



The South Swedish Game Development Industry 2024



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This report looks at the state of the digital game development industry in south Sweden, in the regions Skåne and Blekinge. The report consists of two parts, one with key figures retrieved from the regional game development companies' publicly available annual reports for 2023, and one part based on a regional game developer employee survey conducted in late spring 2024.

It's the second time Game Habitat has conducted a region-wide game developer employee survey. The first survey was conducted in 2022. The regional survey is unique, nowhere else in Sweden has anything similar been done. Annual report data on regional game companies has been collected every year since 2010. Game Habitat aims to conduct the employee survey every other year, and continue to collect annual report data every year, to follow the industry's development as well as changes in the employees' demographics and opinions.

In this report, as in all of Game Habitat's work, the term *games* refers to all kinds of digital interactive games with an entertainment or learning purpose, not gambling as in playing games to earn money.

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About Game Habitat

Game Habitat is the community organization for the game development industry in south Sweden. South Sweden includes the country's two southernmost regions, Skåne and Blekinge. Game Habitat's vision is to enable south Sweden to become the world's most diverse, equal, inclusive, and successful ecosystem for global game development. Game Habitat is a non-profit organization, based in Malmö, south Sweden. Find out more at www.gamehabitat.se.

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Summary

Data from the regional game companies' annual reports for 2023 show that the south Swedish game development industry consists of **168 game development companies** (149 in 2022), which **employ 1 767 people** (1 706 in 2022), have a combined **revenue of 2 353 MSEK** (2 441 MSEK in 2022), and a combined **profit of 319 MSEK** (659 MSEK in 2022).

The regional games industry continues to **grow fast in terms of companies, revenue, and employees, while remaining highly profitable**. Companies in the region develop **games for all platforms**, including PC, consoles, mobile devices, VR/AR, and in all genres. There are also a number of **publishers and service providers** present.

The industry is young, 81 of the companies in the region were founded in the last five years and only two before the turn of the century. In five years, since 2019, the number of **game companies and their revenue have more than doubled**, and the number of **employees is up 60%**.

The survey, conducted in late spring 2024, and extended to game developers in the region, reveals a generally **well-experienced and well-educated yet relatively young workforce**, though **dominantly male**. The regional industry is also strikingly international, with employees of **77 nationalities being represented**.

Despite recent turmoil in the industry globally, the survey found that the game developers are very **fond of the game development industry in general, but that they're even more fond of the regional industry**. The same was true in 2022, when the survey was conducted for the first time.

The games developers get to work on, stability and job security, work-life balance and personal well-being, personal development, and the town where the company is located ranks highest among the respondents when asked why they chose their current job. The main reasons game developers remain in the region, according to the survey, are **the job, partner and/or family and friends, and the quality of life here**. In the survey, **significant pay gaps, workload, and poor work-life balance stand out as the industry's biggest challenges**. Generally, the findings are similar to those in the 2022 survey.

Close to **a quarter of the respondents say they'd like to start their own game company some day**. Another 40% may be interested, and 7% state they've already started their own company. The entrepreneurial drive in the regional industry remains strong, as the results are similar to those of the 2022 survey.

Malmö stands out as the main city in the region's game development industry, being home to 93 game companies and 94% of all the region's game developers. Six of Sweden's ten largest game development companies have offices in Malmö. Measured in employees, Malmö alone is bigger than the neighboring Nordic countries Denmark's, Norway's, and Iceland's entire respective game development industries.

Key figures

	2023	2022	2021	2020	2019
Companies	168	149	120	102	71
Malmö	93	80	70	59	47
Rest of Skåne	57	49	32	25	10
Blekinge	18	20	18	18	14
Sweden	1 010	939	785	667	586
Employees	1 767	1 706	1 515	1 247	1 107
Of which men	77,4%	77,8%	78,7%	81,1%	81,7%
Of which women	22%	21,7%	21%	18,9%	18,2%
Sweden	9 089	8 445	7 944	6 596	5 925
Of which men	75,8%	76,1%	77,7%	78,6%	79%
Of which women	23,7%	23,4%	22,1%	21,4%	21%
Revenue	2 353 MSEK	2 441 MSEK	1 720 MSEK	1 285 MSEK	939 MSEK
Sweden	34 582 MSEK	32 516 MSEK	27 522 MSEK	22 182 MSEK	17 815 MSEK
Profit	319 MSEK	659 MSEK	274 MSEK	197 MSEK	-8 MSEK
Sweden	1 128 MSEK	19 329 MSEK	2 917 MSEK	6 611 MSEK	3 903 MSEK

The figures show that in 2023, south Sweden had 168 game companies with 1 767 employees. Compared to the year before, it's an increase of 13% and 4% respectively. Compared to the annual average growth in 2011-2022, which was 22% and 19%, respectively, the regional industry showed a slower growth in 2023. However, the regional industry still grew in 2023, a significant feat in an industry that globally in this period saw record-high layoffs and game studio closures.

Furthermore, looking back just five years, the number of regional game companies and their revenue have more than doubled, and the number of employees is up 60%. Going back even further, fourteen years ago, in 2010, the region consisted of 15 companies with 218 employees and a combined revenue of 193 MSEK. It's safe to say that the regional game development industry is growing fast.

The data show that the industry is young. Of the 168 companies, 81 were founded in the last five years, and only two were founded before the turn of the century.

Every 5th employee in the regional games industry is a woman, up slightly to 22% in 2023 compared to the year before.

Malmö continues to be home to the majority of the companies in the region, but the number of companies in the rest of Skåne have more than doubled in only three years. Still, 94% of the regional employees are employed by companies in Malmö.

The data shows the regional industry’s revenue exceeded 2 billion SEK again in 2023, while remaining highly profitable.

Companies in the region develop games for all platforms, PC, consoles, mobile, VR/AR, and in all genres. There’s also a number of publishers and service providers present.

Regional digital game development companies are born globals, meaning they launch their products on an international market with the potential of reaching millions of players directly. As the global industry continues to grow, and with the continued investments in new companies and games in the region, the south Swedish game development industry is likely to continue to grow at a similar pace in the coming years.

Apart from the game developers already working in the industry, the region is home to a significant number of students enrolled in game development-specific education. The number of game developer students enrolled at the start of the autumn semester of 2024 amounts to 761, an increase from 665 in the autumn of 2023. There are currently seven higher education schools in the region providing game development-specific education, two universities (Blekinge Institute of Technology, Malmö University), two higher vocational educations (Futuregames, The Game Assembly), and four 1-2 year formal specific studies (Folkhögskolan Fridhem och Skurup i Malmö, Malmö Folkhögskola, Österlens Folkhögskola, Östra Grevie Folkhögskola).

Compared to the rest of Sweden and Europe

Apart from south Sweden, the two other large game development industry clusters in Sweden are in Stockholm and the Västra Götaland region, with hubs in Skövde and Göteborg. Compared to Stockholm, south Sweden has fewer companies and employees and lower revenue. Compared to the Västra Götaland region, south Sweden has about the same number of companies and revenue, but a lot more employees.

The ten largest game development companies in Skåne and Blekinge, and Sweden, respectively, measured in number of employees (figures from November 2024):

Skåne/Blekinge			Sweden		
1	Ubisoft Massive Malmö	690	Ubisoft Entertainment		765
2	Sharkmob	357	King		714
3	IO Interactive	111	EA DICE		677
4	Avalanche Studios Group Malmö	106	Embracer Group		538
5	King Malmö	69*	Avalanche Studios Group		476

6	Tarsier Studios	65	Paradox Interactive	454
7	EB Studio	27	Sharkmob	357
8	Illusion Labs	21	Embark Studios	297
9	Thunderful Malmö	21	Mojang	210
10	Infinite Mana Games	18	Toca Boca	188

* Figure from October 2023.

Six of Sweden's ten largest game development companies, measured in employees, have offices or subsidiaries in Malmö: Ubisoft Entertainment, King, Embracer Group, Avalanche Studios Group, Sharkmob, and Embark Studios. Three of the world's largest game developer companies have subsidiaries in the city, Microsoft/Activision Blizzard through King, Ubisoft through Massive Entertainment, and Tencent through Sharkmob.

Games industry organizations European Games Developers Federation (EGDF) and Video Game Europe (VGA) in June 2024 published an Insights Report with key figure estimates for the game development industry in the EU. According to the latest available figures, from 2022, there were 5 300 game development companies with 90 000 employees in the EU, of which 24,4% of the employees were women. The figures put Sweden as the largest game development country in the EU in terms of number of game companies (followed by Germany and France) and the 5th largest in terms of number of employees (following Poland, France, Germany, and Spain).¹

Malmö is the main city in south Sweden's game development industry, being home to 93 game companies and 94% of the region's game developers. Measured in employees, Malmö alone is bigger than the neighboring Nordic countries Denmark's, Norway's, and Iceland's entire respective game development industries, according to the figures from EGDF and VGA for 2022, which is the latest available figures. Additionally, Malmö is only narrowly behind Denmark measured by number of game companies, but far surpassing Norway and Iceland.

If Malmö were a country, it would be the EU's 11th largest game development country measured in terms of the number of employees (including Sweden in fifth place), according to the figures from EGDF and VGA. Measured by game companies, Malmö would be the EU's 10th largest game development country if using the 2022 regional data (including Sweden in first place). Using the 2023 regional data, Malmö would be the 8th biggest game development country in the EU.

Method

The key figures for Sweden, including specifically for south Sweden, the regions Skåne and Blekinge, have been retrieved from the trade organization Swedish Games Industry's report *Game Developer Index 2024*. The data in *Game Developer Index 2024* is retrieved from

¹ <https://www.egdf.eu/2022-european-video-games-industry-insight-report>

Swedish game development companies' publicly available annual reports. The most recent available annual reports cover the fiscal year 2023.

The figures only include offices and staff in Sweden, not subsidiaries or offices in other countries.

The figures related to regional revenue and profit only include companies registered in south Sweden, in Skåne or Blekinge. This means companies such as Avalanche Studios Group, Thunderful, King, Coffee Stain, and others that have offices in south Sweden, but are registered elsewhere in Sweden, are not included in the regional revenue and profit figures.

The number of regional companies in 2023 include eight companies founded in 2024. As they have yet to submit an annual report, no employees have been registered for these companies. A number of companies founded in 2023 have also yet to submit an annual report, meaning any employees at these companies are not included in the employee figure for 2023. The figures for 2019-2022 reflect the same methodology.

The number of companies included in the key figures includes limited companies (aktiebolag) only. According to Statistics Sweden there were an additional 50 companies of other types (sole trader (egen firma), trading partnership (handelsbolag), and economic association (ekonomisk förening)) working in game development in Skåne and Blekinge in 2023 based on company registrations under NACE 58.210. These companies are not part of the figures above.

The data for the listing of the ten largest game development companies in Skåne and Blekinge, and Sweden, respectively, have been provided by each company by request.

The student data has been provided by the respective schools by request.

Employee survey

The survey consists of 30 questions covering several aspects of the game development industry. It is divided into two parts: one that reflects the people who work in the regional game development industry, and one that reflects their experiences and opinions.

