

GAME CITY SURVEY 2016

HIGHLIGHTING THE GAMES INDUSTRY IN SOUTHERN SWEDEN

This survey serves to highlight the digital games industry in southern Sweden and is published by [Game City](#) on an annual basis. By conducting a survey of all active games companies and organisations in Skåne and Blekinge, the two southernmost provinces of Sweden, Game City aim to present raw data and analysis that can be used

to track developments in the games industry in the region. The data in this survey is based on key figures from publicly available annual reports for fiscal year (FY) 2015, from the period of April 2015 to March 2016. Additional data was also collected from an online survey that was answered by 19 of the 50 companies in November 2016.

HIGHLIGHTS

based on reports for FY 2015

50

COMPANIES

actively working
with game development
in southern Sweden

606

EMPLOYEES

working full-time at the
game development companies
in southern Sweden

942

MILLION SEK

total turnover of the
game development companies
in southern Sweden

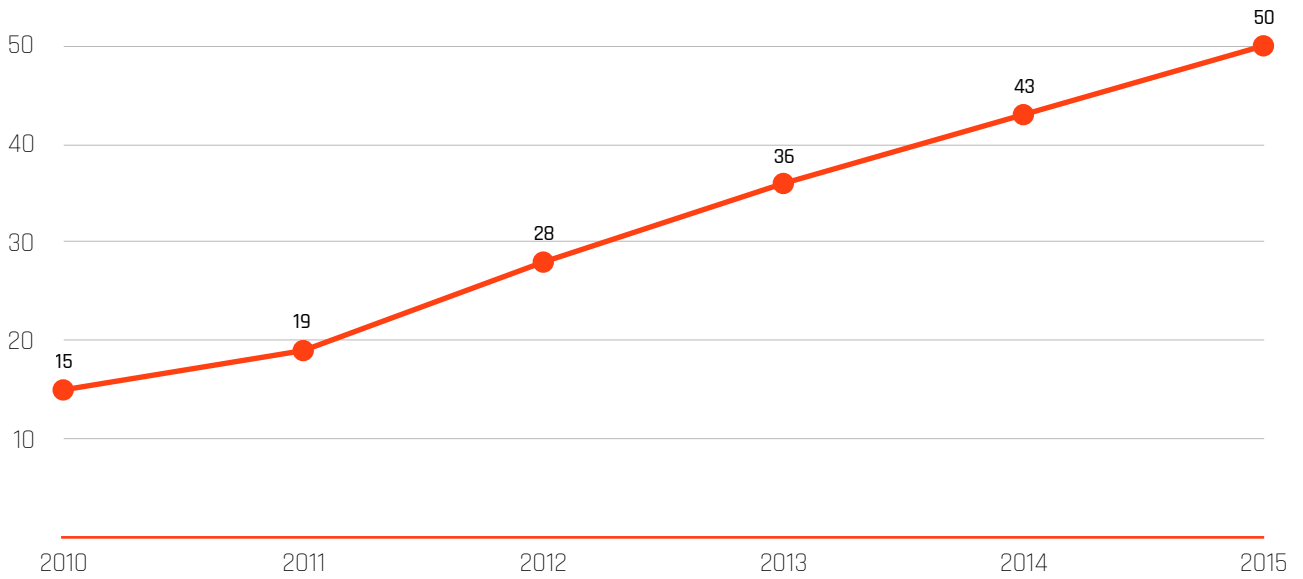
KEY FIGURES

based on reports for FY 2010 - 2015

KEY FIGURES	2015	2014	2013	2012	2011	2010
Companies	50 (+16%)	43 (+19%)	36 (+29%)	28 (+47%)	19 (+27%)	15
Turnover (M SEK)	941,7 (+3%)	916,8 (+57%)	584,1 (+80%)	324,7 (+24%)	261,5 (+35%)	193,8
Profit (M SEK)	352,9 (+4%)	340,9 (+58%)	216,2 (+371%)	45,9 (-2%)	47 (+45%)	32,5
Employees	606 (+16%)	522 (+14%)	456 (+16%)	394 (+13%)	350 (+60%)	218

