



GAMING IN TURKEY

TURKEY GAME MARKET 2019 REPORT



Table of contents

1. Cover Letter
2. 2019 Turkey Overview
3. Estimated 2019 Media and Advertising Investment in Turkey
4. Device and Accessories Ownership in Turkey in 2019
5. Turkish Mobile Player Habits and Details 2019
6. The situation of Gaming and Esports Market in Turkey
7. Turkey Esports Federation TESFED
8. One of Turkey's Rising Star ZULA
9. 2018 - 2019 Comparative Turkey Gaming Industry Report
10. Esports in Turkey 2019 with Details
11. Expert Opinions
12. Gaming in Turkey - Gaming Agency - Esports Agency
13. Gaming in MENA - Gaming Agency - Esports Agency



Thank You

We would like to thank our partners who have been with us since the beginning and who have supported us in the 2019 version of the Turkey Game Market Report, which we have prepared with great effort for 4 years and interpreted the data published from many sources altogether.



Virtual Credit



Gamers'
Prepaid Card



Monster Notebook



Gaming Security Solutions



BAU Esports



Analytical Services



Esports Arena - Kuwait





TURKEY & MENA

OZAN AYDEMİR

FOUNDER / CEO

2019 was a difficult but beautiful year for our country and region. The brand's perspective on esports has changed, the number of events has increased, the game market has grown as TL. The game company's investments in esports increased. The Middle East intertwined more with esports! By 2020, we need to be ready for bigger shows and investments.



Gaming in Turkey

OZAN AYDEMİR

FOUNDER / CEO

2019 was a really quite busy year for Gaming in Turkey Gaming and Esports Agency. We encountered an intensity that we couldn't even find the opportunity to announce many of our projects. In fact, the situation was the intensity that I wanted and expected in the 5th year of the company as Gaming in Turkey Gaming and Esports Agency. In 2020, we will continue with our existing partners and will announce our new clients and brands. Gaming in MENA will open to the Middle East. We will increase our team of 15 people to 30. Our Middle East office will also be active. We will be more intertwined with brands. The duty of entertaining the young generation with our offline and online activities on esports continues.



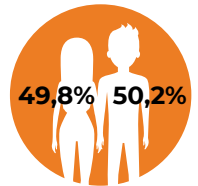
Overview Turkey 2019

Turkey's population in 2019, showed an increase compared to the previous year. Our population has increased by 1 million 151 thousand 115 and reached 83 million 154 thousand 997. This situation reveals that the population in our country has increased by 13.9 per thousand compared to the previous year.

While the male population ratio constitutes 50,2% of the total population rate (41 million 721 thousand 136 people), the female population constituted 49,8% (42 million 433 thousand 861 people).

Turkey, one of the most crowded countries in the world which ranks 18th, 75,2 percent of the population in urban areas according to international data, while the remaining 24,8 percent live in towns and villages.

According to TURKSTAT data, while our province with the highest population is in Istanbul, Ankara, İzmir, Bursa, and Antalya.



2019 Turkey



**TOTAL
POPULATION**
83.154.997



**FEMALE
POPULATION**
41.433.861



**MALE
POPULATION**
41.721.136



**INTERNET
USERS**
63.200.000









**SOCIAL MEDIA
USERS**
53.700.000



Estimated Media Advertising Investment in Turkey


Media and Advertising Investments in Turkey according to the 2019 Forecast Report of **Association of Advertisers** and **Deloitte**; Media channels and percentages used in Turkey are as follows. The numbers show the rise of digital, but conventional channels are still alive and can be very effective at times; if used correctly.

Channel	Market Share	Change
 Television	48,1%	- 7%
 Press	6,6%	- 30,9%
 Outdoor	9,1%	- 1,8%
 Radio	3,6%	- 5,1%
 Cinema	1,3%	8,2%
 Digital	31%	- 10,8%



Estimated Digital Media Advertising Investment in Turkey


The breakdown of digital advertising is particularly important here. Most of the marketing in the gaming industry is digital marketing. Display ads is the most used model.

	Digital Refraction	Percent
	Display	58%
	Search	37%
	Advertisement	4%
	Others	1%



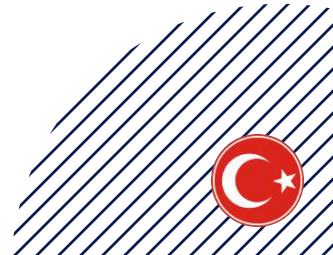
Estimated Digital Media Advertising Investment in Turkey

The breakdown of display ads is as follows.

	Display Refraction	Percent
	Impression / Click Based	68%
	Video	24%
	Native	8%

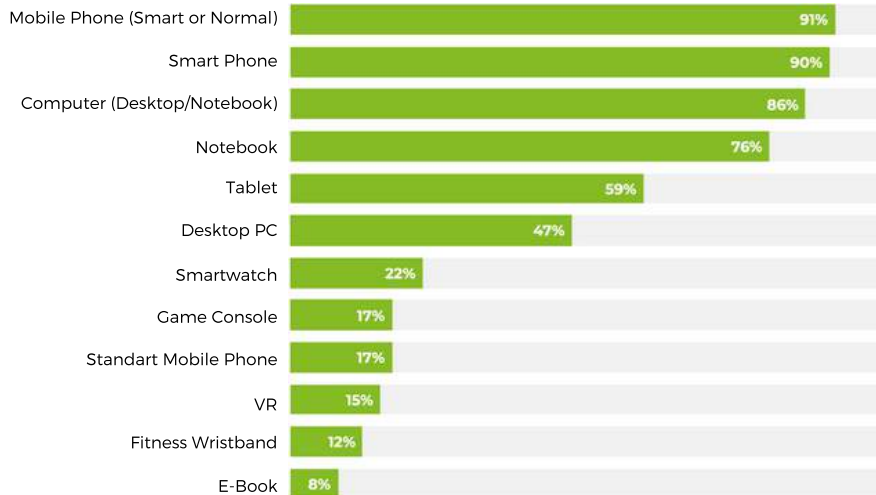


Source: Estimated Media and Advertising Investment in Turkey, Advertisers Association - Deloitte



Device and Accessories Ownership in Turkey

2019 Global Mobile Market User Survey participating users from Turkey; 90% state that they have access to smartphones, 76% laptop computers and 59% access to tablets. While the total rate of smart or regular phone owners is 91%, when the desktop computer is included, computer ownership is observed in 86% of the participants. In tablet ownership, female users are much in front of male users, but smartwatches are more common in the 25-34 age group.

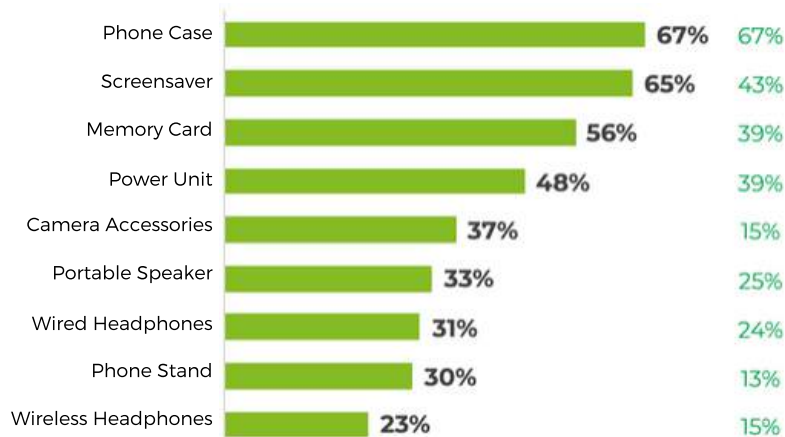


Source: Deloitte Global Mobile User Survey 2019
Base: All adults (18-50), n = 1000 (Turkey)



Accessory Use That Facilitates Mobile Phone Use

We wanted to add this data, which we think may be useful not only for the game and esports market but also for its use in all marketing areas and activities. Especially the game companies can select their options based on the percentages of use below while making special promotions for the players in their advertising activities.



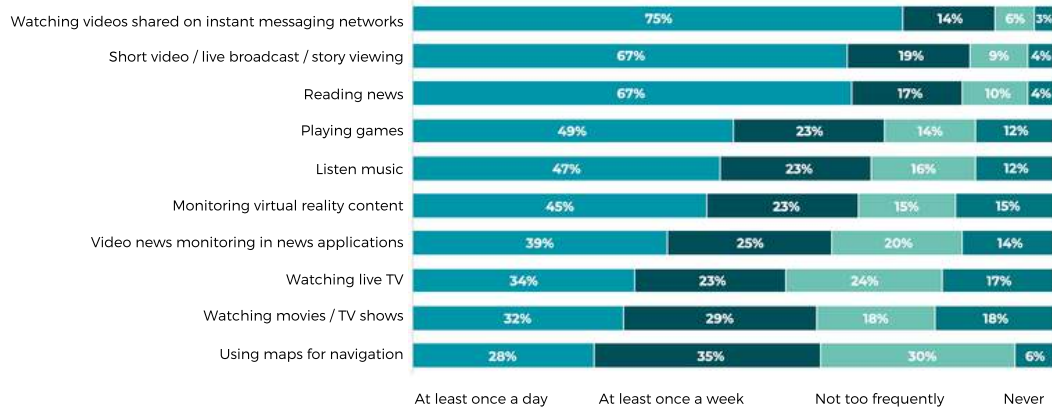
Source: Deloitte Global Mobile User Survey 2019
Base: All adults having a telephone (18-50), n = 914 (Turkey)

European Average



Activities That Users Consume Content on Mobile Phones

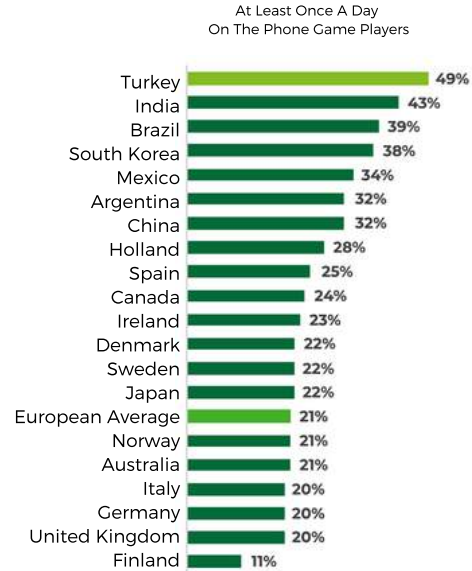
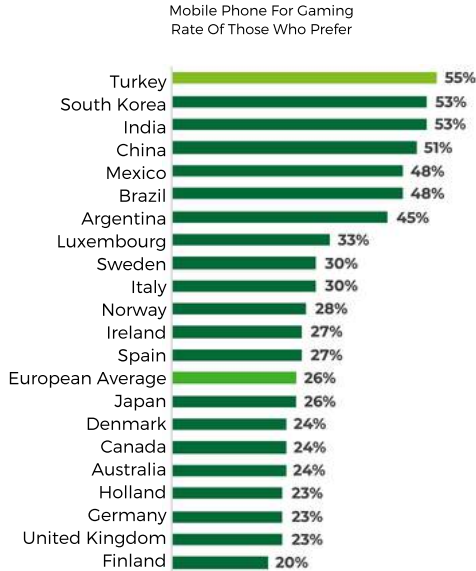
According to the research for mobile phone users in Turkey; instant messaging, watching videos and reading news are now the top 3 habits. As you will notice, the fourth-place comes with games. This shows how big the mobile game market is in Turkey.



Source: Deloitte Global Mobile User Survey 2019
Base: All adults with a smartphone (18-50), n = 900 (Turkey)



Those Who Prefer Their Mobile Phones to Play Games and Those Who Play Games at Least Once a Day on the Phone



Source: Deloitte Global Mobile User Survey 2019
Base: All adults who have a phone (18-50), n = 914; All adults with a smartphone (18-50), n = 900 (Turkey)



When We Play Games on the Phone During the Day

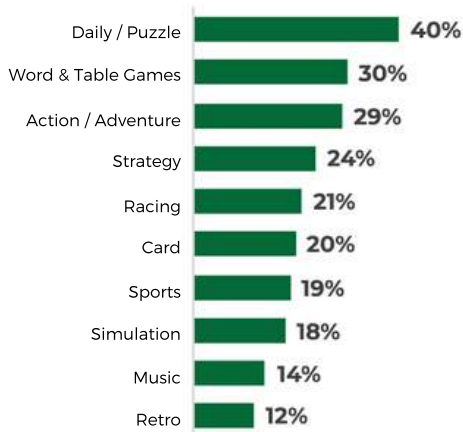


Source: Deloitte Global Mobile User Survey 2019
Base: All adults who play games on their smartphones (18-50), n = 777 (Turkey)

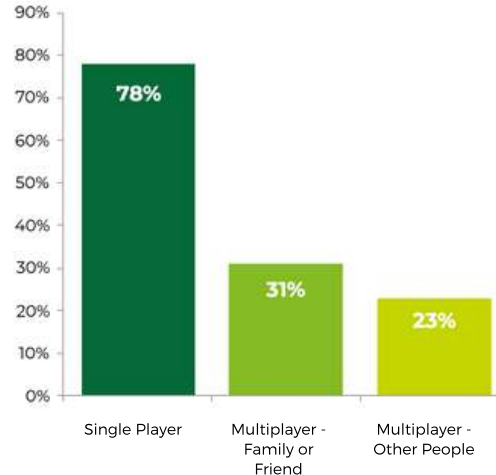


Game Preferences by Game Type and Number of Players

Game Type Preferences



Game Preferences by Number of Players



Source: Deloitte Global Mobile User Survey 2019
Base: All adults (18-50) who have a smartphone, n = 900; All playing games on their smartphones adults (18-50), n = 777 (Turkey)



Turkish Mobile Player Habits

- Mobile game lovers are not satisfied with one game on their phones. According to Nielsen Turkey AdColony & Mobile Gaming Research, users have an average of 4 mobile games on their mobile devices. In tablets, the number doubles to 8!
- Mobile players who are skilled in multi-task can also engage in other activities while playing games. 56% of the participants are watching TV and 45% are playing mobile games while listening to music.
- Users, who embrace mobile games in the fight against stress, also take their breath in mobile games when they want to have fun in their spare time. While 49% of the participants see mobile as an escape to get rid of stress, 52% of them are playing mobile games for fun and 44% for freeing their minds. How mobile games make users feel is among the topics of research. When asked about how they feel while playing mobile games, 47% are relieved, 32% are happy and 28% are excited.
- While 44% of the users choose the mobile games they will play according to the recommendation of friends, 36% make their decisions according to the ranking in the application markets. When it comes to image quality in games, 76% of users emphasize that game image quality is important to them.



What is the situation of the Game Market in Turkey?

Leaving behind 2019, the biggest factor affecting Turkey was the weakness of the TRY against the USD. In fact, although the market is increasing in TRY terms, when you convert it to USD, it shows a decrease compared to the previous year. The main reason for this; while the average exchange rate in 2018 was TRY 4.8, the average exchange rate in 2019 was TRY 5.6.

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



Game Market in Turkey and Esports

2019 was actually the year of Battle Royale, FPS, Strategy and MOBA games. PUBG Mobile was the most played game in Turkey. But at the last moment, Call Of Duty Mobile entered the market so fast that it almost caught PUBG Mobile in its download numbers. Details can be compared in the following sections.

Internet cafes have started to decrease in numbers, but their effects continue. They will be placed by esports arenas, we will see.

The number of esports teams and esports organizations has increased.

In 2019, we experienced great events affecting not only the game market but also all markets; March 31 Local Elections, Istanbul earthquake with 5.8, such as Barış Pınarı Operation. We hope 2020 will be a quieter and more peaceful year for all of us.



Turkey Esports Federation

TESFED

Short Review of 2019

Esports, which is also defined as the sport of the future, is a rapidly developing field in our country as it is around the world. 2019 was a year in which important steps were taken in this sense, we continued our efforts to make our country a world brand in esports with the awareness of our responsibility with clubs, teams, and federations, and we took positive feedbacks.

