



GAMINGINTURKEY

TURKISH GAME MARKET 2017 REPORT



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Gaming in Turkey

OZAN AYDEMİR

Turkey; crossroads of religions, huge open-air museum, bridge of two continents and one of the most valuable gaming markets in the EMEA region. We started with these words last year, and this year we are keeping the same validity. The game industry in Turkey is still one of the most popular centers of Turkey. This time esports is also in the center of all eyes.

FOUNDER

As Gaming in Turkey, Game Agency, and Esports Agency, we continue to share with you the most detailed and accurate information about the Turkish game market. We are delighted to share the new general report that we launched last year with you, even if it is late, working a bit harder this year. You can always contact us for more information.





GAMING IN TURKEY

BEST GAMING AGENCY 2017 TURKEY

EXCELLENCE AWARD FOR
GAME VIDEO PRODUCTION
SERVICES TURKEY

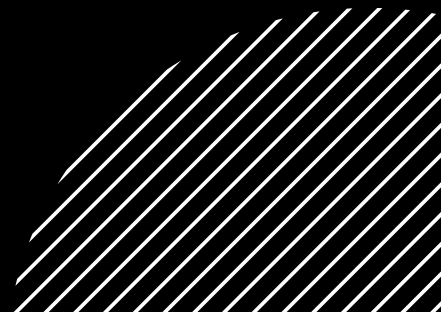




GAMING IN TURKEY



2017 TURKEY GAME MARKET



Overview

Turkey 2017

Turkey, with its young population of **15 million** is still one of the countries with the youngest population. (above the EU average) The average age in Turkey is **29.7** and % 1.4 percent of the total is elderly population. We are one of the countries with the youngest population of the region, even though our average age is growing. This is the main reason why there is so much interest in technology, esports, and game in Turkey.



The population of the country which is close to 80 million as of 2016 has reached to **80 million 810 thousand 525 persons** by the end of 2017 with an increase of 995 thousand 654 persons. In our country with a total population of over 80 million, there are 52 million online users.

The population is using more than 59,000,000 mobile phones and **51,000,000** of the population are social media users.



2017 Turkey



**TOTAL
POPULATION**
80.810.525



**FEMALE
POPULATION**
40.275.000



**MALE
POPULATION**
40.535.000



**INTERNET
USERS**
54.330.000



**SOCIAL MEDIA
USERS**
51.000.000



What is the situation with the Game Market in Turkey?

Turkish game market continues to grow not only with foreign investors but also with export, esports, brand investments and game development especially in 2017. Now the brands are aware of how important it is to reach players and young people with games & esports!

CREATING A GAME ONLY IS NOT ENOUGH; IT MUST BE MARKETED



Game Market in Turkey

Esports & Gamification

The Turkish game sector continues to grow with the new entrances to the market, especially mobile games, esports and esports investments. In addition to **GameX** and **GIST** game expo's, CNR has also started to invest in the gaming industry with its new expo named; **CNR Games Week**.



Turkey is now a country that attracts attention on the global scene. The main reasons for this are; In addition to teams like Galatasaray, Fenerbahçe, and Beşiktaş, Anatolian Clubs also started to invest in the esports. Many big brands started to support professional Turkish esports team. In addition to internet cafes, Gaming Zones numbers are increased. Also, big esports events like **BLAST Pro Series** started to see Istanbul as an esports city. (29th of September 2018)



Game Market in Turkey

Esports & Gamification

Giant companies such as Epic Games and Blizzard's investment in Turkey has been one of the most beautiful news received towards the end of 2017.

According to the past year, export figures of domestic game developers have increased by 40% in 2017 and reached 700 million dollars. Economy Minister Nihat Zeybekçi also stated that the sector continued its successful progress and stated that the target of the game sector in 2018 is, to reach export of 1 billion dollars. Both game development, as well as related marketing and publishing, in terms of the local and global games market, Turkey is now a very important player in the global gaming industry.

