

# SLOVAK GAME DEVELOPMENT INDUSTRY 2024

## COMPANY PROFILES

ACTIVE COMPANIES **69**



YEARS ACTIVE

<b>26%</b> 0 to 2 years	<b>17%</b> 3+ years	<b>31%</b> 5+ years	<b>12%</b> 10+ years	<b>14%</b> 15+ years
-------------------------------	---------------------------	---------------------------	----------------------------	----------------------------



LEGAL FORM

<b>89%</b> Private company	<b>7%</b> Self- employed	<b>3%</b> NGO	<b>1%</b> Physical person
----------------------------------	--------------------------------	------------------	---------------------------------



PRIMARY FOCUS

<b>77%</b> Own game development	<b>14%</b> Outsourcing and co-development	<b>9%</b> Gamedev-related services and activities
--	--	--



COMMISSIONED WORK AND OUTSOURCING

<b>51%</b> <input type="checkbox"/> No commissions or outsourcing	<b>25%</b> <input type="checkbox"/> Outsourcing parts of games and assets
<b>17%</b> <input type="checkbox"/> Outsourcing parts and full development of games	<b>7%</b> <input type="checkbox"/> Outsourcing parts and full development of games, but no contracts yet

## COMPANY LOCATION

GEOGRAPHICAL  
LOCATION



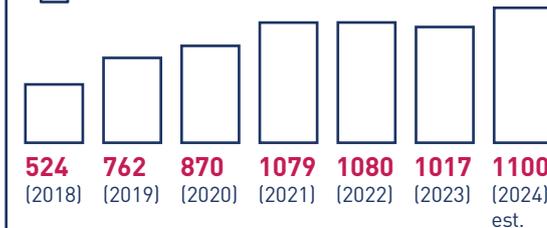
LOCATION BASED  
ON CITY

Bratislava	<b>46%</b>
Košice	<b>20%</b>
Other	<b>34%</b>

## EMPLOYEES



OVERALL NUMBER OF EMPLOYEES

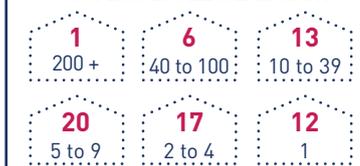


TOP 10  
COMPANIES  
BASED ON  
EMPLOYEE  
HEADCOUNT

1. Pixel Federation
2. QORPO
3. Nine Rocks Games
4. SuperScale
5. Inlogic Software
6. STUDIO 727
7. Games Farm
8. NOISE artillery
9. PowerPlay Manager
10. 60fps



COMPANY SIZE BASED  
ON EMPLOYEE HEADCOUNT



NUMBER  
OF EMPLOYEES  
IN TOP 10%  
OF COMPANIES

**597**

# EMPLOYEES



**NEW WORKING POSITIONS OPENED IN 2023** **-63**



**NEW WORKING POSITIONS OPENED IN 2024 (est.)** **133**



**MEDIAN AGE OF EMPLOYEES** **31**



## WORKING POSITIONS BASED ON SPECIALIZATION

24.1%	Graphic / Concept artist
20.9%	Programmer
9.3%	Other
8.7%	Game Designer
7.6%	Management positions
5.8%	Production
5.2%	Marketing / Sales
5.2%	Animator
4.2%	Tester
3.6%	PR / Community Manager
2.7%	Data Analytic
2.7%	Sound Designer / Composer



## COUNTRIES OF ORIGIN OF FOREIGN EMPLOYEES

48.0%	Czech Republic
14.1%	Ukraine
11.3%	Poland
7.0%	Russia
2.8%	Hungary
2.8%	Vietnam
2.8%	USA
11.2%	Other



## INTERNATIONAL EMPLOYEES

**41.2%** We employ them and plan to employ more in the future

**39.7%** We don't employ them and are not planning to employ them in the future

**19.1%** We don't employ them, but are planning to employ them in the future



## POSITIONS HARDEST TO FILL

30.4%	Programmer
15.9%	Game Designer
14.5%	Graphic / Concept Artist
13%	PR / Marketing
8.7%	Animator
8.7%	Management positions
5.8%	Production
4.3%	Other
2.9%	Data Analytic
2.9%	Tester
2.9%	Sound designer / Composer



## NUMBER OF WOMEN WORKING IN SLOVAK GAMEDEV

**213 (21%)**



## PERCENTAGE OF COMPANIES EMPLOYING WOMEN

**59%**



## REMOTE WORK/OFFICE

**46.4%** Home office, remote and office work

**42%** Home office and remote work only

**11.6%** Office only



## POSITIONS OCCUPIED BY WOMEN

36.4%	Graphic / Concept artist
16.4%	Other
7.9%	Marketing / Sales
7.1%	Management positions
6.5%	PR / Community Manager
5.6%	Animator
4.2%	Programmer
4.2%	Data Analyst
4.2%	Game Designer
4.2%	Production
2.8%	Tester
0.5%	Sound designer / Composer