As the federation, we have done a lot of successful work in 2019. We have signed a cooperation protocol with the Ministry of National Education, which is an important step for the development of esports in Turkey and the proper orientation of the young generation.

For the first time in Turkey, we held the Esports Workshop, which brought together all the stakeholders of the subject and where all aspects of esports were discussed. Again, Turkey's first official esports tournament, which is an important step for esports to become official, was held for the first time under the name of **"TESFED Vodafone Freezone Turkey Cup"**.

Esports, which is still a quite fresh market, requires a period of recognition and understanding before the state and the public. Esport is coming in 4-5 years to the point where football has come in 40-50 years. Investments making by investors, leagues are organizing. If we want to bring esports somewhere reputable in Turkey, we have to collaborate. As the federation, it is up to us to make the lives of all stakeholders of the market as easy as we can. For everyone in the market, the door is always open. We will continue our efforts in 2020 to make our country the number one esports country in the world.



ALPER AFŞİN ÖZDEMİR
TESFED PRESIDENT



Turkey Esports Federation

TESFED

What we have done in 2019 as TEFED?

The presidency of the Turkish Esports Federation (TESFED) was established under the General Directorate of Sports with the approval of the Ministry of Youth and Sports dated April 24, 2018, and numbered 277144. According to the provisions of the Federation Presidency Election Regulation of the Directorate General of Sports, **Alper Afşin ÖZDEMİR** was elected as the "**founding president**" at The Ordinary General Assembly held on May 15, 2018. The board of Directors of TEFED began its mandate with the approval of the ministerial office on July 30, 2018.

TESFED's application for membership in the International E-Sports Federation (IeSF) has been made, work and procedures have been initiated for the acceptance of our federation as the fifty-first member. In addition, our federation is one of the founders of the European E-sports Federations Community, which is currently in the process of being established.

Turkey Esports Federation Athlete, License, Registration, Visa and Transfer instruction, and referee instruction began to be published on September 25, 2018, with the approval of the General Directorate of Sports Services Legal Counsel. Special Esport Halls and qualification certificate instruction began to be issued on December 17, 2018. Along with the creation of new leagues in the coming period, competition instructions will be implemented.



ALPER AFŞİN ÖZDEMİR
TESFED PRESIDENT



Turkey Esports Federation

TESFED

TESFED 2019 ACTIVITIES

TESFED Turkey Cup / December 21-22, 2019: The finals of “TESFED Vodafone FreeZone Turkey Cup”, Turkey's first official sports tournament, took place in an atmosphere of competition and excitement. The cup with the main sponsorship of Vodafone FreeZone, Maximum Card and Red Bull-sponsored, Ataşehir FDR Game Center hosted the final matches. LoL, PUBG, CS: GO, FIFA, Zula and in the scope of Red Bull Last Champion of DOTA 2 winning teams shared a total of TRY 100 thousand prize pool.

TESFED Esports Magazine / December 2019: TEFED magazine design study, which will be published every 2 months, has been prepared, content created and list created for submission to interested persons.

International Ankara Brand Meetings / November 29, 2019: Participation was made in the esports panel during the International Ankara Brand Meetings organized by the Ankara Chamber of Commerce in November 28-29-30 2019.



Turkey Esports Federation

TESFED

TESFED 2019 ACTIVITIES

MEB and TEFED Protocol / November 27, 2019: Various studies will be carried out including national and international esports tournaments in order to give high school level students 21st-century skills within the framework of the cooperation protocol signed between the Ministry of Education and TEFED. Within the framework of the protocol, the organization of esports tournaments, the national tournament in the country as well as the activities for the realization of a tournament between high schools around the world to reward the students who have won the tournaments, the competition under the protocol is planned to be conducted jointly by MEB and TEFED.

TESFED Provincial Representatives Meeting / October 20, 2019: Nonstop Zula Esports Center hosted a strategy meeting of TEFED and provincial representatives. At this meeting hosted by Ingame Group, provincial representatives discussed the progress of esports, regional developments, innovations, and studies.



Turkey Esports Federation

TESFED

TESFED 2019 ACTIVITIES

Turkuvaz Group Esports Summit / October 11, 2019: Esports Summit, which was held at ininal Esports Arena by Turkuvaz Magazine Group's leading economy magazines Para and Forbes, with the participation of T.C. Minister of Youth and Sports Dr. M. Muharrem Kasapođlu.

Esports Workshop / September 25, 2019: The first esports workshop was held where the Turkish Esports Federation (TESFED) presented all aspects of esports, called the sport of the future. Esports clubs, players, universities, game companies, influencers and representatives from the relevant public institutions provided information on their respective fields and discussed and exchanged views with all parties on what is needed for the future and development of esports.



TESFED
TÜRKİYE E-SPOR
FEDERASYONU



Turkey Esports Federation

TESFED

In 2020

- Establishment of the European Esports Federation
- International Esports Federation membership (National participation in international important tournaments after membership)
- Implementation of esports projects with the Ministry of National Education
- Turkey Esports tournament
- Increasing the number of licensed esports players
- Increasing the number of licensed clubs
- Participation in youth and technology activities
- Esports public spotlight will be published
- Development of projects in cooperation with universities.
- Esports magazine will continue to be published
- Steps will be taken to implement the results of the Esports Workshop
- Steps will be taken to improve the technical and infrastructure needs of esports centers



Esports Summit 2019

Republic of Turkey Minister of Youth and Sports

MUHARREM KASAPOĞLU

Speaking at the Esports 2019 Summit, [Turkey Youth and Sports Minister Muharrem Kasapoğlu](#) said that Turkey has made significant progress in a short time on esports and that Turkey is moving forward with confident steps towards becoming a global brand at esports. Minister Kasapoglu also highlighted as;



"Our companies are investing more and more in the industry. Our professional esports players represent our country stronger at the international level. I believe that if we take the right steps at a conscious and strategic level, Turkey will become a global brand in the digital gaming industry. Esports software, hardware, branding and game development activities, including the size of a billion dollars expressed in an area and is part of the game industry. Esports activities have a lot of positive impacts. We will be a country that produces, not uses, so we will support the projects of our young people."



RIOT GAMES

2019 - 2020

Interview

Brief review of 2019 as Riot Games

In 2019, Riot Games announced 6 new games and other projects that will bring great excitement to the entire community and celebrated the 10th year of League of Legends. League of Legends, which is the most played online PC game globally, has more than **100 million active players per month** worldwide. LoL Turkey, with **15 million accounts**, is leading the most played games in our country. More than **2 million new accounts** created last year. In 2019, gamers played a total of **400 million hours LoL** in our country. If we look back, we see that in the 10 years left behind, we continue to grow our community with our strong content and player-driven investments. League of Legends has been the locomotive of esports both in Turkey and around the world. This year, we broke serious records both locally and internationally as LoL Esports. One-day TBF event in Turkey reached more than 1 million individual viewers. The World Final match was watched by an average of 21.8 million people per minute, setting a difficult record to catch in the world esports history.



ERDİÑÇ İYİKÜL
DIRECTOR OF
PUBLISHING
RIOT GAMES

RIOT
GAMES



RIOT GAMES

2019 - 2020

Interview

As Riot Games, 2020 goals

In addition to League of Legends in 2020, we will experience the excitement of entering different games and environments that will give us new experiences. Our new games will allow us to meet players on mobile and console platforms outside of the PC platform, as well as new genres and worlds. With the responsibility and expectation of being the company that develops the most played PC game in Turkey, we aim to provide our players with experiences that they will enjoy as much as LoL and which they will find a fair environment. With this motivation, without neglecting League of Legends, we are committed to re-establishing the throne in the hearts of our players with our new games. In this sense, I think 2020 will be a quite busy year for us, we will grow our community and will embark on new adventures by adding important values to the gaming world.



ERDİÑÇ İYİKÜL
DIRECTOR OF
PUBLISHING
RIOT GAMES

RIOT
GAMES



Why Localization is Important for Turkish Players

In 2019, the [Education First English Language School](#) has published the English Proficiency Index list of 100 countries around the world.

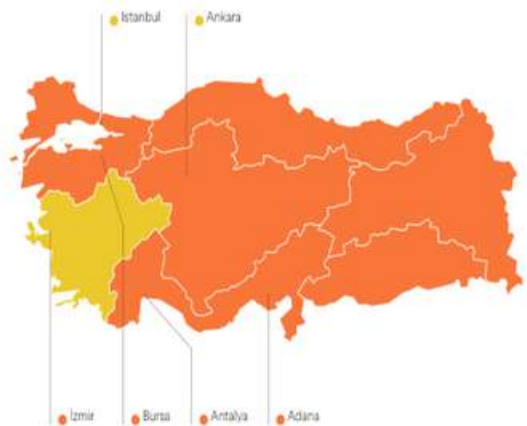
According to the table, as in the previous year, the Netherlands is still number 1 in the English-speaking ratio. Turkey moved backward, unfortunately, fell into the 79.



Why Localization is Important for Turkish Players

Turkey was 62nd in 2017. We're down 11 steps in a year.

Turkey was ranked 32nd in 2012. Since then, every year, the rate has been declining. According to the research the highest level of English in the provinces of Ankara, Turkey. It is followed by Istanbul, Izmir, and Eskisehir.



One of the Turkey's Rising Star ZULA

Interview

What is InGame Group's goal as a domestic gaming company?

In 2012, by the experienced Turkish investors of communications, digital entertainment, and finance industries, InGame Group producing content to millions of gamers, began with the goal of “by a company of gamers worldwide in Turkey” and completed the process of establishing with the support of the new investors from 2014 to today. Although there was a serious potential in terms of gamers in Turkey, there was a lack of a game that would come out of this land and become a phenomenon in the world.

As InGame Group, our number one goal was to bring together a Turkish gaming brand with millions of players from all around the world. Fortunately for us, we have achieved this goal in a very short period of time. InGame Group is one of the most invested game companies in Turkish esports and moving forward with the goal of spreading esports to the base in Turkey by developing the esports ecosystem.

ZULA

**IN GAME
GROUP**



One of the Turkey's Rising Star ZULA

Interview

What has InGame Group done for gaming and esports in 2019?

As a group of companies aiming to contribute to the growing digital gaming industry with investments and innovations, we produce games played in 3 different continents, 10 regions and 11 different languages in addition to Turkey. The process of Zula's becoming a global game has been ongoing since 2016. Our game is currently meeting its players through local streamers in Brazil, Europe, Iran, Russia, and Latin America. We have reached millions of players with the games we have produced to date.

In addition to developing games, InGame Group organizes one of Turkey's 2 official esports leagues with Zula Oyun. In early 2019, we also opened the gates of Nonstop Zula Esports Center, the first in Turkey, and the largest esports center in Europe. Spread over an area of 2500 square meters on Istiklal Street in the heart of Istanbul, Nonstop hosts professional esports matches throughout the year, as well as tournaments where amateur players compete with many different events.

In 2019, we have invested a total of TRY 10 million in digital gaming and esports, including the Nonstop Zula Esports Center. We have handed out millions of Turkish Lira in prizes to our esports players in the Zula ecosystem, especially with the Zula Super League and the Zula Competition Tournament.

In addition, in 2019, we signed the first gamified content project in Turkey in collaboration with Ay Yapım. "Çukur Zula'da" project is a first step towards the future of the entertainment industry and for the first time in Turkey, the characters and stories of a series have been included in a digital game. The pothole map, which was created by modeling the streets through the pothole sequence, took its place among the stash maps.

ZULA
ZULA

IN GAME
GROUP



One of the Turkey's Rising Star ZULA

Interview

What are the 2020 goals, what InGame Group planning for the industry?

In 2020, the Zula Super League continues with its growing prize pool, flash transfers, and brand new content. Many new investments are also planned this year. As a domestic company, the creator of 100 percent domestic game Zula, we are moving with the vision that our country will become a brand in esports around the world. We aim to become the largest in the region by reaching 100 million players in the next 3 years.

We are already at the top of the number of players we can reach as Zula in Turkey, we have more than 1 million active players per month. In the coming period, we aim to spread as much geography as possible outside Turkey and to promote Turkey while increasing our number of players abroad. The Middle East and North African countries will be among the regions where we will increase our investments in the coming period.

In the first month of 2020, we have introduced **Zula Mobile** to our players, which Zula lovers have been waiting for with great excitement. In a very short time after that, our Battle Royale mode will be meeting with Zula PC players. In addition, the first esports series in Turkey, which has reached millions of viewers since its release on YouTube, will be released in March.

We plan to invest approximately TRY 12-13 million in the market of esports in 2020. Together with our other investments, our total investment amount is estimated to be TRY 30-35 million.

ZULA
ZULA

IN GAME
GROUP



2018



2019

**Turkey Game
Market 2018**

&

**Turkey Game
Market 2019**

Comparison!





POPULATION

TURKEY GAME MARKET REPORT 2019

- Turkey Population: **82.003.882**
- Young Population: **15.000.000+**



- Turkey Population: **83.154.997**
- **23.1%** 0 - 14 Age
- **67.8%** 15 - 64 Age
- **9.1%** 64 Years and Above

2018

2019



INTERNET USERS

TURKEY GAME MARKET REPORT 2019

- Internet Users: 59.360.000

- 72% of the population

connected to the Internet



- Internet

Users: 63.200.000+

- 75,3% of the population

connected to the Internet

2018

2019



SOCIAL MEDIA USERS

TURKEY GAME MARKET REPORT 2019

- Active Social Media

Users: 52.000.000



- Active Social Media

Users: 53.700.000

2018

2019



MOBILE USERS

TURKEY GAME MARKET REPORT 2019

- Mobile Users: 76.340.000
- 93% Mobile / Population
- 75 - 80% Smartphone / Mobile
- Smartphone Users:
50.000.000 (+ / -)

2018



- Mobile Users: 82.000.000+
- 98-99% Mobile / Population
- 75 - 80% Smartphone / Mobile
- Smartphone Users:
55.000.000 (+ / -)

2019

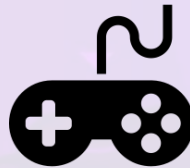


GAMERS

TURKEY GAME MARKET REPORT 2019

- Gamers: 30.000.000+
- Total Generated Game Revenue: 853.000.000 USD (+ / -)
- Mobile: 400.000.000 USD
- PC/Console: 453.000.000 USD

2018



- Gamers: 32.000.000+
- Total Generated Game Revenue: 830.000.000 USD (+ / -)

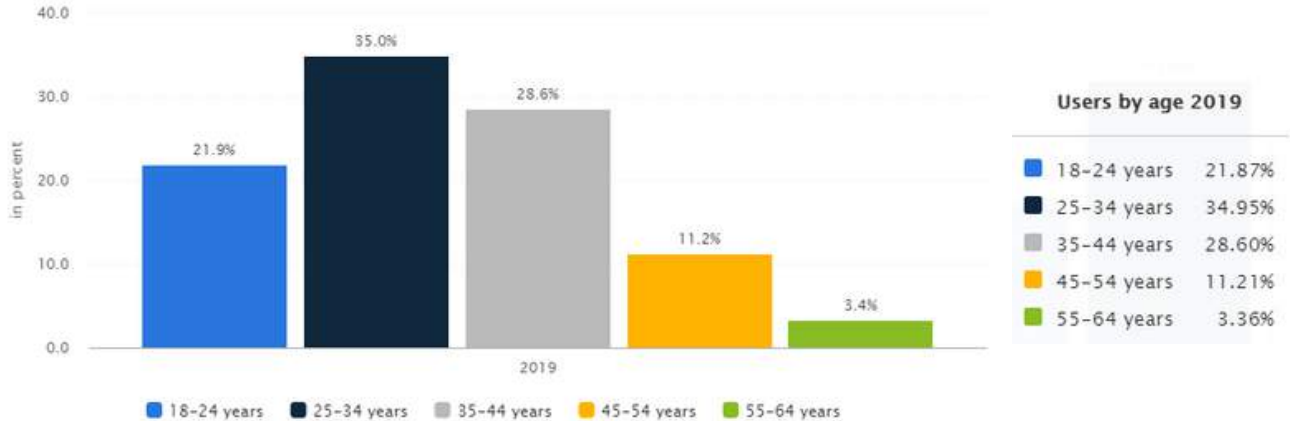
Due to the dollar exchange rate, it shows a decrease.

