



GAMINGINTURKEY

# TURKEY GAME MARKET 2020 REPORT





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# Thank You

We acknowledge our sponsors, accompanying and supporting us, in the 2020 version of the Turkish Gaming Sector Reports that we prepare rigorously and interpret data from many published resources for 5 years.

(Logos of our sponsor brands are listed alphabetically.)



Coca-Cola

Fast Consumption-Beverage



Game Garaj

Gaming Computers  
and Equipment



Jobuum

Social Career  
Platform



Logitech G

Gaming Hardware and  
Equipment



Maximum Gaming

Türkiye İş Bank  
Prepaid Card Product



Ozan

SuperApp



Razer Gold

Payment Channel



Türk Telekom

Leading Information and Communication  
Technologies Company of Turkey

# Thank You

We thank our partners who have walked with us for years and been with us for their support.



Gaming and Entertainment  
Platform Partner



Anti Hacking  
Solution Partner



BAU  
Esports



Analytic Services  
Esports Partner



Chinese Mobile Game  
Publishing Partner



Iranian Mobile Game  
Publishing Partner



Online Tournament  
Platform Partner



GlassHouse  
IT Services Partner



Collegiate Esports  
League



## Turkey and Middle East

**OZAN AYDEMİR**

**PRESIDENT / CEO**

2020 has been a year that people don't want to remember not only in our country but also around the world. The covid period showed us (I wish it had never happened) that certain sectors adapt themselves to the digital transformation very quickly while some go into a nosedive. Even if it's about health, it had an impact on all aspects of our lives. From education to health, the entire world, including Turkey, has passed a test and continues to do so.

We're in times of uncertainty in terms of both our social life and financial status. We can't estimate the new conditions accurately. This period showed us that the digital transformation, which is our inevitable future, will be a part of our life much more quickly after this test. I think the important phrase here is the concept of "SPEED". Those who quickly adapt themselves to the technology will survive. It's not just that; those utilizing technology and the digital world to be "QUICK" will become one upon others. The companies that are innovative and can adapt themselves to this speed of changes will have a more active role against innovations and potential new problems. Our life will return to its regular course sometime after the pandemics, but this will take time, and the process we call "Regular Course" today might be a more digitalized one.



## Turkey and Middle East

**OZAN AYDEMİR**

**PRESIDENT / CEO**

In terms of sectors, the gaming sector is going through this period with pretty significant growth. Playing times have increased by 30%. In this period that we all stay at home for months, the number of active users on Steam, one of the biggest game distribution networks and platforms in the world, broke the record of all times by exceeding 23 million people in the previous months. Not only Steam but also other gaming platforms and games have high volumes. Gameplay rates have seen a major increase during the days we stay at home. The fact that we all must stay at home leads not only the young people but anyone into watching movies, reading books and playing games. People spend more time online.

The biggest change in terms of esports is that all offline activities are canceled and the organizations are fully transferred to online platforms due to pandemics. There are either big or small-sized tournaments for players almost every day. These tournaments can be organized not only by gaming companies but also by brands. While some brands organize tournaments to satisfy their customers and boost sales, other brands organize intracompany or intercompany online tournaments to satisfy their teams. Now, not only PC games but also mobile games have a part in the e-sports arena undoubtedly.



## Turkey and Middle East

**OZAN AYDEMİR**

**PRESIDENT / CEO**

The biggest trend in the period of pandemics is mobile games and hyper-casual game types. Mobile games are generally dominated by the hypercasual type and widely played games that offer high levels of online competition such as PUBG Mobile, Garena Free Fire, and LOL Wild Rift.

Yet many global companies prepare mobile versions of their top games or expand their range of mobile games beyond PC games. On the other hand, the number of gaming companies that develop hypercasual games both globally and locally is booming.

Besides, many investors and companies that want to invest in the sector and are sector-independent are closely and very carefully monitoring the gaming and e-sports sector.



## Gaming in Turkey

**OZAN AYDEMİR**

**PRESIDENT / CEO**

In terms of our own company, Gaming in Turkey, we have completed our 5th year as a Gaming and E-sports Agency. We provide services for more than 20 gaming companies simultaneously. We started Gaming in MENA by setting up our office in Dubai at the beginning of the year. In partnership with FCC, we completed the RUSH FOR FUN E-sports Arena. Our objective is to provide better services in the Middle East by increasing our power and number of teams in that area. Our plans for 2020 included Gaming in Europe, but pandemics slowed down this process a bit. If it goes well, we'll continue expanding by setting up an office in England in 2021.

Apart from that, we're building an internal software team. To start developing our mobile games and products. Our objective is to develop games that can be global hits and also publish products for automatizing marketing. Lastly, I can have a few words about the brands. We're happy to be the official gaming and e-sports agency for **Coca-Cola in 25 countries**. As Gaming in Turkey Gaming and E-sports Agency, we provide services for sector-independent brands beyond hundreds of gaming companies for 5 years. And we train them on how to invest in this sector, how to reach the rising generation by way of this sector and make smart investments. I believe that the local and global brands in Turkey should steer towards the gaming and esports sector more. But it's vital for them to press the right buttons while doing so. It's not just about sponsoring an e-sports team or tournament. They both need to have a good command of the subject and make long-term plans by considering all the aspects.

# 2020 Turkey Overview

In 2020, the population of Turkey is higher than the previous year. Our population increased by 459,365 people and reached 83,614,362 people. It revealed that the population of our country increased at the rate of approximately 5.5 per mille compared to the past year. Our annual population growth rate was 13.9 per mille in 2019.

Male population was 41,915,985 people while female population was 41,698,377 people. Of the total population, 50.1% is male and 49.9% is female.

The population of İstanbul decreased by 56,815 people compared to 2019 and reached 15,462,452 people. Bayburt is the province with the lowest population with 81,910 people. İstanbul, where 18.49% of the population of Turkey resides, is followed by Ankara with 5,663,322 people, İzmir with 4,394,694 people, Bursa with 3,101,833 people, and Antalya with 2,548,308 people.



# 2020 Turkey



**TOTAL  
POPULATION**  
83.614.362



**FEMALE  
POPULATION**  
41.698.377



**MALE  
POPULATION**  
41.915.985



**INTERNET  
USERS**  
66.055.000+

AVERAGE TIME SPENT BY  
INTERNET USERS AGED 16-64  
FOR USING THE INTERNET  
EVERYDAY AT ANY DEVICE

**7 HOURS 57 MINUTES**

POPULATION RATE  
79%

BY GENDER  
MALE 84.7%  
FEMALE 73.3%



**SOCIAL MEDIA  
USERS**  
55.000.000

37.000.000 FACEBOOK  
38.000.000 INSTAGRAM



# Estimated Media and Advertising Investments in Turkey

The rise of the digital continues at full steam according to the figures in the report 2020 Estimated Media and Advertising Investments in Turkey issued by the **Association of Advertising Agencies**. Affecting the entire world, the Covid-19 outbreak is also observed to have a direct impact on media and advertising investments in Turkey. Within this period, advertisers launched campaigns that primarily aim at protecting brand awareness and then focus on sales. The majority of the investments had to be shifted towards digital as you can see in the percentages.

|  | Channel | Market Share 2020 | Market Share 2019 |
|--|---------|-------------------|-------------------|
|   | TV      | 34,7%             | 48,1%             |
|   | Press   | 2,9%              | 6,6%              |
|   | Outdoor | 4,6%              | 9,1%              |
|   | Radio   | 2,1%              | 3,6%              |
|   | Cinema  | 0,4%              | 1,3%              |
|  | Digital | 55,3%             | 31%               |



# Estimated Media and Advertising Investments in Turkey

Looking at the breakdown of digital advertising channels, we see that Search, Display and Video ads are the main stakeholders.

|   | Digital Breakdown | Percent |
|---|-------------------|---------|
|  | Search            | 42%     |
|   | Display           | 33%     |
|   | Video             | 19%     |
|   | Advertisement     | 5%      |
|   | Other             | 2%      |



# Estimated Media and Advertising Investments in Turkey

Looking at the mobile ad part only, we see that use of mobile ads increased by 335%. Turkey stands out as the top country in terms of increase in use of mobile ads.

● Video ● Interstitial ● Banner



While "playable" ad models are popular globally, they don't have many areas of use in Turkey yet.



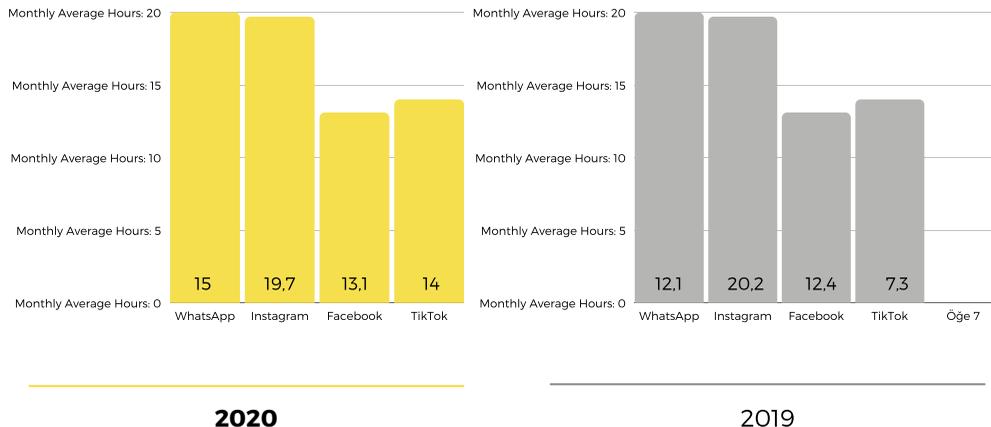
Interstitial ad model draws attention as the most used model, with the video format in the second place and the standard banner ad model in the third place.

**Interstitial Ad Model:** *Interstitial ad, which is a display ad format, allows the advertisers to reach their audience when they are used in mobile apps (and on websites).*



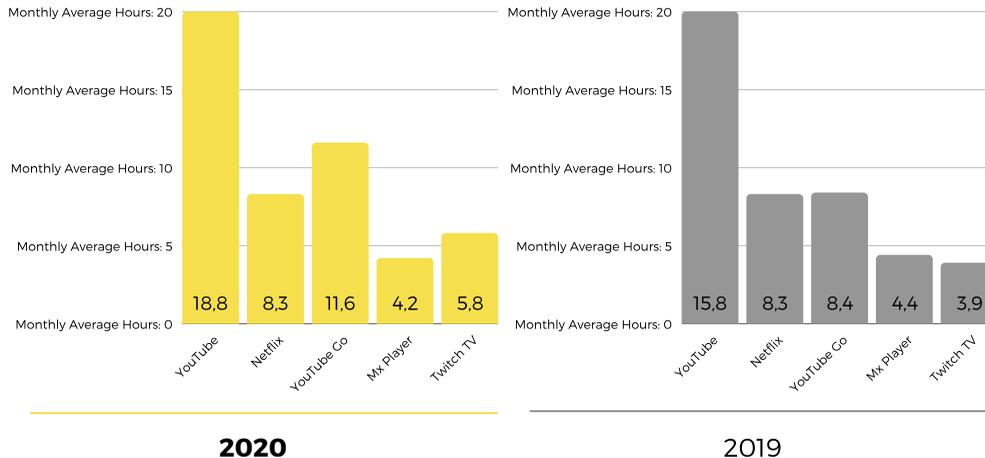
# The Most Used Mobile Social Network Apps in Turkey

In 2020, pandemics also largely affected the position of our habits in our lives. 2020, when we got far away from social activities, made us focus on digital social activities in particular. The usage rate of WhatsApp, Instagram, Facebook, and TikTok, which are essential apps in our phones in Turkey, seems to be rather increased than in 2019.



