



2026

Swedish TV Market

By bundling linear and SVOD services, Swedish telcos are boosting ARPU and reducing churn, driving IPTV revenue to 6 billion SEK with 6% subscription growth. While leaders like Tele2 dominate through aggregation, the industry faces challenges from the terrestrial network collapse and intensified anti-piracy efforts.

The Swedish Terrestrial Network Status

The Digital Terrestrial Television (DTT) network in Sweden remains in a state of regulatory and financial transition. Following the discontinuation of commercial packages like Boxer DTT on December 31, 2024, the network shifted exclusively to Free-To-Air (FTA) channels.

However, the lineup has shrunk further: TV4 officially left the DTT network on December 31, 2025. While initial planning pointed toward a total network shutdown—especially with the state-owned transmission operator, Teracom, holding licenses that expired at the end of 2025—the platform technically persists under newly extended licenses. As a result of these commercial departures, SVT (Sweden’s public broadcaster) is currently saddled with the full cost of the transmission network. Consequently, the Swedish government is actively leading discussions regarding the long-term future, funding, and civil defense role of the DTT platform.

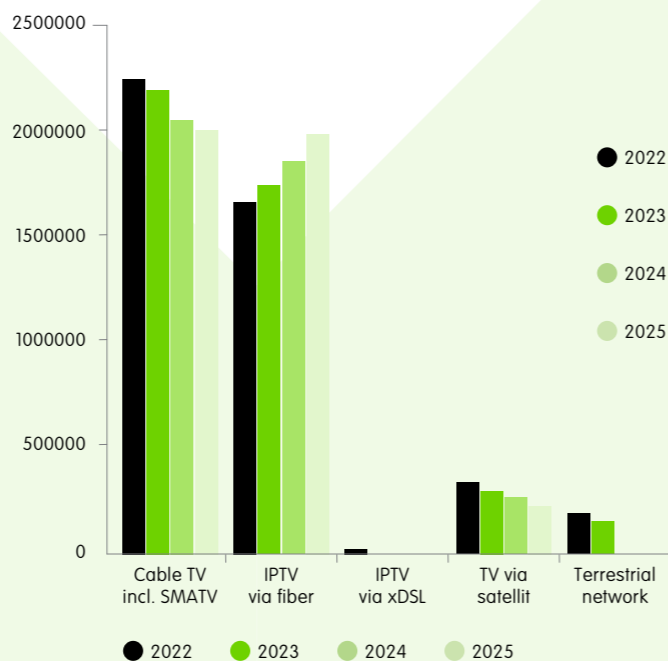
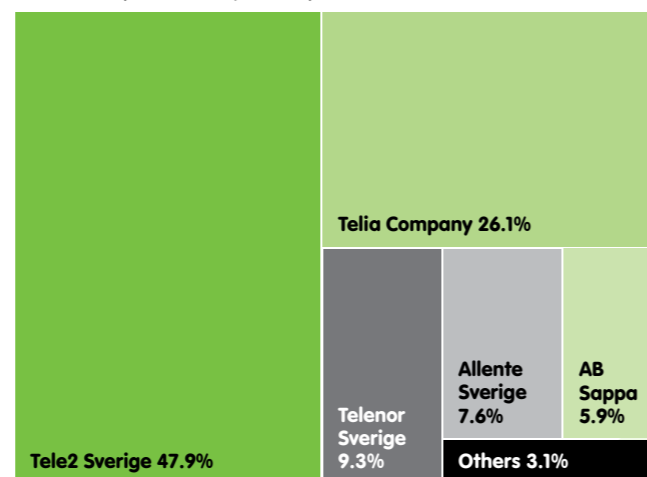
Piracy and Legislative Challenges

Digital video piracy has escalated into a core systemic challenge, with illegal services establishing a footprint equivalent to Sweden’s third-largest television operator. This network relies on exploiting encrypted data architectures by extracting pure source streams directly from major distribution Content Delivery Networks (CDNs). Across the Nordic region, illegal viewership accounts for roughly 5 million consumers. To dismantle this shadow economy, Sweden’s legal architecture has experienced a major overhaul following the government’s “Åtgärder mot illegal ip-tv (SOU 2025:100)” legislative review. Modern criminal enforcement explicitly targets individual consumer compliance, legally categorizing the intentional private receipt and possession of unauthorized media streams as a punishable offense.