2019



GAMERS BY AGE

TURKEY GAME MARKET REPORT 2019

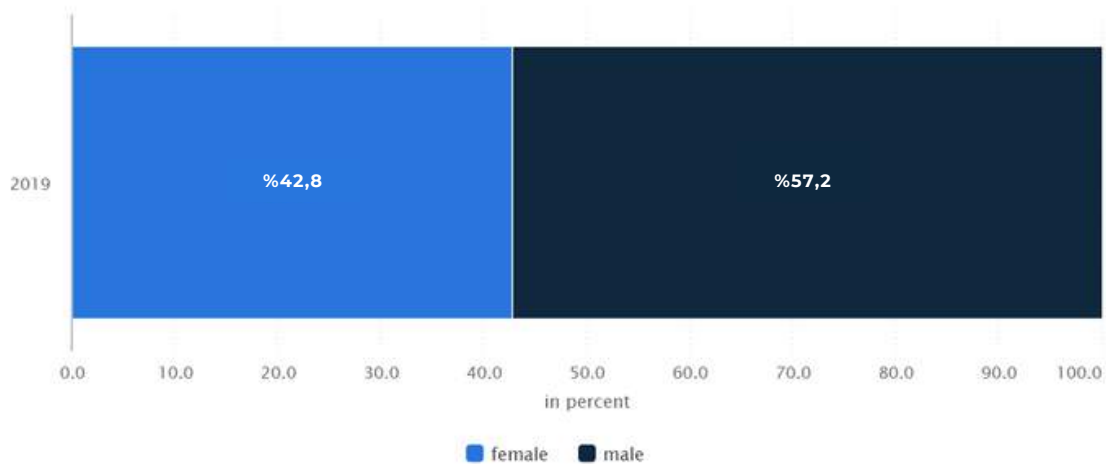


2019



GAMERS BY GENDER

TURKEY GAME MARKET REPORT 2019

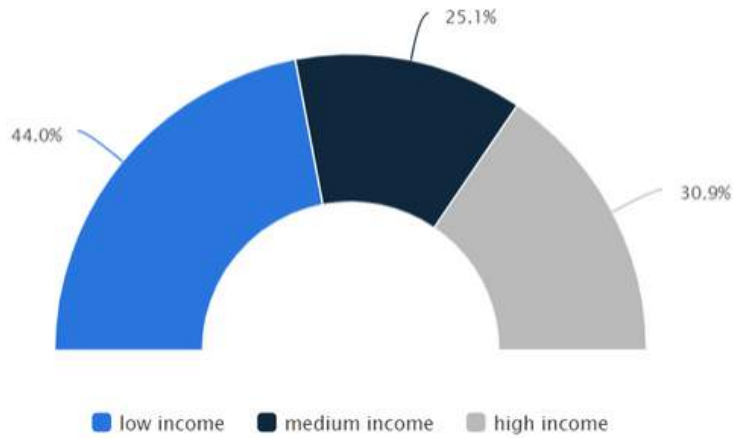


2019



GAMERS BY INCOME

TURKEY GAME MARKET REPORT 2019



2019



TOP 10 MOBILE GAME - FREE DOWNLOAD

TURKEY GAME MARKET REPORT 2019



1	PUBG Mobile - Tencent	15.300.000 +
2	Call Of Duty Mobile - Activision	9.500.000 +
3	Subway Surfers - Kiloo	8.500.000 +
4	Kelime Gezmece - BigStar Games	7.600.000 +
5	Brawl Stars - Supercell	6.600.000 +
6	My Talking Tom - Outfit7	6.000.000 +
7	Fun Race 3D - Good Job Games	6.000.000 +
8	Stack Ball - Azur Int. Games	5.950.000 +
9	Words Of Wonders - Fugo	5.800.000 +
10	Bus Simulator: Ultimate - Zuuks Games	5.700.000 +



TOP 10 MOBILE GAME - PAID DOWNLOAD

TURKEY GAME MARKET REPORT 2019



1	Minecraft Pocket Edition - Mojang	69.000 +
2	Operation Third-Person Shooter War Game 3D	66.500 +
3	Construction Simulator 2014 - Astragon	55.000 +
4	Hitman Sniper - Square Enix	45.000 +
5	Earn to Die - Not Doppler	35.000 +
6	Plague Inc. - Ndemic Creations	31.000 +
7	Football Manager 2019 - SEGA	23.000 +
8	Real Drift Car Racing - Real Games SRLS	22.000 +
9	Hermes: KAYIP - Fatih Beceren	22.000 +
10	Adalet Namluda: Afrin - Rigbak Games	22.000 +



TOP 10 MOBILE GAME - REVENUE

TURKEY GAME MARKET REPORT 2019



1	PUBG Mobile - Tencent	20.000.000 USD +++
2	101 Okey Plus - Zynga	9.750.000 USD + -
3	Game Of Sultans - Mechanist	9.100.000 USD + -
4	Lords Mobile - IGG	7.150.000 USD + -
5	Mobile Legends Bang Bang - Moonton	6.500.000 USD + -
6	Game Of Thrones: Conquest- Warner Bros	5.850.000 USD + -
7	Fun Okey 101 - Quick Game	5.500.000 USD + -
8	Brawl Stars - Supercell	5.200.000 USD + -
9	The Great Ottomans - Onemt	5.000.000 USD + -
10	Clash Of Kings - Elex Technology	4.900.000 USD + -



TURKEY BY DOWNLOADS - GENERAL

TURKEY GAME MARKET REPORT 2019

Top Apps

1		WhatsApp Messenger	Facebook
2		Instagram	Facebook
3		Facebook Messenger	Facebook
4		TikTok	ByteDance
5		Facebook	Facebook
6		Trendyol	Trendyol
7		letgo	letgo
8		Digital Operator	Turkcell
9		RichBurg Sounds	BurgTones
10		Türk Telekom Online İşlemler	Türk Telekom

Top Games

	PUBG MOBILE	Tencent
	Call of Duty: Mobile	Activision Blizzard
	Subway Surfers	Kiloo
	Kelime Gezmece	BigStar Games
	Brawl Stars	Supercell
	My Talking Tom 2	Outfit7
	Fun Race 3D	Good Job Games
	Stack Ball	Azur Interactive Games
	Words Of Wonders	Fugo
	Bus Simulator : Ultimate	Zuuk's Games

Top App Companies

Facebook	United States
Google	United States
Turkcell	Turkey
Trendyol	Turkey
ByteDance	China
InShot Inc	China
ABISHKKING	Hong Kong
Türk Telekom	Turkey
Microsoft	United States
letgo	United States

Top Games Companies

Voodoo	France
Outfit7	Cyprus
Crazy Labs	Israel
SayGames	Belarus
Activision Blizzard	United States
Miniclip	Switzerland
AppLovin	United States
Playgendary	Germany
Supercell	Finland
Tencent	China



TURKEY BY MONTHLY ACTIVE USERS - GENERAL

TURKEY GAME MARKET REPORT 2019

Top Apps

1		WhatsApp Messenger	Facebook
2		Instagram	Facebook
3		Facebook	Facebook
4		Facebook Messenger	Facebook
5		Twitter	Twitter
6		sahibinden.com	sahibinden
7		e-Devlet	Ministry of Transport, Maritime and Communication
8		Ziraat Mobil	Ziraat Bank
9		letgo	letgo
10		Hepsiburada	Hepsiburada.com

Top Games

1		PUBG MOBILE	Tencent
2		Candy Crush Saga	Activision Blizzard
3		101 Okey Plus	Zynga
4		Brawl Stars	Supercell
5		Clash of Clans	Supercell
6		Mobile Legends: Bang bang	Moonton
7		Words Of Wonders	Fugo
8		Kelime Gezmece	BigStar Games
9		Subway Surfers	Kiloo
10		Clash Royale	Supercell



TURKEY BY CONSUMER SPEND - GENERAL

TURKEY GAME MARKET REPORT 2019

Top Apps

1		Azar	Hyperconnect
2		Tinder	InterActiveCorp (IAC)
3		Who - Call&Chat	Scorp
4		Connected2.me	C2M
5		Netflix	Netflix
6		BIGO LIVE	YY Inc
7		LivU	Riley Cillian
8		Bermuda	Bermuda Inc.
9		Followers Analytics for Instagram	MobileX
10		BluTV	Dogan Holding

Top Games

	PUBG MOBILE	Tencent
	101 Okey Plus	Zynga
	Game of Sultans	Mechanist
	Lords Mobile	IGG
	Mobile Legends: Bang bang	Moonton
	Game of Thrones: Conquest	AT&T
	Fun Okey 101	Quick Game
	Brawl Stars	Supercell
	The Great Ottomans	Onemt
	Clash of Kings	Elex Technology

Top App Companies

Hyperconnect	South Korea
InterActiveCorp (IAC)	United States
Riley Cillian	Hong Kong
Scorp	Turkey
C2M	Turkey
Netflix	United States
Bermuda Inc.	South Korea
MobileX	Turkey
Google	United States
Dogan Holding	Turkey

Top Games Companies

Zynga	United States
Tencent	China
Supercell	Finland
IGG	China
Mechanist	China
Moonton	China
Onemt	China
AT&T	United States
Activision Blizzard	United States
FunPlus	China



WORLD RANK - REVENUE

TURKEY GAME MARKET REPORT 2019

- World Rank - Total

18

- World Rank - Mobile

18

2018



- World Rank - Total

18

- World Rank - Mobile

18

2019



POPULAR GAME COMPANIES IN TURKEY

TURKEY GAME MARKET REPORT 2019

- Epic Games
- Blizzard
- Activision
- Electronic Arts
- Ubisoft
- Bethesda
- Tencent
- Pearl Abyss
- Valve
- Bluehole
- KONAMI
- SEGA
- Cameloft
- Vodoo
- Ketchapp
- Square Enix
- Zynga
- Gameforge
- Netease
- Riot Games
- Nfinity - Tam Game
- IGG
- Netmarble
- Naughty Dog
- Neowiz
- Cd Red Project
- Cubizone
- Microsoft Studios
- Bungee
- Eidos
- Rockstar
- Dice
- Bioware
- Kojima
- Codemasters
- Arenanet
- Relic
- ID Software
- Nintendo
- Sony
- Bandai Namco
- Crytek
- Moonton
- Rovio
- Wargaming

2019



ACTIVE TURKISH GAME COMPANIES IN TURKEY

TURKEY GAME MARKET REPORT 2019

- Abyss Gameworks
- Apphic
- Arcade Monk
- Aryas Games
- BigStar Games
- Black Coco
- Clown Games
- Crania Games
- Crealode Games
- Creasaur
- Crescive Games
- Digitoy Games
- Elite Game Studio
- Enrich Games - Publisher
- Fiber Games
- Fugo Games
- Funmoth Games
- Gamikro
- Gamebit Studio
- Gamester
- Gigafun
- Globe Games - Publisher
- Good Job Games
- Gram Games
- GreenGate
- Green Panda Games
- Cripati
- Cunay Dreams
- He2apps
- HES Games
- Hunch Game Studios
- Hyperlab
- Imaginite Games
- Kodobur
- Libra Softworks
- Lokum Games
- MadByteGames
- MagicLab Game Technologies
- Marvy Games
- Masomo
- Mavis Games
- Mayadem
- Mild Mania
- Mobge
- Mobile Craft
- MoraLabs
- Mythra Tech
- Mynet - Funpac
- Narcade
- Negentra
- No Pact
- Nowhere Studios
- Oldmoustache G.works
- Oyun Stüdyosu - Sanalika
- Panteon
- Peak Games
- Pixega Studio
- Pixofun
- Playable Factory
- Ponyom Games
- Rakarnow Studios
- RealityArts Studio
- Recontact Digital Arts
- Ricci Game - Publisher
- Rigbak
- Rocwise Entertainment
- Rootcraft Game Technologies
- Ruby Games Studio
- Simsoft
- SK Games
- Studio Billion
- Suji Games
- TaleWorlds
- Teta Games
- Tiramisu
- Tiplay
- Tolga Ay
- Tricky Games
- Trifles Games
- Tulpar Games
- Udo Games
- Unco Soft
- Vertigo Games
- WeHoog Game Studio
- YekGames
- Zibumi
- Zoetrope Interactive
- Zuuks Games

2019



THE MOST POPULAR TURKISH MADE GAMES OF 2019

TURKEY GAME MARKET REPORT 2019

PC

- Zula - InGame Group
- Mount & Blade - TaleWorlds Entertainment
- Tactic Force - HES Games
- Remnants of Naezith - Tolga Ay
- Doughlings: Invasion - Hero Concept - All Platforms
- Conarium - Zoetrope Interactive
- Soldiers of The Universe
- No 70: Eye of Basir - Oldmoustache Gameworks
- Tartarus - Abyss Gameworks

MOBILE

- Zula Mobil - InGame Group
- Kafa Topu 2 - Masomo / Miniclip
- Words Of Wonders - Fugo
- Kelime Gezmece - BigStar Games
- Fun Race 3D - Good Job Games
- Adalet Namluda: Afrin - Hakan Erunsal
- Hermes: KAYIP - Fatih Beceren
- Bus Simulator: Ultimate - Zuuks Games
- 101 Okey Plus - Peak Games / Zynga

2019



POPULAR TWITCH TV STREAMERS IN TURKEY

TURKEY GAME MARKET REPORT 2019

TWITCH

+2019 GLOBAL NUMBERS

	FOLLOWERS	FOLLOWERS GAINED	TOTAL VIEWS	AVG. VIEWS	PEAK VIEWS	STREAM TIME (HOURS)	WATCH TIME (HOURS)
#1 WTCN	1.394.869	424.811	60.489.874	5.252	71.128	1.273	6.547.232
#2 JAHREIN	1.247.321	236.006	54.368.534	7.215	43.683	862	6.550.607
#3 UNLOSTV	1.055.945	160.887	30.718.413	6.091	19.678	187	1.105.039
#4 KENDİNEMÜZİSYEN	997.580	411.536	33.587.864	7.182	20.382	1.075	7.900.780
#5 MITHRAIN	994.314	383.058	56.711.711	6.021	29.078	1.630	9.669.586
#6 ZEON	933.853	77.809	48.324.622	1.151	5.609	1.507	1.803.632
#7 PİNTİPANDA	739.318	138.815	24.342.596	1.667	8.717	872	1.552.770
#8 RAMMUS53	717.692	315.517	19.451.726	1.758	16.370	1.517	2.712.076
#9 ELRAENN	684.304	435.448	11.241.616	4.296	21.721	701	3.183.024
#10 HAZRETİYASUO	618.890	109.698	11.340.546	911	4.079	304	296.500

2019



POPULAR TWITCH TV STREAMERS IN TURKEY

TURKEY GAME MARKET REPORT 2019

TWITCH

+2019 GLOBAL NUMBERS

	FOLLOWERS	FOLLOWERS GAINED	TOTAL VIEWS	AVG. VIEWS	PEAK VIEWS	STREAM TIME (HOURS)	WATCH TIME (HOURS)
#11 RIOTGAMESTURKISH	616.440	56.392	140.399.308	7.734	47.441	521	4.562.130
#12 ELWIND	566.320	249.015	25.955.611	8.591	24.398	1.072	9.129.023
#13 LEVO	513.545	-739	38.444.667	2.848	16.853	1.026	2.915.727
#14 THEOKOLES	463.864	35.728	68.101.169	1.290	5.124	1.449	1.893.941
#15 THALDRINLOL	453.483	120.469	22.574.667	2.151	13.738	1.814	4.001.292
#16 MIAFITZ	393.433	197.012	6.311.382	773	3.363	600	467.572
#17 JTGTV	377.491	72.962	29.304.515	7.075	24.812	164	1.229.688
#18 BERKRIPEPE	374.567	109.859	8.111.072	2.062	6.742	487	966.461
#19 UTHENERA	356.493	166.110	10.180.452	2.159	26.312	1.409	2.974.793
#20 ALPTV	338.776	60.947	7.020.209	987	4.696	414	393.261