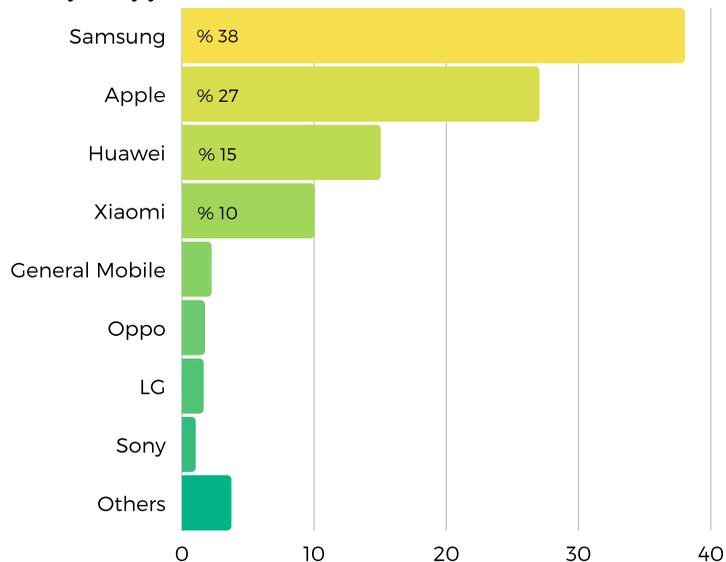
# The Most Used Mobile Video Platforms in Turkey

Especially the new generations prefer digital video platforms while Screen Time, which is the time we spent across TV, continues to exist. And the time we spent on our mobile devices is pretty high. Netflix's success in Turkey has paved the way for many new initiatives.



# Preferred Brands in Turkey

Turkey has a pretty high smartphone usage rate. Many brands have increased their share with high amounts of investments after penetrating the market. While Samsung and Apple are still placed first and second, Huawei and Xiaomi continue to increase their brand awareness and share in the market year by year.



2020



# Turkish Mobile Player Habits

Not only the young but also the adults play games according to the research by AdColony and Global Web Index in 2020. While 81.7% of the adults are female while 76.5% are male. The data collected also reveals that 84% of all internet users in Turkey play a mobile game with a minimum of one device. Demographics and behavioral habits of the mobile players in Turkey are as follows:

- 79% of the adults in Turkey play a mobile game.
- Of the mobile players in Turkey, 50.2% are male and 49.8% are female.
- Percentage breakdown of the age ranges of the mobile players in Turkey:
  - Age: 16-24 - 23.9%
  - Age: 25-34 - 28.5%
  - Age: 35-44 - 25.3%
  - Age: 45+ - 22.4%



## 79% of Turkish Adults are playing mobile games

%81,7 of Turkish Woman



%76,5 of Turkish Man



## Turkish Mobile Gamers



## How old are they?



# Turkish Mobile Player Habits

As anyone can guess, action-adventure games (49.2%) are ranked first among the favorite types of games for the mobile players in Turkey while puzzle games (46.2%) are ranked second and race games (45.7%) are ranked third.

## Favorite Types of Games

Action-Adventure - 49.2%

Puzzle - 46.2%

Race - 45.7%

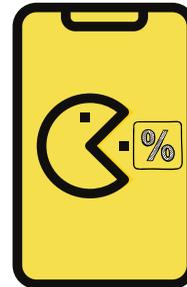
Sports - 45.6%

Strategy - 39.3%

Simulation - 38.3%

Card Games - 26.3%

Role-Play - 21.1%



Looking at the annual in-game revenue generated, we see that the favorite types of games and the types of games for which money is spent are the same, particularly in Turkey.



# Turkish Mobile Player Habits

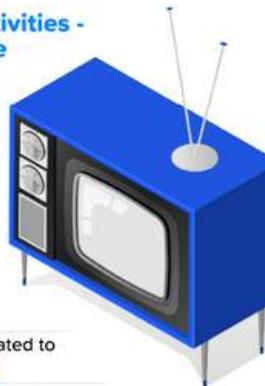
Looking at the personal areas of interest for the mobile players, films (81.7%) and music (72.8%) stand out. They are respectively followed by technology (70.5%) and catering (70.1%). Especially these days when the television is named as the second screen, 60.6% of the mobile players play a mobile game simultaneously while watching television.

## Personal Areas of Interest for Mobile Players in Turkey

Film / Movie - 81.7%  
 Music - 72.8%  
 Technology - 70.5%  
 Food & Beverages - 70.1%  
 News & Current Events - 67.8%

## Second Screen Activities - What they do while watching TV

Use social media: **59.5%**  
 Read my emails: **58.4%**  
 Chat to / message friends: **56.4%**  
 Play Games: **53.3%**  
 Search for products to buy: **37.4%**  
 Read the news: **33.6%**  
 Search for information related to what I'm watching: **30.9%**  
 Interact with the online content of the TV show: **9.9%**  
 Share my opinion of a TV show: **7.2%**



# Turkish Mobile Player Habits

Mobile players spend more than 4 hours on their phones per day, regardless of games. Search engines, social networks, video platforms, instant messaging apps and news sites stand out as the online areas where people spend time most.

| Media Channel  | Less than 1 hour | 1-3 hours | 3-5 hours | More than 5 hours |
|----------------|------------------|-----------|-----------|-------------------|
| Mobile Phone   | %13,7            | %33,6     | %22,3     | %30,3             |
| PC             | %30,1            | %28,8     | %16,1     | %24,9             |
| Traditional TV | %33,9            | %37       | %17,3     | %11,8             |
| OTT            | %73,1            | %16,8     | %5,5      | %4,6              |



# World of Android Gaming in Turkey

There are **over 2,689** Turkish publishers, among 171,986 game publishers on Google Play.

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Turkish publishers offer **over 8,055** games, among the 439,890 games on Google Play.

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The average score of over 8,055 games offered by Turkish publisher on Google Play is 3.94 out of 5. This score is better than overall average score (3.76) of all the mobile games.

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3% of the games published by Turkish publishers is in the paid category while 87% contains ads. 28% of the games utilizes in-app payments.

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Only 18% of the games published by Turkish publishers are available both on Google Play and App Store.



# Why is Localization Essential for Turkish Players?

Turkey has made progress over the previous year according to the 2020 English Proficiency Index study, including 100 countries around the world, carried out by Education First English Language School. This is quite pleasing.

According to the table, Netherlands is still ranked first in terms of English speakers as it has been in the previous years. Turkey has made a 10 level progress, rising from 79th place to 69th place in the list that includes 100 countries.



## Proficiency trend



Source: Education First English Language School English Proficiency Index List 2020



# Why is Localization Essential for Turkish Players?

Turkey had been ranked 62nd in 2017, and then dropped by 11 levels and ranked 73rd in 2018. In 2019, we were ranked 79th. Declining year by year since 2012 when we were ranked 32nd, our country has climbed up 10 levels at once in 2020.

The gaming sector is well aware of the significance of localization for our country. Particularly large and mid-scale gaming companies are trying to reach out to Turkish players in many aspects from dubbing to translation and even in-game cultural items.



No wonder it's a significant factor of success to be well aware that localization isn't just a translation or transfer of an Ottoman item into the games.

We can say that many details such as translation by a specialized team per game content, not having spelling mistakes, using the fonts that comply with our special letters (i.e. Öö, Çç, Şş, ı, İ, Çç, Üü, Çğ), length of the text (interface layout), considering the different sentence structures as the verb is placed at the end in Turkish language, choosing the right vocal artists, and removing in-game contents that might offend Turkish players religiously or politically are just a few underlying reasons for the success of localization.



# Music is an Indispensable Part of Gaming

According to Spotify data, the rate of listening to music or podcast via game consoles has increased by 55% around the world in 2020. This rate is higher in Turkey. It was observed that the rate of listening to music or podcast via game consoles increased by 62% for the game enthusiasts in Turkey in 2020.

According to the Spotify data, the event of listening to music or podcast via game consoles occurred in the early morning hours (06:00-09:00) at most in 2020, with a 47% increase rate around the world and 66% increase rate in Turkey. The analysis is based on the listening activities carried out via game consoles such as Xbox and Playstation, which have Spotify integration.



## SPOTIFY 2020 SUMMARY – TOP SONGS PLAYED VIA GAME CONSOLES IN TURKEY

### Top Female Singers Played via Gaming Consoles in Turkey

- Ezhel
- Travis Scott
- XXXTENTACION
- Murda
- Ben Fero



# Music is an Indispensable Part of Gaming

## SPOTIFY 2020 SUMMARY – TOP SONGS PLAYED VIA GAME CONSOLES IN TURKEY

### Top Female Singers Played via Game Consoles in Turkey

- Billie Eilish
- Sezen Aksu
- Zeynep Bastık
- Didomido
- Tones and I

### Top Songs Played via Game Consoles in Turkey

- "Falling" - Trevor Daniel
- "The Box" - Roddy Ricch
- "goosebumps" - Travis Scott
- "Dolunay" - Enes Batur
- "Roses-Imanbek Remix" - Imanbek, SAINT JHN

### Top Video Game Soundtracks Played via Game Consoles in Turkey

- The Witcher 3: Wild Hunt - Marcin Przybyłowicz
- Interstellar (Original Motion Picture Soundtrack) - Hans Zimmer
- The Witcher (Music from the Netflix Original Series) - Sonya Belousova

### The Most Popular Podcasts Played via Game Consoles in Turkey:

- O Tarz Mı?
- Socrates Podcasts
- KALT'ın Podcast'i
- Fularsız Entellik
- Umarım Annem Dinlemez



# Characteristics of Turkish Players



Players Aged 30 - 40



Players Aged 25 - 30



Players Aged 18 - 24



Players Aged 12 - 18



# Characteristics of Turkish Players

01

## Players Aged 30 - 40

- Works, is well-dressed, 30-40 years old and a player.
- Has all technological tools; good phone, console, PC.
- Spends daily life rather working and plays games after spending time with the family in the evening.
- Has limited time.