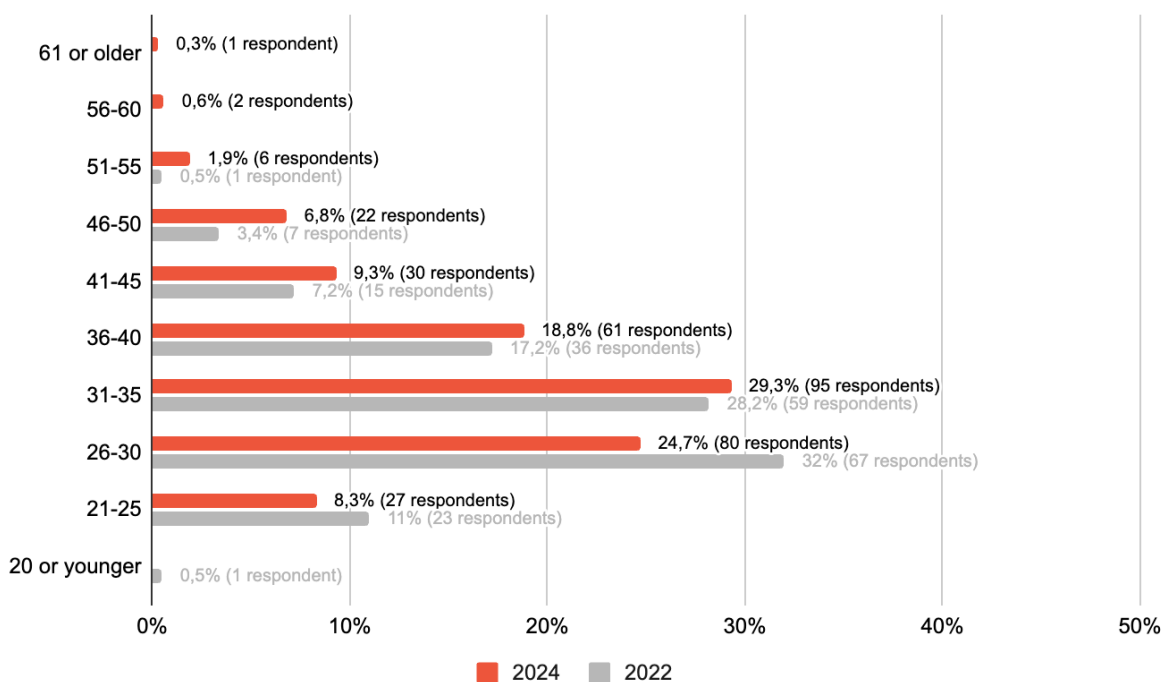
The survey was extended to game development company employees in the regions Skåne and Blekinge via internal channels at each company. The survey was conducted using an online form. In total, 325 people replied to the survey, a response rate of 18,4% based on the number of game development employees in the region. The number of responses per question is 325 unless stated otherwise. The survey was conducted from May to June 2024.

Comparisons with the 2022 survey are made when applicable. The number of responses per question for the 2022 survey is 209 unless stated otherwise.

The percentages in the graphs don't always add up to 100% due to numbers being rounded off to their nearest integer.

Game developers in south Sweden

1. What age are you?

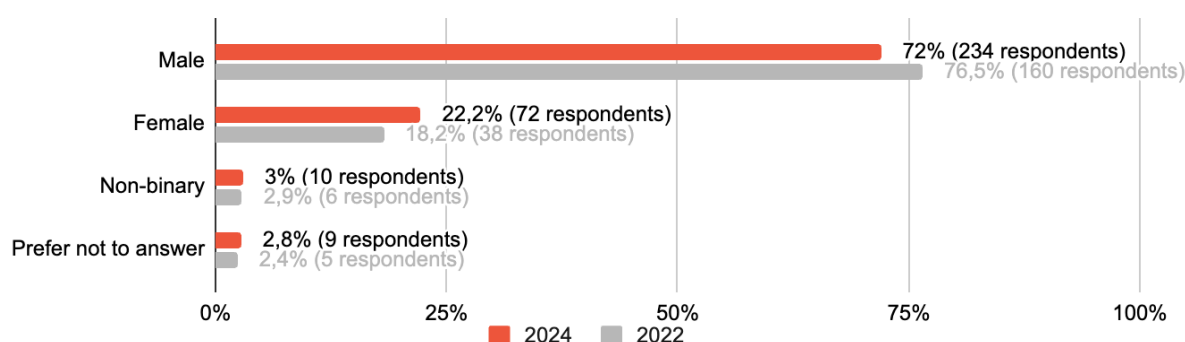


62,3% of the respondents are 35 years or younger, and 37,7% are 36 years or older. Corresponding numbers in the 2022 survey were 71,7% and 28,3% respectively, respondents in this year's survey are slightly older compared to 2022. Still, the game development industry generally is a young industry, and south Sweden is no exception. Of this year's respondents, 54% are aged 26-35 (60,2% in the 2022 survey).

The female respondents as a whole are slightly younger than the male respondents. The share of female respondents is higher than the male respondents in the three youngest age groups, and the share of male respondents is higher than the share of female respondents in all the other age groups. In actual numbers, however, there are more male respondents than female in all age groups. About two thirds, 63,4%, of all female respondents are in the age groups 26-30 and 31-35, the corresponding figure for the male respondents is 51%. In the youngest age group, 21-25, the share of female respondents is 9,8%, and the share of male respondents is 7,4%. The share of male respondents in the age group 36-40 is 21%, significantly higher than the corresponding number for the female respondents which is 12,2%.

In total 324 responses were submitted in this year's survey, and 209 in 2022.

2. To which gender do you identify?



The game development industry is predominantly male, also in south Sweden. 72% of the respondents are male, 22,2% female, and 3% non-binary. Compared to the 2022 survey, it's an increase in female respondents.

Compared to the figures from the regional companies' annual reports, which state 78,1% of the employees are male and 22% female, the figure for male is slightly lower and the figure for female slightly higher in the survey. Only a few regional companies in their annual reports detail the number of employees identifying as non-binary, and in replying to the survey it was possible to not disclose one's gender, which is not the case in the companies' annual reports.. Taking these two factors into account, the gender balance in the survey corresponds well with the gender balance in the companies' annual reports.

A world map illustrating the global distribution of the genus *Euphorbia*. The map uses a color-coded system where red indicates the presence of the genus and grey indicates its absence. Red areas are widespread across North America, South America, Europe, North Africa, the Middle East, Asia, and Australia. Grey areas include Greenland, Iceland, the British Isles, the Azores, the Canary Islands, the Cape Verde Islands, the Sahara Desert, the Arabian Desert, the Indian subcontinent, and parts of Southeast Asia and the Pacific.

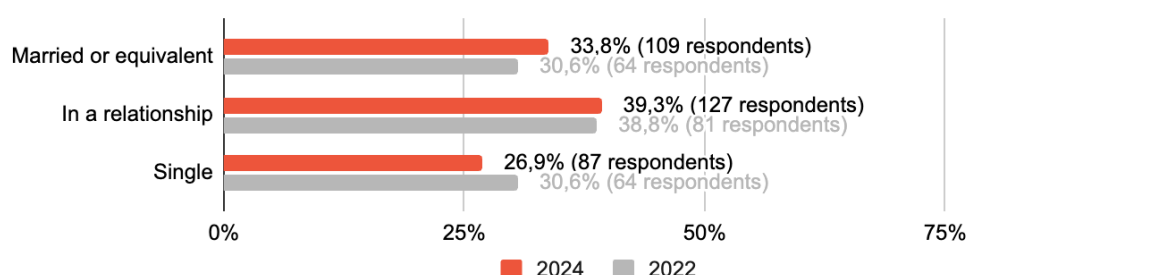
Respondents without Swedish citizenship, and respondents with multiple citizenships with at least one not being Swedish, add up to 40% of the respondents (133 individuals), which could indicate that as many respondents have moved to the region from another country. However, as some countries don't allow multiple citizenships, it's possible that respondents that report only having a Swedish nationality hail from a country other than Sweden. As Sweden allows multiple citizenships, it's also possible that respondents originate from Sweden while also having a foreign citizenship.

The most common nationalities apart from Swedish were British, French, German, and American. The same nationalities that were most common also in 2022. The respondents submitted 38 different nationalities in this year's survey, compared to 35 in 2022.

To complement the survey, Game Habitat asked the ten companies in the region with the most employees to provide lists of employee nationalities. Combining the lists with the survey responses, the results show there are individuals of 77 nationalities, from all continents, in the regional game development industry. An increase from 66 in 2022. All of the 77 nationalities are also represented in Malmö specifically. Nationalities represented:

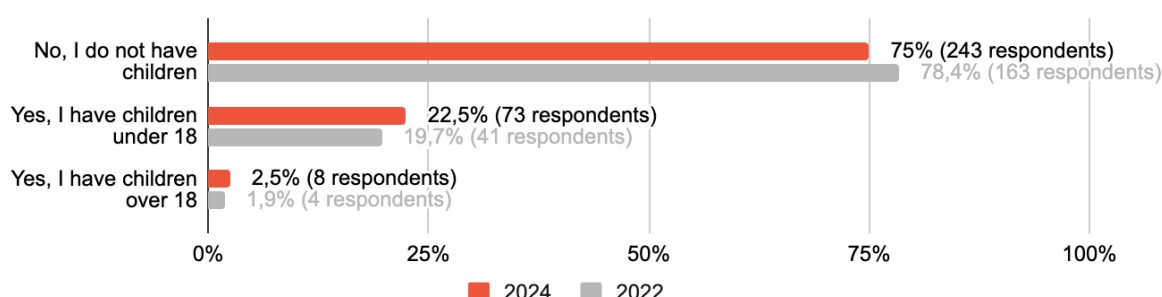
Albania, Argentina, Armenia, Australia, Austria, Azerbaijan, Belarus, Belgium, Bolivia, Bosnia and Herzegovina, Brazil, Bulgaria, Canada, Chile, China, Colombia, Costa Rica, Croatia, Cuba, Czech Republic, Denmark, Egypt, Estonia, Finland, France, Georgia, Germany, Ghana, Greece, Hungary, Iceland, India, Indonesia, Iran, Iraq, Ireland, Israel, Italy, Jamaica, Japan, Latvia, Libya, Lithuania, Mexico, Morocco, New Zealand, Nigeria, North Macedonia, Norway, Pakistan, Peru, Poland, Portugal, Romania, Russia, Serbia, Singapore, Slovakia, Slovenia, South Africa, South Korea, Spain, Sweden, Switzerland, Taiwan, Thailand, The Netherlands, The Philippines, Tunisia, Turkey, Ukraine, United Kingdom, United States of America, Uruguay, Uzbekistan, Venezuela, and Vietnam.

4. Which of the following best describes your civil status?



33,8% of the respondents state they are married or equivalent, 39,3% state they are in a relationship, and 26,9% say they're single. The numbers are comparable to the 2022 survey. In total 323 responses were submitted in this year's survey, and 209 in 2022.

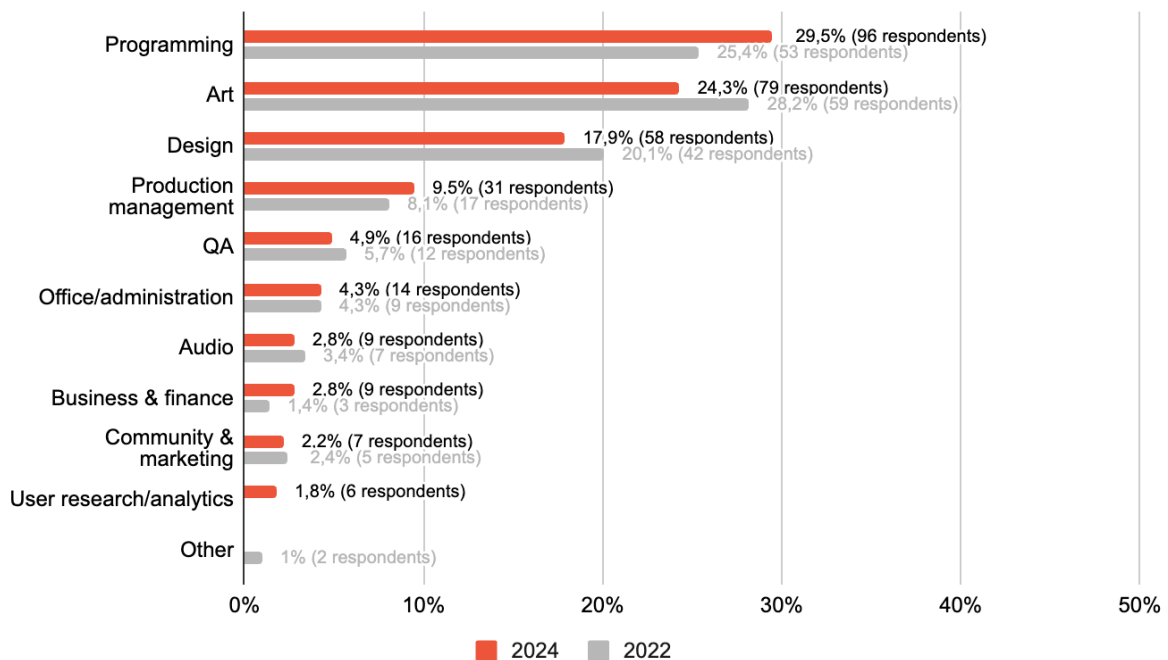
5. Do you have children?