2019



POPULAR YOUTUBE CHANNELS IN TURKEY

TURKEY GAME MARKET REPORT 2019

YOUTUBE

*2019 GLOBAL NUMBERS

	SUBSCRIBERS	AVG. VIEWS	TOTAL VIEWS	TOTAL VIDEOS	MOST POPULAR VIDEO VIEWS
#1 BATURAY ANAR	2.79M	427.18K	709.23M	971	8.7M
#2 SESEGEL	2.64M	183.23K	1.14B	1.78K	9.2M
#3 OYUN DELİSİ	2.61M	54.01K	930.99M	1.59K	5.4M
#4 YAVUZ SELİM	2.58M	359.02K	57.55M	105	3.1M
#5 MINECRAFT EVİ	2.09M	114.33K	658.85M	2.04K	5.9M
#6 GEREKSİZ ODA	2.01M	203.5K	524.34M	1.55K	7.1M
#7 ÜMİDİ	1.95M	126.64K	818.84K	3.92K	5.2M
#8 RULINGGAME	1.89M	262.1K	791.65M	1.88K	9.1M
#9 KOZMİK KARINCA	1.74M	659.44K	389.27K	531	8.3M
#10 TURGUT EKİM	1.7M	541.29K	312.33K	806	8.6M

2019



POPULAR YOUTUBE CHANNELS IN TURKEY

TURKEY GAME MARKET REPORT 2019

YOUTUBE

*2019 GLOBAL NUMBERS

	SUBSCRIBERS	AVG. VIEWS	TOTAL VIEWS	TOTAL VIDEOS	MOST POPULAR VIDEO VIEWS
#11 HAN KANAL	1.6M	112.42K	1.16B	2.77K	15M
#12 AHMET AGA	1.56M	56.04K	769.17M	2.15K	16M
#13 MERVANT	1.41M	211.01K	309.71K	1.54K	3.8M
#14 BARIŞ BRA	1.37M	616.89K	321.95K	1.11K	2.4M
#15 TÜRKPRO	1.35M	207.82K	479.16M	1.13K	5.9M
#16 BATUHAN ÇELİK	1.32M	107.31K	406.23M	1.04K	11M
#17 BERK MUHAMMET	1.29M	235.69K	275.29M	1K	14M
#18 MINECRAFT PARODİLERİ	1.26M	253.15K	537.14M	1.06K	7.1M
#19 MAVİSLİME	1.21M	261.55K	694.47M	512	23M
#20 TUGAY GÖK	1.14M	314.95K	165.06M	493	2.6M

2019



POPULAR INSTAGRAM INFLUENCERS IN TURKEY

TURKEY GAME MARKET REPORT 2019

INSTAGRAM

INFLUENCER	FOLLOWERS
#1 WTCN	689K
#2 HAZRETİ YASUO	609K
#3 KENDİNE MÜZİSYEN	597K
#4 BATURAY ANAR	585K
#5 MERVANT	544K
#6 GEREKSİZ ODA	533K
#7 SESE GEL	478K
#8 JAHREİN	433K
#9 ELRAENN	422K
#10 ÜMİDİ	402K

2019



TOP 10 GAMES AND PLATFORMS WITH THE MOST SPENDS IN TURKEY

TURKEY GAME MARKET REPORT 2019

PC GAMES AND PLATFORMS WITH THE MOST SPENDS

GAME AND PLATFORM	PUBLISHER
#1 LEAGUE OF LEGENDS	["RIOT GAMES"]
#2 FORTNITE	["EPIC GAMES"]
#3 ZULA	["LOKUM GAMES"]
#4 STEAM/PLATFORM	["VALVE"]
#5 BATTLE.NET	["BLIZZARD ENTERTAINMENT"]

2019



ACTIVE PAYMENT INSTITUTIONS

TURKEY GAME MARKET REPORT 2019



- GPay Elektronik Ticaret A.Ş.
- Aypara Ödeme Kuruluşu A.Ş.
- BPN Ödeme Kuruluşu A.Ş.
- Ceo Ödeme Hizmetleri A.Ş.
- Efix Ödeme Hizmetleri A.Ş.
- Elekse Ödeme Kuruluşu A.Ş.
- Faturakom Ödeme Hizmetleri A.Ş.
- Faturamatik Ödeme Kuruluşu A.Ş.
- Föy Fatura Ödeme Kuruluşu A.Ş.
- Global Ödeme Hizmetleri A.Ş.
- GönderAI Ödeme Hizmetleri A.Ş.
- İstanbul Ödeme Kuruluşu A.Ş.
- Klon Ödeme Kuruluşu A.Ş.
- Moka Ödeme Kuruluşu A.Ş.
- MoneyGram Turkey Ödeme Hzm. A.Ş.
- NKolay Ödeme Kuruluşu A.Ş.
- Nestpay Ödeme Hzm. A.Ş.
- Octet Express Ödeme Kuruluşu A.Ş.
- Ödeal Ödeme Kuruluşu A.Ş.
- Paragram Ödeme Hzm. A.Ş.
- Pay Fix Ödeme Hzm. A.Ş.
- Paynet Ödeme Hzm. A.Ş.
- PayTR Ödeme Hzm. A.Ş.
- Paytrek Ödeme Kuruluşu Hzm. A.Ş.
- PayU Ödeme Kuruluşu A.Ş.
- Pratik İşlem Ödeme Kuruluşu A.Ş.
- Ria Turkey Ödeme Kuruluşu A.Ş.
- Sender Ödeme Hzm. A.Ş.
- Tam Fatura Ödeme Hzm. A.Ş.
- Trend Ödeme Kuruluşu A.Ş.
- Tronapay Ödeme Hzm. A.Ş.
- UPT Ödeme Hzm. A.Ş.
- Vezne24 Tahsilat Sistemleri ve Ödeme Hzm. A.Ş.
- Vizyon Tahsilat Sistemleri ve Ödeme Hzm. A.Ş.
- Western Union Turkey Ödeme Hzm. A.Ş.

2019



ACTIVE ELECTRONIC MONEY INSTITUTIONS

TURKEY GAME MARKET REPORT 2019



- İninal Ödeme ve Elektronik Para Hizmetleri A.Ş.
- Turkcell Ödeme ve Elektronik Para Hizmetleri A.Ş.
- Vodafone Elektronik Para ve Ödeme Hizmetleri A.Ş.
- Wirecard Ödeme ve Elektronik Para Hizmetleri A.Ş.
- Papara Elektronik Para ve Ödeme Hizmetleri A.Ş.
- İyzi Ödeme ve Elektronik Para Hizmetleri A.Ş.
- SiPay Elektronik Para ve Ödeme Hizmetleri A.Ş.
- TT Ödeme ve Elektronik Para Hizmetleri A.Ş.
- TURK Elektronik Para A.Ş.
- Ozan Ödeme Hizmetleri ve Elektronik Para A.Ş.
- Paladyum Elektronik Para ve Ödeme Hizmetleri A.Ş.
- Aköde Elektronik Para ve Ödeme Hizmetleri A.Ş.
- BELBİM Elektronik Para ve Ödeme Hizmetleri A.Ş.
- Birleşik Ödeme Hizmetleri ve Elektronik Para A.Ş.
- CEMETE Elektronik Para ve Ödeme Hizmetleri A.Ş.
- D Ödeme Elektronik Para ve Ödeme Hizmetleri A.Ş.
- ERPA Ödeme Hizmetleri ve Elektronik Para A.Ş.
- Hızlıpara Ödeme Hizmetleri ve Elektronik Para A.Ş.

2019



ONLINE SALES CHANNELS

TURKEY GAME MARKET REPORT 2019



- Razer Gold
- BynoGame
- Perdigital
- MTC – Meta Games
- Oyunfor
- Game Satış
- Playstore
- Origin
- Battlenet
- Aral Game
- G2A
- GamerEpin
- En Ucuz Epin
- Epin.com.tr
- Yeşiyurt Game
- Kabasakal Online
- Mupay
- Kopazar
- DurmaPlay
- Klas Game
- FoxnGame
- Voidu
- Kinguin
- Playsultan
- Oyunalışveriş
- Epinstore
- Atagame
- Oyunone
- Epinevi
- BursaGB
- Trinkpay
- Turkpin
- Cadde Game
- Oyunyardım
- XGame
- EpinMy

2019



POPULAR PAYMENT CHANNELS PERCENTAGE

TURKEY GAME MARKET REPORT 2019



- BANK TRANSFER/EFT 36%
- MOBILE PAYMENT 20%
- PRE PAID CARDS 20%
- CREDIT CARD 9%
- KIOSKS 3%
- E WALLET 2%

2019



ASSOCIATIONS

TURKEY GAME MARKET REPORT 2019

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



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

2018

2019



GAME EXHIBITIONS - EVENTS

TURKEY GAME MARKET REPORT 2019

- GameX
- GIST (Gaming İstanbul)



- GameX
- GIST (Gaming İstanbul)

2018

2019



ACADEMIC PROGRAMS IN TURKEY

TURKEY GAME MARKET REPORT 2019



• Bahçeşehir University Game Laboratory BUG

- BUG is a game laboratory project initiated by Bahcesehir University, Department of Communication Design.

• MASTER BUG

- Game Design Graduate Program at Bahçeşehir University: Turkey's first game design graduate program.

• ODTÜ GATE

- Orta Doğu Teknik University Game Technologies Master Program.

• Orta Doğu Teknik University Continuing Education Center

- ODTÜ SEM also has entry level trainings for Unity3D. 30-hour training continues for 5 weeks.

• ATOM

- Animation Technologies and Game Development Center, shortly ATOM, is a pre-incubation center established in 2008 within the Tecknokent of Orta Doğu Teknik University.

2019



ACADEMIC PROGRAMS IN TURKEY

TURKEY GAME MARKET REPORT 2019



• İzmir Ekonomi University

- İzmir Ekonomi University, Department of Computer Games and Technology. Computer Games and Technology Master's program at İzmir University of Economics directly related to game development.

• IŞIK University

- Işık University Computer Graphics and Animation Graduate Program. The Computer Graphics and Animation Master Program at the Institute of Science of Işık University in Istanbul is one of the educational programs considering the game sector.

• Istanbul Bilgi University

- Game Design and Development Undergraduate Program - *awaiting approval from YÖK.*

• Hacettepe University

- Hacettepe Computer Animation and Game Technologies Graduate Program. One of the few master program in game development in Turkey is the Master of Science program in Computer Animation and Game Technologies at Hacettepe University in Ankara.

2019



ACADEMIC PROGRAMS IN TURKEY

TURKEY GAME MARKET REPORT 2019



• **Marmara University computer and Instructional Technology Teaching Undergraduate and Graduate Program**

- While there is no direct game development education in the Department of Computer and Instructional Technology Teaching at Marmara University Atatürk Faculty of Education, there are courses where the basic components of video games, game genres, their place in the education of the individual, psychological and sociological effects of games are examined.

• **Mimar Sinan Fine Arts University Continuing Education Center**

- The Continuing Education Center of Mimar Sinan Fine Arts University in Istanbul is one of the paid educational institutions providing Game Development education. They offer Unity3D game engine training with 2 different levels.

• **IndiGo Consulting and Education Services**

- IndiGo offers mobile game development educations with Unity3D and 3D Character Modeling trainings. IndiGo is also a resident organization in Ankara.

2019



ACADEMIC PROGRAMS IN TURKEY

TURKEY GAME MARKET REPORT 2019



• **Bilişim Education Center**

- Bilişim Education Center is also one of the paid education centers. In addition to various software educations, both individual and enterprise, they also offer 3D animation trainings. Bilişim Education Center provides services in the cities of Istanbul, Ankara, Eskişehir, Konya, Bursa and Antalya.

• **Bilişim Academy**

- Bilişim Academy is another private educational institution. They also provide Unity3D training. They are located at Yıldız Technical University Teknopark in Istanbul.

• **Union of Chambers and Commodity Exchanges of Turkey University of Economics and Technology Continuing Education Research and Application Center, TOBB ETU SEM**

- Paid game development courses at TOBB ETU Sem in Ankara provide education for Unity3D game engine.
- **3D Academy School of Animation and Visual Effects**
- 3D Academy School of Animation and Visual Effects is a center providing 3D modeling, graphic design, visual effects education for many other markets along with the gaming industry.

2019



UNIVERSITIES OFFERING "GAME SPECIFIC" UNDERGRADUATE AND GRADUATE COURSES IN TURKEY TURKEY GAME MARKET REPORT 2019



While esports increasing its reach and awareness day by day, it is also taking into account its popularity, especially among younger generations, to the educational institutions. Even though the universities hosting the birth of esports, where the culture of the game is most common, tournaments, organizations have been competitive since decades ago and esports, especially in our country, we have been observing its great rise for last 4 years clearly. Esports' technology is used as a more widespread and in pioneering countries in the past is older and therefore, today the prevalence of this culture, the economic size varies accordingly from country to country. Another factor is population.

When we examine the profile of esports followers, which is projected to be 10 million people in our country, we see that there is an audience of around 75% of high school and university education ages. In our country, which has a large young population and where education is culturally important, the interest of higher education institutions in the game and esports has increased in this direction.

The number of university esports and gaming clubs, which was around 40 in 2017, has reached the number of 145 as of 2020. Behind this incredible trend, Bahçeşehir University invested in the professional esports field for the first time in 2016, physical esports field was built on campus, esports scholarship and student club professionalize process started later with the sponsorship of professional esports teams of universities. As of 2020, there are physical gaming and esports areas in 9 university campuses.

**EDUCATION AND ESPORTS
THROUGH THE EYES OF THE
EXPERT**



SEÇKİN TOPALOĞLU
BAU ESPORTS COORDINATOR
BAHÇEŞEHİR UNIVERSITY

2019



UNIVERSITIES OFFERING "GAME SPECIFIC" UNDERGRADUATE AND GRADUATE COURSES IN TURKEY TURKEY GAME MARKET REPORT 2019



This interest in the universities has also increased the competitive environment in the organizations, and in recent years, it has become possible to follow the challenges. ÜniLig (Interuniversity League of Legends Tournament) organized by Riot Games, has been organized since 2013, while in 2019 the Interuniversity PUBG tournament with GLL was also held. Finally, we saw that the Turkish University Sports Federation (TUSF) organized a FIFA'19 tournament under the name of the esports branch. The number of initiatives of many gaming companies and tournament operators in this field is increasing day by day.

This development in the universities was not only restricted to tournaments and esports but also made it possible to see many national events. In particular, Güest GO by Gazi University, one of Ankara universities, and Metu Geex events by Middle East Technical University bring together many games and Esports lovers, while Bahçeşehir University in Istanbul carries out events under the name of BAU ONLAN. All university clubs bring their members together through many community tournaments during the academic term.

Another issue is the development of esports in academic fields; while it is possible to see undergraduate and graduate programs globally, studies are also being carried out by some of our institutions lead by BAU in our country. While it is possible to reach certificate programs now, we can predict that within a few years academic programs will increase and expand rapidly.

**EDUCATION AND ESPORTS
THROUGH THE EYES OF THE
EXPERT**



SEÇKİN TOPALOĞLU
BAU ESPORTS COORDINATOR
BAHÇEŞEHİR UNIVERSITY



UNIVERSITIES OFFERING "GAME SPECIFIC" UNDERGRADUATE AND GRADUATE COURSES IN TURKEY TURKEY GAME MARKET REPORT 2019



With the rapid and dynamic movement of universities, we can see a growing interest in the field in secondary education. The increase in the number of clubs in high schools, the fact that universities are conducting courses and workshops and, more importantly, esports scholarship opportunities have created a new opportunity for potential students who want to become professional players.