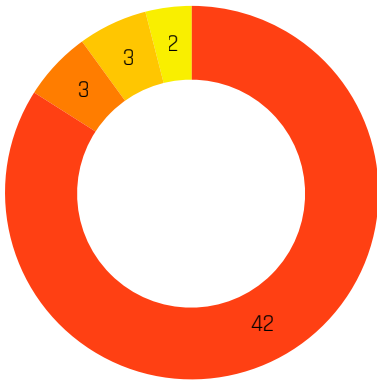
COMPANIES

number of active game development companies 2010 - 2015

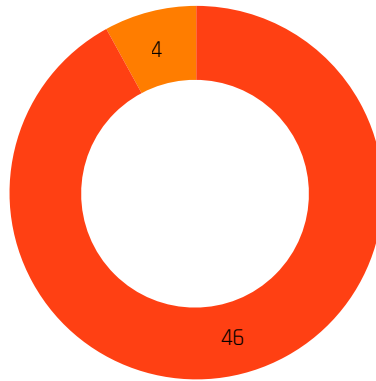


50 organisations have been identified as active within game development or closely related areas. 46 of the companies are limited liability companies (aktiebolag) and 4 are sole proprietorships (enskild firma). 30 of the companies are based in Malmö, 10 in Karlshamn, 5 in Helsingborg and the remaining 5 are based in other cities in the region.

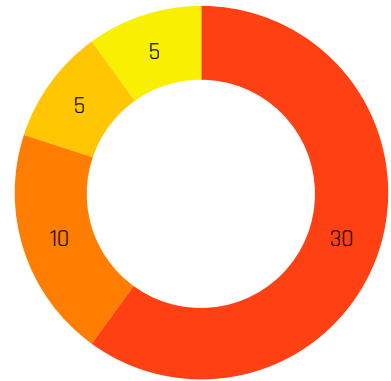
BUSINESS TYPE



COMPANY TYPE



COMPANY LOCATION



● Developers ● Service providers
● Events ● Other

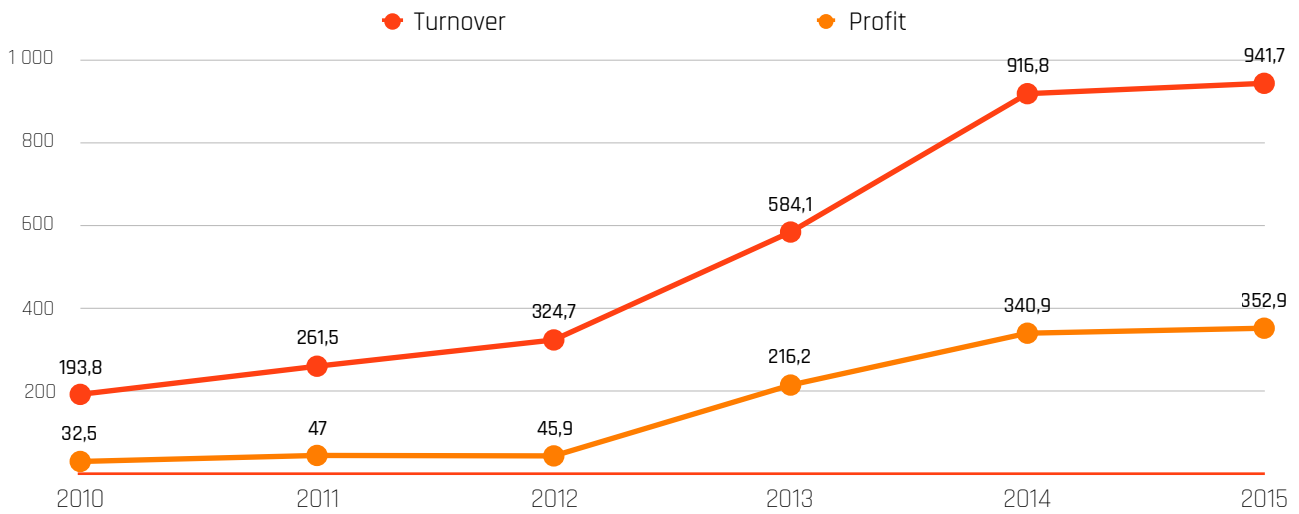
● Limited liability (AB)
● Sole proprietorships (EF)

● Malmö ● Karlshamn
● Helsingborg ● Other



TURNOVER & PROFIT

total turnover and profit based on reports for FY 2010 - 2015, in millions of SEK



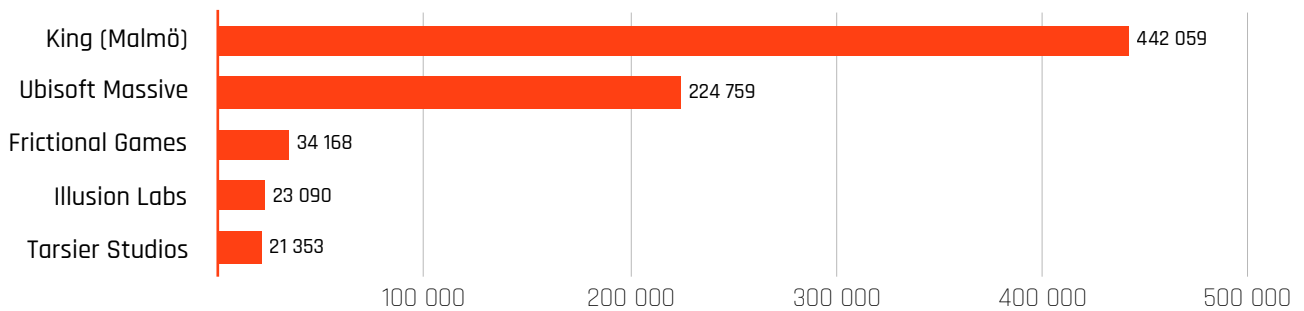
The companies in the region had a total turnover of SEK 941,7 million in FY 2015, a growth of 2,71% compared to the previous year.

