

SLOVAK GAME DEVELOPMENT INDUSTRY 2023

COMPANY PROFILES

ACTIVE COMPANIES **66**



LEGAL FORM

81.8%	9.1%	7.6%	1.5%
Private company	Physical person	Self-employed	NGO



PRIMARY ORIENTATION

72.7%	13.6%	13.6%
Own game development	Outsourcing and co-development	Gamedev-related services and activities



YEARS ACTIVE

30.3%	10.6%	40.9%	6.1%	12.1%
0 to 2 years	3+ years	5+ years	10+ years	15+ years

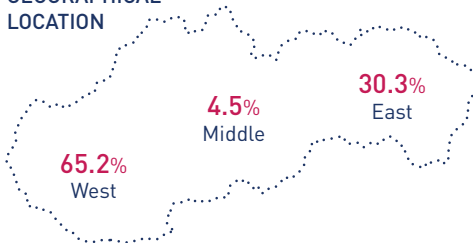


COMMISSIONED WORK AND OUTSOURCING

51.5% <input type="checkbox"/>	24.2% <input type="checkbox"/>
No commissions or outsourcing	Outsourcing parts of games and assets
18.3% <input type="checkbox"/>	6% <input type="checkbox"/> Outsourcing parts and full development of games, but no contracts yet
Outsourcing parts and full development of games	

COMPANY LOCATION

GEOGRAPHICAL LOCATION



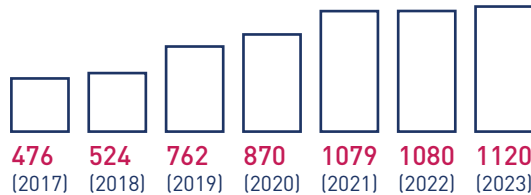
LOCATION BASED ON CITY

Bratislava	45.5%
Košice	21.3%
Other	33.2%

EMPLOYEES



OVERALL NUMBER OF EMPLOYEES

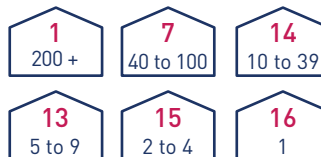


TOP 10 COMPANIES BASED ON EMPLOYEE HEADCOUNT

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



COMPANY SIZE BASED ON EMPLOYEE HEADCOUNT



NUMBER OF EMPLOYEES IN TOP 10% OF COMPANIES

669

EMPLOYEES

⊕ WORKING POSITIONS BASED ON SPECIALIZATION

29.5%	.....	Programmer
27.4%	.....	Graphic artist
20.5%	.....	Other
13.0%	....	Game designer
12.4%	....	Production
7.4%	...	Marketing, sales
7.3%	...	Animator
6.2%	...	Tester
5.3%	...	Community manager
4.2%	..	Data analytic
2.6%	..	Sound designer, composer

⊕ POSITIONS HARDEST TO FILL

42.4%	<input type="checkbox"/>	None
30.3%	<input type="checkbox"/>	Programmer
16.7%	<input type="checkbox"/>	Game designer
16.7%	<input type="checkbox"/>	Graphic artist
15.2%	<input type="checkbox"/>	Animator
9.1%	<input type="checkbox"/>	PR / Marketing
7.6%	<input type="checkbox"/>	Data analytic
7.6%	<input type="checkbox"/>	Other
4.5%	<input type="checkbox"/>	Production
3%	<input type="checkbox"/>	Sound designer, composer
1.5%	<input type="checkbox"/>	Tester



NEW WORKING POSITIONS OPENED IN 2022

221



NEW WORKING POSITIONS OPENED IN 2023 (est.)

50



MEDIAN AGE OF EMPLOYEES

30



NUMBER OF WOMEN WORKING IN SLOVAK GAMEDEV

205 (19%)



PERCENTAGE OF COMPANIES EMPLOYING WOMEN

51,5%



NUMBER OF EMPLOYEES FROM ABROAD

98 (9%)



COUNTRIES OF ORIGIN OF FOREIGN EMPLOYEES

39.7%	Czechia
19.5%	Various
13.8%	Ukraine
12.1%	UK
6.9%	Russia
3.5%	United States
3.5%	Serbia
3.5%	Vietnam



POSITIONS OCCUPIED BY WOMEN

37.7%	Various
31.2%	Graphic artist
8.6%	PR / Community manager
7.4%	Production
7.4%	Marketing, sales
5.7%	Game designer
5.7%	Data analytic
5.1%	Animator
4.6%	Tester
4.0%	Programmer



INTERNATIONAL EMPLOYEES

45.5% We employ them and plan to employ more in the future	33.3% We don't employ them and are not planning to employ them in the future
18.2% We don't employ them, but are planning to employ them in the future	3% We employ them but are not planning to employ them in the future