25% of the respondents state they have children, compared to 21,6% in the 2022 survey. This reflects the young workforce that the regional game development industry consists of. It also reflects the Swedish average for when individuals become parents the first time, which in 2023 (the latest available data) was 30,4 years of age for females and 32,4 for males according to Statistics Sweden². In total 324 responses were submitted in this year's survey, and 208 in 2022.

² <https://www.scb.se/pressmeddelande/rekordhog-medelalder-bland-forstagangsforaldrar>

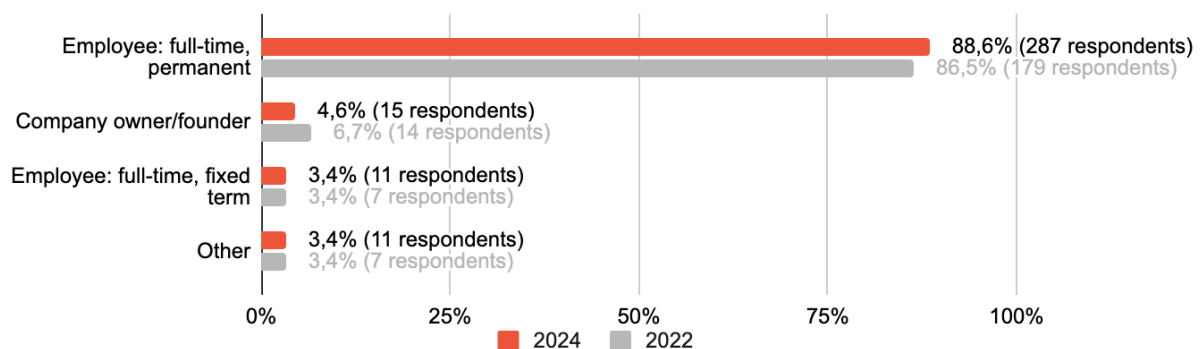
6. Which of the following best captures the work that you do?



Among the respondents, *Programming*, *Art*, and *Design* are the most common professions. These are also the most common professions in the industry in general. Compared to the 2022 survey, *Programming* and *Art* have changed place in the top, but most other results are similar. *Other* includes *Project management* and *Localisation*.

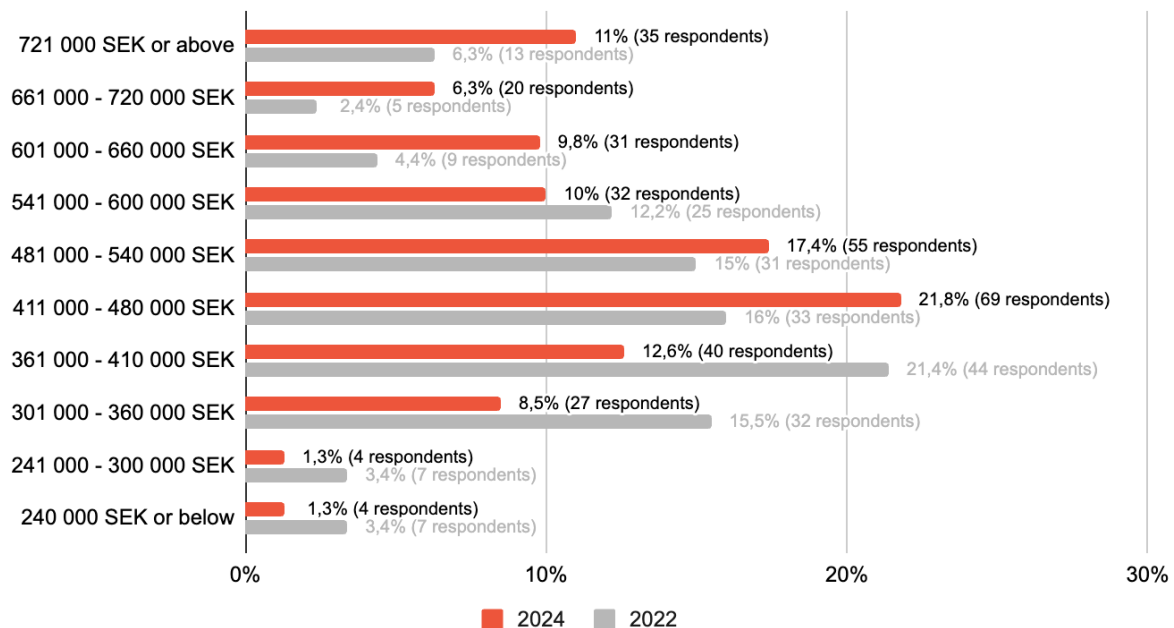
In this year's survey, three predefined alternatives had been adjusted compared to the 2022 survey: QA was added, *Production management* was rephrased from *Production*, and *Office/administration* was rephrased from *Office management*.

7. What type is your current employment contract?



The vast majority, 88,6%, of the respondents have a full-time permanent contract. The same was true in the 2022 survey. *Other* contracts include permanent part-time, freelancer/consultant, student, and probationary employment. In total 324 responses were submitted in the 2024 survey, and 207 in 2022.

8. Which of the following best describes your annual compensation before tax?



Annual compensation rates are distributed relatively evenly across respondents. The same was true in the 2022 survey. Compared to the 2022 survey however, more respondents stated higher salaries in 2024. This might be because of annual salary increases, and/or because respondents in this year's survey are slightly older than in 2022, as older employees commonly earn more than younger employees. According to Statistics Sweden, the average salary in Sweden, including all industries, in 2023 (the latest available data), was 39 900 SEK per month (478 800 SEK annually)³. Meaning at least 54,5% of the respondents in the survey have a salary above the Swedish average, an increase from 40,3% in the 2022 survey.

Also looking at the median salary in Sweden, which in 2023 (the latest available data) was 35 600 SEK per month (427 200 SEK annually)⁴, the majority of the respondents report earnings above the Swedish average.

All figures in the graph are in SEK. In total 317 responses were submitted in the 2024 survey, and 206 in 2022.

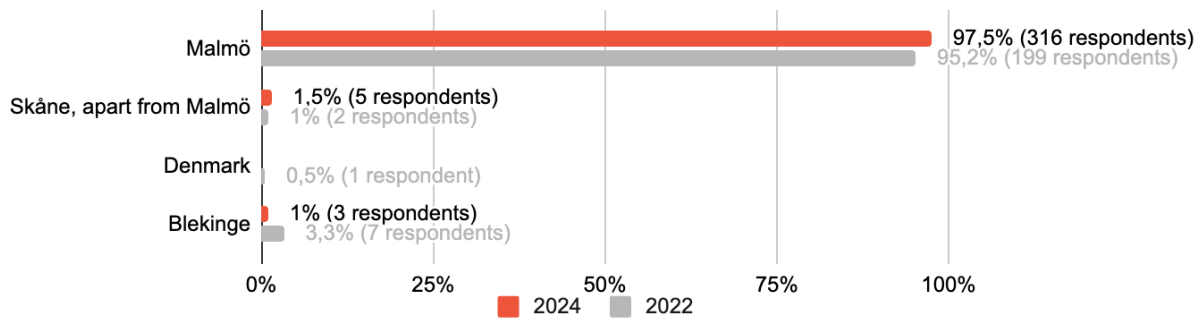
³

<https://www.scb.se/hitta-statistik/sverige-i-siffror/utbildning-jobb-och-pengar/medelloner-i-sverige>

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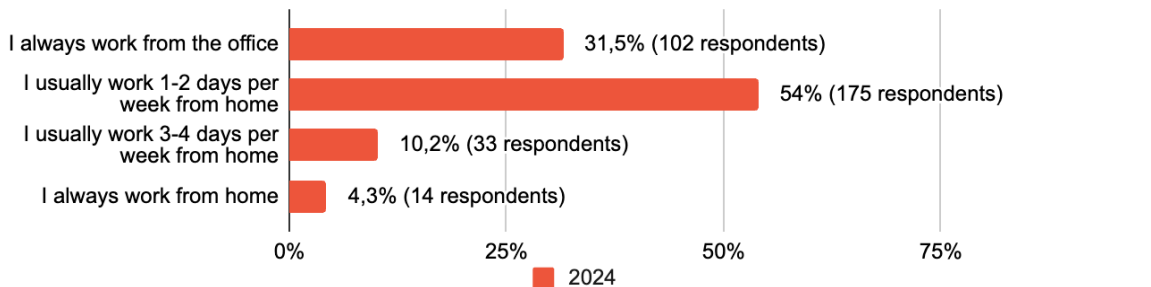
<https://www.scb.se/hitta-statistik/sverige-i-siffror/utbildning-jobb-och-pengar/medianloner-i-sverige>

9. Where is the office you most regularly work from located?



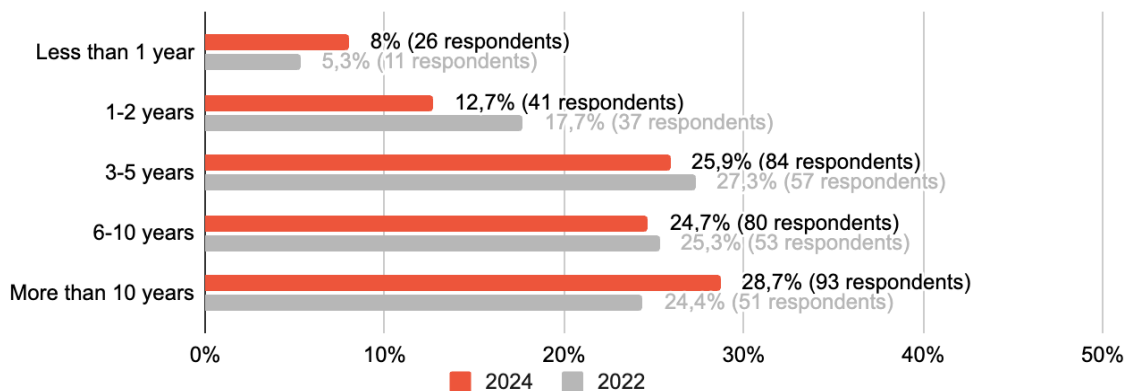
The vast majority, 97,5%, of the respondents in the survey work most regularly in Malmö. A slight increase compared to the 2022 survey. The figure corresponds with the figure based on the regional companies' annual reports which state that 94% of the staff are employed by companies located in Malmö.

10. Do you work from home?



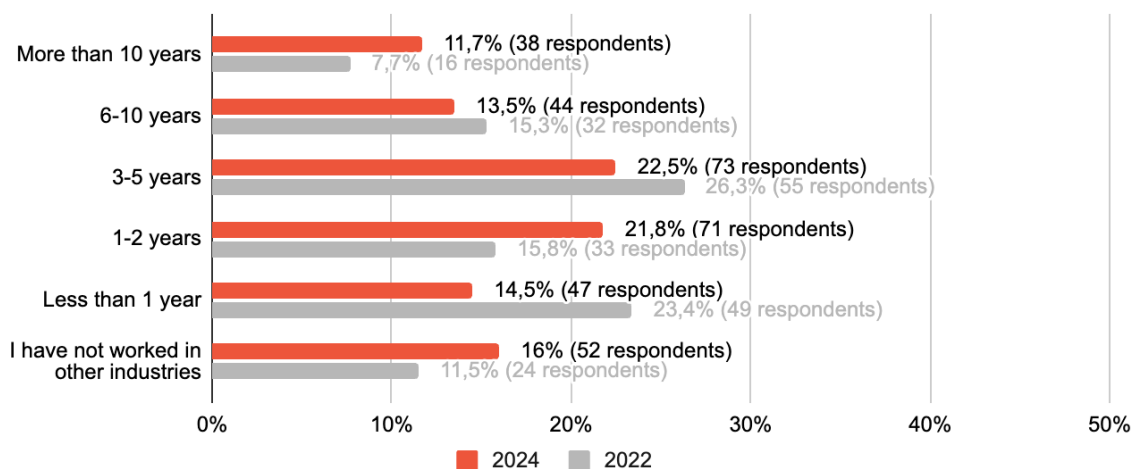
54% of the respondents state they work from home 1-2 days per week, and 31,5% state they always work from the office. The results reflect the bigger regional game companies' policies on working from home. Employees at most of the bigger companies in the region are able to work from home up to twice a week, whereas a few other regional companies in their policies state that work is primarily done from the office. The question was new in the 2024 survey. In total 324 responses were submitted.