02

## Players Aged 25 - 30

- Works and prefers sports clothing, is 25-30 years old and a player.
- Sleeps late.
- Plays game at many platforms.
- Primary choice is a good phone - computer

03

## Players Aged 18 - 24

- University student, prefers sports clothing, is 18-24 years old, a player.
- Uses laptop.
- Likes listening to music.
- Stays awake till late hours.

04

## Players Aged 12 - 18

- Is 12-18 years old and a player.
- Is at high school / secondary school.
- Plays games with phone.
- Is at school during daytime and has limited time.
- Sleeps early, is a day person.



# What's the Status of Turkish Gaming Market?

The pandemics, which affected every aspect of our lives, has had a direct impact on gaming sector as we leave the 2020 behind. The growth rate of the gaming sector, which is already on the rise, has further accelerated. This development worldwide applies to Turkey, as well. "Playing Games" has been the best source of entertainment regardless of the platforms. Even the quick rise of the exchange rate of dollar couldn't interfere with the growth of turnovers in Turkey.

**COVID-19 LEVELLED UP GAMING AND ESPORTS!**



# Gaming Market and Esports in Turkey

2020 has been an entire year that we must consider all the stats with a different approach. People who have never played games in their life played games in 2020 when all the entertainment had to be restrained within our homes. This led to an increase in both the number of players and the money spent on games that are almost our best source of entertainment.

While hypercasual games were on the agenda for new players, hardcore players preferred Battle Royale, FPS, Strategy, and MOBA games as they did in the previous year. Casual games such as Among Us and Fall Guys, which any audience might like made their mark in the sector during this period.

Throughout 2020; Turkish players prefer PUBG Mobile, Brawl Stars, Garena Free Fire, Kafa Topu 2, ROBLOX, 101 Okey Plus, Mobile Legends Bang Bang, Lords Mobile, and similar games on mobile, the choice of the overall gaming audience was hyper-casual and puzzle games.

Offline events were replaced by online tournaments. Numerous tournaments created a new world for players as well as brands. The appearance of e-sports has changed and evolved. The number of teams and sponsor brands also increased. About 5.5 million e-sports enthusiasts continue to cultivate the ecosystem. Unfortunately, our internet cafes and e-sports arenas of pretty high investments had to skip this period.

Above all, the gaming sector has been the sector of the highest investment. The first unicorn of Turkey has been a gaming company: Peak Games. Companies such as Rollic Games achieved success in a short period and sold shares, and Mount & Blade Bannerlord, our PC game with sales support high enough to compete with top quality (AAA) games, led people to focus on the gaming sector. The production rate and quality of our country increased for hyper-casual games.



# Gaming Market and Esports in Turkey

## Top 3 Eye Catching Major Events in 2020

- Having provided for early access at 13:00 in March 2020, Mount & Blade II: Bannerlord broke a new record by reaching **100k** simultaneous users at the time it's published.
- Rollic Games were officially sold to Zynga from the US for **168 million dollars**.
- Peak Games, a local mobile gaming company, were sold to Zynga, one of the biggest gaming companies in the world and a US based business, for **1.8 billion dollars**.



# A Sector of the Highest Investment: Gaming!

While startups received a total investment of 19 million dollars in the first quarter of 2020, this amount increased up to 28.3 million dollars in the second quarter. According to the report, startup investments increased up to 45.8 million dollars in the third quarter. Having a transaction volume of approximately 2 billion dollars due to share sales made in the gaming sector during the first nine months of 2020 moved the gaming sector to the top in terms of investments received.



Sales of Peak Games and Rollic Games to the American Zynga respectively for 1.8 billion dollars and 168 million dollars in the gaming area in the first three quarters of 2020 were also the transactions featured in the report. The sale of Payguru, dealing with financial technology and also having a quite good position in the gaming sector, to Tpay, one of the biggest mobile payment companies of the Middle East and Africa, stood out.



# A Sector of the Highest Investment: Gaming!

| Company            | Investor                                      | Amount of Investment                                    |
|--------------------|---|---|
| HEY Games          | Ludus Giriřim Stüdyosu                        | 1.200.000 USD   |
| Bigger Games       | Index Ventures, Play Ventures, David Helgason | 6.600.000 USD   |
| Daxe Games         | Sedat Eryılmaz                                | 1.000.000 TL  |
| Gamer Arena        | Roman Neustadter                              | 3.500.000 EURO (Valuation)                              |
| Click Game Studio  | VOR Studio                                    | 4.500.000 TL  |
| Axell Studio       | Destex Digital, Rasyonel Global               | 400.000 USD   |
| Gorilla Softworks  | WePlay Ventures                               | 2.500.000 TL (Valuation)                                |
| Hoody              | WePlay Ventures                               | 1.800.000 TL (Valuation)                                |
| Funmoth Games      | WePlay Ventures, Matchingham Games            | 10.500.000 TL (Valuation)                               |
| Madcraft Studios   | WePlay Ventures                               | 2.000.000 TL (Valuation)                                |
| Gnarly Game Studio | WePlay Ventures                               | 5.000.000 TL (Valuation) / 500.000 TL (Seed Investment) |
| Fabrika Games      | Voodoo  | No Information Found                                    |
| Rare Forge         | Mynet   | 50% Share Buy   |
| Rollic             | Zynga   | 80% Share: 168.000.000 USD                              |
| Veloxia            | MobileX                                       | 440.000 USD   |
| Peak Games         | Zynga   | 1.800.000.000 USD                                       |
| Coda               | London Venture Partners                       | 4.000.000 USD   |
| Onnect (Oyun)      | Rollic  | 6.000.000 USD   |
| Forge Games        | WePlay Ventures                               | 2.600.000 TL (Valuation)                                |
| Cyroscooping Games | WePlay Ventures                               | 2.200.000 TL (Valuation)                                |
| Brew Games         | Actera Türk                                   | 4.000.000 USD   |
| Fiber Games        | Boğaziçi Ventures                             | 30.000.000 TL (Valuation) / 3.000.000 TL Investment     |



Note: Some of the investments in the first quarter of 2021 were also listed.  
The list was compiled by investigating the news published. If anything is missing in the list, we will update it when we're reached out.



# Turkish E-sports Federation

## TESFED

### Interview

#### As the President of Federation, could you provide us with a brief evaluation of 2020?

Covid-19 has been such a long process that we never expected and got us off-guard, not only in our country but also around the world. It has left quite distinctive impressions on both our personal life and business life. I believe that pandemics will leave its marks behind when it ends and thereafter cause a certain amount of transformation in every sphere of life. Looking specifically at gaming and e-sports, they were shown increased interest naturally since they are in an online environment and provide a sort of safe way of socialization, along with the increased time people stay at home. The number of new players and e-sports viewer rates increased by 20% on average. Efforts were made to support the stay-home times of the people in this period with the special tournaments organized by either our federation or gaming companies.

TESFED scored many significant victories in 2020 to spread e-sports in Turkey and to make Turkey a trademark country in the international area.



**TESFED**  
TÜRKİYE E-SPOR  
FEDERASYONU



ALPER AFŞİN ÖZDEMİR  
PRESIDENT OF TEFED



# Turkish E-sports Federation TESFED

## Interview

**As the President of Federation, could you provide us with a brief evaluation of 2020?**

Celebrating the second anniversary this year, Bitexen TEFED Turkish Cup scored a great victory in popularizing e-sports among masses by reaching 700k e-sports fans, and our national team, formed by the champions of the NBA2K tournament held during the Cup blew us up by becoming the champion. Our national team presented an undefeated championships to Turkey by winning against all the competitor country teams in the “FIBA Esports Open”, organized by the International Basketball Federation. Dota 2, Tekken 7 and Pes champions in the TEFED Turkish Cup officially represented our country by competing in the regional qualifying rounds of the International E-sports Federation (IESF) World Championship in October.



ALPER AFŞİN ÖZDEMİR  
PRESIDENT OF TEFED



# Turkish E-sports Federation

## TESFED

### TESFED 2020 Activities - As TEFED, what did we do in 2020?

#### **Establishment of European E-sports Federation / 21 February 2020:**

European E-sports Federation has been established on February 21, Friday with participation of 23 member countries following a preparation period of 1.5 years during which Turkish E-sports Federation played an active role. With TEFED being the founder member in the first election organized by European E-sports Federation, TEFED President Alper Afşin Özdemir was elected as a board member as a result of getting 19 out of 22 votes cast by eligible countries. Turkey has become one of the countries that have a voice in European E-sports Federation.



**TESFED “#StayHome Cup” / 27 March 2020:** To raise awareness against the Covid-19 threat and support the #StayHome Campaign, a public “#StayHome Cup” was organized with a pool of prizes including 50k TRY main prize through cooperation with Papara.

#### **Collaboration protocol between TEFED and HADO Turkey / 17 June 2020:**

A collaboration protocol was signed with HADO Turkey on behalf of Meleap Inc., a Japan based developer company that penetrated into the Turkish market with the tagline “Sport of the Future” as part of the principle of supporting development of e-sports in Turkey. Collaboration protocol covers establishment of Turkey Hado National Team, and organization of domestic tournaments and events.



# Turkish E-sports Federation

## TESFED

### TESFED 2020 Activities - As TEFED, what did we do in 2020?

#### **Bitexen TEFED Turkish Cup / 2 October-15 December 2020:**

Turkey's only official e-sports tournament organized by Turkish E-sports Federation (TESFED) celebrated its second anniversary this year under the name of "Bitexen TEFED Turkish Cup". Assuming a significant role in bringing this type of sports to wide sections of the society, increasing awareness and spreading it to the base, the tournament scored a significant victory with participation of 2,491 e-sport players and by reaching over 700,000 e-sports fans.



#### **First official representation in the IESF 2020 Regional Tournaments**

**/ 20 October 2020:** "Bitexen TEFED Turkish Cup tournaments designated 3 champions to officially represent Turkey abroad for the first time. The champions in Dota-2, Tekken 7 and PES tournaments of TEFED Turkish Cup joined the IESF 2020 Regional Tournaments, organized by the International E-sports Federation (IESF) for these 3 games on 20 October-20 November, on behalf of Turkey.



# Turkish E-sports Federation

## TESFED

### TESFED 2020 Activities - As TEFED, what did we do in 2020?

**Gaming Day / 15 December 2020:** We attended the Groupm Gaming Day organized by Wavemaker Turkey. Opening speech for the event was made by the TEFED President Alper Afşin Özdemir.

**E-Sports Summit #2 / 22 December 2020:** We attended the E-sports Summit organized by PARA within Turkuvaz Medya. TEFED President Alper Afşin Özdemir gave a speech in the opening of the online summit that brings e-sports stakeholders together.

**Current number of the licensed e-sports players and e-sports teams:** Including 194 female players, 2,439 e-sports players were licensed by TEFED in 2 years. In the meantime, the number of licensed clubs increased to 125, and the number of e-sports halls, which was 3 in 2019, increased to 19.