Operators

- IPTV (operator stream) is increasing 6%
- Subscription is growing
- Tele2 grows the market share to 47,9%.
- Revenue increases with bundles and price increases
- The number of subscriptions via cable TV networks decreased with -2%

Share of Pay TV Subscriptions by Provider 2025



Bundling Strategies and Market Consolidation

The mainstream Swedish subscription television environment has undergone structural transformations defined by intense corporate alignment and horizontal consolidation. Traditional media boundaries are dissolving as major Subscription Video on Demand (SVOD) operators—including Disney+, HBO Max, SkyShowtime, and Viaplay—pivot away from direct consumer warfare. Instead, they are actively pursuing integrated strategic partnerships, re-establishing telecom and internet providers like Telia, Tele2, and Telenor as vital aggregation portals.

Key Market Shift: Growth is now driven by hybrid stream and linear bundles that unite live television with high-demand streaming platforms under a single billing structure.

To offset rising costs, operators have broadly increased subscription prices across these offerings. This hybrid bundling strategy, combined with higher pricing, has successfully insulated modern telecommunication firms from subscriber churn while driving up total Average Revenue Per User (ARPU).

This financial trajectory is clearly reflected in the 2025 market data:

- Operator stream subscriber growth: Increased by 6%.
- Operator stream revenue growth: Surged from 4.9 billion SEK to 6 billion SEK, a sharp rise driven heavily by the implementation of these increased subscription prices.

Media Consumption Habits and Digitalization

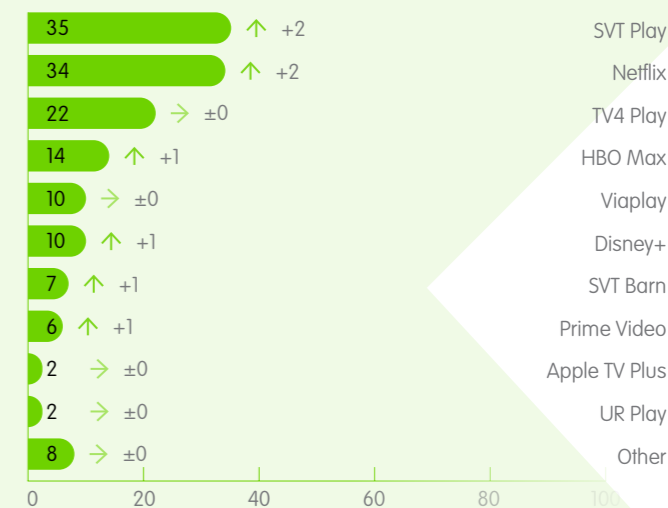
Sweden’s digital transformation is near total and spans across all demographic groups. The consumption of moving images heavily dominates the market at the expense of traditional print media, with the daily reach of printed newspapers continuing a steady decline in favor of digital platforms. This development is accelerated by almost ubiquitous smartphone access, which has firmly

established new, deeply rooted digital media habits throughout the entire population.

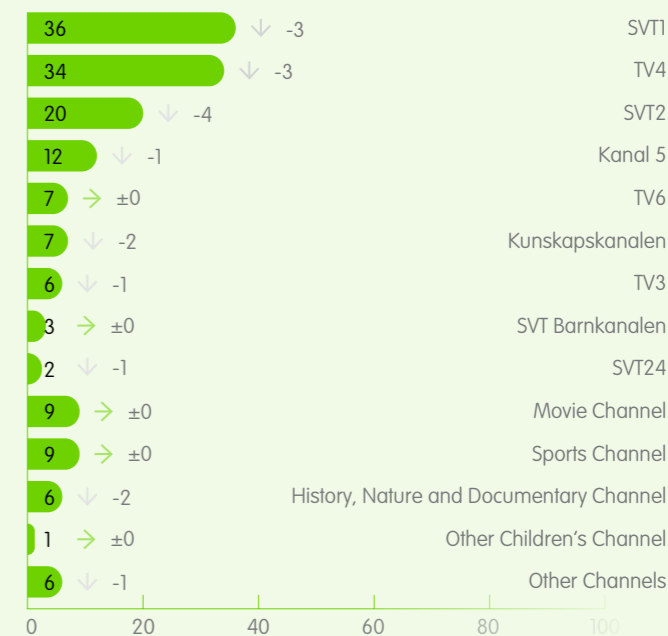
Media Habits 2025 (on a typical day):

- 98% have access to a smartphone
- 95% watched moving images in some form
- 84% used social media
- 76% listened to the radio in some form
- 64% listened to music
- 60% read a daily newspaper
- 49% read or listened to a book

STREAMING SERVICES Ages 9–85, 2025 (percentages and change from 2024, in percentage points)



TV CHANNELS Daily Reach, Ages 9–85, 2025 (percentages and change compared with 2024, in percentage points)



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