With this acceleration in high schools, the Ministry of National Education also took action and signed a protocol with both the Turkish E-Sports Federation and Riot Games. The ministry will launch curriculum actions in the coming periods by the name of gaming and esports.

While it is possible to catch opportunities in the field of esports and education for brands, institutions that want to attract new generations, Turkey should support this potential in infrastructure investments made by public institutions. Public authorities, families, the private sector, the academic community will come together to create a more productive market in the medium and long term. In this market, it will be possible for young players, teams, brands that are included in the stories and adventures of startups to make a difference.

**EDUCATION AND ESPORTS
THROUGH THE EYES OF THE
EXPERT**



SEÇKİN TOPALOĞLU
BAU ESPORTS COORDINATOR
BAHÇEŞEHİR UNIVERSITY

2019



INTERNET (CYBER) CAFES

TURKEY GAME MARKET REPORT 2019

- **20.000 +** cyber cafes (7000 to 10.000 most active ones)
- **7.5 Million** gamers are visiting Cyber Cafes / Month

2018



- **16.500 +** cyber cafes (9.900 most active ones)
- **325.000** gamers are visiting Cyber Cafes / Daily (**8.5 million** players per month) visits internet cafes.

2019



INTERNET (CYBER) CAFES PC CONFIGURATION

TURKEY GAME MARKET REPORT 2019



• Processor	i3	i5	i7		
• Percentage Odds	30%	50%	20%		
• Ram	4 GB	8 GB	16 GB	32 GB	64 GB
• Percentage Odds	20%	30%	45%	5%	
• Internet Speed	16 MB	24 MB	64 MB	100 MB	
• Percentage Odds	15%	30%	35%	20%	

2019





INTERNET (CYBER) CAFES DAILY CAFE STATUS

TURKEY GAME MARKET REPORT 2019



- Density Time
- Density Days (Friday - Weekends)
- Average Rental Fees / Hour
- Daily Average Pin Sales (pcs)
- Average Food Fee Per Person

15:00 - 22:00

12:30 - 24:00

3 TL - 6.5 TL

10 / PER CAFE

13 TL

2019





MOST PLAYED GAMES IN INTERNET CAFES

TURKEY GAME MARKET REPORT 2019

- PUBG
- League Of Legends
- Fortnite
- CS: GO
- ZULA
- GTA
- Silkroad
- Blade & Soul
- Steam Games
- Wolfteam

2019





INTERNET (CYBER) CAFES PENETRATION

TURKEY GAME MARKET REPORT 2019





ESPORTS TEAMS IN TURKEY

TURKEY GAME MARKET REPORT 2019

- Beşiktaş JK, 1907 Fenerbahçe, Galatasaray, HWA, Royal Bandits, Oyun Hizmetleri, AURORA, Bursaspor, Arena Bulls, Dark Passage, Mod-Z, Ice, Başakşehir FK, Trabzonspor, Futbolist, Turkish King, İstanbul Esports, Göztepe Esports, Antalyaspor, Kayseri Esports, Konya Esports, TOA, Rurnbles, Galaktikos, BAU Supermassive, Gamers of Future, Vengeance, Revenge Wish Esports, Sangal Esports



- 1907 Fenerbahçe
- SRONIN
- Alaturkaspor
- Ankaragücü
- Antalyaspor
- Antimomentum FC
- Arena Bulls
- Aslanlar
- Asmalı FC
- Attack on Pandas
- Austrian Force Esports
- BaaL7 FC
- Banditos 1905
- Besiktas
- Black Rhinos
- Blaze Esports
- Bursa Espor
- Caykur Rizespor
- Chapulling Espor
- Cıyan Kartalları
- Circle is Coming
- Collectors
- CRIPS Esports
- Dark Passage
- Delirium
- Destination PEL
- Digital Athletics
- Digital Stars Espor
- Epik FC
- Eskişehirspor
- Futbolist
- Galaktikos
- Galatasaray
- Gamers of Future
- Gazişehir Espor
- Gençlerbirliği
- Godzilla Esports
- GOF Esports
- Gokturkler
- Göztepe Spor
- Great Sultans Esports
- Hoooligans FC
- ICE Warriors
- Imaginative Esports
- Interrail TR Espor
- İstanbul City
- İstanbulBirligi
- İstanbul Başakşehir
- İstanbul Espor
- İstanbul Wildcats
- Jester of
- Karamamba FC
- Kayserispor
- Kocaelispor
- LLC Esports
- LOG
- Los Turcos
- Mad
- Mavi Kaplanlar
- Mersin İdman Yurdu
- MEVA
- Mod-Z
- Old School Esports
- Ottoman PF ESPORTS
- Outlaw Esport
- Outrage
- Oyun Hizmetleri
- Raiders FC
- Red Foxes
- RIP City
- Royal Youth
- Sakaryaspor
- Sangal Esports
- Shockers FC
- Simply Simple
- Sivasspor
- Slot
- Steel Tactics
- Supermassive
- Team Aurora
- Team NV
- Team R2
- Team Turquality
- The Daltons
- TOA
- Trabzonspor
- UltraTurk Esports
- Umraniye Esport
- Urgod FC
- UzunKopru SK
- Vatan Esport
- Vengeance
- Venom Esports
- Winner Club TR
- Young Boys TR

2018

2019



ESPORTS TEAMS IN TURKEY

TURKEY GAME MARKET REPORT 2019

TEAMS

- 1907 Fenerbahçe
- 5RONIN
- Alaturkaspor
- Ankaragücü
- Antalyaspor
- Antimomentum FC
- Arena Bulls
- Aslanlar
- Asmalı FC
- Attack on Pandas
- Austrian Force Esports
- BaaL17 FC
- Banditos 1905
- Besiktas
- Black Rhinos
- Blaze Esports
- Bursa Esport
- Caykur Rizespor
- Chapulling Esport
- Cıyan Kartalları
- Circle is Coming
- Collectors
- CRIPS Esports
- Dark Passage
- Delirium
- Destination PEL
- Digital AtHletics

GAMES

League of Legends, Wolfteam, Zula, FIFA

League of Legends, DOTA2

FIFA Pro Club

FIFA Pro Club

FIFA Pro Club

FIFA Pro Club

CS: GO, Fortnite

FIFA Pro Club

FIFA Pro Club

PUBG

FIFA Pro Club

FIFA Pro Club

FIFA Pro Club

League of Legends (Man and Woman), CS:GO Woman, Rocket League, Zula, Hearthstone, PUBG, Teamfight Tactics, FIFA

FIFA Pro Club

Pubg, Pubg Mobile, CSGO Woman, Rocket League, FIFA

Zula

FIFA Pro Club

FIFA Pro Club

FIFA Pro Club

PUBG

Wolfteam

PUBG

League of Legends

FIFA Pro Club

PUBG

PUBG, PUBG Mobile, FIFA, Teamfight Tactics

2019





ESPORTS TEAMS IN TURKEY

TURKEY GAME MARKET REPORT 2019

TEAMS

- Digital Stars Esports
- Epik FC
- Eskişehirspor
- Futbolist
- Galakticos
- Galatasaray
- Gazişehir Esports
- Gamers of Future
- Gençlerbirliği
- Godzilla Esports
- GOF Esports
- Gokturkler
- Göztepe Spor
- Great Sultans Esports
- Hooligans FC
- ICE Warriors
- Imaginative Esports
- Interrail TR Esports
- Istanbul City
- Istanbul Birliği
- İstanbul Başakşehir
- İstanbul Esports
- İstanbul Wildcats
- Jester of
- Karamamba FC
- Kayserispor
- Kocaelispor
- LLC Esports

GAMES

- FIFA Pro Club
- FIFA Pro Club
- FIFA Pro Club
- FIFA Pro Club, PUBG
- FIFA Pro Club, League of Legends
- FIFA Pro Club, Zula, Wolfteam, League of Legends
- FIFA Pro Club
- Zula
- FIFA Pro Club
-
- Zula, PUBG
- FIFA Pro Club
- FIFA Pro Club
- FIFA Pro Club
- FIFA Pro League
- Zula, Point Blank, Tactic Wars
- Zula, CS:GO, Wolfteam
- FIFA Pro Club
- FIFA Pro Club
- FIFA Pro Club
- FIFA Pro Club
- Zula, FIFA Pro Club, Wolfteam
- League of Legends, Starcraft, Fortnite, Apex Legends, PUBG, FIFA Pro Club
- Wolfteam
- FIFA Pro Club
- FIFA Pro Club
- FIFA Pro Club
- FIFA Pro Club

2019





ESPORTS TEAMS IN TURKEY

TURKEY GAME MARKET REPORT 2019

TEAMS

- LOG
- Los Turcos
- Mad
- Mavi Kaplanlar
- Mersin İdman Yurdu
- MEVA
- Mod-Z
- Old School Esports
- Ottoman PF ESPORTS
- Outlaw Esport
- Outrage
- Oyun Hizmetleri
- Regnant Esports
- Raiders FC
- Red Foxes
- RIP City
- Royal Youth
- Sakaryaspor
- Sangal Esports
- Shockers FC
- Simply Simple
- Sivasspor
- Slot
- Steel Tactics
- Supermassive
- Team Aurora
- Team NV
- Team R2
- Team Turquality

GAMES

- CS: GO
- FIFA Pro Club
- FIFA Pro Club
- FIFA Pro Club
- FIFA Pro Club
- PUBG
- Zula
- CS: GO
- FIFA Pro Club
- Zula
- CS: GO
- Zula
- NBA, Dota 2, PUBG Mobile, CS:GO, FIFA, Underlords, Rainbow Six Siege
- FIFA Pro Club
- PUBG
- FIFA Pro Club
- League of Legends, Hearthstone, Apex Legends, Fortnite
- FIFA Pro Club
- Wolfteam, FIFA Pro Club, CS:GO
- FIFA Pro Club
- PUBG
- FIFA Pro Club
- FIFA Pro Club
- CS: GO, FIFA Pro Club, PUBG Mobile, League of Legends, Rocket League
- League of Legends
- FIFA Pro Club, League of Legends
- CS: GO
- FIFA Pro Club
- Wolfteam

2019





ESPORTS TEAMS IN TURKEY

TURKEY GAME MARKET REPORT 2019

TEAMS

- The Daltons
- TOA
- Trabzonspor
- UltraTurk Esports
- Umraniye Espor
- Urgod FC
- UzunKoprü SK
- Vatan Espor
- Vengeance
- Venom Esports
- Winner Club TR
- Young Boys TR

GAMES

- FIFA Pro Club
- CS:GO, Pubg, Zula(KADIN), Fortnite, Tactic Forse
- FIFA Pro Club
- FIFA Pro Club
- FIFA Pro Club
- FIFA Pro Club
- FIFA Pro Club
- FIFA Pro Club
- Zula
- FIFA Pro Club
- FIFA Pro Club
- FIFA Pro Club

2019





2019 TURKEY LICENSED ESPORTS PLAYERS

TURKEY GAME MARKET REPORT 2019



There are nearly **85+** licensed esports teams in Turkey.



There are nearly **1515+** licensed esports players in Turkey.

** As of January 14, 2020, the number of licensed female esports players is 131 and the number of male esports players is 1.384, and the total number of licensed esports players is 1.515. The number of licensed esports teams is 85.*

2019





TURKISH ESPORTS TEAMS THAT USE SOCIAL MEDIA BEST

TURKEY GAME MARKET REPORT 2019

FACEBOOK

	PAGE LIKE	AVERAGE WEEKLY POST	AVERAGE POST LIKES	ENGAGEMENT RATE
1907 FENERBAHÇE ESPOR	51K+	1-9	81	0.42%
GALATASARAY ESPORTS	44.8K+	1-8	81	0.15%
BEŞİKTAŞ ESPORTS	62.2K+	1-9	22	0.05%
BAHÇEŞEHİR SUPERMASSIVE	92K+	1-3	259	0.51%
DARK PASSAGE	149K+	1	40	0.03%

INSTAGRAM

	FOLLOWERS	AVERAGE WEEKLY POST	AVERAGE POST LIKES	ENGAGEMENT RATE
1907 FENERBAHÇE ESPOR	47K+	3	2190	5.95%
GALATASARAY ESPORTS	166K+	1-3	3500	2.10%
BEŞİKTAŞ ESPORTS	144K+	3-5	2100+	1.45%
BAHÇEŞEHİR SUPERMASSIVE	50.9K+	3-5	4000+	7.85%
DARK PASSAGE	20.1K+	1-4	822+	4.08%

2019





TURKISH ESPORTS TEAMS THAT USE SOCIAL MEDIA BEST

TURKEY GAME MARKET REPORT 2019

YOUTUBE

	SUBSCRIBERS	TOTAL VIEWS
1907 FENERBAHÇE ESPOR	12.7K+	820K+
GALATASARAY ESPORTS	-	-
BEŞİKTAŞ ESPORTS	1.86K+	48.5K+
BAHÇEŞEHİR SUPERMASSIVE	11.4K+	693K+
DARK PASSAGE	26.3K+	5.35M+

TWITTER

	FOLLOWERS	AVERAGE WEEKLY POST	AVERAGE POST LIKES	ENGAGEMENT RATE
1907 FENERBAHÇE ESPOR	82K+	1-10	219	2.74%
GALATASARAY ESPORTS	46,9K+	1-10	442	3.65%
BEŞİKTAŞ ESPORTS	48,9K+	1-10	597	5.78%
BAHÇEŞEHİR SUPERMASSIVE	37.2K+	1-7	1123	7.2%
DARK PASSAGE	29.7K+	1-6	473	5.2%

2019





TURKISH ESPORTS PLAYERS THAT USE SOCIAL MEDIA BEST

TURKEY GAME MARKET REPORT 2019

FACEBOOK

	PAGE LIKE	AVERAGE WEEKLY POST	ENGAGEMENT RATE
ZEYNEP SU "SYLCHASIE" KAYKILMAZ (ISTANBUL WILDCATS)	1160+	3-4	24.5%
MUSTAFA KEMAL "DUMBLEDDOG" GÖKSELOĞLU (FREE)	27.6K+	1	0.03%
ASIM CİHAT "FABFABULOUS" KARAKAYA (FREE)	-	-	-
BERKAY "ZEITNOT" AŞIKUZUN (BAHÇEŞEHİR SUPERMASSIVE)	16.9K+	1	0.06%
KORAY "NARU" BIÇAK (FREE)	64.3K+	1	0.03%

INSTAGRAM

	FOLLOWERS	AVERAGE WEEKLY POST	AVERAGE POST LIKES	ENGAGEMENT RATE
ZEYNEP SU "SYLCHASIE" KAYKILMAZ (ISTANBUL WILDCATS)	22.8K+	2-3	6.12K	26.6%
MUSTAFA KEMAL "DUMBLEDDOG" GÖKSELOĞLU (FREE)	27.4K+	1	5.4K	19.7%
ASIM CİHAT "FABFABULOUS" KARAKAYA (FREE)	17.5K+	1	7.41K	42.3%
BERKAY "ZEITNOT" AŞIKUZUN (BAHÇEŞEHİR SUPERMASSIVE)	16.6K+	1	7.09K	42.7%
KORAY "NARU" BIÇAK (FREE)	45.6K+	1	10.9K	23.9%

2019





TURKISH ESPORTS PLAYERS THAT USE SOCIAL MEDIA BEST

TURKEY GAME MARKET REPORT 2019

YOUTUBE

	SUBSCRIBERS	TOTAL VIEWS
ZEYNEP SU "SYLCHASIE" KAYKILMAZ (ISTANBUL WILDCATS)	5.54K+	150K+
MUSTAFA KEMAL "DUMBLEDOGE" GÖKSELOĞLU (FREE)	4.67K+	95.1K+
ASIM CİHAT "FABFABULOUS" KARAKAYA (FREE)	4.33K+	198K+
BERKAY "ZEITNOT" AŞIKLIZUN (BAHÇEŞEHİR SUPERMASSIVE)	4.21K+	60K+
KORAY "NARU" BIÇAK (FREE)	8.94K+	365K+