11. How many years of work experience do you have in the game development industry?



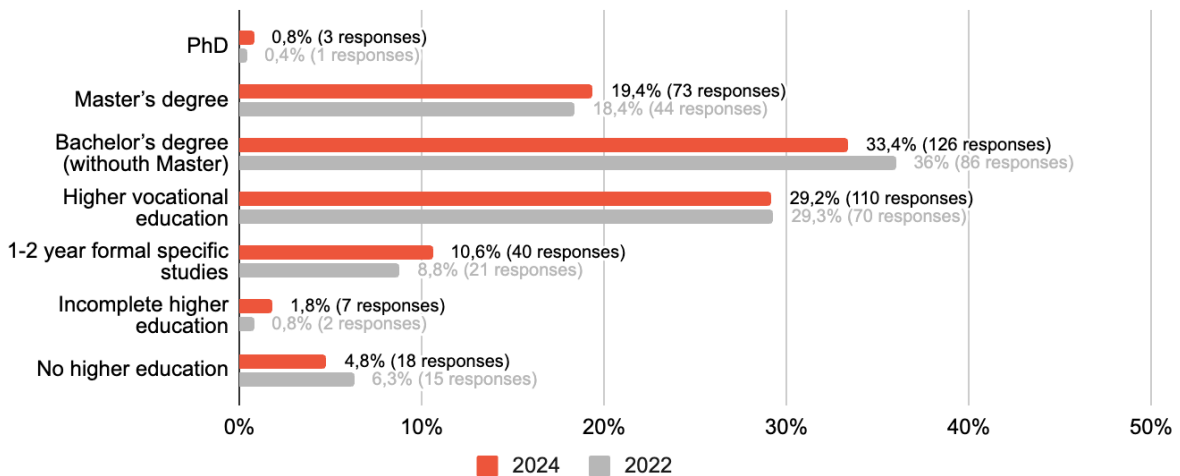
The survey shows an experienced workforce, despite its average young age, with 53,4% of the respondents having worked six years or more in the game development industry. 28,7% of the respondents state they have worked more than 10 years in the industry. Both figures are slight increases from the 2022 survey. In total 324 responses were submitted in the 2024 survey, and 209 in 2022.

12. How many years of work experience do you have in other industries?



The vast majority, 84%, state they have worked in an industry other than the game development industry. A slight decrease compared to the 2022 survey.

13. What education have you completed?



All respondents state they completed high school/upper secondary school, the same was true in the 2022 survey. 18 respondents did not continue with higher education, another seven started a higher education but never graduated. Meaning 92,3% of the respondents, 299 individuals, did complete at least one higher education, a slight increase from 91,8%, 191 individuals, in the 2022 survey.

The most common degree is a Bachelor's degree, followed by a higher vocational education. The same as in the 2022 survey.

39 respondents, equal to 12% of the respondents, state they've completed both an academic (PhD, Bachelor's, or Master's) and a non-academic education (higher vocational education, or 1-2 year formal specific studies). A slight increase from 9,1%, 19 respondents, in 2022. 32 respondents, 25,4% of the respondents with a Bachelor's degree (not including respondents who also completed a PhD or Master's degree), and 7 respondents, 9,6% of the respondents with a Master's degree (not including those who also completed a PhD), did also complete a higher vocational education or 1-2 year formal specific studies. Corresponding numbers in the 2022 survey were 16 respondents, 18,6% of the respondents with Bachelor's degree, and 3 respondents, 6,8% of the respondents with a Master's degree.

47 respondents, 14,5% of all the respondents, completed two higher educations (not including Bachelor's or Master's degree required to complete the next academic level of education). Corresponding numbers in the 2022 survey were 29 respondents, 13,9% of the respondents. One respondent in the 2024 survey stated he/she completed three higher educations.

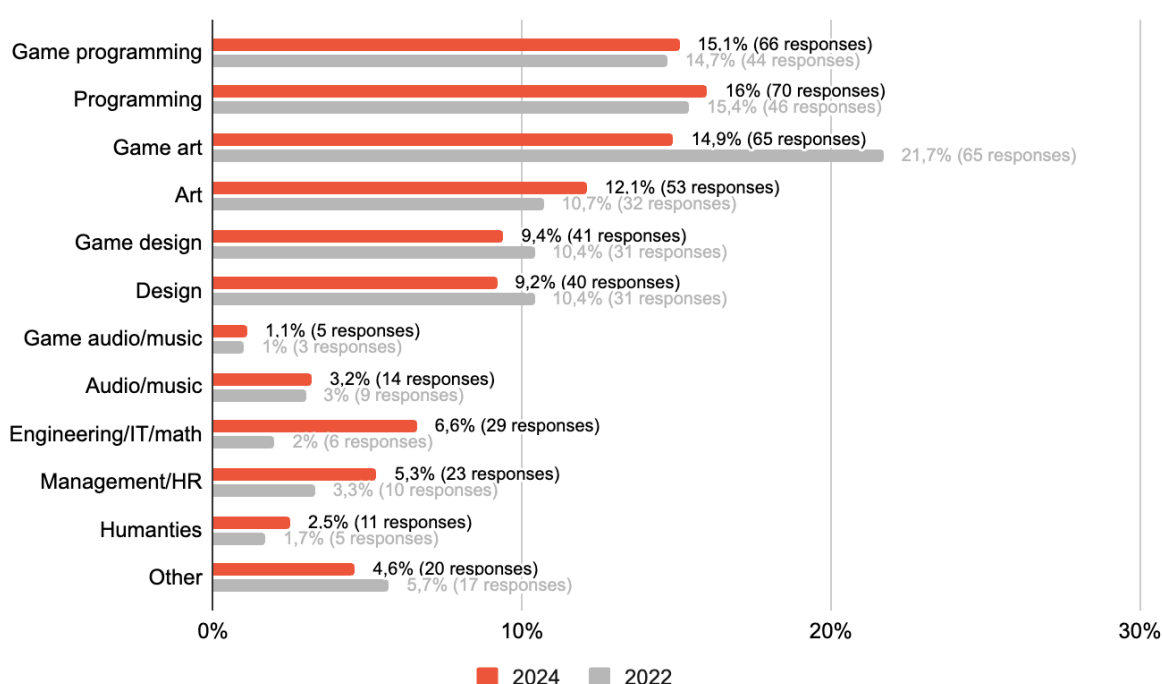
More respondents, 202 in total, or 62,3% of all respondents, have completed an academic education (Bachelor's, Master's, or PHD) than respondents who have completed a non-academic education (higher vocational education, or 1-2 year formal specific studies), 150 respondents, or 46,3%. In 2022, the corresponding numbers were 129 and 82, 62% and 39,4% respectively.

53,6% of the responses is a completed academic education (PhD, Bachelor's, or Master's), and 39,8%, are completed non-academic education (higher vocational education, or 1-2 year formal specific studies). Corresponding numbers in the 2022 survey were 54,8%, and 38,1% respectively.

Higher vocational education (yrkeshögskola) and 1-2 year formal specific studies (such as folkhögskola) are common game development specific educations. Formal training, regardless of type, is often the easiest way to enter the game development industry.

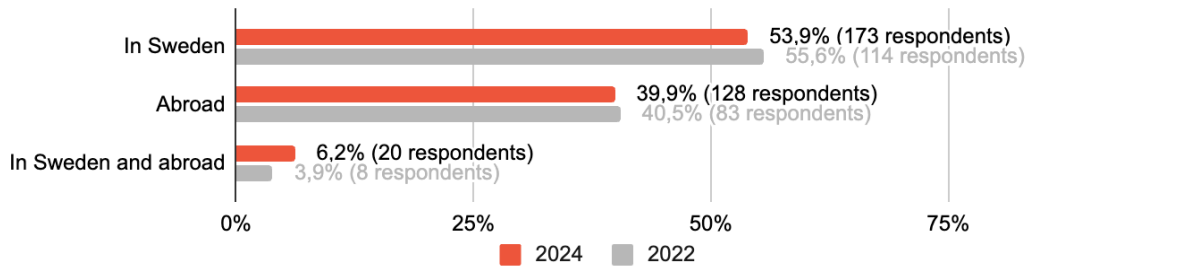
In total 324 respondents submitted 377 responses in the 2024 survey, and 208 respondents submitted 239 responses in 2022.

14. What was the main subject in your main education?



Programming is the most common main subject of education among the respondents, followed by *Game programming*, and *Game art*. This is different from the 2022 survey when *Art* was the most common subject. *Engineering/IT/math*, and *Management/HR* also increased significantly in this year's survey. The most common professions among respondents (survey questions 6) was *Programming*, *Art*, and *Design*, which correlates well with what the respondents have studied. This was also true in the 2022 survey. *Other* include education such as *Communications*, *Law*, *Archaeology*, and *Psychology*. Of the total responses, 40,5% were game-specific educations. A decrease from 47,8% in the 2022 survey. In total 318 respondents submitted 437 responses, meaning several respondents have completed more than one education. In the 2022 survey, 204 respondents submitted 299 responses.

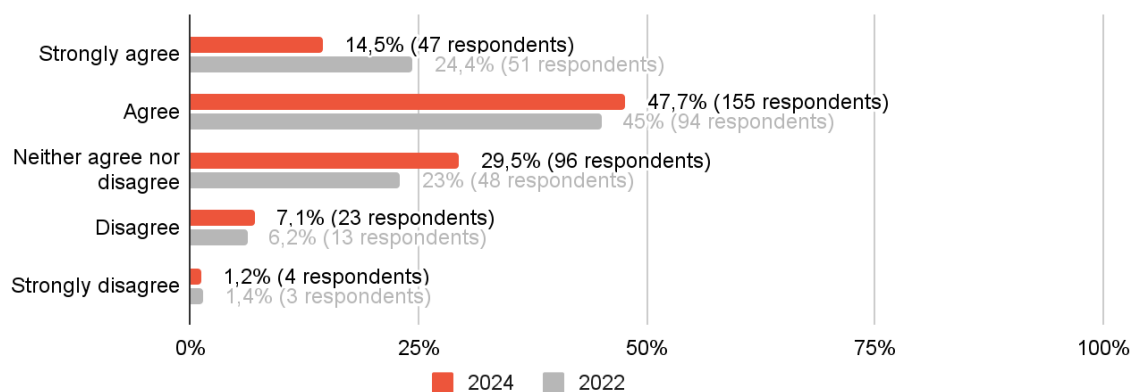
15. Have you studied in Sweden or abroad?



60% of the respondents have studied in Sweden, and 40% abroad. The results are similar to those in the 2022 survey. In total 321 responses were submitted in the 2024 survey, and 205 in 2022.

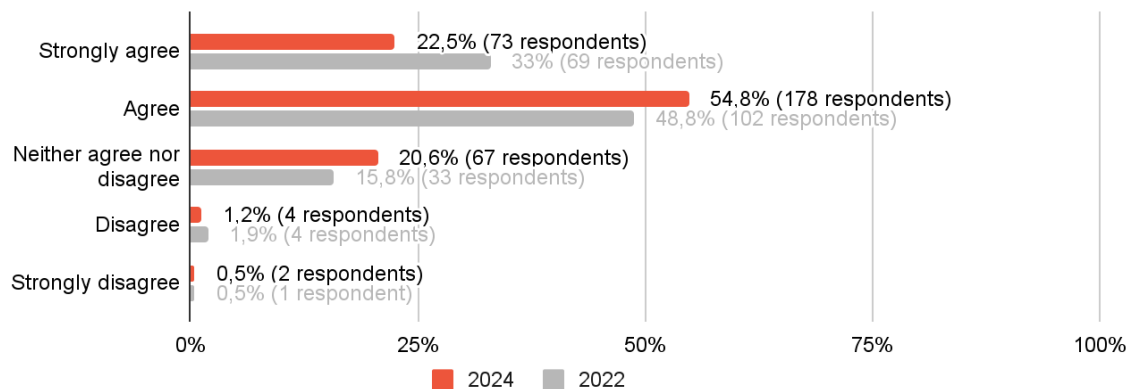
The game developers' experiences and opinions

16. The game development industry in general is a great industry to work in



Most respondents are fond of their industry in general, with 62,2% strongly agreeing or agreeing with the statement that the industry in general is *great* to work in. However, 8,3% disagree or strongly disagree with the statement. The results can be translated into a numerical value on a scale from -2 to 2, with 0 being neutral, making it possible to calculate a median and an average. The median in this year's survey was 1, the same result as in 2022. However, the average response in 2024 is 0,67, compared to 0,85 in 2022. The biggest difference from the 2022 survey is the significant decrease in strongly agree. A turbulent past year in the global games industry with layoffs and studio closures could be part of the reason why the respondents state they're less positive to the industry in this year's survey compared to the 2022 survey.