# Turkish E-sports Federation

## TESFED

### Interview

#### TESFED 2021 Strategies

I expect a rapid recovery process in 2021. In this sense, we plan to continue our efforts from where we left off and in line with our goals. The primary goal of TEFED is to make Turkey one of the well-known e-sports countries in the world. So far, we've taken important steps in this direction, and also achieved international success specifically in the previous year. We'll further push and continue our efforts to win new victories and championships in the international arena, and spread e-sports to wide masses within the country. To this end, we'll take significant steps in 2021.

**What we did and couldn't do (due to the current pandemics) in TEFED's 2020 strategy** *For the national cup events, we had final matches online due to the pandemic this year while we had them offline and with spectators before pandemic.*



ALPER AFŞİN ÖZDEMİR  
PRESIDENT OF TEFED



# RIOT GAMES

## 2019 - 2020

### Interview

#### A brief evaluation of 2020 by RIOT Games

2020 has been a year of great progress for us to convert from a gaming company to an entertainment company. Today, we've evolved into an utterly different company with a total of 5 games, virtual music band, Netflix documentary, animation series, and e-sports events that bring together millions across screens and thousands in physical environments while we had only League of Legends, the most played PC game in the world, just a few years ago.

We've discovered different types of games and platforms with our new titles. We knew that the expectation would be quite high for any game to be issued after the League of Legends, a game that made its mark in the history of games perfectly. Huge interest shown by the people showed us that we met these expectations and were on track. I believe that we've redressed the balance in the gaming world with Valorant and League of Legends: Wild Rift in particular.



**ERDİÑÇ İYİKÜL**  
RIOT GAMES  
TURKEY COUNTRY  
MANAGER



# RIOT GAMES

## 2019 - 2020

### Interview

#### 2021 goals as Riot Games

If I were to talk about the details of our 2021 goals briefly, Valorant is a quite significant and successful product for us. It managed to grab Turkish players' attention since its release date. We intend to boost this attention by consistently providing them with new contents. Recognizing that we made strong start, our goal is to become the most played tactical FPS game. On mobile, we continue our efforts to provide our players with new experiences in the best way, with the Wild Rift after the Legends of Runeterra. In this respect, we want to reach the players that we can't reach via our PC games. We'll achieve this not only with a gaming experience but also by displaying the charm of the community we created. Thus, we intend to both ensure that our community expands and we have a higher share in the mobile market where we made a strong start.

Finally, we want to meet a wider audience through various media and various platforms by differentiating our content as an entertainment company. Also, we want to make an impact on the life of anyone playing our games and continue to provide exciting contents for them.



**ERDİÑÇ İYİKÜL**  
RIOT GAMES  
TURKEY COUNTRY  
MANAGER

**RIOT**  
**GAMES**



# 2020 in the Eyes of ZULA

## Interview

How was 2020 for you?

What did you do in the gaming and e-sports sector?

As millions of people started spending more time at home since the pandemic process limits the mobility of the people, any type of digital content consumption has naturally increased.

We can say that we have experienced great increase in the number of existing and returning players. While the number of our daily active users increased by 20%, the number of new users acquired per month increased by 15%.

As InGame Group, we wanted to work towards raising awareness of the players by considering the increase in the number of players. In this respect, we started reminding the 14 rules announced by the Ministry of Health.

We started organizing #StayHome events for supporting the players to stay at home during this period and added earnings with gifts both within game and from our partners to the entertainment.



**GENCO ALP**  
INGAME GROUP  
FOUNDING PARTNER  
CEO

**ZULA**

**IN GAME GROUP**



# 2020 in the Eyes of ZULA

## Interview

How was 2020 for you?

What did you do in the gaming and e-sports sector?

On the other hand, we attach great importance to make our contribution to develop e-sports in our country due to the responsibility of being a local gaming company. In this respect, we realized the project named "Her Oyunun Başı Sağlık" (Health Before Any Game) under the leadership of our Federation, TESFED. Intended to be a guiding light for growth of informed e-sports players, this project has the characteristics of a prototype that is unique not only in Turkey but also around the world.

This year, we also put our signature under a strategic partnership with Vodafone Freezone, the youth brand of Vodafone. This partnership also covers organizing a joint Zula tournament with Vodafone FreeZone, which provides the first gaming tariff in Turkey. Vodafone FreeZone also enables improvements up to 5 ms in latency for the players on the Zula Mobile platform with the joint architectural structure it has developed together with InGame Group.

We've organized many events. Of these events, the "Zula Women's Tournament" organized for the March 8 celebrated its second anniversary. As specific to Zula game on special days, the Ramadan events in which players win various prizes during the Ramadan, Zula Influencer Cup on the Victory Day on August 30, the Republican Cup on October 29, the "Tügeneraller Kampanyası" (Feathery Generals Campaign) on October 4, which is organized with the support of the Foundation of Community Volunteers (TOG) and PawPaw Turkey and where players donated animal food for the street animals are just a few of these events... On one hand, the only official local esports league in Turkey, "Zula Super League" continues.



**GENCO ALP**  
INGAME GROUP  
FOUNDING PARTNER  
CEO

**ZULA**

**IN GAME GROUP**



# 2020 in the Eyes of ZULA

## Interview

What are your goals for 2021?

What kind of innovations shall we expect from you?

2021 will be a year in which we'll start new gaming projects. Thus, we plan to expand in terms of employment for both our offices in Turkey and Berlin.

Having 30 million players in Turkey and around the world, our popular MMOFPS game Zula started to be played on the mobile phones this year under the name of "Zula Mobile" following a meticulous development process. InGame Group's developer team continues to work non-stop for Zula Mobile and bring it to perfection. We'll have global launch within 2021 for the Zula Mobile, from which we have great expectations. Thereby we hope that we have yet another globally successful new game find the gaming enthusiasts.

To further please the enthusiasts of Zula, which is our PC game in MMOFPS type, we've created more content and will continue to do so. Online e-sports tournaments will be diversified, leading up to a point where competition is maximized.



**GENCO ALP**  
INGAME GROUP  
FOUNDING PARTNER  
CEO

**ZULA**

**IN GAME GROUP**



# The Market Welcomes a Giant ONEDIO Gaming

## Interview

As Onedio, we started our publishing life in 2012 and put a signature under the most discussed and shared content in Turkey. We've created tens of thousands of content and continue to create more in tens of categories including current news, magazine news, sports news, science and tech, the most interesting historical facts, best series/movie recommendations. We contact with minimum 5 million people everyday via the Onedio.com and the social media channels owned by Onedio.

Now is the time to focus seriously on a content vertical which we believe that we have ignored to some extent until this day. We'll be a part of the gaming industry, which is the biggest content and entertainment market in the world. Moreover, we've joined forces with Gaming in Turkey, which is one of the best organizations in Turkey in this field. We've created the "Onedio Gaming" brand by combining the reach, editorial system, and information and experience on the social media channels (i.e. media) with GiT's deep knowledge of the gaming sector and its relations with the sectoral stakeholders.

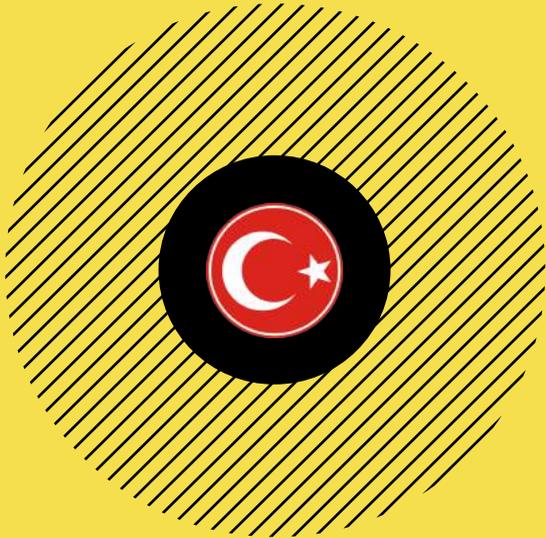
We'll create written content, write articles, make livestreams, generate videos and organize tournaments concerning the world of gaming and e-sports with the Onedio Gaming project, which also makes me feel excited as an active player for many years. You can follow us under the Onedio Gaming tab on Onedio.com and via Onedio Gaming accounts at all social networks. Hoping to see you very soon with very good news!



**KAAN KAYABALI**  
FOUNDER  
ONEDIO



**2019**



**2020**

**Turkey Game  
Market 2019  
&  
Turkey Game  
Market 2020  
Comparison!**





# POPULATION

## TURKEY GAME MARKET REPORT 2020

- 2019 Population: **83.154.997**

- **23.1%** Age: 0 - 14

- **67.8%** Age: 15 - 64

- **9.1%** Age: 64+



- 2020 Population: **83.614.362**

- **22.8%** Age: 0 - 14

- **67.7%** Age: 15 - 64

- **9.5%** Age: 64+

**2019**

**2020**

Source: Turkish Statistical Institute (TSI)



# INTERNET USERS

TURKEY GAME MARKET REPORT 2020

- Internet Users:  
62.200.000+



- 75.3% of the population  
is online

- \* People in age group 16-74
- \* Internet access at home 88.3%

**2019**

- Internet Users:  
66.055.000+

- 79% of the population  
is online

- \* People in age group 16-74
- \* Internet access at home 90.7%
- \* Internet usage rate by gender  
Male 84.7% - Female 73.3%

**2020**

Source: Turkish Statistical Institute (TSI)



# SOCIAL MEDIA USERS

TURKEY GAME MARKET REPORT 2020

• Active Social Media Users: **53.700.000**



• Active Social Media Users: **55.000.000**

• Average time spent on the social media every day by the internet users aged 16-64: **2 Hours 57 Minutes**

**2019**

**2020**



# MOBILE USERS

## TURKEY GAME MARKET REPORT 2020

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



- Mobile Users: 82.800.000+
- 99,6% Mobile / Population
- 75 -80% Smartphone / Mobile
- Smartphone Users:  
55.500.000 (+ / -)
- 4.5G Subscribers: 76.5 Millions
- 3G Subscribers: 4.4 Millions

**2019**

**2020**



# PLAYERS

## TURKEY GAME MARKET REPORT 2020

- Players: **32.000.000+**
- Total Game Revenue:  
**830.000.000 USD (+ / -)**

1 Dollar = 5,6826 TRY

### 2019



- Players: **36.000.000+**
- Total Game Revenue:  
**880.000.000 USD (+ / -)**

- *Mobile: 450.000.000 USD (+ / -)*
- *PC: 230.000.000 USD (+ / -)*
- *Console: 200.000.000 USD (+ / -)*

