



SLOVAK GAME DEVELOPMENT INDUSTRY 2021



ACTIVE COMPANIES **63** ::

FINANCE

Overall turnover (M EUR)	€
2016	24.1
2017	36.1
2018	45.7
2019	51
2020	72.2
2021	+84.7

TOP 10 companies based on turnover

1. Pixel Federation
2. PowerPlay Studio
3. SuperScale
4. Inlogic Software
5. Blue Brain Games
6. Studio 727
7. Nine Rocks Games
8. Games Farm
9. Old B1ood
10. 3Division



Overall turnover in 2020

EUR 72,202,888

Estimated overall turnover in 2021

EUR 84,690,118

Turnover of top 10% companies in 2020

EUR 62.2M (86%)

COMPANY LOCATION

Geographical location



Location based on county

Bratislava	52%	Trnava	5%
Košice	25%	Trenčín	2%
Nitra	7%	Žilina	2%
Prešov	7%		

COMPANY PROFILES

Years active



40%	Less than 5 years
36%	5+ years
13%	10+ years
8%	15+ years
3%	20+ years

Legal form



Private company:	83%
Self-employed:	11%
Physical person:	6%

Primary orientation



Own game development	70%
Gamedev related services and activities	17%
Outsourcing	13%

Commissioned work and outsourcing

No commissions or outsourcing	41%	Outsourcing parts and full development of games	22%
Outsourcing parts of games and assets	25%	Outsourcing parts and full development of games, but no contracts yet	12%

EMPLOYEES

 Overall number of employees



Number of employees in top 10% of companies

537



★ Top 10 companies based on employee headcount

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|---------------------|---------------------|
| 1. Pixel Federation | 6. Nine Rocks Games |
| 2. PowerPlay Studio | 7. Games Farm |
| 3. Inlogic Software | 8. Artillery |
| 4. Superscale | 9. 60fps |
| 5. Studio 727 | 10. Cypronia |

82 New working positions opened in 2020

208 New working positions opened in 2021 (est.)

32 Median age of employees

Company size based on employee headcount



Positions hardest to fill

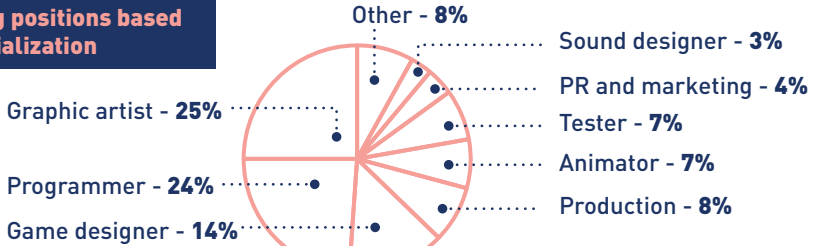


Programmer 27%
Game designer 22%
Animator 21%

Graphic artist 18%
Producer 13%
Marketing and PR 10%

Data analytic 4%
Sound designer 4%
Other 10%

Working positions based on specialization



Number of employees from abroad

80
(9%)

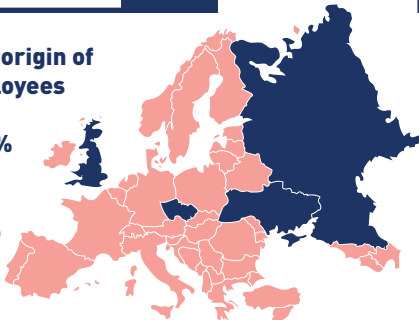


Number of women working in Slovak gamedev

141
(16.2%)

Countries of origin of foreign employees

Czechia - 24%
Russia - 7%
UK - 7%
Ukraine - 5%
Other - 57%



Positions occupied by women

Graphic artist	32%
Producer	16%
Game designer	15%
Marketing and PR	15%
Programmer	10%
HR, operations	10%
Animator	9%
Data analytic	9%
Tester	6%

GAMES

Own full-release games created	26	Games created in cooperation with a third party	147	Overall number of released and unreleased projects being worked on	256
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Primary target platform for released games

71%	PC (Windows)
46%	Android
35%	iOS
29%	Xbox consoles
24%	Playstation consoles
24%	Nintendo Switch
18%	Browser and HTML5
9%	VR/AR

Games published in 2020 via

Self-publishing on PC and mobile	27%
Published via international publisher	12%
Self-publishing on console and VR platforms	10%
Self-publishing on web-based platforms	10%



Developed games financed via



75%	Self-funding	12%	Bank loans
29%	Public funding	9%	International investor
20%	Commission	3%	International publisher
15%	International publisher	3%	Platform holder
15%	Slovak investor		

PANDEMIC AND THE STATE'S ROLE

Did the pandemic influence your company's financial situation?

51%	No
20%	Positively
17%	Negatively
11%	Very negatively
1%	Very positively

Did the pandemic influence your overall project development expenses?

13%	Very negatively	☹️
19%	Negatively	😞
61%	No	😐
6%	Positively	😊
1%	Very positively	😄

Did the pandemic change your development tempo and employee productivity?

34%	No	🕒
33%	Slowed	
17%	Considerably slowed	
11%	Accelerated	
5%	Considerably accelerated	

What support would you appreciate most?

81%	R&D funding
80%	More public funding
78%	Tax incentives and deductions
75%	Better education and education support
67%	Traveling and presentation support
54%	Effective ways of employing foreigners
49%	Favourable loans

Working structure changes after pandemic ends

Not considering any changes	40%
Considering more home office time	27%
Considering permanent home office	15%
Considering less home office	5%
Considering total cancelation of home office	5%