"Gamification", which is based on creating an interactive game environment by adding game and play dynamics to a brand or a product, has become very popular in our country. Effective areas of Gamification are; In-house recruitment to increase employee satisfaction, increase sales by offering another purpose by making the user experience more enjoyable. (which are based on making rewards systems and competitive elements used in games, including digital game design techniques, into business and non-game elements and making them interactive and engaging)



**Turkey has 30 million +
active gamers
spending 70% of their
gaming time on PC.
(total game time
spent)**



Total Game Time Spent

In terms of total game time spent, this is the 3rd highest ranking in the world following Poland and Russia. Though it should be mentioned that a higher percentage of Turkish gamers use their time on free to play games rather than pay to play games when compared with the Western gaming market, placing Turkey at the 18th place in terms of global revenue rankings.



2016



2017

**Turkey Game
Market 2016**

&

**Turkey Game
Market 2017
Comparison!**





POPULATION

TURKISH GAME MARKET REPORT 2017

- Turkey Population: 80.032.059

- Young Population: 13.228.496



- Turkey Population: 80.810.525

- Young Population: 15.000.000+

2016

2017



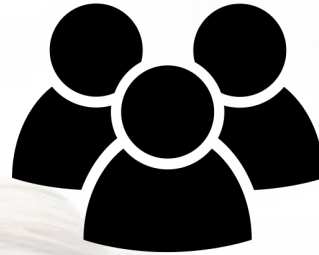
INTERNET USERS

TURKISH GAME MARKET REPORT 2017

- Internet Users: 46.196.720

- %59 of the population

connected to the Internet



- Internet Users: 54.330.000

- %67 of the population

connected to the Internet

2016

2017



SOCIAL MEDIA USERS

TURKISH GAME MARKET REPORT 2017

- Active Social Media

Users: 34.000.000

2016



- Active Social Media

Users: 51.000.000

2017



MOBILE USERS

TURKISH GAME MARKET REPORT 2017

- Mobile Users: 72.028.853
- %90 Mobile / Population
- %60 Smartphone / Mobile
- Smartphone Users:

40.336.157 (+ / -)

2016



- Mobile Users: 72.729.472
- %90 Mobile / Population
- %70 - 75 Smartphone / Mobile
- Smartphone Users:

50.000.000 (+ / -)

2017



GAMERS

TURKISH GAME MARKET REPORT 2017

- Gamers: 29.300.000
- Total Generated Game Revenue: 755.000.000 USD
- Mobile: 332.500.000 USD
- PC/Console: 432.500.000 USD