1 Dollar = 7,0234 TRY

### 2020



# PLAYERS

TURKEY GAME MARKET REPORT 2020

## Players Breakdown (Estimated)

- **MOBILE:** 35 Million Players



- **PC:** 22 Million Players



- **CONSOLE:** 17 Million Players

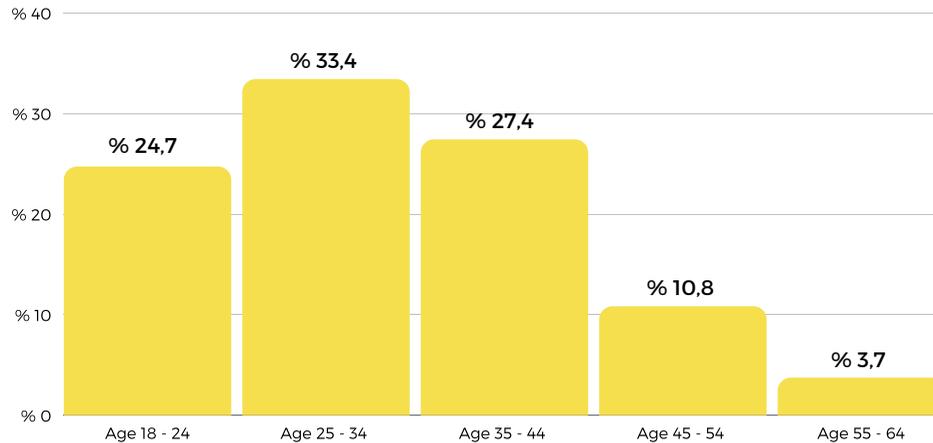


2020



# PLAYERS BY AGE

## TURKEY GAME MARKET REPORT 2020



**2020**

### Players by Age 2019

|             |         |
|-------------|---------|
| Age 18 - 24 | 21,87 % |
| Age 25 - 34 | 34,95 % |
| Age 35 - 44 | 28,60 % |
| Age 45 - 54 | 11,21 % |
| Age 55 - 64 | 3,36 %  |

### Players by Age 2020

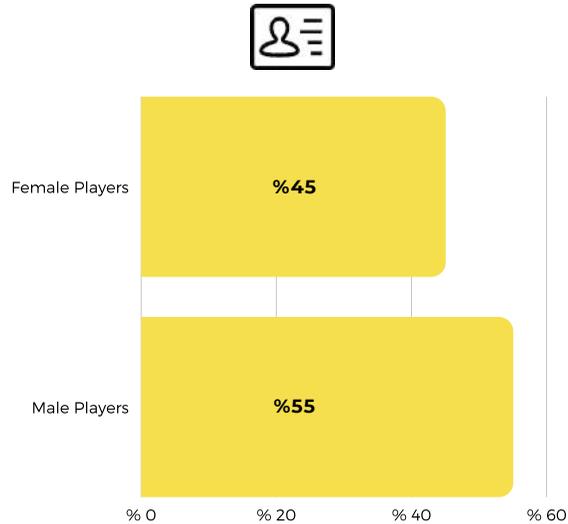
|             |        |
|-------------|--------|
| Age 18 - 24 | 24,7 % |
| Age 25 - 34 | 33,4 % |
| Age 35 - 44 | 27,4 % |
| Age 45 - 54 | 10,8 % |
| Age 55 - 64 | 3,7 %  |





# PLAYERS BY GENDER

TURKEY GAME MARKET REPORT 2020

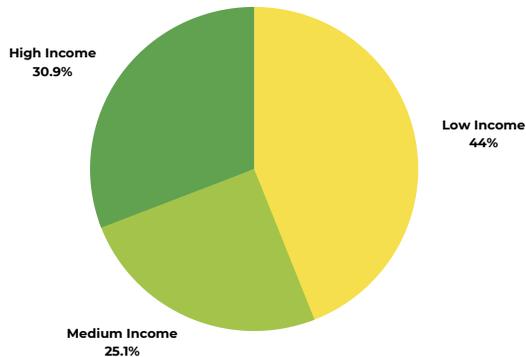


# 2020

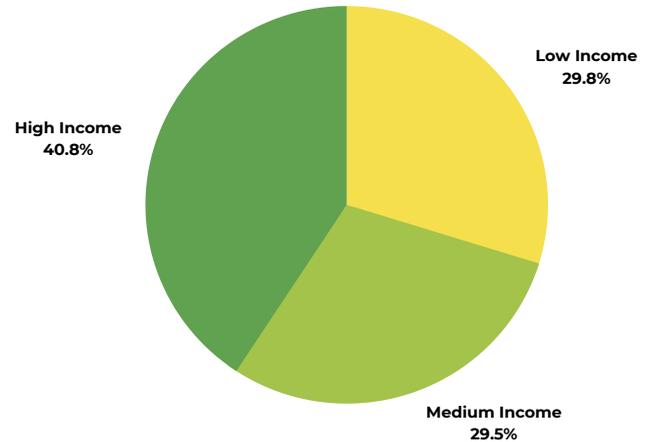


# PLAYERS BY INCOME

TURKEY GAME MARKET REPORT 2020



**2019**



**2020**



# TOP 15 MOBILE GAMES - FREE GAMES DOWNLOAD

## TURKEY GAME MARKET REPORT 2020

|           |   |              |
|-----------|---|--------------|
| <b>1</b>  | PUBG Mobile - Tencent                     | 15.730.000 + |
| <b>2</b>  | Brawl Stars - Supercell                   | 10.530.000 + |
| <b>3</b>  | Subway Surfers - Sybo                     | 8.500.000 +  |
| <b>4</b>  | Brain Test: Tricky Puzzles - Unico Studio | 8.200.000 +  |
| <b>5</b>  | Gardenscapes - New Acres - Playrix        | 7.500.000 +  |
| <b>6</b>  | Kafa Topu 2 - Masomo                      | 7.300.000 +  |
| <b>7</b>  | Bus Simulator: Ultimate - Zuuks Games     | 7.200.000 +  |
| <b>8</b>  | Among Us! - InnerSloth                    | 6.220.000 +  |
| <b>9</b>  | Tiles Hop: EDM Rush                       | 6.000.000 +  |
| <b>10</b> | Batak - Alper                             | 6.000.000 +  |
| <b>11</b> | Scary Teacher 3D - Z&K Games              | 5.950.000 +  |
| <b>12</b> | My Talking Tom Friends - Outfit7          | 5.750.000 +  |
| <b>13</b> | Candy Crush Saga - King                   | 5.700.000 +  |
| <b>14</b> | My Talking Tom 2 - Outfit7                | 5.650.000 +  |
| <b>15</b> | ROBLOX - Roblox                           | 5.600.000 +  |





# TOP 15 MOBILE GAMES - PAID GAMES DOWNLOAD

## TURKEY GAME MARKET REPORT 2020



|           |  |           |
|-----------|--|-----------|
| <b>1</b>  | Minecraft Pocket Edition - Mojang              | 115.000 + |
| <b>2</b>  | Başkanlar - Fatih Beceren                      | 60.000 +  |
| <b>3</b>  | Plague Inc - Ndemic Creations                  | 55.000 +  |
| <b>4</b>  | Hitman: Sniper - SQUARE ENIX                   | 45.000 +  |
| <b>5</b>  | Construction Simulator 2014 - Astragon         | 42.000 +  |
| <b>6</b>  | Football Manager 2020 Mobile - SEGA            | 39.000 +  |
| <b>7</b>  | Earn To Die - Not Doppler                      | 35.000 +  |
| <b>8</b>  | RFS - Real Flight Simulator - RORTOS           | 31.000 +  |
| <b>9</b>  | Justice Gun 2 - Rigbak                         | 26.000 +  |
| <b>10</b> | Grand Theft Auto: San Andreas - Rockstar Games | 23.000 +  |
| <b>11</b> | Earn To Die - Not Doppler                      | 18.000 +  |
| <b>12</b> | Bridge Constructor - HeadUpGames               | 15.000 +  |
| <b>13</b> | Real Drift Car Racing                          | 14.000 +  |
| <b>14</b> | The Sun Origin: Post-apocalyptic               | 14.000 +  |
| <b>15</b> | Grand Theft Auto: Vice City - Rockstar Games   | 13.000 +  |



# TOP 10 MOBILE GAMES - REVENUE

## TURKEY GAME MARKET REPORT 2020



|           |   |                  |
|-----------|---|------------------|
| <b>1</b>  | PUBG Mobile - Tencent                   | 15.000.000 USD + |
| <b>2</b>  | 101 Okey Plus - Zynga                   | 9.000.000 USD +  |
| <b>3</b>  | Brawl Stars - Supercell                 | 7.400.000 USD +  |
| <b>4</b>  | Game Of Thrones: Conquest - Warner Bros | 7.000.000 USD +  |
| <b>5</b>  | Mobile Legends: Bang Bang - Moonton     | 6.500.000 USD +  |
| <b>6</b>  | Lords Mobile - IGG                      | 6.200.000 USD +  |
| <b>7</b>  | Game Of Sultans - Mechanist             | 5.850.000 USD +  |
| <b>8</b>  | Free Fire - Garena                      | 5.100.000 USD +  |
| <b>9</b>  | Rise Of Kingdoms - Liliith              | 5.000.000 USD +  |
| <b>10</b> | MapleStory M - NEXON                    | 4.700.000 USD +  |
| <b>11</b> | Fun Okey 101 - Quick Game               | 4.500.000 USD +  |
| <b>12</b> | Empires & Puzzles - Small Giant Games   | 4.300.000 USD +  |
| <b>13</b> | Clash Of Clans - Supercell              | 4.200.000 USD +  |
| <b>14</b> | State Of Survival - KingsGroup          | 4.000.000 USD +  |
| <b>15</b> | Days Of Empire - Onemt                  | 3.700.000 USD +  |



# THE MOST DOWNLOADED MOBILE APPS IN TURKEY

## TURKEY GAME MARKET REPORT 2020



|           |   |              |
|-----------|---|--------------|
| <b>1</b>  | TikTok - ByteDance  | 21.000.000 + |
| <b>2</b>  | WhatsApp Messenger - WhatsApp                                 | 19.000.000 + |
| <b>3</b>  | HES - Life At Home - Turkey Ministry Of Health                | 18.000.000 + |
| <b>4</b>  | Trendyol - Trendyol   | 16.000.000 + |
| <b>5</b>  | Instagram - Instagram   | 15.000.000 + |
| <b>6</b>  | Zoom Cloud Meetings - Zoom Video Communications               | 14.000.000 + |
| <b>7</b>  | e-Devlet - Ministry Of Transport, Maritime and Communications | 13.000.000 + |
| <b>8</b>  | Eba - Eba   | 12.500.000 + |
| <b>9</b>  | Facebook - Facebook   | 11.000.000 + |
| <b>10</b> | Hepsiburada - Hepsiburada.com                                 | 11.000.000 + |
| <b>11</b> | LMR - Loyalty Free Music - Lyubomir Hristov                   | 11.000.000 + |
| <b>12</b> | Facebook Messenger - Facebook                                 | 10.000.000 + |
| <b>13</b> | Telegram - Telegram   | 10.000.000 + |
| <b>14</b> | Snapchat - Snap   | 9.500.000 +  |
| <b>15</b> | Ziraat Mobil - Ziraat Bank                                    | 9.500.000 +  |