17. The game development industry in south Sweden is a great industry to work in



The vast majority of respondents are fond of the south Swedish game development industry, with 77,3% strongly agreeing or agreeing with the statement that the industry in general is *great* to work in. The figure is higher than the one for the industry in general, which was 62,2%. The number of respondents that disagree or strongly disagree with the statement is also significantly fewer than for the industry in general.

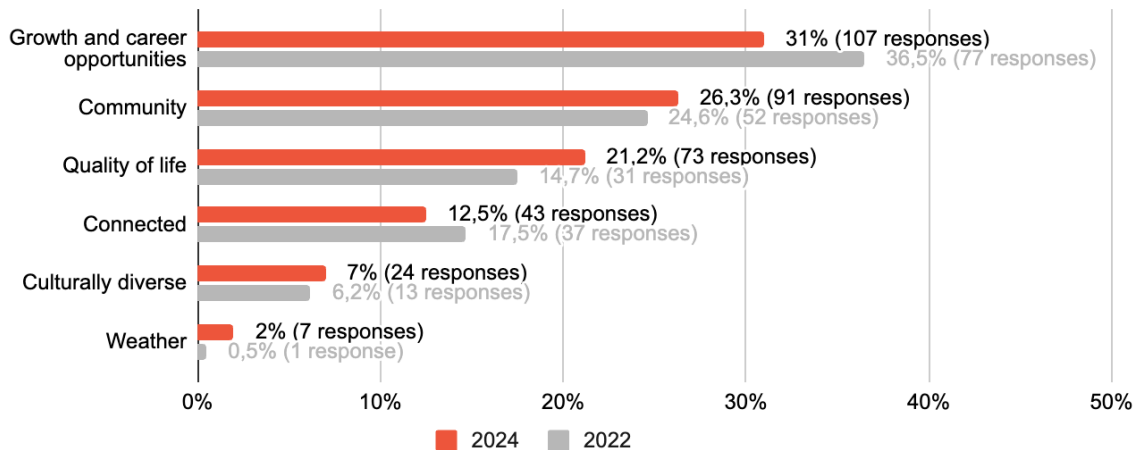
The results can be translated into a numerical value on a scale from -2 to 2, with 0 being neutral, making it possible to calculate a median and an average. The median in this year's survey was 1, the same result as in 2022. However, the average response in 2024 is 0,98, compared to 1,12 in 2022. The average response is higher than for the industry in general, and the decrease is slightly smaller compared to the 2022 survey for the regional industry.

Comparing the results, the respondents' attitude towards the regional south Swedish industry is more positive than the attitude towards the industry in general. However, the average has decreased since the last measurement. The biggest difference from the 2022 survey is the significant decrease in strongly agree, similar to the results for the industry in general. The economic downturn and the turbulence in the global game development industry has hit south Sweden as well, this could be part of the reason why the respondents state they're less positive to the regional industry in this year's survey compared to the 2022 survey.

Comparing the results for respondents who moved to the region from elsewhere in Sweden or from abroad, and respondents originating from the region, only small differences emerge. The most significant being that respondents who moved to the region from elsewhere in Sweden or from abroad have more positive attitudes towards the regional industry compared to respondents who originate from the region. This is also different from the results from the 2022 survey. 77,7% of the respondents who moved to the region from elsewhere in Sweden or from abroad strongly agreed or agreed with the statement, compared to 76,3% for respondents who originate from the region. In the 2022 survey, 80% of the respondents who moved to the region from elsewhere in Sweden or from abroad strongly agreed or agreed with the statement, compared to 83% for respondents who originate from the region.

In total 324 responses were submitted in the 2024 survey, and 209 in 2022.

18. In your opinion, what is the **best** thing about Malmö and southern Sweden as a game development region?



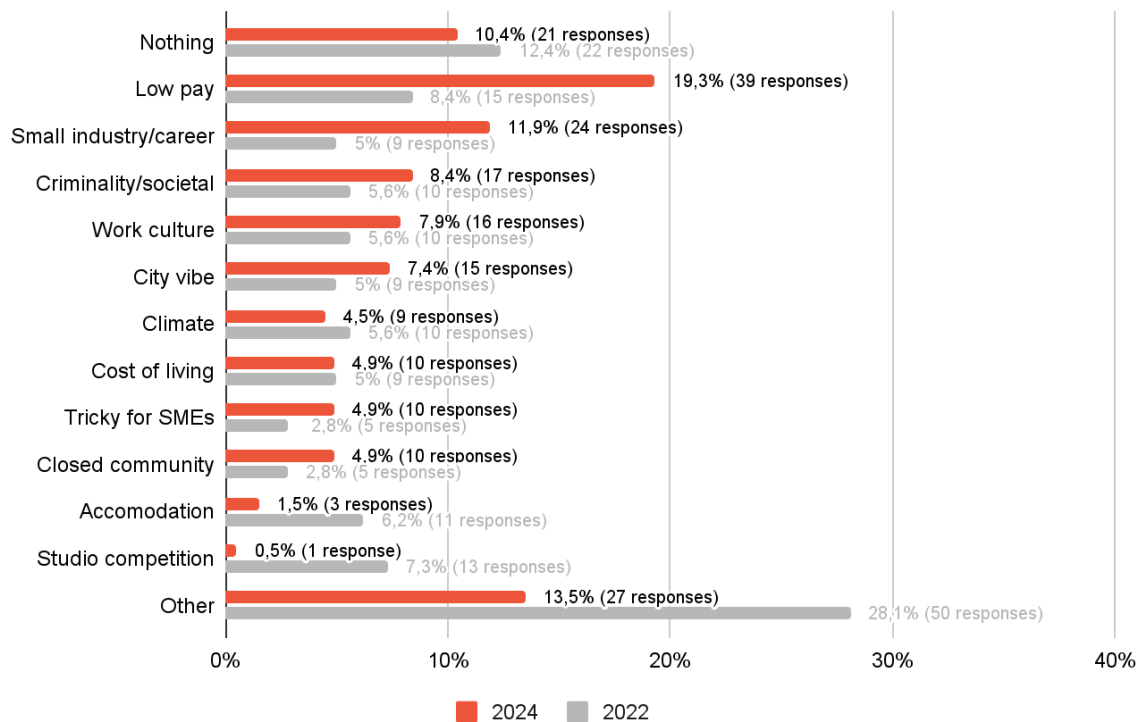
The most common responses were *Growth and career opportunities* followed by *Community* (as in the individuals in the ecosystem and the opportunities for social activities), *Quality of life* (as in working conditions, costs of living, size of the city of Malmö etc), *Connected* (as in good connections to the rest of the world), *Culturally diverse*, and *Weather*. Compared to the 2022 survey, the importance of *Quality of life* has increased significantly, and *Connected* and *Growth and career opportunities* have decreased.

This was an open-ended question, and responses have been clustered in categories. It's therefore possible to provide more than one response per respondent. In total 214 respondents submitted 345 responses. In the 2022 survey, 178 respondents submitted 211 responses.

Examples of the most commonly submitted responses:

- “Compared to the rest of the industry the work life balance is OUTSTANDING, beautiful seaside town, and Swedish labour laws promise more job security. The people are really nice too.”
- “Tight knit community, a lot of cross-studio social gatherings as well as good vibes”
- “A lot of opportunities, a nice work culture”
- “The impressive amount and diversity of game studios”
- “City layout is quite compact. Being able to bike anywhere. Easy to find apartments. Relatively low living costs compared to Copenhagen and Stockholm. Great career and networking opportunities.”
- “It's a very migrant-friendly area. Knowing English only you could easily live here and not feel isolated”
- “Relatively mild weather - comfortable summers and mild winters”
- “The amount of studios both small and large, and people from different cultures living and working together”

19. In your opinion, what is the worst thing about Malmö and southern Sweden as a game development region?



Apart from *Nothing*, the most common responses were *Low pay*, *Small industry/career opportunities*, *Criminality/societal development*, and *Work culture*. This is slightly different from the 2022 survey when responses were more evenly distributed. The biggest differences is the significant increase in *Low pay* and *Small industry/career opportunities* in this year's survey, and the decrease in *Accommodation* and *Studio competition*. The general turbulence in the industry could be one reason for the differences in the results.

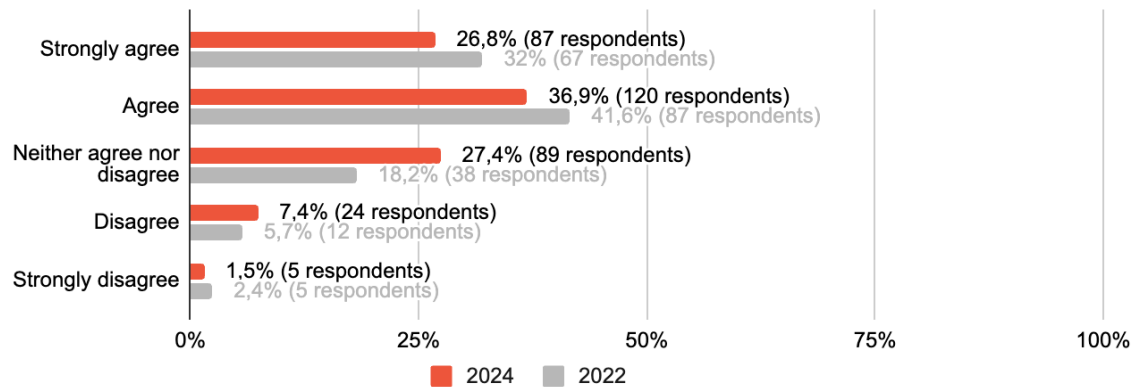
This was an open-ended question, and responses have been clustered in categories. It's therefore possible to provide more than one response per respondent. However, a threshold at 5% in either year's survey, equal to nine or fewer responses in 2024 and eight and fewer in 2022, has been implemented to focus on the most common responses. *Other* includes 27 different categories of responses, such as *Nature*, *Far from family*, *Location*, *Bureaucracy*, *Cultural and language barriers*, *Segregation*, *Finding talent*, *Diversity*, and *Connectivity to the rest of the games industry*. Compared to the previous question, the variety of responses is much bigger but there are only about half as many responses in total, not counting *Nothing*. In total 176 respondents submitted 202 responses in the 2024 survey, and 174 respondents submitted 178 responses in 2022.