2016



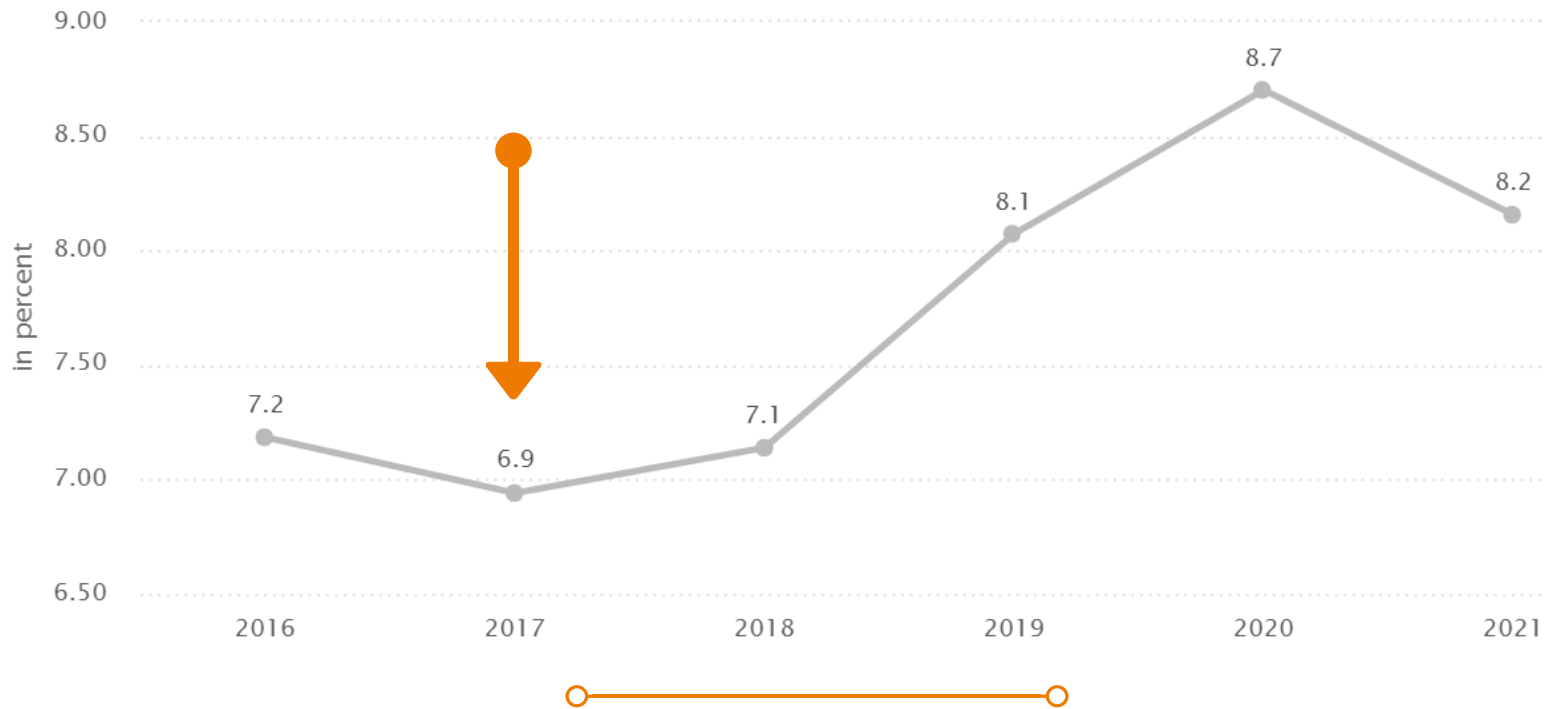
- Gamers: 30.000.000 +
- Total Generated Game Revenue: 810.000.000 USD (+ / -)
- Mobile: 372.400.000 USD
- PC/Console: 437.600.000 USD