TWITTER

	FOLLOWERS	AVERAGE WEEKLY POST	AVERAGE POST LIKES	ENGAGEMENT RATE
ZEYNEP SU "SYLCHASIE" KAYKILMAZ (ISTANBUL WILDCATS)	1744+	1-3	105	4.2%
MUSTAFA KEMAL "DUMBLEDOGE" GÖKSELOĞLU (FREE)	47.3K+	1-4	469	9.8%
ASIM CİHAT "FABFABULOUS" KARAKAYA (FREE)	39.7K+	3-5	577	5.47%
BERKAY "ZEITNOT" AŞIKLIZUN (BAHÇEŞEHİR SUPERMASSIVE)	31K+	1	1616	4.2%
KORAY "NARU" BIÇAK (FREE)	66.1K+	7-8	542	8.4%

2019





ESPORTS AND GAME EVENTS IN TURKEY

TURKEY GAME MARKET REPORT 2019

- Intel ESL Turkey Championship
- Vodafone Freezone League of Legends Championship League
- Pro Elite League
- Virtual Pro League
- **TESFED Vodafone FREEZONE Turkey Cup**
- Hepsigamer Online League
- Youth Fever Inter-High School Esports Competition Tournament
- PUBG Invitational ESL
- PUBG Mobile Tournament Vodafone Freezone
- ESL PUBG Turkey Weekly Tournaments
- PUBG TAMGAME League
- OBT "Let The Games Begin" Events
- PUBG LITE Survival Masters 4VS4
- 4x4 # Show Yourself PUBG Mobile Event
- Mobile Legends: Bang Bang M1 Turkey World Championship Qualifiers
- Wolfteam Turkey Cup
- Zula Super League
- Zula Turkey Cup
- Pubg Survival Masters
- Chapter VIII Multiplayer
- Turkish Stars League

2019





ESPORTS ORGANIZATIONS IN TURKEY

TURKEY GAME MARKET REPORT 2019

TESFED Vodafone FREEZONE Turkey Cup

The “TESFED Vodafone FreeZone Turkey Cup” finals, organized by Turkey E-Sports Federation (TESFED) as the first official esports tournament in Turkey, were held at the Ataşehir FDR Game Center on 21-22 December. Turkey's most popular games LoL, PUBG, CS: GO, FIFA, Zula and in the scope of Red Bull Last Champion Dota 2 matches held in the finals, esports players competed for a total prize pool of TRY 100 thousand. The tournament, which is open to participants from all over Turkey, was held for the first time under the main sponsorship of Vodafone FreeZone, and with the sponsorship of Maximum Kart and Red Bull. On the first day of the finals, FIFA, CS: GO, Zula and Red Bull Last Champions matches were held, and on the second day, PUBG and LOL matches were played.

The TESFED Vodafone FreeZone Turkey Cup is one of the most comprehensive esports tournaments to date and is Turkey's first official esports cup.



2019





ESPORTS ORGANIZATIONS IN TURKEY

TURKEY GAME MARKET REPORT 2019

TESFED Vodafone FREEZONE Turkey Cup

Turkey Cup applications started in November. For Zula 960, for LoL 935, for CS: GO 565, for PUBG 508, for Dota 2 195, for FIFA 182, including a total of 3,345 esports players applied. The qualifiers for the final matches were held online. The matches were full of enthusiasm and excitement, which has not been seen in the tournaments that have taken place so far, with the participation of the fans.

The organization, which is expected to fill an important gap in the field of esports in our country, will give formality under esports corporate identity and will accelerate the spread and development of this sport, which is also defined as "the sport of the future", to broad segments of society.

The TEFED Vodafone FreeZone Turkey Cup, which is the only official organization that brings together 6 of the most popular esports games held throughout the country, will be held 2 times a year. Unlike tournaments involving only professional teams and players, participants from all over Turkey can compete in the TEFED Vodafone FreeZone Turkey Cup.



2019





BRANDS THAT INVEST IN ESPORTS AND GAMING

TURKEY GAME MARKET REPORT 2019

- ininal
- Monster Notebook
- Razer Gold
- SteelSeries
- Monster Energy
- ASUS
- Vodafone
- LG
- Turk Telekom
- Turkcell
- McDonalds
- Burger King
- Dlive
- CarrefourSA
- Hepsi Burada
- Red Bull
- KFC
- Ülker
- Maximum
- SenpAI
- Gillette
- FOX
- Opet
- OMEN By HP
- Vestel
- Migros
- Logitech
- BENQ
- Twitch TV
- Tahsildaroğlu
- Coca-Cola
- THY
- HyperX
- Cooler Master
- TOSLA
- HDI Sigorta
- Popeyes
- BKM Express
- Lenovo
- AOC
- itopya
- Playstation
- Western Digital
- Bahçeşehir University
- Bahçeşehir College
- Doğuş University
- GEO College
- ByNoGame
- Bero-Host
- Bloody Gaming
- Vertagear
- NAU Drinks
- Rampage
- Armas Hotels
- incehesap.com
- Formahane
- LimeSoda
- Sapphire
- FunnyToken
- Papara
- Borusan Otomotiv

** This list has been compiled from the activities we follow throughout the year. It may be the missing brands.*

2019





GAMES PLAYED IN TURKEY AS ESPORTS

TURKEY GAME MARKET REPORT 2019

- League of Legends
- Counter Strike Global Offensive
- Playerunknown's Battlegrounds (PUBG)
- Fortnite
- PUBG Mobile
- PUBG Lite
- Dota2
- Overwatch
- Hearthstone
- ZULA
- Wolfteam
- Apex Legends
- Tom Clancy's Rainbow Six Siege
- League of Legends Teamfight Tactics
- FIFA
- Rocket League
- Mobile Legends: Bang Bang
- Heavy Metal Machines
- Age of Empires 2
- Starcraft 2
- Pro Evolution Soccer
- Brawl Stars

2019





ESPORTS MEDIA IN TURKEY

TURKEY GAME MARKET REPORT 2019

- Hürriyet Spor Arena/Espor
- Fanatik Espor
- SporX Espor
- That's Game Bro
- Playerbros
- Dijital Sporlar
- Multiplayer
- 5mid
- Only A Gamer
- GG Espor
- Mynet Espor



- Playerbros
- SporX Espor
- GG Espor
- 5Mid
- Medya Espor
- Thats Game Bro
- Fanatik Espor
- Esporin
- Only A Gamer
- Esporfix
- Flank Esports
- Hubogi
- Gamer People
- Dijital Sporlar
- Esports 360 Mag
- Esporcu
- Elektronik Sporlar
- Multiplayer
- Hürriyet Espor
- Mynet Espor
- Espor Analist
- Esports Life

2018

2019



TURKEY TOP 10 GAME SITES (BASED ON 2019 TOTAL TRAFFIC)

TURKEY GAME MARKET REPORT 2019



- Merlinin Kazanı
- TürkMMO
- GameX Now
- Playerbros
- Gamer.com.tr
- Fragtist
- Bölüm Sonu Canavarı
- Oyungezer
- Leadergamer
- 5 Mid

2019



GAME MAGAZINES IN TURKEY

TURKEY GAME MARKET REPORT 2019

Oyungezer



Level



2018



2019



TURKEY GAME MARKET EXPERT VIEWS

TURKEY GAME MARKET REPORT 2019



**ALPER AFŞİN
ÖZDEMİR**

PRESIDENT TESFED

Esports, which is also defined as the sport of the future, is a rapidly developing field in our country as it is around the world. 2019 was a year in which important steps were taken in this sense, we continued our efforts to make our country a world brand in esports with the awareness of our responsibility with clubs, teams, and federations, and we took positive feedbacks. As the federation, we have done a lot of successful work in 2019. We have signed a cooperation protocol with the Ministry of National Education, which is an important step for the development of esports in Turkey and the proper orientation of the young generation. For the first time in Turkey, we held the Esports Workshop, which brought together all the stakeholders of the subject and where all aspects of esports were discussed. Again, Turkey's first official esports tournament, which is an important step for esports to become official, was held for the first time under the name of "TESFED Vodafone Freezone Turkey Cup".



ERDİÑÇ İYİKÜL
DIRECTOR OF
PUBLISHING
RIOT GAMES

As one of the biggest players in the market, we closely follow all the dynamics of our ecosystem. The gaming industry has grown at remarkable rates every year, making it one of the largest markets in the world. As Riot Games, we are creating our strategy by closely following player expectations both as game types and platforms. FPS game development, mobile, and console investments are the most important indicator of this. To mention the esports side, we have been leading the ecosystem with our investments in League of Legends Esports for years in Turkey. The development of esports in our country has reached remarkable levels, especially with the establishment of a professional league structure named Vodafone FreeZone Championship League in 2015. As Riot Games, we have the first and largest professional structure in the country with our activities in the last 8 years. We continue to make important investments to train the stars of the future esports world in our country. The university business associations and the Academy League brought our server to Turkey with an investment of TL 10 million in 2017, and Riot Games Esports Stage, which is Europe's greatest and first esports center in Turkey, opened the gates for gamers on January 19, 2019, can be considered as our investments.



TURKEY GAME MARKET EXPERT VIEWS

TURKEY GAME MARKET REPORT 2019



İLHAN YILMAZ
MONSTER
NOTEBOOK CEO

In Turkey, esports has spread rapidly and reached a large mass, especially in recent years. Our teams achieved remarkable results in international competitions. These achievements had contributed to the industry considerably and created new opportunities for amateur gamers. Today, there are over 15 thousand amateur esports teams in Turkey. Approximately 80 teams are licensed by the federation. We will observe the growth of this number in the next years. Monster Notebook is always supportive of games and gamers, we are sure that we will observe many other successes in the international arena. Globally, there are over 1 billion people playing digital games. Esports is expected to be among the top 10 most-watched sports branches around the world. By 2019, gaming market revenues passed 152 billion dollars. As of 2022, these numbers are expected to reach 196 billion dollars. The Turkish market is the eighteenth largest gaming market in the global ranking, which is growing rapidly. Turkey is the leader in its region with its 1 billion dollars gaming market. Just like any other field, our country has great potential in gaming as well. Considering the 13 million young population, Turkey is a wonderful opportunity for attracting investors. There are nearly 30 million gamers. We are aware of this great potential. As Monster Notebook, we will continue our contributions to the gaming ecosystem.



YEŞİM ALGAN
RAZER GOLD
COUNTRY MANAGER

Especially in 2019, we can say that Razer Gold attracted attention by Turkish gamers and that we were very pleased with this exponentially increasing interest in the short term. Razer Gold, which creates more advantageous purchasing power for millions of users all over the world; also in 2020's Turkey, will be signing on greater projects and brand partnerships. With the development of the Turkish Game Market, we aim to help local companies that want to open up to the global. For this, we will meet with local game companies in 2020 to create Razer Gold opportunities to benefit from its global power. I believe that the Turkish Game Market will surpass the 1 billion dollar threshold targeted by this process and will become one of the world's major game markets. I have no doubt that, as Razer Gold, the leading payment system of 2020, with projects that will be the permanent supporter of the Turkish Game Market, we will have a year full of advantages and surprises with our members.



TURKEY GAME MARKET EXPERT VIEWS

TURKEY GAME MARKET REPORT 2019



GL BEN YACI
CMO
ininal

Since our founding in 2012 until today, as ininal, we have been the payment method that players love and use the most. By understanding the game and the needs of the player, we have made it our mission to ensure that in-game payments are made safely and in a user-friendly way. In line with this mission, we have become the most accessible payment method for players with more than 20 thousand sales points and 75 thousand top-up points. We think that esports has great potential for the game industry. Researches confirm this prediction. 2020 will be an important turning point for the global esports market. According to the data: the esports market will grow over 26 percent this year, and the volume created in Turkey is expected to exceed \$1 billion. It is precisely for this reason, we are very pleased to give the name ininal as the main sponsor of the biggest esports arena of Turkey, Europe, and the Middle East. ininal Esports Arena, with a capacity of 1600 people, on an area of 3.800 square meters, will offer the opportunity to perform tournaments with 100 players on the same stage. ininal Esports Arena is including; 4K resolution and 70 square meters LED screen, broadcast room and studios, team and referee rooms, VIP lounge, seminar and meeting rooms, specially reserved areas for broadcasters and social media influencers, cafes and catering areas for the audience and also 120 m2 pop-up stores and exhibition areas. ininal Esports Arena will also host a giant game center with 80 gaming computers and about 850 square meters of experience areas that will allow direct contact with the visitors for brands. ininal Esports Arena will become the game center of Turkey, Europe, and even the Middle East, with all these features and privileges. All gamers are welcome to ininal Esports Arena, which will open at the end of February 2020.



BURAK GZALAN
FOUNDER - CEO
INGAME GROUP

Digital games and esports continued to gain momentum in 2019 in our country, which has significant potential with its young population. As a group of companies aiming to contribute to the growing digital game industry with investments and innovations, InGame Group has also made significant investments in this field since the first month of 2019. As InGame Group, while continuing to develop games with the Zula Game, we organized one of Turkey's two official esports league. At the beginning of 2019, we opened Turkey's first and Europe's biggest esports center; Nonstop Zula Esports Center. Zula also undertakes the mission of promoting our country with the most popular MMO FPS game of our country and places such as Maiden Tower and Nemrut, which are also included in the game as playable maps. Zula meets players through local publishers in Brazil, Europe, Iran, Russia, and Latin America; and has a total of 27 million players in the world including Turkey. In 2019, we made a total investment of TRY 10 million in the field of digital games and esports. Millions of TRY's were awarded to esports players in the Zula ecosystem, especially at the Zula Super League and the Zula Competition Tournament. This year, we also launched a special project that will have future reflections. We signed in cooperation with "Ay Yapim" for the first gamified content in Turkey. First time in Turkey, characters, and story of a television series, were included in a digital game. This was an innovative step towards the future of the entertainment industry. As the game industry continues to grow, we will continue to project exciting works.



TURKEY GAME MARKET EXPERT VIEWS

TURKEY GAME MARKET REPORT 2019



BARIŞ ÖZİSTEK
CHAIRMAN AT
NETMARBLE EMEA

The Turkish game market should be evaluated in two aspects. If we look at it as a domestic market, we have not had a good year, especially because of the sudden fluctuations in exchange rates. Revenues for games on a USD basis fell below expectations. Especially on the mobile gaming side, Apple's exchange rate policy has had a negative impact on the market. We know this is a temporary period, we can predict that the domestic market will be mobile in 2020 as prices and the economy stabilize again. On the other hand, Turkey's game development power is increasing day by day. We have managed to become one of the most important countries in the world developing and exporting games. With over 500 indie game development studios, we have become decisively the most successful country in Eastern Europe and the Middle East region. The number of Turkish gaming companies that have achieved international success has increased enormously in 2019. It will continue to accelerate in 2020. Esports, on the other hand, is also growing rapidly. Given that we have 82 million people and the youngest population in Europe, the fast development of the gaming industry is quite normal. Europe's largest esports arena was opened in Istanbul, in addition to the opening of 4 more esports centers on a medium scale in Istanbul was one of the highlights of 2019.



OZAN AYDEMİR
GAMING IN TURKEY
CEO - FOUNDER

We have written a lot about 2019 in our report, so I would like to give some of my views in 2020. In 2020, we will hear more news about esports in both TR and global. Support from the government has also begun to increase on this issue. Turkey and the Middle East, in particular, have experienced a wriggle this year and this will continue in 2020. The growth momentum of the Hyper Casual category in mobile games will continue. There's a new concept here. Large game companies have created a revenue-sharing model system by incorporating Hyper Casual games from small developer games into their pools. This system is also being tried in Turkey. It is a good advantage for small-scale companies that can make their game but cannot open to the global market and the reason for lack of marketing budget. Companies like Tencent, Netease, EA, Riot Games, Blizzard are the names that could make their mark in 2020. The new future games they announced towards the end of 2019 are the games the whole world is waiting for now. I think the big bite will be Riot Games'.



