

SLOVAK GAME DEVELOPMENT INDUSTRY 2024

COMPANY PROFILES

ACTIVE COMPANIES 69



YEARS ACTIVE

26%	17%	31%	12%	14%
0 to 2 years	3+ years	5+ years	10+ years	15+ years



LEGAL FORM

89%	7%	3%	1%
Private company	Self-employed	NGO	Physical person



PRIMARY FOCUS

77%	14%	9%
Own game development	Outsourcing and co-development	Gamedev-related services and activities



COMMISSIONED WORK AND OUTSOURCING

51%

No commissions or outsourcing

25%

Outsourcing parts of games and assets

17%

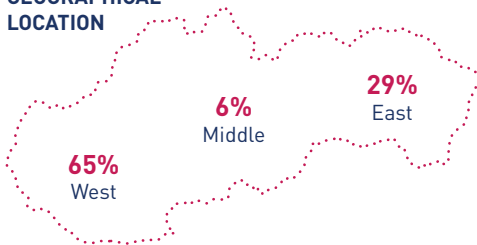
Outsourcing parts and full development of games

7%

Outsourcing parts and full development of games, but no contracts yet

COMPANY LOCATION

GEOGRAPHICAL LOCATION



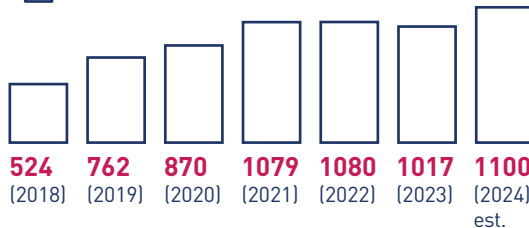
LOCATION BASED ON CITY

Bratislava	46%
Košice	20%
Other	34%

EMPLOYEES



OVERALL NUMBER OF EMPLOYEES

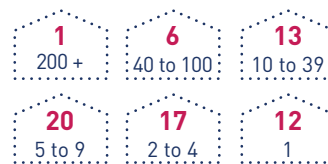


TOP 10 COMPANIES BASED ON EMPLOYEE HEADCOUNT

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

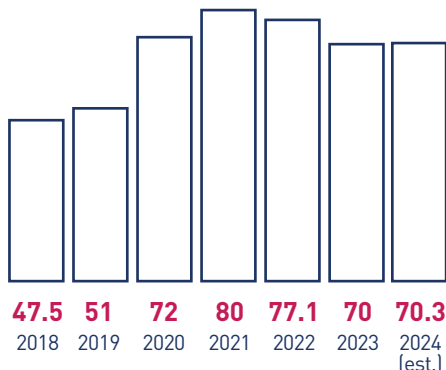


**90 : NUMBER OF EMPLOYEES
(8.8%) : FROM ABROAD**

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

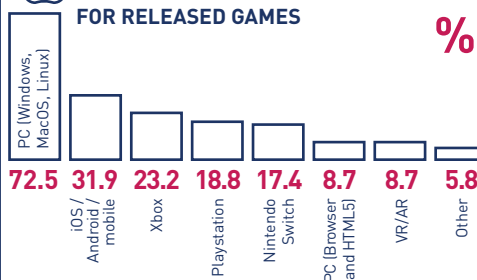
GAMES CREATED IN COOPERATION WITH A THIRD PARTY



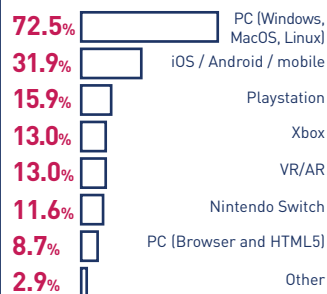
310
OVERALL NUMBER OF RELEASED AND UNRELEASED PROJECTS BEING WORKED ON



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

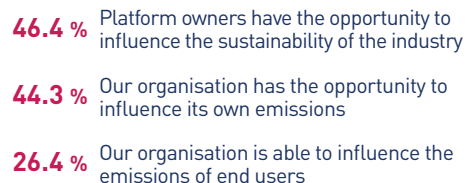
22,030



INVOLVEMENT IN SUPPORTING THE DEVELOPMENT OF THE GAMING INDUSTRY IN SLOVAKIA



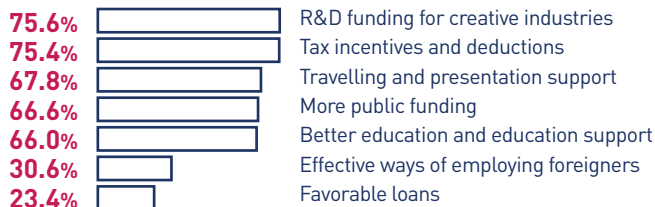
SUBJECTIVE ASSESSMENT OF THE ENVIRONMENTAL IMPACT OF THE GAMING INDUSTRY



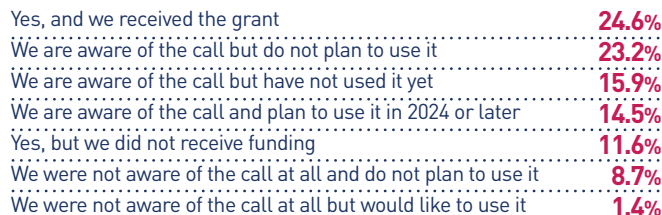
STATE'S ROLE



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?