2017



ONLINE GAMES REVENUE GROWTH %

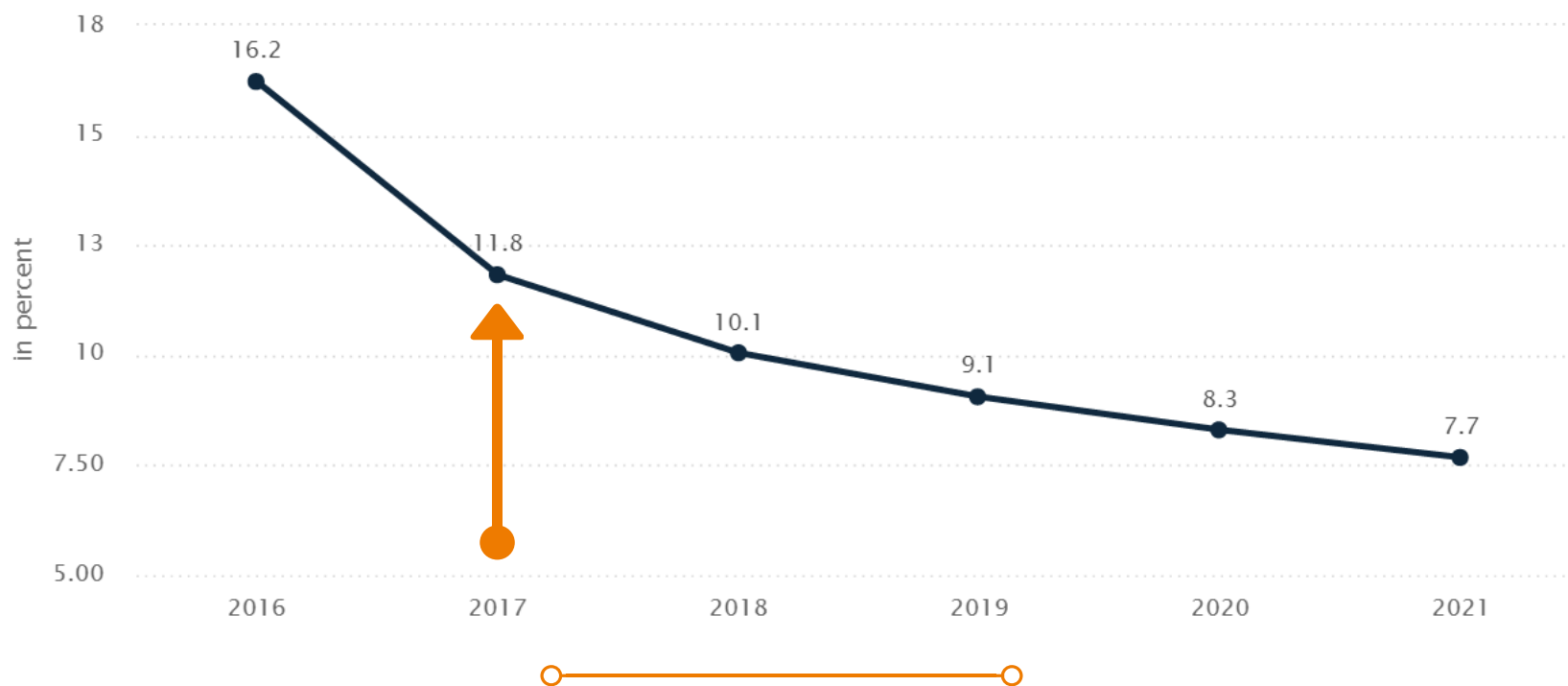
TURKISH GAME MARKET REPORT 2017





MOBILE GAMES REVENUE GROWTH %

TURKISH GAME MARKET REPORT 2017





WORLD RANK - REVENUE

TURKISH GAME MARKET REPORT 2017

• World Rank - Total

16

• World Rank - Mobile

16

2016



• World Rank - Total

18

• World Rank - Mobile

18

2017



BIGGEST GAME COMPANIES IN TURKEY

TURKISH GAME MARKET REPORT 2017



netmarble
Turkey



2016



GAMINGINTURKEY

2017



BIGGEST PAYMENT COMPANIES IN TURKEY

TURKISH GAME MARKET REPORT 2017

- Game Sultan, Ininal, lyzi.co, BKM Express, ipara, Mikro Ödeme (Wirecard), 3Pay, Paybyme, PayU, Perdigital, Gpay, PayGuru, Game Satış, EPin



- Game Sultan, Ininal, lyzi.co, BKM Express, ipara, Mikro Ödeme (Wirecard), 3Pay, Paybyme, PayU, Perdigital, Gpay, PayGuru, Game Satış, EPin, Papara

2016

2017



ONLINE RESELLERS

TURKISH GAME MARKET REPORT 2017

- Game Sultan, Voidu, Kinguin, G2A, Steam, Aral Game, Perdigital, ByNoGame, Epin, GameSatış, Türk Telekom Playstore



- Game Sultan, Voidu, Kinguin, G2A, Steam, Aral Game, Perdigital, ByNoGame, Epin, GameSatış, Türk Telekom Playstore

2016

2017



ASSOCIATIONS

TURKISH GAME MARKET REPORT 2017

- **TOGED** (Game Developers Association of Turkey)

- **OYUNDER** (Game Designers, Developers Producers & Publishers Association)

2016



- **TOGED** (Game Developers Association of Turkey)

- **OYUNDER** (Game Designers, Developers Producers & Publishers Association)

2017



GAME EXHIBITIONS

TURKISH GAME MARKET REPORT 2017

- GameX
- GIST (Gaming Istanbul)



- GameX
- GIST (Gaming Istanbul)
- CNR Games Week

2016

2017



ACADEMIC PROGRAMS

TURKISH GAME MARKET REPORT 2017

- Bahçeşehir University
- Bahçeşehir University BUG Game Lab.
- İstanbul Bilgi University
- ODTÜ Gate



- Bahçeşehir University
- Bahçeşehir University BUG Game Lab.
- İstanbul Bilgi University
- ODTÜ Gate
- İzmir Dokuz Eylül University
Digital Game and Design
Incubation Center