TURKEY GAME MARKET EXPERT VIEWS

TURKEY GAME MARKET REPORT 2019



SEÇKİN TOPALOĞLU
BAU ESPORTS
COORDINATOR
BAHÇEŞEHİR UNIVERSITY

Research shows that there are over 30 million players (including mobile) in our country. The rapid increase in the announced export numbers and the fact that it has reached 1 billion US Dollar band is also exciting. The point where the game industry, which shows growth potential in all aspects, is in common with esports is the demographic structure. Considering the young generation of over 10 million people who are aware of and follow esports, and considering the economic cycle that developments in technology will provide, esports can be considered as an area that offers opportunities. While global esports are expected to reach 1.8 billion dollars for 2022, growth of 40% has also affected the Turkish market in recent years. It is possible to increase the potential of the Turkish esports market of 30 million with the right guidance.



SERHAT BEKDEMİR
FOUNDER COLLEGIATE
ESPORTS LEAGUE

We can say that we have a really dynamic gaming market that has been on the rise in recent years, we are talking about an ecosystem where the foreign investment of around \$ 500 million has been made in the last 2-3 years and the total valuations of the leading companies of the market have exceeded billion dollars. Of course, the young population of our country will be the power that keeps this dynamic market up and going. The era of cassette/CD games has been over and the investments that have not been made in our country in these areas, the issues of pirated content ended far ago. With the internet and platforms liberating game developers, we are not running before publishers to resources anymore. Our young generation is aware of the situation, using their productivity to build a successful gaming studio despite all kinds of difficult circumstances, and knowing that they can achieve great valuations in a much shorter time than traditional business areas. Market revenues, currently around \$ 850 million, will continue to rise with the addition of new players and increased investments. Esports needs to be evaluated separately from the game market. The esports industry lost rapid momentum and underwent a realignment process, although it became more vocal and found more coverage in the media than in the gaming industry. As an effect of the economic processes that our country is going through, there is a significant reduction in sponsorship sales. The investor, who expects a quick turnaround, is also being very cautious at the moment, as a business is being done with a distinct culture in an evolving industry that is technically different from the business norms in the traditional sports and entertainment world. All companies operating in the field of esports in Turkey continue to be active in this field in order to read the future of the market well and to be able to make the move at the right time.



TURKEY GAME MARKET EXPERT VIEWS

TURKEY GAME MARKET REPORT 2019



ARAS ŞENYÜZ
BJK ESPOR CEO
MILDMANIA PARTNER

2019 has been the year of neither esports, console, nor PC in the gaming world. The most obvious winner of 2019 was mobile games, as seen by the numbers. Following the PUBG Mobile craze that started in 2018, we saw COD Turkey hit on mobile platforms in 2019 and there is no such thing as ordinary in the gaming world. These 2 games broke all the top-ranking routines we know. PUBG Mobile is holding the title: "Turkey's top-grossing and most played game". PUBG Mobile has a total of 10 million active players per month in all-female and male audiences. This is a record! In addition to the approximately \$ 250 million mobile game market turnover, we see that when we add the turnover of these 2 games; Turkey mobile gaming market grows very clear. It is quite possible that we will be placed in the top 10 in terms of turnover in the world. Of course, the biggest share was the Z generation, who spent 3 hours and 40 minutes a day on the phone. This rate, which increased by 35% compared to 2018, shows that being able to play games while on the go and open sessions quickly have become a priority. Considering that the new generations have grown using "Touch Screen" instead of using a mouse, it is impossible not to think that the gap will open in 2020. The fact that all giant game companies carry their IP's to mobile is the biggest proof. As a result, in 2019, the gaming market of Turkey, it was a year that grows in all areas. But mobile games closed the year as a leader. Our hope is that 2020 will be much better.



METE TEVETOĞLU
DR.
LEGIST - SCHOLAR
TESFED HC MEMBER

There have been quite significant developments in relation to the 2019 games and the institutionalization of electronic sports. Following the establishment of the Turkey Electronic Sports Federation, the establishment of the basic legal regulations on electronic sports; the successful increase in the number, scope, and reach of the game leagues and tournaments was very pleasing. It is also exciting for the future that our game companies, studios have increased in number, many investment contracts have been completed, and our game developers have made successful efforts. On the other hand, 2019 was a year in which we frequently faced copyright law cases of clone gaming and gaming elements around the world. As competition increases and institutionalization nourishes and strengthens the game culture, I think this will bring with it more branches or clubs in the field of games and esports, new projects, investments and of course many contractual and legal arrangements.



TURKEY GAME MARKET EXPERT VIEWS

TURKEY GAME MARKET REPORT 2019



EMRE LALELI
COUNTRY MANAGER
FALCONAI - SENPAI

Esports has been developing in our country in the last 10 years, gaining serious momentum. When we compare ourselves to the big players of the market like Europe, America, Korea, we can say that we are a bit behind, but as long as we maintain this increasing momentum, it is quite possible to catch them in the next 5 years. Now, gaming is a part of everyone's life. Especially with the popularization of League of Legends in our country, significant investments were made in the field of esports. Only the numbers on papers encourage many companies to be involved in the market. Turkey is a country with very serious potential in terms of its young population. In the coming years, we expect to increase the awareness and popularity of esports, as well as the number of people who show interest in esports to a significant degree. In this increase, of course, we think that the spread of artificial intelligence technologies will improve the player experience, the professionalization of esports and people starting to take more roles in this field with a serious impact.



İLKYAY TEPE
STEELSERIES TURKEY
COUNTRY MANAGER

Considering the population and the developing internet infrastructure, I can say that the game market is still crawling. According to market research, the game market in Turkey is approaching 1 billion dollars. New investments, esports events, esports gaming cafes, offline and online tournaments play a major role in the development of the gaming industry. Esports has caught everyone's attention now. Great teams such as Beşiktaş, Galatasaray, set up their own esports teams and continues to compete on other platforms at professional levels. In the coming years, I would like to see our esports teams reach the level to compete in international tournaments and bring trophies to our country. In a sense, this will be a great introduction to Turkey.



TURKEY GAME MARKET EXPERT VIEWS

TURKEY GAME MARKET REPORT 2019



KAMER KEMERKAYA
COFOUNDER CEO
MORALABS

2019, especially in the mobile gaming world, has taken its place in the gaming industry as the star of hyper-casual games. In Turkey, as both publisher and developer, we have seen the establishment of many hyper-casual games companies and a few of them have achieved successful works by reaching high download numbers. In this sense, I think that every step that will contribute to the development of the game market in Turkey will please and hopefully make everyone happy in this market. We find that small game studios achieve their goals with lower budgets versus very large marketing budgets and are very useful to them in creating a sustainable business model. I think this trend will continue to increase in 2020. My advice to game developers who want to enter this field is to follow trends and experiment with game development as fast as possible. As known in the gaming world, it is not very possible to achieve success with the first game. But because the development processes and the results occur in short periods of 2-3 weeks, they will be able to try new ones easily in the short term.



SERTAÇ PIÇAKÇI
VP OF PRODUCT
MASOMO

In Turkey, 2019 was a very exciting year for the gaming industry. Especially in the field of mobile gaming, the acquisition of Turkish companies by the world's largest gaming companies has greatly increased the motivation of both Turkish investors and indie game developers in the market. These exciting developments in 2019 will have some positive repercussions for 2020. In particular, the biggest contribution of this situation to the Turkish gaming market will be 'data transfer'. Companies acquired by global gaming companies have also been able to transfer their experience (know-how) to them quickly. All stakeholders in the Turkish gaming market, starting with the employees in these companies, will be able to add their experiences and make the Turkish gaming industry move forward much faster in a quite short time. In addition, the low-cost but higher-quality (compared to Europe and America costs) workforce of Turkey which mobile gaming companies operating abroad, will be noticed easily by these companies. It will become more possible that corporate acquisitions will increase employment and that Turkey will become the mobile game development center everyone talks about in the global arena.



TURKEY GAME MARKET EXPERT VIEWS

TURKEY GAME MARKET REPORT 2019



TAYGUN ARDA ÖZTÜRK
PRODUCER TALEWORLDS
ENTERTAINMENT

In the world, the game market has grown exponentially over the past 10 years, exceeding the \$ 100 billion thresholds and keeps growing with high momentum. Another example of this is that there are around 2.5 billion gamers around the world as the number of users. The gamers and the game market in Turkey are developing rapidly. We are proud to be a part of this industry. With Bannerlord, the second game of our Mount & Blade series, which will be launched in 2020 and is eagerly awaited by a large audience, we aim to both grow and develop our local industry, continue to take a place in the world game market.



SİMAY DİNC
COFOUNDER
RECONTACT GAMES
FOUNDER
WOMEN IN GAMES
TÜRKİYE

2020 will be the harvest year of our digital crops. I believe that the added-value created by the creative industries in Turkey will increase and create awareness. We are working hard together to develop the gaming market and to get things global, and we see that this effort has returned. Our two big events, 'Hackathon at Museum' and 'Hacking the Future', which we organized as Women in Games Turkey in 2019, have had a great impact around the world and our cooperation has increased globally. According to the reports, the proportion of women in the gaming industry has risen to 28%. Gaming is not just a work of men or women, gaming is a work of culture and art of the twenty-first century, its diversity comes from the blending of different disciplines. We are working on the question of how we can raise awareness with the game for a better world by bringing together game developers, artists, scientists every summer with 'Hacking the Future' project. As the game development is something independent of the place, we see production growing not only in Istanbul or Ankara but also in other cities of Turkey. Another positive issue is that our publishers, who not only develop games but also contribute to the growth of the market, take investment from foreign funds. We will continue to receive investment news from Turkish gaming companies on the radar of foreign funds in 2020.



TURKEY GAME MARKET EXPERT VIEWS

TURKEY GAME MARKET REPORT 2019



TEVFİK SAYGIN ERGEN
MARKETING MANAGER
NFINITY GAMES

In 2019, we witnessed a lot of changes in the gaming and esports stages of the world and Turkey. With games such as PUBG, Fortnite, Apex Legends, we have gone through a period where changes in player habits and their repercussions on the market have hit the peak. Gaming and esports became the number one choice of brands to reach young people and many partnerships were born in this direction. Following these developments closely, Nfinity Games has developed and implemented customized experiences through PUBG, and Point Blank, which we have provided services in Turkey, Azerbaijan, and Arab countries since 2010, distributed services in line with the needs of the brands. To deliver the returns of the mobile age to our Point Blank players, we have released our TAM Game app. As Nfinity Games, we have experienced our first mobile game publishing with OutLaw in 2019. In addition, we have introduced our online store TAM Store to our players in January 2020, which is the first in Turkey with the feature that we have been working on throughout 2019 and allows in-game equipment shopping using TAM Game Gold including more than 100 products. We continued our 9-year adventure in esports in 2019. Last year, we took our league champion teams to PBWC and PBIC, which gave teams from Turkey and Azerbaijan the chance to represent their countries in international tournaments and an experience they will never forget in the international esports arena. We expect too much in a new 10 years with 2020 and we are excited to celebrate the 10th year of Nfinity Games with our players and business partners.



HARUN YILDIZ
GENERAL MANAGER
CO-FOUNDER PARTNER
KODOBUR

As a console game developer company, we can consider 2019 as an enjoyable and the rapid growth year. Nintendo's entry into the Turkish market with the Switch and Sony's popular published games (God of War - Red Dead Redemption) made 2019 a great year for gamers. We will be moving the development environment we started with PlayStation 3 to PlayStation 5 in 2020. This change will be an important development for console players in Turkey, also shows rapid growth and our increasing export numbers. We are sure that 2020 will be more enjoyable for Turkish console game developers and gamers.



TURKEY GAME MARKET EXPERT VIEWS

TURKEY GAME MARKET REPORT 2019



ÇINAR ERGİN
CHAIRMAN
ARİSTO COMMUNICATION

By managing Joygame's PR work between 2011 and 2015, we had the opportunity to see the size and potential of the market. Since then, we have been carrying out media communication projects of leading brands of the gaming industry. Nowadays, the PR circle holds much more than media channels. Brands in the market should also deal with creative services such as video creation, event development, marketing, as well as creative content creation and influencer strategies. For this reason, the game market is one of the most colorful markets for PR work. I can tell you that the gaming industry is able to reach its target audience easily through PR studies and digital strategies. However, I believe that the market needs to explain itself deeper, especially in terms of its contribution to our country and brands. If we take into account that Turkey is an important center between the Middle East and Europe, better recognition of the game market and increased investments will have the potential to contribute significantly to the economy of the country. However, the gaming industry, which is in instant communication path to millions of users, is one of the most effective tools for brands to reach their young target audience. The companies that are aware of the market, will take point-shot collaborations with the brands in the game market, and they will make more effective efforts than millions of advertising spending.



ERAY UYGUN
SENIOR
PUBLISHING
MANAGER
FUNPAC GAMES

We already knew that we live in a country that places the top of the world rankings of consumption on the internet and game market, in social media usage with gamers from all age groups. But the year 2019 has shown us how big a resource we are, not just through the eyes of the gamers, also sectoral clearly. The unstoppable growth of the mobile gaming industry was so effective that hundreds of thousands of software designers, game designers, and artists, have finally found themselves in a world where they can show their talents in Turkey. In the top 10 of the America mobile game market ranking, we have seen at least 2-3 games that have been made by the hands of Turkish creators. As the number of companies that feed, direct and train these teams with large investments and marketing experiences has increased, quality and competition have continued to increase in the same way. We have seen in the early months of 2020 that momentum is determined to maintain its place. As Funpac, we are very happy to be a part of it.



TURKEY GAME MARKET EXPERT VIEWS

TURKEY GAME MARKET REPORT 2019



CİHAN AĞAIŞI
SENIOR COUNTRY
MANAGER
WIZARD GAMES

The Turkish game market continues to be the market that follows global trends and stands out with its own unique characteristics, reaching larger audiences every day. The market, which has attracted the attention of game publishers and producers from many countries of the world, is now attracting attention with the games it produces and companies globally. I think the market, which improved on a vast scale in 2019, will show faster growth in the following years, along with various games and platforms.



AYŞEGÜL AYDOĞAN
MANAGING PARTNER
COUNTRY MANAGER
GAMELOFT

2019, compared to the last 5 years, was the peak period of the game industry. I can say that the momentum will increase rapidly in 2020. If we look at the rates of mobile usage, the game market has surpassed the entertainment market in terms of both download and active users compared to the previous years. Users in Turkey checks on their mobile phone screen 70 times a day, that means once every 15 minutes. 1 in every 5 people checks on the smartphone in traffic and they spend an average of TRY 7.5 a month on apps. Especially in Gameloft games, this number is approximately 3.5 hours, and I can say that mobile network usage is increasing each passing year compared to Wi-Fi. According to a recent study, 78% of mobile gamers in our country play games from their smartphones. 51.6% of mobile gamers are female users. This makes me proud to be a female leader in the game industry. These numbers also show us how serious the market has become. We will continue to lead the mobile gaming industry as Gameloft in 2020. Cloud gaming, gamification ideas, and distribution solutions will be included in our business models and we will take a more active role in market research with data analysis and case studies that will contribute to the mobile gaming industry. In addition, I think we have brought a loud voice in Turkey and the world with the ESL & Asphalt 9:Legends Vodafone 5G Esports tournament, which we launched in 17 countries during Q4 2019.



