017, the nationwide FM network was shut down.<sup>26</sup> This made Norway the first country to switch off nationwide FM services. Today, four terrestrial networks for DAB+ have been implemented. Many local radio stations still broadcast on FM, but the idea is that the local networks should also be on DAB+ by the end of 2031.

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<sup>25</sup> RÚV: Annual report for 2022

<sup>26</sup> Radioskiftet: The Story of Radios Digital Switch-Over

### **Who issues broadcast licences for radio?**

To transmit digital radio via the DAB network, three types of licences are required: a frequency licence, administered by The Norwegian Communications Authority (Nkom); an installation licence for the transmitter facilities; and a content licence. The latter two are administered by the Norwegian Media Authority (Medietilsynet).<sup>27</sup> The public broadcaster NRK has, according to the Norwegian Broadcasting Act, a licence exemption for content. The frequency and facilities concession are awarded to an operator who will lease capacity on its DAB frequency to content providers. This actor is called the transmitter network operator. A licence for content is granted based on an agreement between the content provider and the transmission network operator. It is the owner of the transmitter network who, in negotiations, grants access to capacity on non-discriminatory terms. The content provider must therefore undertake to cover costs that the transmission network operator may have. In Norway, Telenor is the largest provider of terrestrial broadcasting services.

### **Financing of public service radio**

In Norway, a public service tax replaced the licence fee from 2020. The tax is income-related and financed by a reduction of the basic deduction. The tax is calculated based on personal income and must be paid by everyone over 17 years of age who has taxable income. The financing model means that one must pay a maximum of 1,700 Norwegian kroner per person a year. There is no separate fee for organisations, businesses, schools, and so on. It is not stated in NRK's annual report<sup>28</sup> how the broadcasting tax was divided between radio and television. However, the total operating income of NRK was 6.2 billion Norwegian kroner ( $\approx$  545 million euro) in 2022.

### **Does privately owned public service radio occur?**

No, in Norway, P4 (owned by Viaplay Group) had a licence as a public service channel until the nationwide FM network was shut down in 2017.

### **Stations and ownership**

Norway had 171 radio channels on the terrestrial network in 2022, 33 of which were national DAB+ channels, 66 were regional DAB+ channels, and 122 were local channels; 57 of them were sending on FM.<sup>29</sup> In addition to the state-owned operator NRK, there are two significant radio operators, Viaplay Group, with their largest station P4, and Bauer Media, with their largest station Radio Norge. The French radio channel NRJ, owned by NRJ Group, is operated by Viaplay Group. Among the several local and niche radio stations in Norway there are a few independent or community-based channels.

### **What do market shares look like in terms of listening time?**

Since 2019, Nielsen Media Research is responsible for the radio survey measuring the nationwide channels in Norway. The PPM panel reports the official listenership figures for national radio channels. Listeners above nine years old who has listened at least one minute are registered as listeners. When Norway switched off the FM network for radio in 2017, the number of daily listeners was 63 per cent. The following year, the numbers of daily listeners was down to 57 per cent. However, according to listening figures from 2022, 62 per cent of the Norwegian population listened to the radio daily.

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<sup>27</sup> [Medietilsynet: Starte radio på DAB, internett, kabel eller satelitt \(in Norwegian\)](#)

<sup>28</sup> [NRK: Annual report 2022 - PDF 10,3 MB \(in Norwegian\)](#)

<sup>29</sup> [medienorge: statistics \(source no longer available\)](#)



In recent years, there has been a decrease in listening time. The average daily listening time was 82 minutes in 2022, down from 90 minutes in 2019.<sup>30</sup> NRK has the largest market share of radio listening time, with about 60 per cent in 2022. The most popular NRK channel was NRK P1, which broadcasts news, current affairs, culture, and entertainment.

The main competitors of NRK are the commercial radio operators Viaplay Group and Bauer Media. Their stations P4 and Radio Norge both broadcast popular music and light programmes. P4 had a market share of about 14 per cent and Radio Norge about 9 per cent in 2022.



## Sweden

### **How is the terrestrial network for radio structured?**

The terrestrial network for radio is on FM in Sweden. The Swedish terrestrial network for radio is owned and operated by the state-owned Teracom Group.<sup>31</sup> They provide frequencies for both the commercial radio channels and the public service radio channel, Sveriges Radio (SR).

In December 2014, a roadmap to digitalise terrestrial radio was presented to the Swedish Minister of Culture.<sup>32</sup> The report proposed that digitalisation should begin in 2016. But after the consultation round ended, the government decided not to go ahead with DAB+. Still, SR broadcasts on DAB+ in the Stockholm area, Gothenburg area, Malmö area, and Norrbotten (a province in northernmost Sweden). Additionally, several commercial broadcaster's broadcast on DAB+ with a licence from The Swedish Agency for the Media (Mediemyndigheten). The licences are valid until July 2026.