2016

2017



INTERNET (CYBER) CAFES

TURKISH GAME MARKET REPORT 2017

- 20.000 + cyber cafes
- 7.5 Million gamers are visiting Cyber Cafes / Month



- 20.000 + cyber cafes
- 7.5 Million gamers are visiting Cyber Cafes / Month

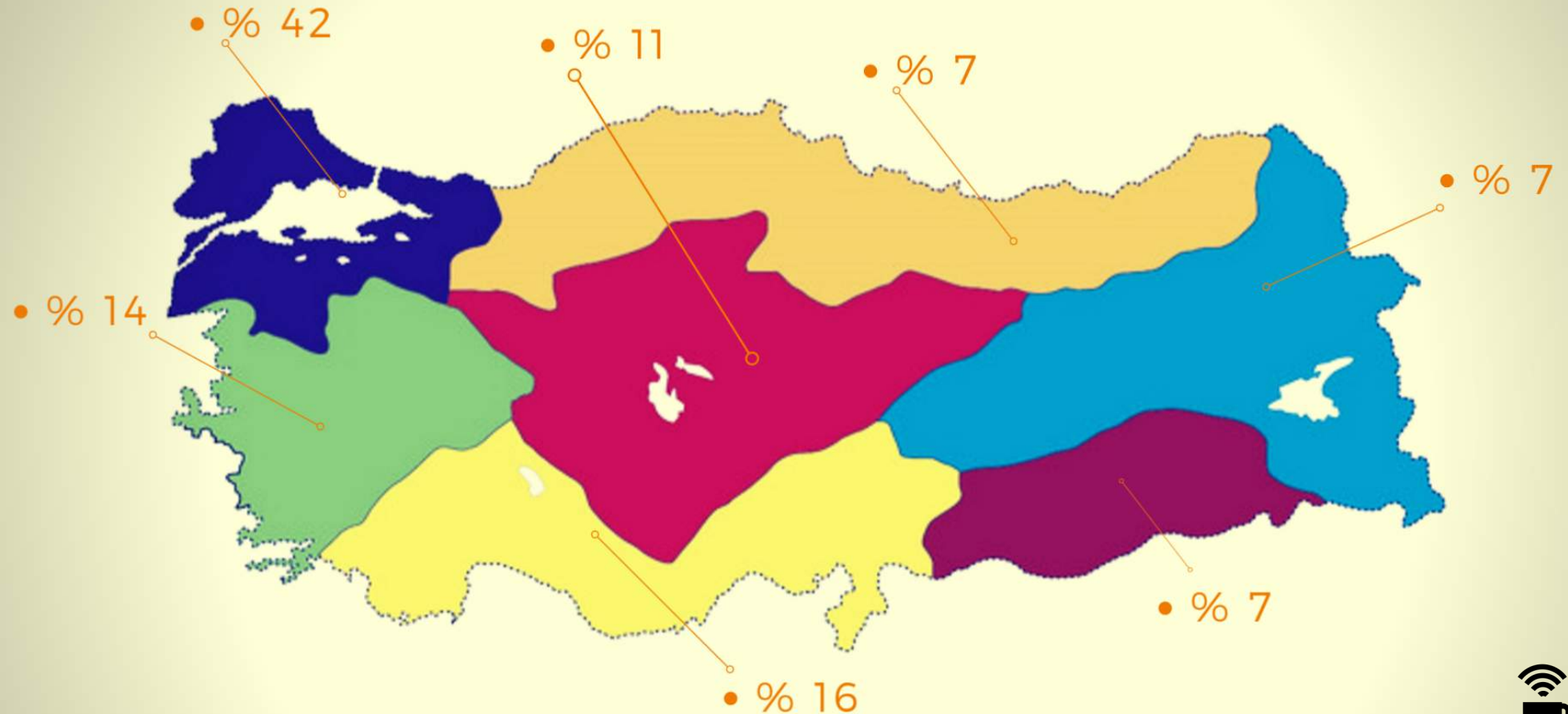
2016

2017



INTERNET (CYBER) CAFES PENETRATION

TURKISH GAME MARKET REPORT 2017





ESPORTS TEAMS IN TURKEY

TURKISH GAME MARKET REPORT 2017

- Dark Passage, HWA, BAU Supermassive, Space Soldiers, 1907 Fenerbahçe, Galatasaray, Beşiktaş, ANT Espor, Team Turqality, Zone Esports, Crew Esports