## POSITIONS OCCUPIED BY FOREIGN EMPLOYEES

Graphic artist	<b>30.4%</b>
Other	<b>14.3%</b>
Marketing / Sales	<b>13.4%</b>
Programmer	<b>11.6%</b>
PR / Community manager	<b>8.0%</b>
Game design	<b>8.0%</b>
Production	<b>4.5%</b>
Data analytics	<b>3.6%</b>
Animator	<b>2.7%</b>
Tester	<b>2.7%</b>
Sound designer / Composer	<b>0.9%</b>



**90 (8.8%)** : NUMBER OF EMPLOYEES FROM ABROAD

## FINANCE



### OVERALL TURNOVER (M EUR)



### OVERALL TURNOVER IN 2023

**70,091,500 EUR**



### ESTIMATED OVERALL TURNOVER IN 2024

**70,300,000 EUR**



### TURNOVER OF TOP 10% COMPANIES IN 2023

**58,554,000 (83.5%)**



### TOP 10 COMPANIES BASED ON TURNOVER

1. Pixel Federation
2. Nine Rocks Games
3. Inlogic Software
4. SuperScale
5. PowerPlay Manager
6. Blue Brain Games
7. Gentlemen's
8. Noise Artillery
9. Games Farm
10. 60fps

## GAMES



**80 OWN FULL-RELEASE GAMES CREATED**

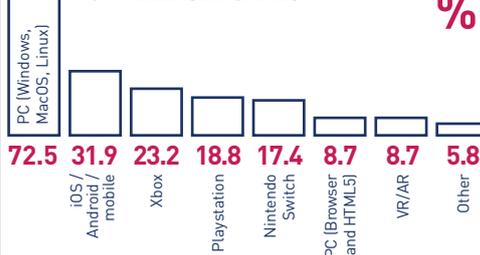
**157 GAMES CREATED IN COOPERATION WITH A THIRD PARTY**



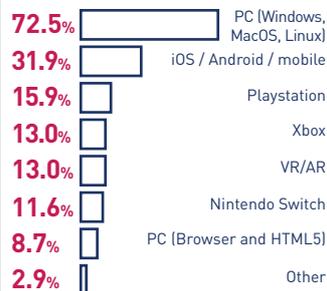
**OVERALL 310 NUMBER OF RELEASED AND UNRELEASED PROJECTS BEING WORKED ON**



### PRIMARY TARGET PLATFORM FOR RELEASED GAMES



### PRIMARY TARGET PLATFORM FOR GAME DEVELOPMENT



### GAMES PUBLISHED VIA

Projects not yet published	46.4%
Self-publishing via Google Play or AppStore	20.3%
Self-publishing via Steam (and its equivalents)	15.9%
Other	11.6%
Published via international publisher	11.6%
Self-publishing as an online download	10.1%
Self-publishing via platform holders Nintendo, Sony, Microsoft, etc	5.8%



### DEVELOPED GAMES FINANCED VIA

Self-funding	65.2%
Public funding	34.8%
International publisher	15.9%
Commission	15.9%
Other	11.6%
International investor	10.1%
Slovak investor	7.2%
Bank loans	7.2%
Slovak publisher	2.9%
Platform holders Nintendo, Sony, Microsoft, etc	1.4%

## MISCELLANEOUS

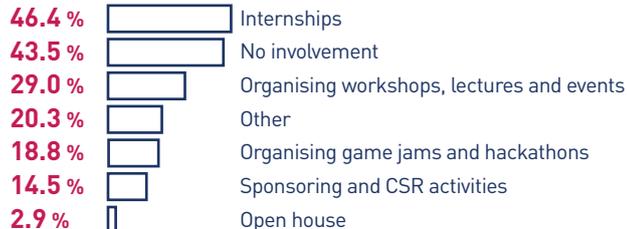


Number of players of **SERIOUS GAMES** or **HEALING GAMES** in 2023

**22,030**



### INVOLVEMENT IN SUPPORTING THE DEVELOPMENT OF THE GAMING INDUSTRY IN SLOVAKIA



### SUBJECTIVE ASSESSMENT OF THE ENVIRONMENTAL IMPACT OF THE GAMING INDUSTRY



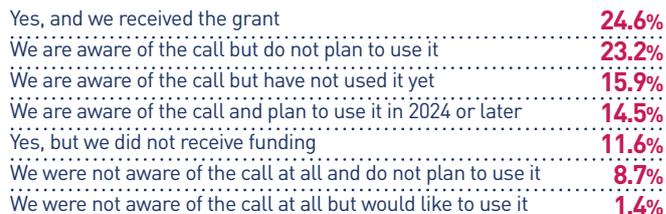
## STATE'S ROLE



### WHAT SUPPORT WOULD YOU APPRECIATE MOST?



### DID YOU TAKE ADVANTAGE OF THE 2023 CALL FOR SUPPORT FOR GAME CREATION FROM THE SLOVAK ARTS COUNCIL?



### DID YOU APPLY FOR SUPPORT IN THE EUROPEAN FUNDING SCHEMES CREATIVE EUROPE OR HORIZON IN 2023?