The compound annual growth rate (CAGR) for the region in the period 2010-2015 is 35,67%.

LARGEST TURNOVER

turnover top 5 based on reports for FY 2015, in thousands of SEK

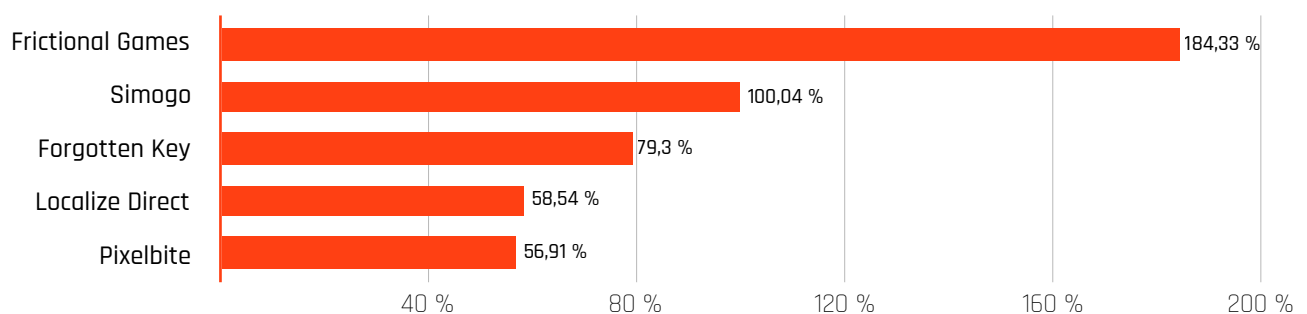
King's Malmö studio still has the largest turnover in the region. The approximation for King was done by multiplying King's turnover per employee for FY 2015 with the number of employees of King's Malmö studio over the same period.



LARGEST GROWTH

Top 5 growth increase from last year, based on net turnover in reports for FY 2015

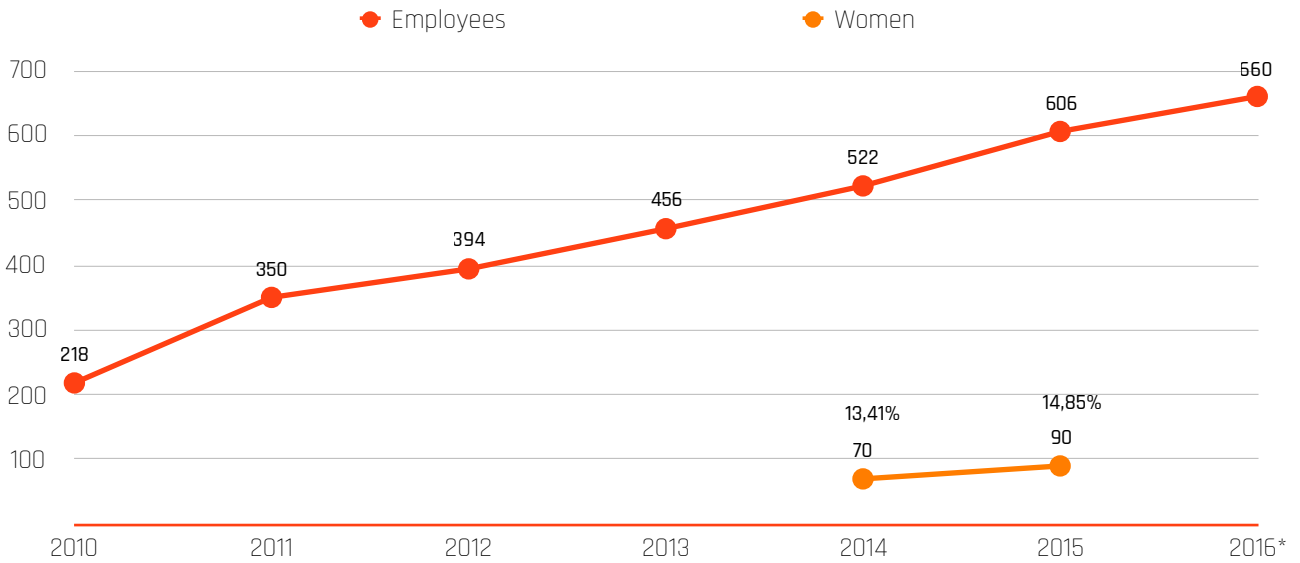
Only limited liability (AB) companies with a minimum turnover of SEK 200 000 the previous year are factored in.