2016



- Dark Passage, HWA, BAU Supermassive, Space Soldiers, 1907 Fenerbahçe, Galatasaray, Beşiktaş, ANT Espor, Team Turqality, Zone Esports, Crew Esports, Royal Bandits, Team Aurora, Bursaspor, OHM, Çilekler, Team Galakticos, TOA Esports, Revenge Wish Esports, Rurnbles eSports, Sangal Esports

2017

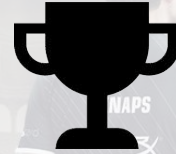


ESPORTS MEDIA IN TURKEY

TURKISH GAME MARKET REPORT 2017

Dijitalsporlar

Multiplayer



Dijitalsporlar

Multiplayer

PlayerBros

ESporX

Karnaval Radio

ThatsGameBro

5Mid

2016

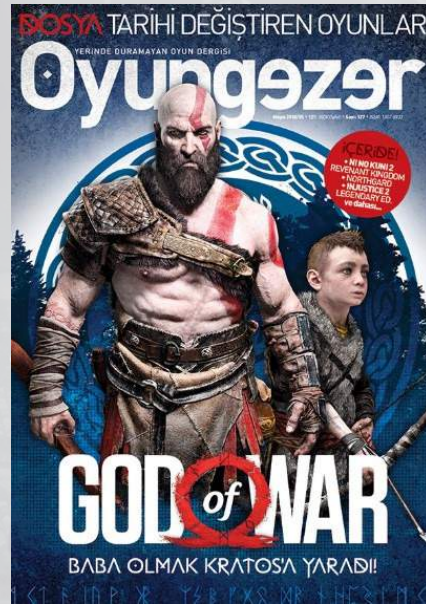
2017



GAME MAGAZINES IN TURKEY

TURKISH GAME MARKET REPORT 2017

Oyungezer



Level



2016



2017

HOW ABOUT MEA REGION?

MEA Region top countries, based on game revenues

GAMING IN TURKEY IS READY TO SERVE YOU IN MEA REGION TOO





MEA REGION

TOP COUNTRIES BASED ON REVENUES

- Turkey: 810M USD
- Saudi Arabia: 647M USD
- Iran: 431M USD
- UAE: 281M USD
- Egypt: 122M USD
- TOTAL: 4Bn+ USD 2017 Revenue



- Population: 1.662.960.000 +
- Online Population:
585.000.000 +
- Gamers: 336M+
- 25% Revenue Based Growth
(2016 - 2017)

2017

GAMING IN TURKEY GAMING AGENCY ESPORTS AGENCY

Experience the best performance and sales in Turkey and MENA
with Gaming in Turkey.

GAMING IN TURKEY - GAMING AGENCY & ESPORTS AGENCY



GAMINGIN**TURKEY**





GAMINGIN**TURKEY**

MEDIA HUB FOR GAMING

01

Gaming
Industry
News Blog

02

Gaming
Agency
Esports
Agency

03

Game
Operations
GM Services

04

QA
Services

05

Publishing



GAMING IN TURKEY

Gaming in Turkey, operating in Turkey for 3 years, is a completely eSports and gaming agency.

Gaming in Turkey provides full 360-degree service with integrated online and offline marketing actions tailored for gaming companies.

Gaming in Turkey, which brings 10 years of experienced online gaming professionals under one roof, is cooperating with game publishers and developers around the world.

Gaming in Turkey serves also many major brands in Turkey as Gaming and Esports Agency.

Gaming in Turkey is a digital hero. We name our selves; G.I.T



Gaming in Turkey

OZAN AYDEMİR

As Gaming in Turkey Game Agency and Esports Agency, we are active in both our country and the Middle East.

FOUNDER

As Gaming in Turkey, our only aim is to provide the most accurate and best service in terms of marketing, operation, and publishing to the game companies, organize esports organizations and show the best way to the brands which wants to invest in games and esports.





GAMINGINTURKEY

GAMING INDUSTRY NEWS BLOG



01

**Gaming
Industry
News Blog**

Gaming in Turkey is one of the market-leading website and blog for news and information about the Turkey video games industry, covering all aspects of the interactive entertainment value chain. Our blog covers every part of the industry, from design, development, publishing, marketing, distribution, retail, interviews, and analysis.