### **Who issues broadcast licences for radio?**

Public service broadcasters have broadcasting licences decided upon by the government, and these apply only to terrestrial broadcasting.<sup>33</sup> The current broadcasting period started in January 2020 and runs until the end of December 2025. The Swedish Agency for the Media is responsible for issuing broadcasting licences for commercial radio.<sup>34</sup> In August 2018, Sweden's commercial radio landscape got a new broadcasting structure. Instead of a system with a number of local broadcast permits, a system was introduced with 3 national and 35 regional permits. The permits were distributed after a closed bidding and are valid for eight years. The current permits for commercial radio are valid until July 2026. The broadcasting companies paid a total of 1.3 billion Swedish kronor (≈ 113 million euro) for the broadcasting licences, at the beginning of the period in August 2018.

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<sup>30</sup> [Nordicom: Radio listening time and reach in each Nordic country](#)

<sup>31</sup> [About Teracom Samhällnät \(in Swedish\)](#)

<sup>32</sup> [Swedish Government Official Reports about digitalising terrestrial radio \(SOU:2014:77\) in Swedish](#)

<sup>33</sup> [Government decision: Permission for Sveriges Radio AB to broadcast audio radio \(in Swedish\)](#)

[PDF 2,49 MB](#)

<sup>34</sup> [The Swedish Agency for the Media: broadcast radio \(in Swedish\)](#)

### **Financing of public service radio**

Public service broadcasting is, since January 2019, funded by an individual public service fee in Sweden. This fee is paid through taxes by everyone over 18 years old who has a taxable income. The public service fee is kept outside the state budget and is administered by the Swedish Tax Agency.<sup>35</sup> The size of the fee is decided for each income year, and in 2023, the fee was set to a maximum of 1,300 Swedish kronor per person per year. People with an income lower than 130,025 Swedish kronor per year paid 1 per cent of their income. In 2022, the three public service broadcasters (SVT, SR, and UR) received 8.9 billion Swedish kronor ( $\approx$  795 million euro) (of which SVT received 5.2 billion Swedish kronor ( $\approx$  4.7 million euro), SR received 3.2 billion ( $\approx$  285 million euro), and UR received 463 million Swedish kronor ( $\approx$  41 million euro) for their activities. The public service broadcasters are not allowed to broadcast advertisements, but SVT and SR may use sponsorship with restrictions, while UR's programmes may not be sponsored at all.

There is no public service fee for organisations, businesses, schools, and so on.

### **Does privately owned public service radio occur?**

There is no private public service radio in Sweden.

### **Stations and ownership**

There are 67 radio channels in Sweden, including national, regional, and local stations. In addition, there are about 140 community radio stations. SR operates four nationwide channels: P1, P2, P3, and P4. P4 is found in 25 regions where they produce their own local programmes but also broadcast jointly produced nationwide content. On the commercial radio market, Bauer Media Group and Viaplay Group are the major commercial media players. Bauer Media owns several popular radio channels such as Mix Megapol and Rockklassiker. The Viaplay network includes channels such as RIX FM and Bandit Rock.

### **What do market shares look like in terms of listening time?**

Radio listening is measured by Kantar in Sweden.<sup>36</sup> Kantar uses the PPM measurement method and measures radio-only listening on FM or the web. According to their studies, radio has steadily lost listeners over the past years. In 2013, 74 per cent of the population had listened at least three minutes of radio on an average day. In 2022, after a small change of counting listenership, 63 per cent had listened to radio for at least one minute.

In 2013, the daily listening time for radio was 111 minutes. In 2022, it was down to 80 minutes. In terms of radio companies' shares of total listening time, SR had the largest audience, with 77 per cent. Bauer Media Group had 13 per cent, and Viaplay Group Radio 10 per cent.

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<sup>35</sup> [The Swedish Tax Agency: Public service fee \(In Swedish\)](#)

<sup>36</sup> [Kantar: Radio listenership figures \(in Swedish\)](#)

## Summary

- Denmark, Finland, Iceland, and Norway have only one public service company each, which houses both television and radio operations. In Sweden, public service radio and television are organised in three different companies.
- Norway uses DAB+ for radio broadcasting and is the only Nordic country that has switched off nationwide FM radio.
- Denmark is the only Nordic country that has publicly funded but privately owned public service radio channels. In Norway, P4 (owned by Viaplay) had a licence as a public service channel until the nationwide FM network was shut down in 2017.
- The Icelandic National Broadcasting Service (RÚV) is funded from both a licence fee and advertising revenue. The tax contributes two-thirds of RÚV's revenues, while advertising accounts for the rest.
- Public service radio has, overall, a dominating position in the Nordic countries except Finland, where public service radio has been matched by commercial radio in recent years.
- The national commercial radio sectors are dominated by a few companies. One of the major media houses in Europe, German Bauer Media Group, operates in all Nordic countries except Iceland; Swedish Viaplay Group operates in Norway and Sweden.

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