Examples of the most commonly submitted responses:

- "Salaries are not high enough"
- "The amount of job opportunities"
- "Weather is awful"
- "Malmö, as any large city, has its problems with criminality"

- “Swedish work culture is very different from mine (southern Europe). Here people tend to avoid conflict a lot, which can be very frustrating.”
- “Difficult to get into the industry without knowing someone or being exceptional”
- “Not very central in Europe (difficult to get to places without flying)”
- “There are only a handful of bigger companies to work at”

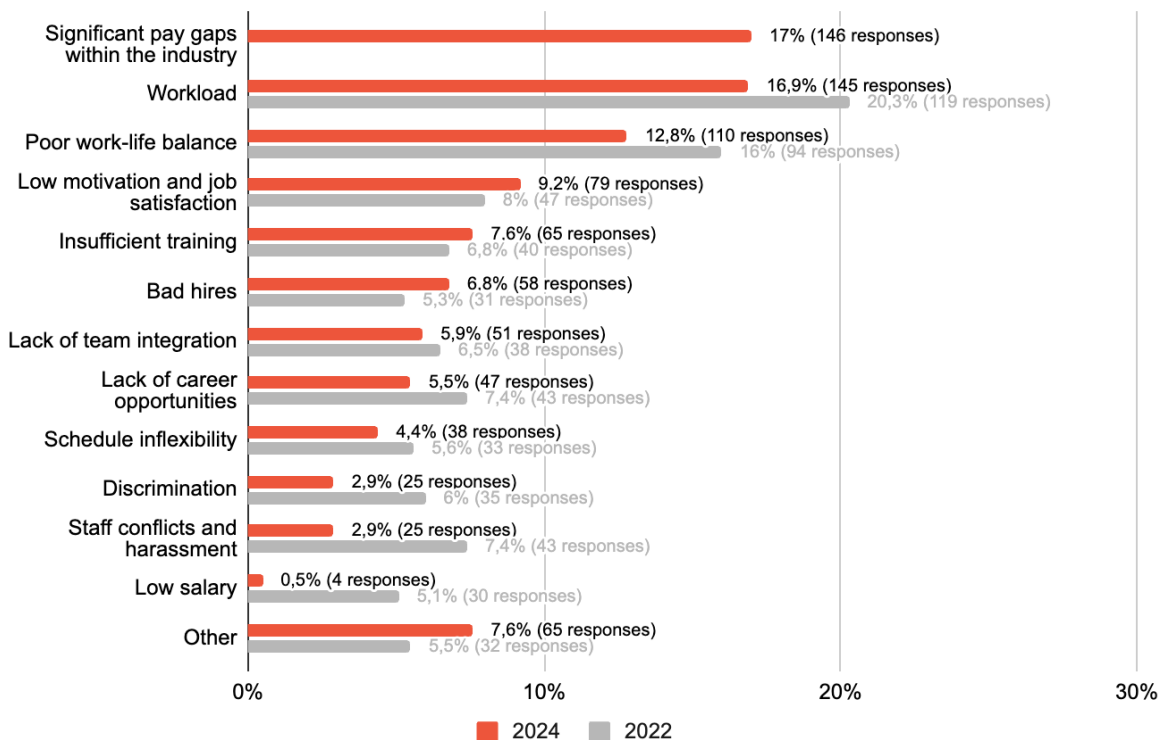
20. Ten years from now, I see myself still working in the industry



63,7% of the respondents say they are likely to keep working in the game development industry for the next ten years. This is a decrease from 73,6% in 2022. The past year's turbulence in the games industry with layoffs and studio closures could be part of the reason why the respondents state they're less likely to remain in the industry compared to the 2022 survey. 8,9% of the respondents say they are unlikely to remain in the industry for the next ten years, a slight increase from 8,1% in 2022.

The results can be translated into a numerical value on a scale from -2 to 2, with 0 being neutral, making it possible to calculate a median and an average. The median in this year's survey was 1, the same result as in 2022. However, the average response in 2024 is 0,8, compared to 0,95 in 2022.

21. In your opinion, what are the main challenges in the games industry?

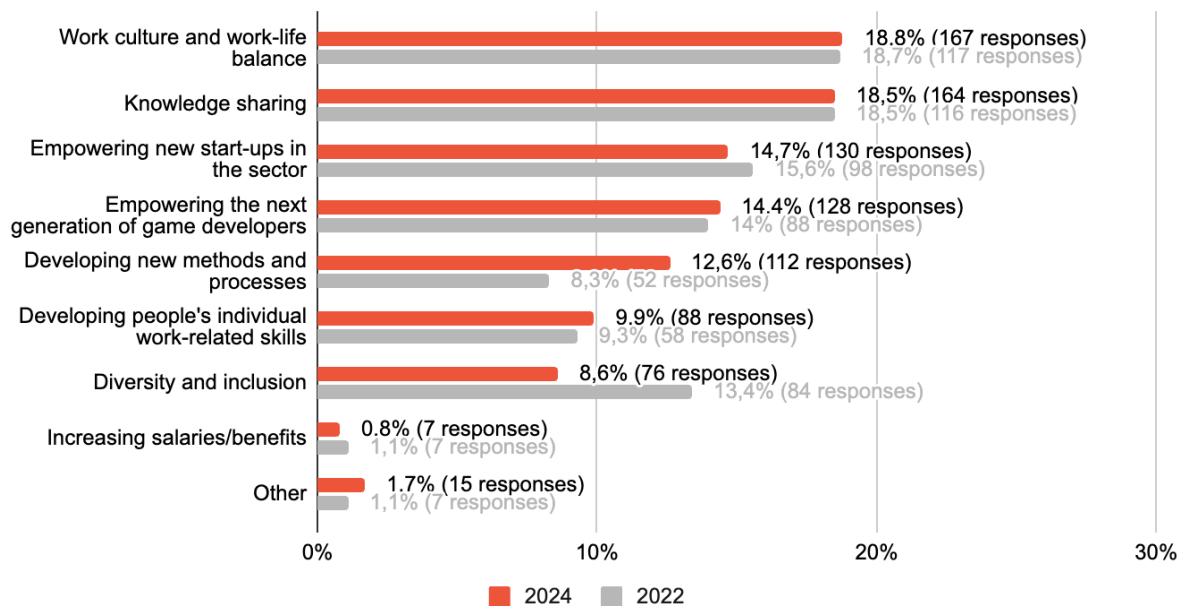


Significant pay gaps within the industry and *Workload* are cited as the main challenges in the industry. In this year's survey, *Significant pay gaps within the industry* was added as a predefined alternative. The alternative was not predefined in the 2022 survey, but some of the open-ended responses that were categorized as *Low salary* in 2022 alluded to the issue. No other changes were done in this year's survey compared to 2022. *Low salary* wasn't a predefined alternative in either survey. Compared to the 2022 survey, the responses differ slightly, most notably on the rise of *Significant pay gaps within the industry* and the decrease of *Workload*, *Poor work-life balance*, *Discrimination*, and *Staff conflicts and harassment*. In the 2022 survey, *Workload* and *Poor work-life balance* stood out as most cited as the industry's main challenges.

Respondents were encouraged to submit their top three challenges, responses have then been clustered in categories. A threshold at 3% in either year's survey, equal to 25 or fewer responses in 2024 and 17 and fewer in 2022, has been implemented to focus on the most common responses. *Other* include responses such as *Poor organisation and leadership*, *Employment insecurity*, *Lack of equipment or technology*, *Competition with the industry*, and *There are no challenges*.

In total 323 respondents submitted 858 responses in the 2024 survey, and 205 respondents submitted 585 responses in 2022.

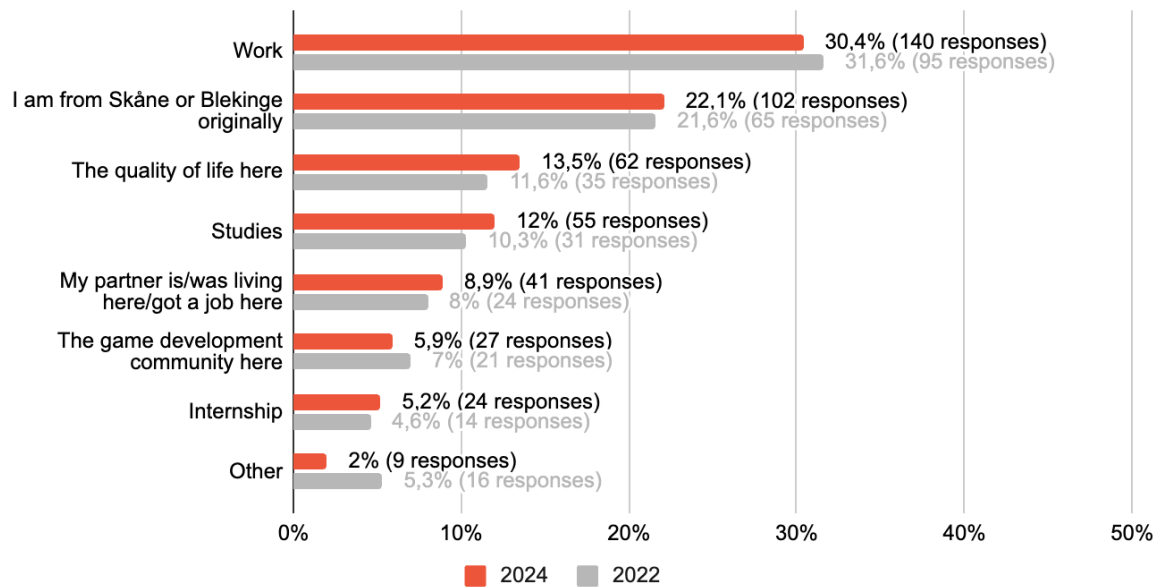
22. In your opinion, what are the most important things for the industry in this region to focus on in the coming 1-3 years?



Work culture and work-life balance, and *Knowledge sharing* stand out as the most important tasks for the regional industry to work on in the coming years according to the respondents. These were also the issues that were the most cited in the 2022 survey. Overall, the responses in this year's survey and the 2022 survey are very similar, the biggest differences are the increase of *Developing new methods and processes*, and the decrease of *Diversity and inclusion*. *Other* includes responses such as *Unionizing*, *Job stability*, *Support for accompanying partner/family*, and *Need for innovation*.

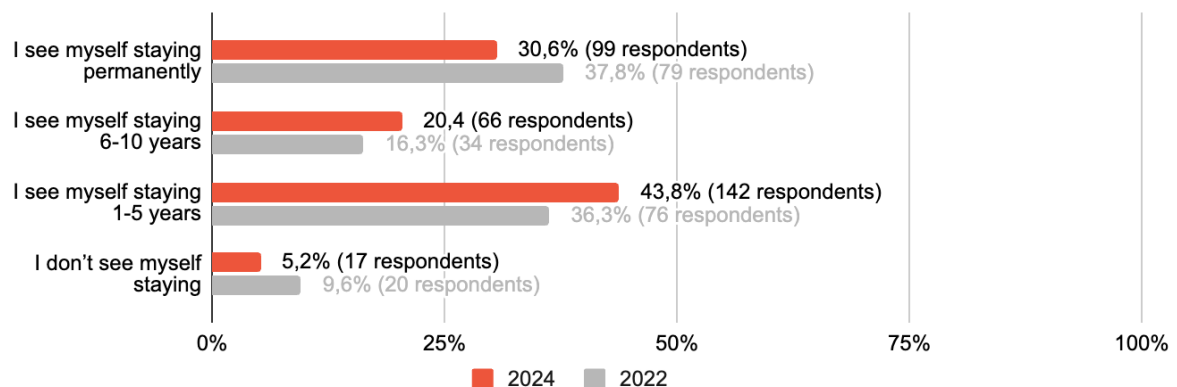
Respondents were encouraged to submit their top three tasks, responses have then been clustered in categories. In total 318 respondents submitted 887 responses in the 2024 survey, and 209 respondents submitted 627 responses in 2022.

23. What made you move to southern Sweden?



Many respondents moved to the region because of work, many also originate from the region. The responses are generally similar to the ones from the 2022 survey. *Other* include responses such as *Proximity to family*, *Culture*, *Particularities of the region* (such as housing market and infrastructure), and *Desire to leave another country*. It was possible to provide more than one response to the question. In total 324 respondents submitted 460 responses in the 2024 survey, and 209 respondents submitted 301 responses in 2022.

24. Do you see yourself still living in southern Sweden in the future?



43,8% of respondents say they'll likely remain in the region for 1-5 years, and 30,6% say they'll likely remain in the region permanently. This is a significant change from 2022 when more respondents expected to remain permanently. Compared to 2022, there's also a significant decrease in respondents not seeing themselves staying.

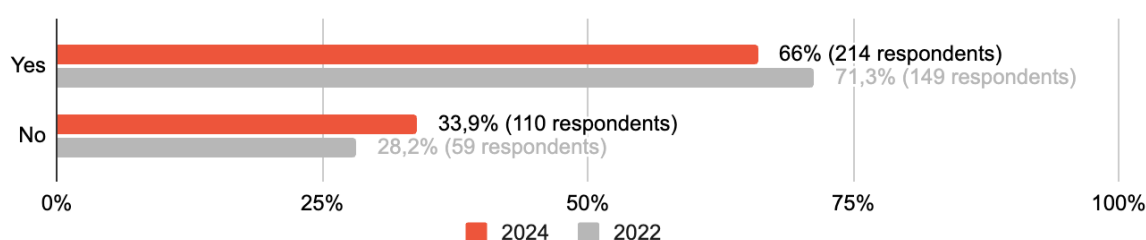
Comparing the results for respondents who moved to the region from elsewhere in Sweden or from abroad, and respondents originating from the region, some differences emerge. The most common response for respondents originating from the region is that they'll likely to

remain in the region (47,5%, compared to 22,8% for respondents who moved to the region from elsewhere in Sweden or from abroad). The most common response for respondents who moved to the region from elsewhere in Sweden or from abroad is that they likely remain in the region for 1-5 years (51,8%, compared to 25,7% for respondents originating from the region). The figures for remaining in the region are slightly lower for both groups in 2024 than in 2022 (58,2% and 28,2% respectively). For respondents saying they're likely to remain in the region 1-5 years, the 2024 figures are higher than in 2022 for respondents who moved to the region from elsewhere in Sweden or from abroad (43,7%), but lower for respondents originating from the region (20,9%).