GAMINGINTURKEY

GAMING AGENCY & ESPORTS AGENCY - GAME MARKETING SERVICES

02

**Game Agency
Esports Agency**

**Localization
UI / UX
Media Planning
Video Production
Brand & Strategy
Development
Digital Marketing**

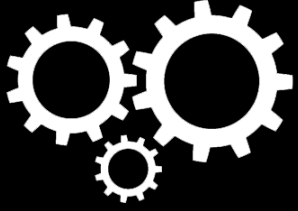
**Social Media
Management
Creative Designs
Digital PR
E-Sports
Partnerships
Influencer Marketing**





GAMINGINTURKEY

OPERATIONAL SERVICES



03

**Operational
Services**

- Game Translation
- Game Event Organizations
- Game Customer Support
- Game Related Local Payment Options
- Game Management
- Game Moderation
- Game Monitoring (7 / 24)





GAMINGIN**TURKEY**

QA SERVICES

04

Quality Assurance; As Gaming in Turkey, we provide a thorough QA process using best infrastructure and well trained professional QA team.

Cross-Platform Testing

Device Screen Size Test

Operating System Compatibility Test

Product Functional Controls

Design & UI Controls

Usability tests

Bug & Fixes

Full Test Before Launch

**QA
Services**





GAMINGIN**TURKEY**

GAME PUBLISHING

05

Mobile Game Publishing
PC Game Publishing
Exclusive Partnerships
Channeling Partnerships

Publishing





GAMING IN TURKEY

AS GAMING IN TURKEY

WE ARE GRATEFUL TO OUR STRATEGIC PARTNERS, WHO ARE ALWAYS WITH US IN THIS GAMING ADVENTURE.





OUR STRATEGIC PARTNER **GAMEX** INVITES YOU TO THE GAME EXHIBITION
BETWEEN **6 - 9 SEPTEMBER 2018**
<http://www.gamex.com.tr/>





WE ARE GRATEFUL TO OUR STRATEGIC PARTNER **ANIMATION INTERNATIONAL** & **DORAEMON**, WHO HELPED US TO ENTER JAPAN MARKET!

<http://ai-turkey.com/tr/>



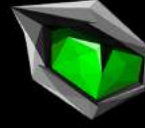


MONSTER TULPAR T5 V18.1 15.6" GAMING LAPTOP

Check this MONSTER!

If you like to play GAME, MONSTER Notebook will be one of the most appropriate options for you. We thank Monster for their support.





MONSTER

TULPAR
T5 V18.1



NVIDIA GEFORCE GTX 1060

NVIDIA Geforce GTX 1060 ile dizüstü bilgisayarınıza ihtiyacınız olan tüm performansı sağlıyor. Yeni nesil GTX 10 serisi grafik kartı önceki nesil ekran kartlarına göre %40 daha fazla performans sunmaktadır. Bu sayede sizi asla yan yolda bırakmayan, olağanüstü bir grafik çözümünü hafif ve taşınabilir olarak, Monster Tulpar modelinde sizlere sunuyor.



FULL HD 1920 x 1080 IPS MAT LED EKKRAN

IPS ekranlar, tüm renkleri %95 gerçeğe yakın göstermektedir. Geniş görüş açısı ile Full HD çözünürlüğü bir araya getiren teknoloji.



INTEL® COFFEE LAKE CORE™ i7 İŞLEMCI

8. nesil Intel Core i7 işlemci; çoklu uygulama ve optimum verimlilik için performans olarak sıçrama sağlıyor. 4K video işleme gibi yüksek güç gerektiren iş akışına önemli iyileştirmeler getiriyor.





SPECIAL THANKS

We are grateful to our partner Game Sultan, field marketing expert and monetization platform for support us in data mining to finalize Turkey Game Market Report 2017.

www.gamesultan.com

REFERENCES

Game Sultan, Gaming in Turkey Marketing Team, Newzoo, Statista, WeAreSocial



GAMINGINTURKEY

**Gaming in Turkey is
ready for you to serve.
Let's Meet at;
“Gaming In Turkey”**

info@gaminginturkey.com

WWW.GAMINGINTURKEY.COM