# TOP MOBILE APPS IN TERMS OF MONEY SPENT IN TURKEY

## TURKEY GAME MARKET REPORT 2020



|           |                           |                 |
|-----------|---------------------------|-----------------|
| <b>1</b>  | Azar - Hyperconnect       | 9.500.000 USD + |
| <b>2</b>  | TikTok - ByteDance        | 7.000.000 USD + |
| <b>3</b>  | BIGO LIVE - BIGO          | 6.000.000 USD + |
| <b>4</b>  | LivU - Riley Cillian      | 5.500.000 USD + |
| <b>5</b>  | Live Chat - Riley Cillian | 4.000.000 USD + |
| <b>6</b>  | Tinder - Match Group      | 4.000.000 USD + |
| <b>7</b>  | Connected2.me - C2M       | 4.000.000 USD + |
| <b>8</b>  | Who - Call&Chat           | 3.500.000 USD + |
| <b>9</b>  | Yalla - Yalla             | 2.500.000 USD + |
| <b>10</b> | Zynga Poker - Zynga       | 2.500.000 USD + |
| <b>11</b> | YouTube - Google          | 2.500.000 USD + |
| <b>12</b> | Bermuda - Bermuda Inc.    | 2.000.000 USD + |
| <b>13</b> | Kodlama Yap               | 2.000.000 USD + |
| <b>14</b> | letgo - letgo             | 2.000.000 USD + |
| <b>15</b> | BluTV - Dogan             | 1.500.000 USD + |



# TURKEY IN WORLD REVENUE RANKING

TURKEY GAME MARKET REPORT 2020

- World Ranking - Total

18

- World Ranking - Mobile

18

**2019**



- World Ranking - Total

18 - 19

- World Ranking - Mobile

18 - 19

**2020**



# POPULAR GAMING COMPANIES IN TURKEY

TURKEY GAME MARKET REPORT 2020

- 2K Games
- Arenanet
- Arkane Studios
- Astragon
- Bandai Namco
- Bethesda
- Bioware
- Blizzard/Activision
- Capcom
- CD Projekt Red
- ConcernedApe
- Crytek
- Cubinet
- Deep Silver
- Devolver Digital
- EA Games
- Epic Games
- Facepunch Studios
- Facepunch Studios
- Firaxis Games
- FromSoftware
- Gameforge
- Gameloft
- Garena
- Grinding Gear Games
- Habby
- HeadUpGames
- Hinterland Games
- IGG
- Innersloth
- Ketchapp
- KingsGroup
- Klei Entertainment
- Kojima
- Konami
- Krafton Game Union
- KRAFTON, Inc.
- Larian Studios
- Lilith Games
- Lion Studios
- Mechanist
- miHoYo
- Miniclip
- Mojang
- Moon Studios
- Moonton
- Naughty Dog
- Ndemc Creations
- Netease
- Netmarble
- NEXON
- Nfinity Games
- Nintendo
- Not Doppler
- Obsidian Entertainment
- Onemt
- Outfit7
- Paradox Interactive
- Pearl Abyss
- Playrix
- Psyonix
- Psyonix LLC
- Quick Game
- Relic
- Riot Games
- Roblox Cooperation
- Rockstar
- Rockstar Games
- RORTOS
- SCS Software
- SEGA
- Small Giant Games
- Sony Interactive
- SQUARE ENIX
- Square Enix
- Studio Wildcard
- Supercell
- Supergiant Games
- Sybo
- Techland
- Techland
- Tencent
- Ubisoft
- Unico Studio
- Valve
- Voodoo Games
- Wargaming
- Wargaming
- Warner Bros. Interactive
- Xbox Game Studios
- Z&K Games
- Zynga



# LOCAL GAMING COMPANIES IN TURKEY

TURKEY GAME MARKET REPORT 2020

## COMPANY

- Alictus
- Alper Games
- Amelos Interactive
- Apphic
- ArcadeMonk
- Arsh Game Studio
- Aryas Games
- Axell Studio
- Babil Studios
- Backpack Games
- Berzah Games A.Ş.
- Black Coco
- CatPath
- Clown Games
- Crania Games
- Crealode Games
- Creasaur Entertainment
- Crescive Games
- Digitoy Games
- Dream Games
- Elite Game Studio
- Enrich Games

## WEBSITE

[www.alictus.com](http://www.alictus.com)  
[www.alpergames.com](http://www.alpergames.com)  
[www.amelosinteractive.com](http://www.amelosinteractive.com)  
[www.apphicgames.com](http://www.apphicgames.com)  
[www.arcademonk.com](http://www.arcademonk.com)  
[www.arshgames.com](http://www.arshgames.com)  
[www.aryasgames.com](http://www.aryasgames.com)  
[www.axellstudio.com](http://www.axellstudio.com)  
[www.babilstudios.com](http://www.babilstudios.com)  
[www.backpack.games](http://www.backpack.games)  
[www.berzahgames.com](http://www.berzahgames.com)  
[www.blackcoco.net](http://www.blackcoco.net)  
[www.cataeon.com](http://www.cataeon.com)  
[www.clown.gs](http://www.clown.gs)  
[www.craniagames.com](http://www.craniagames.com)  
[www.crealodegames.com](http://www.crealodegames.com)  
[www.creasaur.net](http://www.creasaur.net)  
[www.crescivegames.com](http://www.crescivegames.com)  
[www.digitoy.games](http://www.digitoy.games)  
[www.dreamgames.com](http://www.dreamgames.com)  
[www.ingamegroup.com](http://www.ingamegroup.com)  
[www.enrichgames.com](http://www.enrichgames.com)

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# LOCAL GAMING COMPANIES IN TURKEY

## TURKEY GAME MARKET REPORT 2020

### COMPANY

- Erik Games
- Fabrika Games
- Fiber Games
- Forge Games
- Fugo Games
- Funika Games
- Funmoth Games
- Funpac (Mynet)
- Gamebit Studio
- Gameguru
- GameHub
- Gamester
- Gamikro
- Globe Games
- Gnarly Game Studio
- Good Job Games
- Gram Games
- Günay Studio
- Hammurabi Games
- He2 Apps
- Heisen Games
- HES Games

### WEBSITE

[www.erikgames.com](http://www.erikgames.com)  
[www.fabrikagames.com](http://www.fabrikagames.com)  
[www.fibergames.com.tr](http://www.fibergames.com.tr)  
 -  
[www.fugo.com.tr](http://www.fugo.com.tr)  
[www.funikagames.com](http://www.funikagames.com)  
[www.funmoth.com](http://www.funmoth.com)  
[www.funpac.com](http://www.funpac.com)  
[www.studiogamebit.com](http://www.studiogamebit.com)  
[www.gameguru.net](http://www.gameguru.net)  
[www.gamehub.gs](http://www.gamehub.gs)  
[www.gamester.com.tr](http://www.gamester.com.tr)  
[www.gamikro.com](http://www.gamikro.com)  
<https://globalgames.net/>  
[www.gnarlygamestudio.com](http://www.gnarlygamestudio.com)  
[www.goodjobgames.com](http://www.goodjobgames.com)  
[www.gram.gs](http://www.gram.gs)  
[www.gunaystudio.com/tr/](http://www.gunaystudio.com/tr/)  
[www.hammurabigames.com](http://www.hammurabigames.com)  
[www.he2apps.com](http://www.he2apps.com)  
[www.heisengames.net](http://www.heisengames.net)  
[www.hesgames.com](http://www.hesgames.com)

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# LOCAL GAMING COMPANIES IN TURKEY

## TURKEY GAME MARKET REPORT 2020

### COMPANY

- Hey Games
- Hoody Studios
- Houch Game Studios
- HyperFlow Games
- Hyperlab
- HyperMonk
- Imaginite Studios
- Indie-dir Games
- Jib Games
- Joker Game
- Kodobur
- Kraker Studio
- Lacivert Digital Services
- Leartes Studios
- Libra Softworks
- Lokum Games
- MadByte Games
- Madcraft Studios
- MagicLab Game Tech.
- Mangorama Studio
- Masomo
- Mavis Games
- Mayadem Teknoloji

### WEBSITE

[www.hey.gs/tr/](http://www.hey.gs/tr/)  
[www.hoodystudios.com/](http://www.hoodystudios.com/)  
[http://houch.games/](http://http://houch.games/)  
[www.hyperflowgames.com](http://www.hyperflowgames.com)  
[www.hyperlab.games](http://www.hyperlab.games)  
[www.hypermonkgames.com/](http://www.hypermonkgames.com/)  
[www.imaginitesoft.com](http://www.imaginitesoft.com)  
[www.indiedir.com](http://www.indiedir.com)  
[www.jib.gs](http://www.jib.gs)  
[www.joker.games](http://www.joker.games)  
[www.kodobur.com/tr](http://www.kodobur.com/tr)  
[www.krakerstudio.com](http://www.krakerstudio.com)  
[www.lacivert.org](http://www.lacivert.org)  
<https://leartesstudios.com/>  
[www.librasoftworks.com](http://www.librasoftworks.com)  
[www.lokumgames.com](http://www.lokumgames.com)  
[www.madbytegames.com](http://www.madbytegames.com)  
[www.madcraftstudios.com](http://www.madcraftstudios.com)  
[www.maglab.com.tr](http://www.maglab.com.tr)  
[www.mangoramastudio.com](http://www.mangoramastudio.com)  
[www.masomo.com](http://www.masomo.com)  
[www.mavisgames.com](http://www.mavisgames.com)  
[www.mayadem.com](http://www.mayadem.com)

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# LOCAL GAMING COMPANIES IN TURKEY

TURKEY GAME MARKET REPORT 2020

## COMPANY

- Mayaworks
- MildMania
- Mobge
- Mobilecraft
- Momentum DMT
- Moralabs
- Mythra Tech
- Narcade
- Negentra
- Neuron Entertainment
- Nitrid Game
- no-pact
- Noho Games
- nowherestudios
- Oldmoustache Gameworks
- Overdose Caffeine
- Oyun Stüdyosu
- Panteon
- Passion Punch Studio
- Peak Games
- Pixega Studio
- Pixofun

## WEBSITE

www.maya.works  
 www.mildmania.com  
 www.mobge.net  
 www.mobilecraft.net  
 www.momentum-dmt.com/tr/  
 www.moralabs.com  
 www.mythratech.com  
 www.narcade.com  
 www.negentra.com.tr  
 -  
 www.nitrid.com  
 www.nopact.com  
 www.noho.games  
 www.nowherestudios.com  
 -  
 www.odcaf.com  
 www.oyunstudyosu.com  
 www.panteon.games  
 www.passionpunch.studio  
 www.peak.com  
 www.pixegastudio.com  
 www.pixofun.com

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 senem@passionpunch.studio  
 contact@peak.com  
 info@pixegastudio.com  
 info@pixofun.com