There is a considerable willingness to stay in south Sweden among respondents, especially considering the relatively young workforce that it is and that their professional skills are applicable at workplaces everywhere in the world. The decrease since 2022 could be attributed to the turbulence in the industry caused by the economic downturn, forcing more respondents to keep an open mind in regards to relocating in order to find a new job if necessary.

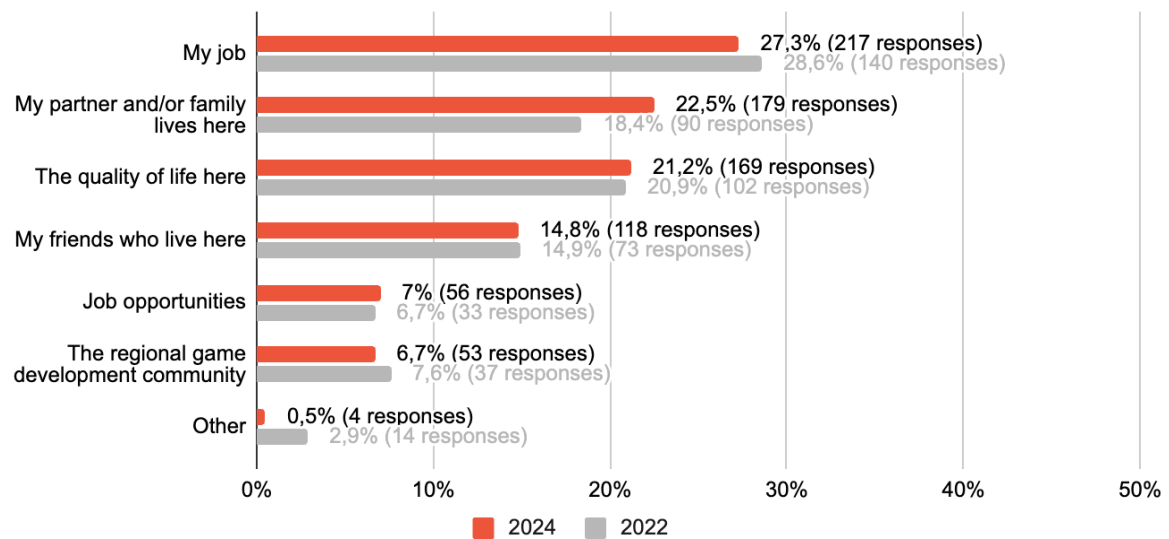
In total 324 responses were submitted in the 2024 survey, and 209 in 2022.

25. Had you heard about the game development industry in Malmö and southern Sweden before applying for and taking up a job here?



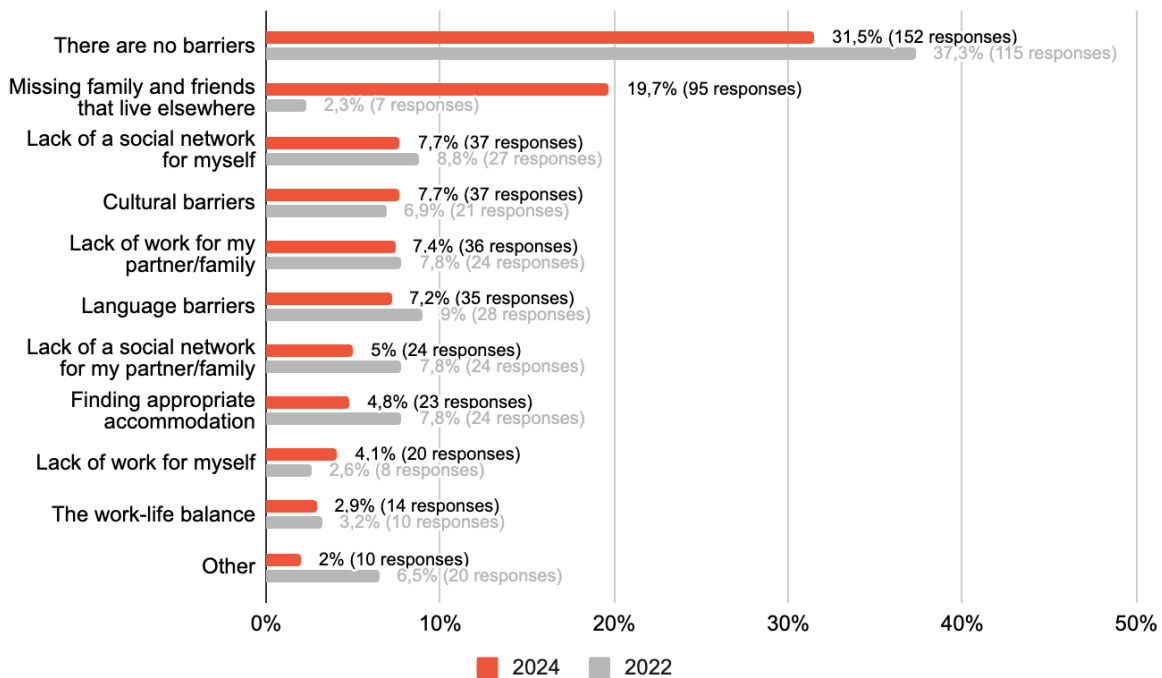
66% of the respondents say they had heard about Malmö and south Sweden's game development industry before taking up a position in the region. It's a slight decrease compared to 2022. In total 324 responses were submitted in the 2024 survey, and 208 in 2022.

26. What are the main reasons you remain in southern Sweden?



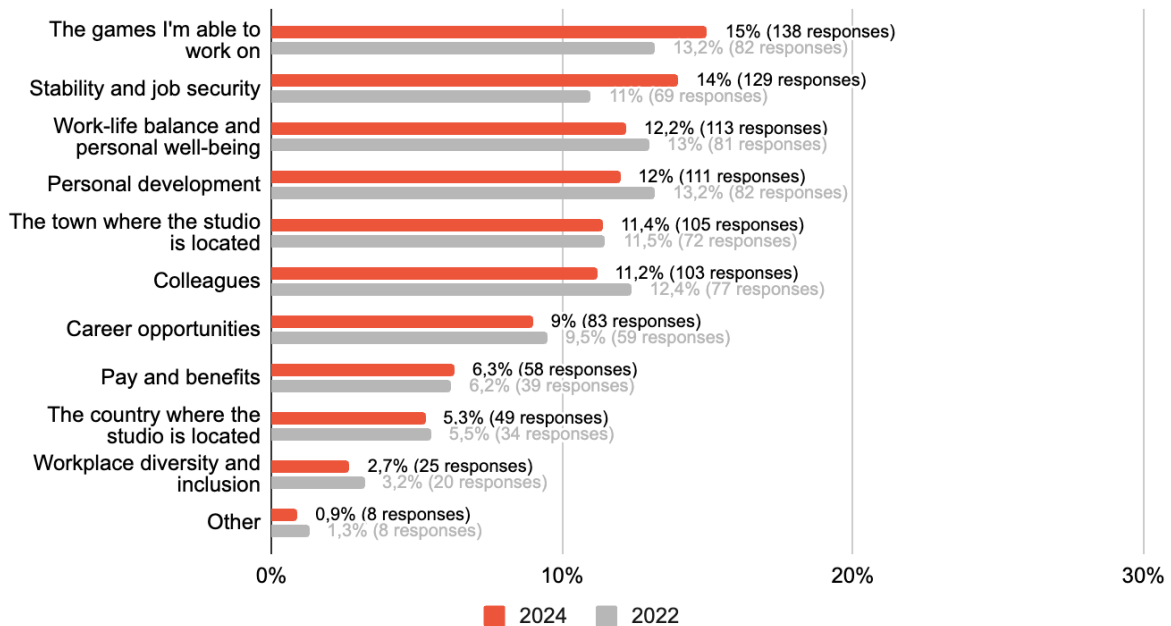
My job is the main reason respondents remain in the region, followed by *Partner and/or family living here* and *Quality of life here*. Compared to the 2022 survey, the biggest difference is the increase in *Partner and/or family living here*, thus also overtaking *Quality of life here* as the second most important reason to remain. *Other* consist of responses such as *Culture*, *Economy*, *Region as a new home*, and *Particularities of the region* (such as housing market and infrastructure). It was possible to provide more than one answer to the question. In total 323 respondents submitted 796 responses in the 2024 survey, and 207 respondents submitted 489 responses in 2022.

27. What are the main barriers for you to stay in southern Sweden?



The most common response was that *There are no barriers* to remain in the region, 44% of the respondents stated this (55% in 2022). *Missing family and friends that live elsewhere* was the second most common response. In this year's survey, *Missing family and friends that live elsewhere* was added as a predefined alternative. The alternative was not predefined in the 2022 survey, but some of the open-ended responses that were categorized as such prompted the change in this year's survey. No other changes were done in this year's survey compared to 2022. Apart from *Missing family and friends that live elsewhere*, no other barriers stand out significantly, and the results are similar to the 2022 survey. *Other* include responses such as *City of Malmö too small*, *Salary*, *Climate*, and *Visa issues*. It was possible to provide more than one answer to the question. In total 320 respondents submitted 483 responses in the 2024 survey, and 208 respondents submitted 308 responses in 2022.

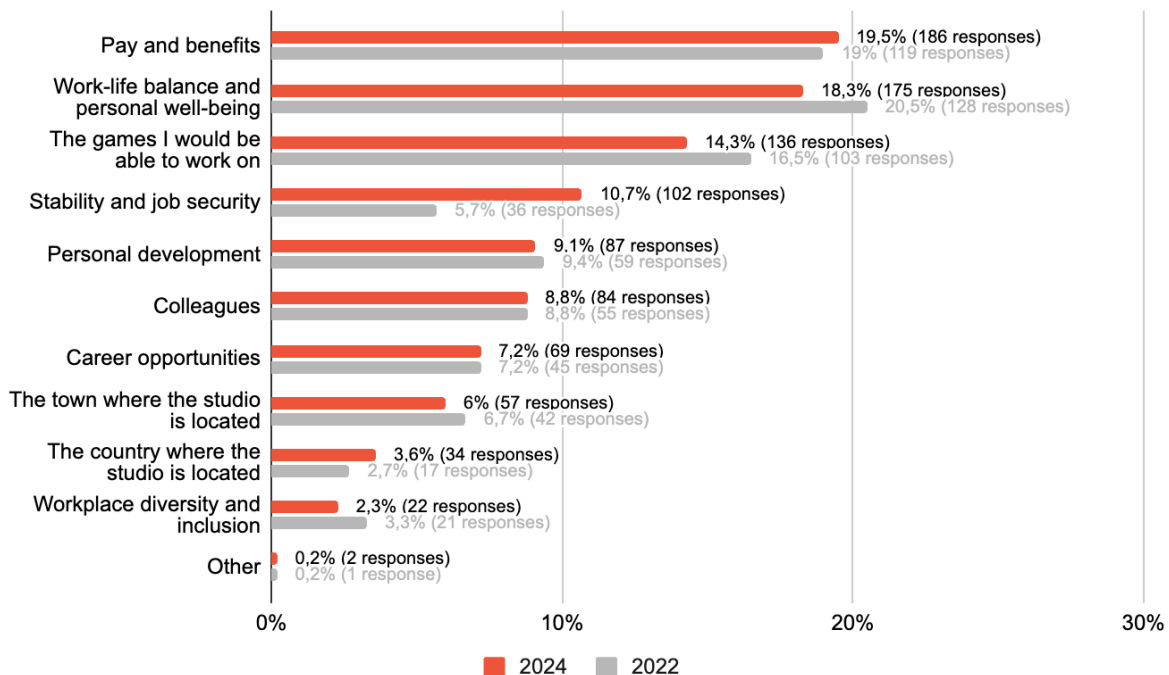
28. What were the main reasons for you to choose your current workplace?