POSITIONS OCCUPIED BY FOREIGN EMPLOYEES

Graphic artist	34.5%
Tester	25.9%
Programmer	9.5%
Other	10.3%
Game designer	5.2%
Sound designer / Composer	5.2%
Animator	4.3%
Production	2.6%
Marketing / Sales	1.7%
PR / Community manager	0.9%



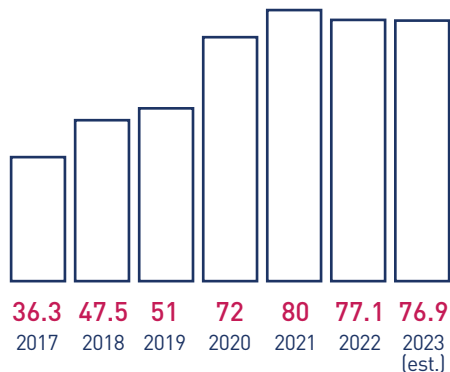
REMOTE WORK/OFFICE

Home office, remote and office work	Home office and remote work only	Office only
53.7%	35.8%	7.5%

FINANCE



OVERALL TURNOVER (M EUR)



OVERALL TURNOVER IN 2022

77.115.000 EUR



ESTIMATED OVERALL TURNOVER IN 2023

76.900.000 EUR



TURNOVER OF TOP 10% COMPANIES IN 2022

65.297.000 (84.6%)



TOP 10 COMPANIES BASED ON TURNOVER

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

GAMES



OWN FULL-RELEASE GAMES CREATED

49

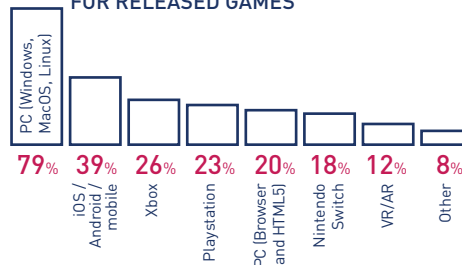


GAMES CREATED IN COOPERATION WITH A THIRD PARTY

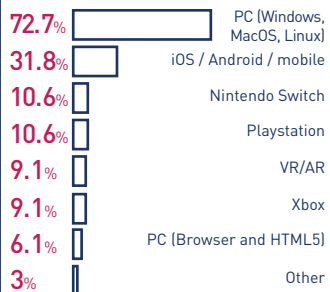
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PRIMARY TARGET PLATFORM FOR RELEASED GAMES



PRIMARY TARGET PLATFORM FOR GAME DEVELOPMENT



OVERALL **282** NUMBER OF RELEASED AND UNRELEASED PROJECTS BEING WORKED ON



GAMES PUBLISHED VIA

Projects not yet published **50%**

Self-publishing via Google Play or AppStore **21.2%**

Self-publishing via Steam (and its equivalents) **18.2%**

Self-publishing as an online download **15.2%**

Published via international publisher **13.6%**

Other **10.6%**

Self-publishing via platform holders Nintendo, Sony, Microsoft, etc **7.6%**

Published via Slovak publisher **1.5%**

DEVELOPED GAMES FINANCED VIA

Self-funding **65.2%**

Public funding **37.9%**

Commission **21.2%**

International publisher **18.2%**

Other / I don't want to say **13.6%**

International investor **9.1%**

Slovak investor **7.6%**

Platform holders Nintendo, Sony, Microsoft, etc **3%**

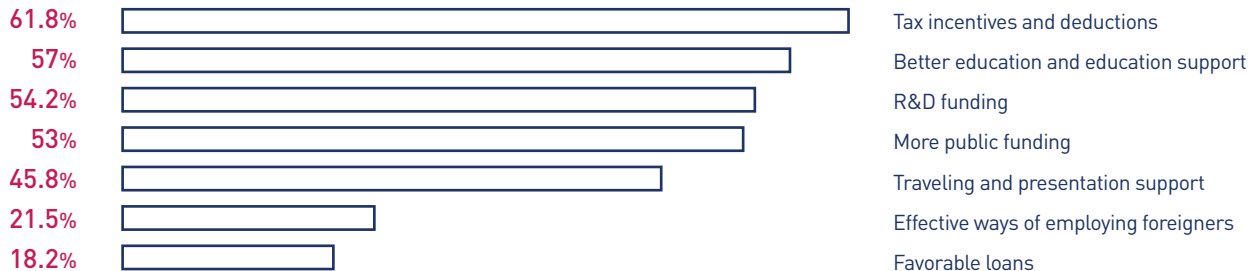
Slovak publisher **1.5%**

Loans **1.5%**

STATE'S ROLE AND PUBLIC FUNDING



WHAT SUPPORT WOULD YOU APPRECIATE MOST?



MISCELLANEOUS



Number of players of
SERIOUS GAMES
or
HEALING GAMES
in 2022

9020



IS YOUR COMPANY INVOLVED IN SUPPORTING THE DEVELOPMENT OF THE GAMING INDUSTRY IN SLOVAKIA?