# LOCAL GAMING COMPANIES IN TURKEY

## TURKEY GAME MARKET REPORT 2020

### COMPANY

- Playable Factory
- Poison Software Studio
- Proximity Games
- RealityArts Studio
- Recontact Games
- Rockwise Entertainment
- Rog Studios
- Rollic Games
- Ruby Game Studio
- Simsoft
- Sir Studios
- SK Games
- Srio Studios
- Studio Billion
- Studio Gamebit
- Suji Games
- TaleWorlds Entertainment
- Teta Games
- tiplay
- Tiramisu Studios
- Trifles Games
- Udo Games

### WEBSITE

[www.playablefactory.com](http://www.playablefactory.com)  
[www.poisonsoftwarestudio.com](http://www.poisonsoftwarestudio.com)  
 -  
[www.realityartsstudio.com](http://www.realityartsstudio.com)  
[www.recontactgame.com](http://www.recontactgame.com)  
[www.rocwise.com](http://www.rocwise.com)  
[www.rogstudios.com](http://www.rogstudios.com)  
[www.rollicgames.com](http://www.rollicgames.com)  
[www.rubygamestudio.com](http://www.rubygamestudio.com)  
[www.simsoft.com.tr](http://www.simsoft.com.tr)  
[www.sirstudios.com](http://www.sirstudios.com)  
[www.skgames.net](http://www.skgames.net)  
 -  
[www.studiobillion.com/tr](http://www.studiobillion.com/tr)  
[www.studiogamebit.com](http://www.studiogamebit.com)  
[www.suji.games](http://www.suji.games)  
[www.taleworlds.com](http://www.taleworlds.com)  
[www.tetagames.com](http://www.tetagames.com)  
[www.tiplaystudio.com](http://www.tiplaystudio.com)  
[www.tiramisu.game](http://www.tiramisu.game)  
[www.triflesgames.com](http://www.triflesgames.com)  
[www.udogames.com](http://www.udogames.com)

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# LOCAL GAMING COMPANIES IN TURKEY

## TURKEY GAME MARKET REPORT 2020

### COMPANY

- Uncosoft Yazılım
- VantaPlay Games
- Vertigo Games
- VLMedia
- Weez Beez
- Zuuks Games

### WEBSITE

[www.uncosoft.com](http://www.uncosoft.com)  
[www.vanta.games](http://www.vanta.games)  
[www.vertigogames.co](http://www.vertigogames.co)  
[www.vlmedia.com.tr](http://www.vlmedia.com.tr)  
[www.weezbeez.com](http://www.weezbeez.com)  
[www.zuuks.com](http://www.zuuks.com)

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# THE MOST POPULAR TURKISH GAMES IN 2019

TURKEY GAME MARKET REPORT 2020

## PC

- Mount & Blade II: Bannerlord - TaleWorlds Entertainment
- Mount & Blade: Warband - TaleWorlds Entertainment
- Sabotaj - HES Games
- Zula - InGame Group

## MOBILE

- 101 Okey Plus - Zynga
- Basketball Arena - Masomo Gaming
- Başkanlar - Fatih Beceren
- Batak - Alper
- Bus Simulator: Ultimate - Zuuks Games
- Bus Simulator: Ultimate - Zuuks Games
- Fun Okey 101 - Quick Game
- Kafa Topu 2 - Masomo Gaming
- Recontact Istanbul: Eyes Of Sky - Recontact Games
- Recontact London - Recontact Games
- Zula Mobil - InGame Group



# POPULAR STREAMERS IN TURKEY / TWITCH TV

TURKEY GAME MARKET REPORT 2020

## TWITCH

TOP 20 POPULAR TWITCH STREAMERS IN TURKEY

|   | FOLLOWERS | NEW FOLLOWERS | TOTAL VIEWS | AVERAGE VIEWS | MAXIMUM VIEWS | STREAMING HOURS | HOURS VIEWED |
|---|-----------|---------------|-------------|---------------|---------------|-----------------|--------------|
| #1 FERİT "WTCN" KARAKAYA                  | 2.19M     | 721K          | 97M         | 8,386         | 76,089        | 1398            | 11.7M        |
| #2 TUĞKAN "ELRAEN" GÖNÜLTAŞ               | 1.94M     | 175K          | 49M         | 20,648        | 83,351        | 983             | 20.3M        |
| #3 KEMAL CAN<br>"KENDİNE MÜZİSYEN" PARLAK | 1.77M     | 711K          | 65M         | 13,331        | 69,962        | 1078            | 14.4M        |
| #4 CANTUĞ "UNLOST" ÖZSOY                  | 1.76M     | 663K          | 43M         | 18,588        | 134,901       | 308             | 5.73M        |
| #5 AHMET "JAHREIN" SONUÇ                  | 1.53M     | 271K          | 76M         | 14,820        | 35,913        | 1032            | 11.2M        |
| #6 CEM "MITHRAIN" KARAKOÇ                 | 1.42M     | 31.2K         | 80M         | 4,461         | 20,094        | 1637            | 7.3M         |
| #7 İSLAM "RAMMUS53" EKŞİ                  | 1.16M     | 448K          | 32M         | 3,416         | 12,977        | 1845            | 6.3M         |
| #8 PELİN "PQUEEN" BAYNAZOĞLU              | 1.10M     | 744K          | 25M         | 5,058         | 29,931        | 1554            | 7.86M        |
| #9 NECATİ "ZEON" AKÇAY                    | 963K      | 29.6K         | 51M         | 1,965         | 11,332        | 849             | 1.67M        |
| #10 KAAAN "ELWIND" ATICI                  | 838K      | 243K          | 42M         | 6,817         | 19,385        | 1009            | 6.8M         |



# POPULAR STREAMERS IN TURKEY / TWITCH TV

TURKEY GAME MARKET REPORT 2020

## TWITCH

TOP 20 POPULAR TWITCH STREAMERS IN TURKEY

|                                       | FOLLOWERS | NEW FOLLOWERS | TOTAL VIEWS | AVERAGE VIEWS | MAXIMUM VIEWS | STREAMING HOURS | HOURS VIEWED |
|---------------------------------------|-----------|---------------|-------------|---------------|---------------|-----------------|--------------|
| #11 BERK "RIP" TEPE                   | 715K      | 331K          | 14M         | 6,207         | 24,717        | 482             | 3M           |
| #12 ALPEREN "ALPTV" DÜRÜK             | 629K      | 276K          | 13M         | 5,470         | 31,618        | 559             | 3M           |
| #13 GÖZDE "MIAFITZ" DEMİRAL           | 621K      | 206K          | 11M         | 936           | 4,256         | 586             | 549K         |
| #14 BERKE "THALDRINLOL" DEMİR         | 556K      | 102K          | 30M         | 1,509         | 11,609        | 1993            | 3M           |
| #15 MUHAMMED "THEOKOLES" İŞİK         | 464K      | 4.1K          | 69M         | 603           | 3,615         | 764             | 460K         |
| #16 BATU "VIDEOYUN" BOZKAN            | 458K      | 137K          | 30M         | 1,677         | 16,518        | 2152            | 3.6M         |
| #17 ŞÜKRÜ "UTHENERA" ŞENTÜRK          | 446K      | 75K           | 15M         | 2,041         | 10,162        | 1325            | 2.7M         |
| #18 OĞUZHAN "JROKEZ" DALKIRAN         | 430K      | 115K          | 15M         | 2,079         | 14,555        | 566             | 1.5M         |
| #19 İSMAİLÇAN "XANTARESCN" DÖRTKARDEŞ | 404K      | 236K          | 11M         | 5,089         | 20,863        | 458             | 2.3M         |
| #20 YAĞIZ "10000DAYS" VARDARBAŞ       | 402K      | 156K          | 19M         | 1,188         | 11,193        | 2647            | 3.1M         |



# POPULAR YOUTUBE CHANNELS IN TURKEY

TURKEY GAME MARKET REPORT 2020

## YOUTUBE

TOP 20 POPULAR YOUTUBE CHANNELS IN TURKEY

|                   | SUBSCRIBERS | AVERAGE VIEWS | TOTAL VIEWS | TOTAL VIDEOS | MOST POPULAR VIDEO VIEWS |
|-------------------|-------------|---------------|-------------|--------------|--------------------------|
| #1 SESEGEL        | 3.4M        | 362K          | 1.75B       | 2,021        | 1.4M                     |
| #2 BATURAY ANAR   | 3.1M        | 442K          | 828M        | 981          | 1.7M                     |
| #3 LAZ            | 2.7M        | 931K          | 1B          | 1,631        | 5.6M                     |
| #4 KOZMİK KARINCA | 2.6M        | 527K          | 692M        | 727          | 2.3M                     |
| #5 YAVUZ SELİM    | 2.5M        | 69K           | 990M        | 342          | 1.4M                     |
| #6 MEZARCI        | 2.4M        | 693K          | 352M        | 506          | 2.4M                     |
| #7 ÜMİDİ          | 2.3M        | 122K          | 1.1B        | 4,633        | 1.5M                     |
| #8 GEREKSİZ ODA   | 2.2M        | 265K          | 680M        | 1,768        | 882K                     |
| #9 BARIŞ BRA      | 2.2M        | 684K          | 601M        | 1,241        | 2.2M                     |
| #10 MINECRAFT EVİ | 2.2M        | 152K          | 781M        | 2,414        | 1.3M                     |



# POPULAR YOUTUBE CHANNELS IN TURKEY

TURKEY GAME MARKET REPORT 2020

## YOUTUBE

TOP 20 POPULAR YOUTUBE CHANNELS IN TURKEY

|                          | SUBSCRIBERS | AVERAGE VIEWS | TOTAL VIEWS | TOTAL VIDEOS | MOST POPULAR VIDEO VIEWS |
|--------------------------|-------------|---------------|-------------|--------------|--------------------------|
| #11 TÜRKPRO              | 2M          | 365K          | 815M        | 1,437        | 1.2M                     |
| #12 BARIŞ G              | 2M          | 742K          | 383K        | 586          | 1.1M                     |
| #13 EGOİST PATİ          | 2M          | 453K          | 417M        | 588          | 1.5M                     |
| #14 RULINGGAME           | 1.9M        | 134K          | 909M        | 2,016        | 1.7M                     |
| #15 ERSİN YEKİN          | 1.9M        | 380K          | 469M        | 1,681        | 3.6M                     |
| #16 MINECRAFT PARODİLERİ | 1.9M        | 842K          | 1B          | 1,501        | 7.8M                     |
| #17 HANKANAL             | 1.8M        | 208K          | 1.4B        | 3,019        | 2.2M                     |
| #18 DEADPIES             | 1.7M        | 313K          | 940M        | 1,608        | 2.9M                     |
| #19 MERVANT              | 1.7M        | 159K          | 375M        | 1,621        | 2M                       |
| #20 YBJ                  | 1.6M        | 462K          | 463M        | 1,656        | 6M                       |