The games I'm able to work on is the main reason respondents choose their current workplace, followed closely by *Stability and job security* which has seen the most significant increase compared to the 2022 survey. The reason for this increase could be attributed to the turbulence in the industry caused by the economic downturn. Similar to the 2022 survey, several reasons rank equally in importance among respondents. Apart from the top two reasons, only small changes compared to the 2022 survey can be noted. *Other* include responses such as *Life situation*, *Technology available*, and *Freedom*.

Respondents were encouraged to submit their top three reasons. In total 324 respondents submitted 922 responses in the 2024 survey, and 209 respondents submitted 623 responses in 2022.

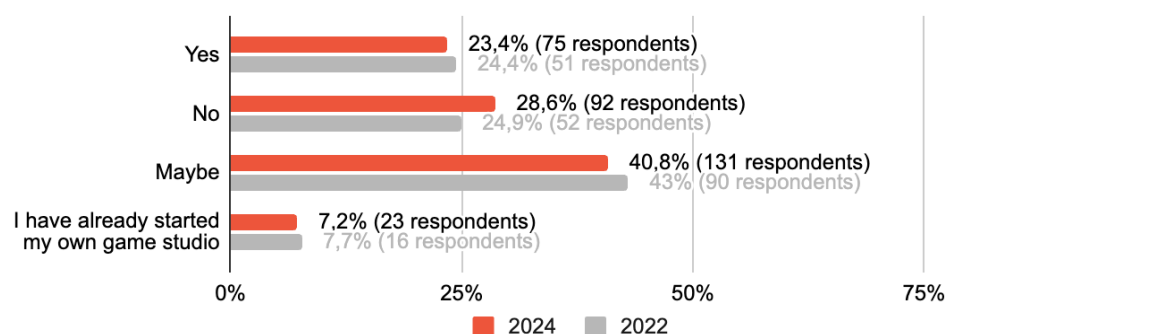
29. If you were looking for a new job within the industry, what factors would be the most important to you?



Pay and benefits, and *Work-life balance and personal well-being* stand out as the main factors respondents value the most should they look for a new job. These were also the main factors in the 2022 survey. Compared to the previous question, the main reasons respondents remain with their current employer, *The game I get to work on* dropped from the most important factor to being the third most important. The same was true in 2022. *Stability and job security* increased significantly in this year's survey compared to 2022, but it's still valued less than in the previous question where it sits in second place at 14%. Other include *Good production workflow*, and *Good organization*.

Respondents were encouraged to submit their top three reasons. In total 323 respondents submitted 954 responses in the 2024 survey, and 209 respondents submitted 626 responses in 2022.

30. Would you like to start your own game studio in the future?



23,4% of the respondents say they would like to start their own game studio some day.

Another 40,8% say they may be interested. Both numbers are slight decreases compared to the 2022 survey.

Looking at solely respondents who in question 22 (In your opinion, what are the most important things for the industry in this region to focus on in the coming 1-3 years?) stated that one of the most important things for the regional industry to focus on in the coming years is to empower new startups, the results look somewhat different. Of the 130 respondents that identified this as an area they want increased focus on, 34,6% say they want to start their own game studio, a significant difference compared to the other respondents. Another 43,8% of these respondents may be interested. The fact that the 130 respondents who wish to see an increased focus on empowering new game startups themselves are more interested in founding a studio might not be surprising. However, the reason these respondents have not done so already, could be attributed to a lack of sufficient regional support. Regardless, the results could be interpreted as there being a strong entrepreneurial will in the region.

Method

The survey and questions were developed in 2022 by an external contractor, Viva Media (previously known as ID Kommunikation), based on input from Game Habitat, the Swedish Games Industry, and selected regional game company representatives. The survey was piloted in a focus group with seven game developers who tested the survey and provided feedback. The input was incorporated into the final survey.

To allow comparisons to be made between this year's survey and the survey from 2022, the questionnaire has remained largely unchanged. Three questions were removed, one question was added (question 10), and for three questions the predefined alternatives were changed to reflect the data from the 2022 survey (questions 6, 21, and 27).

The survey was extended to game development company employees in the regions Skåne and Blekinge via internal channels at each company. The survey was conducted using an online form. It was not mandatory for the respondents to answer any of the questions. No sampling method was used and the survey relied entirely on people's willingness to participate. It is therefore possible that the survey contains a sampling bias. The respondents replied to the survey anonymously.

Several survey questions provided respondents with the possibility of writing a free text answer instead of, or along with, choosing a predefined option. The unique text answers were manually thematised in order to combine similar responses into larger categories.

The data was prepared, and analyzed using Microsoft Excel and Google Sheets.

A total of 325 respondents replied to the survey. The survey was conducted from May to June 2024. The total number of respondents in the 2022 survey was 209. The data and the report were published in November 2024.

Questionnaire

The questionnaire used to survey the respondents is divided differently and questions numbered differently from the report as the questionnaire is tailored to the respondents' needs, and this report primarily to other audiences. Three questions in the questionnaire are not presented in the report.

The questionnaire in full:

Your workplace and experience

**1. How many years of experience do you have in the game development industry?
Regardless of whether you have been working full-time or part-time.**

- a. Less than 1 year
- b. 1-2 years
- c. 3-5 years
- d. 6-10 years
- e. More than 10 years

2. How many years of work experience do you have in other industries?

- a. Less than 1 year
- b. 1-2 years
- c. 3-5 years
- d. 6-10 years
- e. More than 10 years
- f. I have not worked in other industries

3. Which of the following best captures the work that you do?

If you have multiple responsibilities, please pick the one that you spend the most time on.

- a. Programming
- b. Design
- c. Art
- d. Audio
- e. QA
- f. Production management
- g. Community & marketing
- h. Business & finance
- i. Office/administration
- j. Other: _____

4. What type is your current employment contract?

- a. Company owner/founder
- b. Employee: full-time, permanent
- c. Employee: full-time, fixed term
- d. Employee: part-time, permanent
- e. Employee: part-time, fixed term
- f. Freelancer/Consultant
- g. Student
- h. Other

5. How many people work at your current studio?

If you work as a freelance consultant, pick the option that describes where you spend most of your time.

- a. Sole employee
- b. 2-9
- c. 10-49
- d. 50-249
- e. 250 or more

6. Where is the office you most regularly work from located?

- a. Malmö
- b. Skåne apart from Malmö
- c. Blekinge
- d. Denmark

7. Do you work from home?

- a. I always work from the office
- b. I usually work 1-2 days per week from home
- c. I usually work 3-4 days per week from home
- d. I always work from home

Attitudes towards the games industry

How strongly do you agree or disagree with the following statements?

8. The game development industry IN GENERAL is a great industry to work in.

- a. Strongly disagree
- b. Disagree
- c. Neither agree nor disagree
- d. Agree
- e. Strongly agree

9. The game development industry IN SOUTH SWEDEN is a great industry to work in.

- a. Strongly disagree
- b. Disagree
- c. Neither agree nor disagree
- d. Agree
- e. Strongly agree

10. Ten years from now, I see myself still working in the game development industry.

- a. Strongly disagree
- b. Disagree
- c. Neither agree nor disagree
- d. Agree
- e. Strongly agree

11. In your opinion, what are the main challenges in the game industry?

Please choose your top 3.

- a. Workload
- b. Poor work-life balance
- c. Schedule inflexibility
- d. Insufficient training

- e. Staff conflicts and harassment
- f. Lack of team integration
- g. Discrimination
- h. Low motivation and job satisfaction
- i. Bad hires
- j. Significant pay gaps within the industry
- k. Lack of equipment or technology
- l. Lack of career advancement opportunities
- m. There are no challenges in the game industry
- n. Other: _____

Work motivations

12. What were the main reasons for you to choose your current workplace?

Please choose your top 3.

- a. The games I am able to work on
- b. Pay and benefits
- c. Work-life balance and personal wellbeing
- d. Stability and job security
- e. Personal development
- f. Career opportunities
- g. Colleagues
- h. Workplace diversity and inclusion
- i. The town where the studio is located
- j. The country where the studio is located
- k. Other: _____

13. If you were looking for a new job within the industry, what factors would be the most important to you?

Please choose your top 3.

- a. The games I am able to work on
- b. Pay and benefits
- c. Work-life balance and personal wellbeing
- d. Stability and job security
- e. Personal development
- f. Career opportunities
- g. Colleagues
- h. Workplace diversity and inclusion
- i. The town where the studio is located
- j. The country where the studio is located
- k. Other: _____

14. Would you like to start your own game studio in the future?

- a. Yes
- b. No
- c. Maybe
- d. I have already started my own game studio

Experiences of Malmö and southern Sweden

15. What made you move to southern Sweden?

You can choose more than one answer.

- a. Internship
- b. Studies
- c. Work
- d. My partner is/was living here
- e. My partner got a job here
- f. The quality of life here
- g. The game development community here
- h. I am from Skåne or Blekinge originally
- i. I don't live in southern Sweden
- j. Other: _____

16. What are the main reasons you remain in southern Sweden?

You can choose more than one answer.

- a. My job
- b. Job opportunities
- c. The regional game development community
- d. My friends who live here
- e. My partner and/or family lives here
- f. The quality of life here
- g. Other: _____

17. What are the main barriers for you to stay in southern Sweden?

You can choose more than one answer.

- a. Language barriers
- b. Cultural barriers
- c. Finding appropriate accommodation
- d. The work-life balance
- e. Lack of work for myself
- f. Lack of work for my partner/family
- g. Lack of a social network for myself
- h. Lack of a social network for my partner/family
- i. Missing family and friends that live elsewhere
- j. There are no barriers for me to stay here
- k. Other: _____

18. Do you see yourself still living in southern Sweden in the future?

- a. Yes, I see myself staying here in the coming 1-5 years
- b. Yes, I see myself staying here in the coming 6-10 years
- c. Yes, I see myself staying here permanently
- d. No, I don't see myself staying here

Malmö and southern Sweden as a game development region

19. Had you heard about the game development industry in Malmö and southern Sweden before applying for and taking up a job here?

- a. Yes
- b. No

20. In your opinion, what is the best thing about Malmö and southern Sweden as a game development region?

21. In your opinion, what is the worst thing about Malmö and southern Sweden as a game development region?

22. In your opinion, what are the most important things for the games industry in this region to focus on in the coming 1-3 years?

Please choose your top 3.

- a. Knowledge sharing
- b. Developing people's individual work-related skills
- c. Developing new methods and processes
- d. Work culture & work-life balance
- e. Diversity & inclusion
- f. Empowering new start-ups in the sector
- g. Empowering the next generation of game developers
- h. Other: _____

Talent pool

23. What age are you?

- a. 20 or younger
- b. 21-25
- c. 26-30
- d. 31-35
- e. 36-40
- f. 41-45
- g. 46-50
- h. 51-55
- i. 56-60
- j. 61 or older

24. To which gender do you identify?

- a. Female
- b. Male
- c. Non-binary
- d. Prefer not to answer
- e. Other: _____

25. Which of the following best describes your civil status?

- a. Single
- b. In a relationship
- c. Married or equivalent

26. Do you have children?

- a. Yes, I have children under 18
- b. Yes, I have children over 18

- c. No, I do not have children

27. Which of the following best describes your annual compensation before tax?

- a. 240 000 SEK or below
- b. 241 000 - 300 000 SEK
- c. 301 000 - 360 000 SEK
- d. 361 000 - 410 000 SEK
- e. 411 000 - 480 000 SEK
- f. 481 000 - 540 000 SEK
- g. 541 000 - 600 000 SEK
- h. 601 000 - 660 000 SEK
- i. 661 000 - 720 000 SEK
- j. 721 000 SEK or above

28. What is your nationality?

If you have more than one, please name them all.

29. What education have you completed?

You can choose more than one answer.

- a. High school/upper secondary school
- b. Bachelor's degree
- c. Master's degree
- d. Higher vocational education (in Swedish: Yrkeshögskola)
- e. 1-2 year formal specific studies (e.g. folkhögskola, Hyper Island, Berghs, other)
- f. Other: _____

30. What was the main subject in your main education?

You can choose more than one answer.

- a. Game programming
- b. Programming
- c. Game Art
- d. Art
- e. Game Design
- f. Design
- g. Game audio/music
- h. Audio/music
- i. Other: _____

31. Would you mind telling us the name of the school and education you attended to complete your main education?

32. Have you studied in Sweden or abroad?

- a. I have studied in Sweden
- b. I have studied abroad
- c. I have studied both in Sweden and abroad

33. Is there anything else you would like to add?