TURKEY GAME MARKET EXPERT VIEWS

TURKEY GAME MARKET REPORT 2019



MEHMET UMUR ERMEÇ
GENERAL MANAGER
TIPLAY STUDIO

2019 was quite a fast year for the mobile gaming market in Turkey, as all around the world. As well as the outstanding achievements of mobile game publishers such as Rollic and Good Job Games, the launch of large and small mobile game studios operating in the hypercasual field from all over Turkey, and the international success of many of these marked 2019. I think that in 2020, the potential in Turkey will be strengthened and new mobile gaming initiatives will emerge, and even the well-established gaming companies operating in different verticals will turn to hypercasual and casual mobile gaming production. In the coming period, while foreign companies that invest not in the potential of talented young people but in prototypes that enter production bands, waste hundreds of seedlings to get fruit. I predict that initiatives that develop the game developer ecosystem outside of the 3 major cities will gain importance. I believe that oFON, which has been founded by Rollic and Tiplay Studio for this purpose, will train game entrepreneurs who will be role models to young people who are committed to the market while accelerating programs and investment funds that will turn talented teams into successful startups will lead the industry. I believe that the hypercasual sector will continue to gain value on a global scale in the medium term with the popularization of mobile esports, the introduction of cloud gaming systems operating with the subscription model and the expansion of hybrid gaming types, and these initiatives will offer great opportunities to Turkey.



DAN TANASESCU
EU PRODUCT
MARKETING MANAGER
WORLD OF WARSHIPS

In 2019, our expansion into the rapidly growing Turkish gaming market marked a year of discovery for World of Warships. Finding people and companies to drive this discovery forward was our pinnacle of the year. We learned a lot about Turkey and its passionate gaming community, and in doing we witnessed Turkey develop to be the 5th fastest-growing European audience for World of Warships. We take pride in the trust given to us by our Turkish players, as for World of Warships and Wargaming.net, success thrives through its community. For us, the player comes first and foremost, and that's why for 2020 we are committed to having a bigger presence in Turkey with more local player gatherings and participation in Turkish Gaming Conferences. Behind the regular marketing activities, we believe that meeting our players face-to-face brings us a bigger value than just showing them a branded banner or video. We look forward to seeing you in Turkey in 2020.



TURKEY GAME MARKET EXPERT VIEWS

TURKEY GAME MARKET REPORT 2019



ALİ SAYIN
CO-FOUNDER
VERTIGO GAMES

In terms of mobile games, 2019 has been a year of a growing, increasing market with new competitive members of the market. In terms of the Turkish market, it was a year in which local studios and foreign investments were placing at the top. In our country, as in the rest of the world, there have been serious changes and developments. Interest in the gaming industry, especially in mobile game development, has grown. As Vertigo Games, we have increased our investments and doubled team members to evaluate this period even more actively and to strengthen our position. Investing in individuals has been our most important path to follow in 2019. In the mobile FPS/TPS category, Critical Strike had giant competitors like Call of Duty. Starting with PUBG, the mobile migration of desktop games increasing competition as well as creating new opportunities. A significant part of desktop games players will join the mobile gaming world and the chart will grow even bigger. That's why every major competitor that enters the mobile gaming industry is also a bigger opportunity for us. As Vertigo, we put these thoughts into practice and in 2019, we increased our CCU four times while reaching 20 million players. 2019 was a pretty dynamic and productive year both for us and other mobile studios. It is clear that this will continue to increase in 2020. Our goal is to reach 100 million players and take our growth to another level.



CENK ÇELEBİOĞLU
FOUNDER
COMPOSER
25M2

As a PC game lover since childhood, I follow the developing technology and productions very closely. It is another memory of having followed the games from monthly magazines and playing games with cassettes and discs from stores when there was no internet... But I am very happy with the explosion in gaming with the presence of platforms that support independent game developers. So we had a chance to experience different minds, different ideas. It offered the opportunity of selecting, downloading and playing instantly what we wanted out of countless games. Now it's time for the online stream gaming platforms we've been looking for. On the other hand, the most important thing for me is that games are the reason I started music at an early age. My journey, which began with the Commodore 64 and the Amiga, continues today with evolving technology. Having witnessed how wonders can be created with only 4 channels, I think today is the greatest chance to be presented to someone who can produce music with unlimited channels. Because the idea is the main thing, and then the importance of applying that idea in a perfect way becomes a better understanding. For this reason, besides the soundtracks of movies and commercials, the place of making the music of Zula and Osmanlı Savaşları (Ottoman Wars) games has a different place for me. We're witnessing great game music equally good as film soundtracks. The music of these productions is of the same quality. Increased number of producers, growing gamer audience, rise in quality is incredibly exciting and inspiring for someone like me who is both consuming and producing. See you in the new game music!



TURKEY GAME MARKET EXPERT VIEWS

TURKEY GAME MARKET REPORT 2019



ERGİN YAVUZOL
COUNTRY SALES
MANAGER
BENQ



ÖYKE CAN ASAAD
ESPORTS MARKETING
EXECUTIVE
BENQ

In consideration of the mass communication and engagement, to interpret the rise of the concept of esports as coincidental or underestimating the popularity of esports among the Y, Z and Alpha generations is a huge mistake to make. According to that, we supported university and college events and the esports arenas in the region to strengthen our relationship with the youth who is interested in esports. Also, via the experience events we held in Istanbul, we gave instructions about our products and information about how to choose the right equipment for the esports enthusiasts. Together with the launch of our new performance-focused products in 2020, we are focusing to increase the number of our operations to support esports enthusiasts more. Like all the other branches in sports, esports as well as a performance-based branch and created numberless of inspirational stories, unforgettable moments and legends. As BenQ Zowie, we are aiming to produce esports equipment to support esports enthusiasts to increase their performance to the top in their esports journey.



TURKEY GAME MARKET EXPERT VIEWS

TURKEY GAME MARKET REPORT 2019



BURAK AKAR
DIRECTOR OF
OPERATIONS - CCM
TELEPERFORMANCE

In 2019, we witnessed the rapid rise of indie games designed by local developers, with a growing interest in gamer communities. The market has become more active, especially with foreign investor's investments in local companies. We have learned so much and we keep continue while serving gaming industries leading global companies for 5 years. Companies have begun to design and develop games with feedbacks from players while adopting more agile and efficient resource management to increase their efficiency, both in reducing costs and increasing player satisfaction. Now, game companies in Europe and MENA regions prefer to cooperate with us not only to provide player support, but also for esports, community pages, social media administrations, game contents, quest translations, and even in-game purchase packages. As Teleperformance, we share our knowledge and best practices with our business partners and design their player experiences together. We offer services not only in Turkish but also in different languages. In the digital world, we are in, chat and mail are among the most preferred channels for the gaming industry.



ULUÇ ALİ KIRANGİL
HEAD OF
GAMING IN TURKEY

I witnessed improvements in the Turkish Game Market and it gives me pleasure. We finished baby steps and started to move forward to 2019 with bigger and stronger steps. After the Turkish Esports Federation establishment, esports is more trustable and became a trusted area for brands. In 2019, they created some milestones for Esports and will change the view of families and companies. On the other hand, increased numbers of local game companies give us some ideas about the game industry for Turkey, we also pointed out this in our Turkish Game Market Report 2019. According to data from 2018, numbers increased nearly triple. It shows that this impact will continue in 2020 as well. Our expectations about the esports and game industry for 2020 are high and thinking about revenues will beat 1 billion USD. After expanding the cell phone market in Turkey, game companies will start to produce mid-core mobile games and this will also increase revenues and game development. Turkey has the youngest population when we check European countries and it will continue in 2020 too. The game audience is 1 of 3rd when we look to the population of the country and it will also affect new game companies to open their games in Turkey and it will also expand the industry. Gaming in Turkey has also lots of plans for 2020 and for the near future. The most important one is opening Gaming in MENA office. We are excited to open Mena to our clients and many more game companies to let them work in Mena countries to reach more players. I wish 2020 will bring more success, happiness, and profit for all of us!

RAZER GOLD



Razer Inc. invested 100% in leading gaming services both in Turkey and abroad, including Gamesultan and Rixty in 2018. With the subsequent rebranding, Razer Gold introduced its product to gamers in 2019. Razer Gold, the world's largest virtual credit system for gamers, brings solution for gamers face in many markets, such as not having credit cards for payments, not being asked to use credit cards, or multiple, unsecured payment systems in games.

With a single Razer Gold account, gamers and digital users of Turkey can purchase the products of the newest PC and mobile game titles from the vast library of Blizzard, Tencent, NetEase, Wargaming, Riot, Steam, more than 2 thousand game, in-game, entertainment and digital content easily. Some of the popular games that offer payment method as Razer Gold are; PUBG Mobile, Lords of Mobile, Mobile Legends, Crossfire, World of Warcraft, DOTA 2, CS:GO, Zula, League of Legends, etc. Social platforms are; Bigo TV, Huya Limited, Twitch, Azar, Who, Connected2me, LiVU, LiveMe etc.

Razer Gold can be obtained from `more than 3.5 million` physical stores worldwide through its online website, as well as gift cards from markets. Gamers use Razer Gold exclusive rare in-game items (weapons, costumes and more), or discounts on game titles. Example, thanks to our global collaboration with Tencent, the Razer parachute and the ScarL Razer weapon, which are exclusively for Razer users, have been made available to players this year.

With the motto` By Gamers for Gamers', Razer's surprises and services to gamers and digital content users are endless. Its users also take advantage of the loyalty rewards system, known as Razer Silver. Each use of Razer Gold awards Razer Silver, and Razer Silver can also be used to receive rewards such as gift cards, digital content/costumes, or Razer hardware products.

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PAYMENT METHOD OF GAMERS!

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boost the gaming to the next level with ininal!

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secure ininal card.

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App Store

GET IT ON
Google play



INSTANT RETURN GUARANTEE
IF YOU CAN'T PLAY ANY GAME OF YOUR CHOICE



XIGNCODE3

XIGNCODE3™

XIGNCODE3 is a Reliable Anti Cheat Solution for Online Games. PC Online -Mobil (IOS / Android) - Perfect solution for all game platforms like console! XIGNCODE3 supports all game platforms on the market, its integration is simple and easy to use, compatible with all game engines, has extensive support in different languages (English, Chinese, Japanese and Korean) and more than 300 experienced employees. If you want to create a safe environment for your games, you can contact us to learn the details of XIGNCODE3. Gaming is an authorized agency in Turkey XIGNCODE3 Turkey and the Middle East.

<https://www.gaminginturkey.com/en/xigncode3-anti-cheat-gaming-security-solution/>



HOW ABOUT MEA REGION?

MEA Region top countries, based on game revenues

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





MEA REGION

TOP COUNTRIES BASED ON REVENUES

- Turkey: 826M USD
- Saudi Arabia: 758M USD
- Iran: 458M USD
- UAE: 334M USD
- Israel: 396M USD
- Egypt: 280M USD
- TOTAL: 4.8 Bn+ USD 2019 Revenue

Source: Newzoo - 2019 Free Global Game Market Report



- Population: 1.754.998.000 +
- Online Population: 657.787.000 +
- Gamers: 359.539M+
- 11% Revenue Based Growth
(2018 - 2019)

2019

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



GAMINGINTURKEY





GAMING IN TURKEY

GAMING & ESPORTS AGENCY

01

Game
Marketing

Art
Design

02

Esports
Organizations
Tournaments

03

Game
Operation

QA
Services

IT
Services

04

Game and
Esports
Consultancy
for Brands

05

Mobile
Game
Development

06

Sectoral
Reports



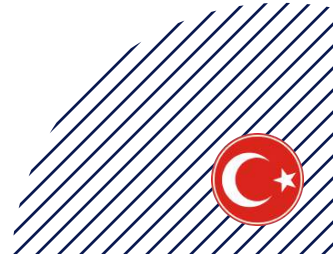
GAMING IN TURKEY

Gaming in Turkey, operating in Turkey for 5 years, is a completely esports and gaming agency.

We provide full 360-degree service with integrated online and offline marketing actions tailored for gaming companies.

Gaming in Turkey, which brings 12 years of experienced online gaming professionals under one roof, is cooperating with game publishers and developers around the world.

We serve also many major brands in Turkey. With Gaming ins MENA Middle East office, we serve the entire Middle East.



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.

FOUNDER / CEO

Gaming in Turkey and Gaming in MENA; Media Hub For Gaming Industry & Gaming Agency & Esports Agency. Experience the best performance and sales in Turkey and MENA with Gaming in Turkey & Gaming in MENA! For more information, you can always contact us.





GAMINGIN**TURKEY**

GAME MARKETING SERVICES

01

Game
Marketing

- Localization
- Influencer Marketing
- Media Planning
- Video Production
- Brand & Strategy
- Digital Marketing
- User Acquisition
- Social Media
- Creative Designs
- Digital PR & PR
- Partnerships





GAMINGIN**TURKEY**

ART DESIGN

01

Art
Design

- Concept Design
- Character Design
- Illustration
- Marketing Assets
- 3D Modeling
- 2D Animation
- 3D Animation
- And More...





GAMINGIN**TURKEY**

ESPORTS ORGANIZATIONS - TOURNAMENTS

02

Esports
Organizations
Tournaments

- Esports Organizations
- Sponsorship
- Team Management
- Online / Offline Tournaments
- Internet Cafe Events





GAMINGIN**TURKEY**

OPERATION

03

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

Operational
Services





GAMINGIN**TURKEY**

QA SERVICES

03

QA
Services

Quality Assurance; As Gaming in Turkey, we provide a thorough QA process using the 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





GAMINGIN**TURKEY**

IT SERVICES

03

- Cloud
- CDN
- Hosting
- Multi Downloader Platform

IT
Services





GAMINGIN**TURKEY**

GAME AND ESPORTS CONSULTANCY FOR BRANDS

04

Game and
Esports
Consultancy for
Brands

We provide consultancy services for local and global brands on the investments they need to make and the steps they need to take in addition to the conventional advertising channels.

- Player-Oriented Customer Audience for Your Brand
- Which Game To Choose To Work With?
- Sponsorship for Games or Esports
- In-Game Customer / Brand Experience
- Game-to-Sales Forwarding
- Internal Organization
- Etc...





GAMING IN TURKEY

MOBILE GAME DEVELOPMENT

05



Mobile Game
Development





GAMING IN TURKEY

SECTORAL REPORTS

06

Sectoral
Reports





GAMINGIN**TURKEY**

ACHIEVEMENTS

Achievements & Projects; That GAMING IN TURKEY Team Has Been Involved & Led Under Gaming in Turkey & Different Companies

40

Game
Publishing

42

Million
User

90

Thousand
CCU

59

Awards

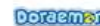
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New Brand



GAMING IN TURKEY

CLIENTS



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CLIENTS



Make A Wish



ONE IT



GAMING IN TURKEY



GAMING IN TURKEY

CLIENTS

JUNKYARD
TYCOON

PEYHO

TEKNOLOJİ
TEKFEST
E-SPORTS

DAMAT
TWEEN

TRICKSY
GAMES

PATH

perdigital

GamesDom

KARANDIK
ISKIK

STARK
INTERACTIVE

Adopt
MyGame

WARFACE

GIT
GAMINGINTURKEY

25m2
MULTI PRODUCTION

POKERIX

giftfeed

Sarıkele



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GAMING IN TURKEY

Gaming in Turkey is a gaming and esports agency that has been serving in Turkey for 5 years, based completely on esports and gaming. For the last 3 years, Gaming in Turkey sharing sectoral reports that are available free of charge to everyone to support both the market and the brands that want to invest in the market and to introduce our region closer.

The information contained in this report is for general information purposes and Gaming in Turkey Gaming and Esports Agency does not intend to provide any advice or services in conjunction with this report. This report, which is prepared to help you make decisions before you invest, is intended to be supportive. It is recommended that you consult a competent professional specialist/company before making your investment decisions. All sources of information in the report are indicated at the bottom of the pages where they are located and in the “References” section. All information collected is open source information and the report has been prepared by the expert team of Gaming in Turkey with all blended industry information.

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GAMING IN TURKEY

Gaming in Turkey Gaming in MENA Gaming and Esports Agency



GAMING IN MENA

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