EMPLOYEES

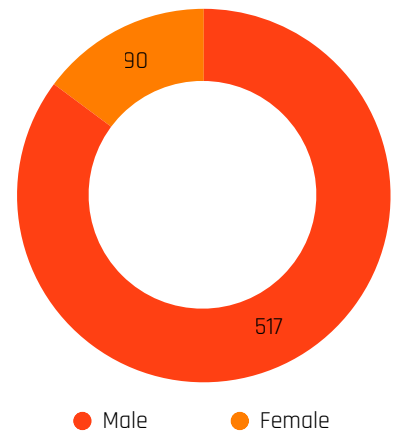
Total number of employees in the area, based on reports for FY 2010 - 2015

*The preliminary prognosis for 2016 is based on the survey in November 2016



A total of 606 people were employed by the 50 companies on average in FY 2015, an increase of 16% since the previous year. For 2016 we estimate that the numbers will increase to about 660 based on the November 2016 survey. The survey also indicates that there is a demand to hire more than 120 new employees in 2017.

GENDER DISTRIBUTION



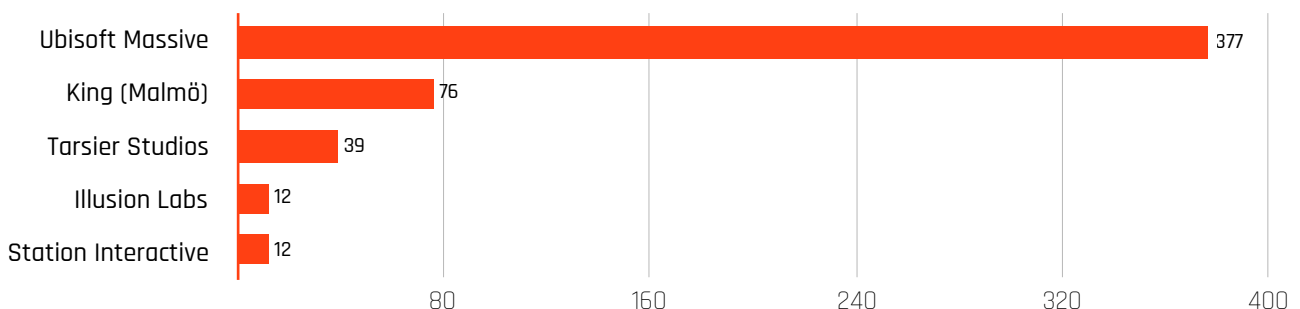
NATIONALITIES

DIVERSITY & EQUALITY

At least 40 nationalities were represented in the games industry in the region based on the November 2016 survey. 14,85% of the employees in the region are identified as women, which is an increase from last years 13,41%.

TOP EMPLOYERS

employees top 5, based on reports for FY 2015



FUTURE

From the 19 companies that answered the November 2016 questionnaire survey we can see that:

- 11 expect their turnover to increase in 2017
- 11 are planning to hire additional staff in 2017
- Programming is the most wanted competence

The greatest challenges for continued growth among the 19 companies are primarily funding and finding the right talent.

It is clear that the games industry in Skåne and Blekinge continues to have an exciting and promising future ahead of it. Ubisoft Massive alone expect to grow with at least 100 additional staff during 2017.

The future looks very promising for this young industry in the region, with continued growth both on the financial side with increased revenue and profits, as well as on the human side with more people and increasing equality and diversity.

METHOD

This survey has been conducted in several steps.

The list of companies active in game development in Skåne and Blekinge that was created for last years survey was complemented with both new and previously missed organisations.

There may be additional companies in the region that have not been included in the survey.

The data in this survey is based on key figures from publicly available annual reports for FY 2015, from the period of April 2015 to March 2016.

Additional data was also collected from a questionnaire survey in November 2016 that was answered by 19 of the 50 companies.

The data from previous years presented in this years survey may differ from data presented in previous survey reports due to complements and corrections.

GAME CITY

Game City is a non-profit organisation that is working to develop and maintain southern Sweden as Europe's leading region in the development of digital games.

Game City currently has about 25 members, from freelancers and small studios to medium and large sized companies. Game City covers Skåne and Blekinge, the two southern most provinces of Sweden. The organization has its seat in Malmö, Sweden's third largest city.

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