# POPULAR INSTAGRAM INFLUENCERS IN TURKEY

TURKEY GAME MARKET REPORT 2020

## INSTAGRAM

| INFLUENCER          | FOLLOWERS |
|---------------------|-----------|
| #1 ELRAEN           | 949K      |
| #2 MEZARCI          | 871K      |
| #3 WTCN             | 850K      |
| #4 KENDİNE MÜZİSYEN | 752K      |
| #5 HZ. YASUO        | 738K      |
| #6 BARIŞ G          | 732K      |
| #7 TUGAY GÖK        | 709K      |
| #8 MERVAN           | 707K      |
| #9 UNLOST           | 651K      |
| #10 BATURAY ANAR    | 626K      |



# POPULAR INSTAGRAM INFLUENCERS IN TURKEY

TURKEY GAME MARKET REPORT 2020

## INSTAGRAM

| INFLUENCER       | FOLLOWERS |
|------------------|-----------|
| #11 GEREKSİZ ODA | 571K      |
| #12 SESEGEL      | 569K      |
| #13 DOCH         | 560K      |
| #14 EGOİST PATİ  | 505K      |
| #15 MIAFITZ      | 505K      |
| #16 ERSİN YEKİN  | 490K      |
| #17 ÜMİDİ        | 477K      |
| #18 PQUEEN       | 468K      |
| #19 BARIŞ BRA    | 460K      |
| #20 EFE UYGAÇ    | 449K      |



# THE MOST PREFERRED PC GAMES IN 2020

## TURKEY GAME MARKET REPORT 2020

- Among Us
- Assassin's Creed Odyssey
- Assassin's Creed Valhalla
- Baldurs Gate
- Battlefield V
- Borderlands 3
- Call of Duty: Black Ops 4
- Civilization VI
- Counter-Strike: Global Offensive
- Cyberpunk 2077
- Death Stranding
- Destiny 2
- Doom Eternal
- Dota 2
- eFootball PES 2020
- eFootball PES 2021
- Euro Truck Simulator 2
- Fall Guys
- Far Cry New Dawn
- FIFA 2020
- FIFA 2021
- Football Manager 2020
- Football Manager 2021
- Fortnite
- Frostpunk
- GTA V
- Hades
- League of Legends
- Mafia: Definitive Edition
- Metin2
- Monster Hunter World
- Mortal Kombat 11
- Mount & Blade II: Bannerlord
- NBA 2K20
- Need For Speed Heat
- PLAYERUNKNOWN'S BATTLEGROUNDS
- Red Dead Redemption 2
- Sekiro
- Star Wars Jedi Fallen Order
- Stardew Valley
- The Crew 2
- Tom Clancy's Rainbow Six: Siege
- Valorant
- Warframe
- World Of Warcraft



# ACTIVE PAYMENT ORGANIZATIONS

## TURKEY GAME MARKET REPORT 2020



- Aypara 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.
- Klön Ödeme Kuruluşu A.Ş.
- Moka Ödeme Kuruluşu A.Ş.
- MoneyGram Turkey Ödeme Hizmetleri A.Ş.
- N Kolay Ödeme Kuruluşu A.Ş.
- Nestpay Ödeme Hizmetleri A.Ş.
- Octet Express Ödeme Kuruluşu A.Ş.
- Ödeal Ödeme Kuruluşu A.Ş.
- Paragram Ödeme Hizmetleri A.Ş.
- Pay Fix Elektronik Para ve Ödeme Hizmetleri A.Ş.
- Paybull Ödeme Hizmetleri A.Ş.
- Paynet Ödeme Hizmetleri A.Ş.
- PayTR Ödeme ve Elektronik Para Kuruluşu A.Ş.
- Paytrek Ödeme Kuruluşu Hizmetleri A.Ş.
- PayU Ödeme Kuruluşu A.Ş.
- Pratik İşlem Ödeme Kuruluşu A.Ş.
- Ria Turkey Ödeme Kuruluşu A.Ş.
- Sender Ödeme Hizmetleri A.Ş.
- Trend Ödeme Kuruluşu A.Ş.
- Tronapay Ödeme Hizmetleri A.Ş.
- UPT Ödeme Hizmetleri ve Elektronik Para A.Ş.
- Vezne24 Tahsilat Sistemleri ve Ödeme Hizmetleri A.Ş.
- Vizyon Elektronik Para ve Ödeme Hizmetleri A.Ş.
- Western Union Turkey Ödeme Hizmetleri A.Ş.



# ACTIVE ELECTRONIC FUND ORGANIZATIONS

TURKEY GAME MARKET REPORT 2020



- Aköde Elektronik Para ve Ödeme Hizmetleri A.Ş.
- BELBİM Elektronik Para ve Ödeme Hizmetleri A.Ş.
- Birleşik Ödeme Hizmetleri ve Elektronik Para A.Ş.
- BPN Ödeme ve Elektronik Para Hizmetleri 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.
- Hızlıöde Elektronik Para ve Ödeme Hizmetleri A.Ş.
- Hızlıpara Ödeme Hizmetleri ve Elektronik Para A.Ş.
- IQ Money Ödeme Hizmetleri ve Elektronik Para A.Ş.
- İnal Ödeme ve Elektronik Para Hizmetleri A.Ş.

- İyzi Ödeme ve Elektronik Para Hizmetleri A.Ş.
- Lydians Elektronik Para ve Ödeme Hizmetleri A.Ş.
- Ozan Elektronik Para A.Ş.
- Paladyum Elektronik Para ve Ödeme Hizmetleri A.Ş.
- Papara Elektronik Para ve Ödeme Hizmetleri A.Ş.
- SiPay Elektronik Para ve Ödeme Hizmetleri A.Ş.
- TT Ödeme ve Elektronik Para Hizmetleri A.Ş.
- TURK Elektronik Para 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.



# ONLINE SALES CHANNELS

## TURKEY GAME MARKET REPORT 2020



- Aral Game
- Atagame
- Battlenet
- BKM Express
- BursaGB
- BynoGame
- Cadde Game
- DurmaPlay
- En Ucuz Epin
- Epin.com.tr
- Epinevi
- EpinMy
- Epinstore
- Fastpay
- FoxnGame
- G2A
- Game Satış
- GamerEpin
- Hopi
- ininal
- Kabasakal Online
- Kinguin
- Klas Game
- Kopazar
- Maximum Mobil - Dijital Kod Market
- MTC – Meta Games
- Mupay
- Origin
- Oyunalıveriş
- Oyunfor
- Oyunone
- Oyuyardım
- Ozan SuperApp
- Papara
- Passolig
- Perdigital
- Playstore
- Playsultan
- Razer Gold
- Tosla
- Trinkpay
- Turkpin
- Voidu
- XGame
- Yeşiyurt Game



# ASSOCIATIONS

## TURKEY GAME MARKET REPORT 2020

- **TOGED** (Turkish Association of Game Developers)
- **OYUNDER** (Association of Game Designers, Developers, Publishers and Producers)



- **TOGED** (Turkish Association of Game Developers)
- **OYUNDER** (Association of Game Designers, Developers, Publishers and Producers)

**2019**

**2020**



# GAME EXHIBITIONS

TURKEY GAME MARKET REPORT 2020

- GameX
- GIST (Gaming İstanbul)



*All exhibitions  
were delayed  
due to **Covid-19**.*

**2019**

**2020**





# SECTORAL EDUCATION IN TURKEY

TURKEY GAME MARKET REPORT 2020



## Starting with Education is the Best Choice

With the impact of the pandemic, one of the things people preferred most at their homes during the times of lockdown was definitely the digital video games. Another important matter across the world stood out as trying to provide education online.

In the same period, one of the obstacles to popularization of e-sports and gaming world in the public spheres was the fact that decision makers comprise earlier generations.

However, digitalization of all tools such as communication, media, education, business management etc. with the impact of pandemics in 2020 both narrowed the gap of utilizing technology between the earlier generations and the youth and made the digital world of the youth more visible and comprehensible.

IN THE EYES OF  
AN EXPERT  
EDUCATION AND E-SPORTS



SEÇKİN TOPALOĞLU  
BAU ESPORTS COORDINATOR  
BAHÇEŞEHİR UNIVERSITY



# SECTORAL EDUCATION IN TURKEY

TURKEY GAME MARKET REPORT 2020



As the time spent across the computer is increased due to online education, records were broken in many fields. The number of simultaneous players, video views, channels, interactions and many other indicators revealed an increase. Another impact of this situation was naturally on the marketing and advertising sector. Due to many physical events being cancelled, the brands turned towards digital platforms and thereby influencers and streamers. It's right to say that "gaming" is at the core of these platforms that rather addresses the young generation.

The fact that the followers of digital video games and e-sports are substantially people of educational (university, high school) age inevitably drags the educational institutional organizations closer or even into these sectors. We could say that the academy, as of 2020, joined the e-sports literature that developed on the basis of events at the student clubs level for the past 3-4 years. It's no coincidence that many academicians do research in this field and discuss it as the subject of their doctoral, master's, undergraduate and thesis studies. The time spent at home during the lockdown period was an opportunity for many students to think of how to integrate gaming into their academic studies and convince their advisors.

IN THE EYES OF  
AN EXPERT  
EDUCATION AND E-SPORTS



SEÇKİN TOPALOĞLU  
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BAHÇEŞEHİR UNIVERSITY



# SECTORAL EDUCATION IN TURKEY

TURKEY GAME MARKET REPORT 2020



Games are included into the curriculums with many different educational models abroad and also their ins and outs are being investigated. Even though the time spent for games generally worry the educators and families, studies in the field also reveal many benefits. This course of events indicate that gaming, e-sports and education will rapidly be intertwined at our country in the next years.

Finally, we must take certain precautions and take long term steps as a community if we consider this develop to be inevitable:

- We must provide educational institutions and the youth with the infrastructure and hardware needs of these sectors that require cutting edge technology and connection bandwidth.
- We must prepare a healthier (nutrition, physical, mental) context for use of the technology by the youth.
- We must form bases that allow the families, educators and decision makers to see it from a different perspectives other than “playing”.

IN THE EYES OF  
AN EXPERT  
EDUCATION AND E-SPORTS



SEÇKİN TOPALOĞLU  
BAU ESPORTS COORDINATOR  
BAHÇEŞEHİR UNIVERSITY



# GAME DESIGN OPTIONAL UNDERGRADUATE COURSES

TURKEY GAME MARKET REPORT 2020



## TITLE

MEDİPOL UNIVERSITY

## COURSE NAME

DIGITAL GAME DESIGN

## COURSE OBJECTIVE

The objective of the course "Digital Game Design" in the New Media and Communication Program at Communication Faculty of Medipol University is to provide information on the structures and technologies of the current digital games within the context of fundamental game design content, do visual studies practically in the computer environment, and create a sample game design project.

## TITLE

İSTANBUL KÜLTÜR UNIVERSITY

## COURSE NAME

DIGITAL GAME DESIGN

## COURSE OBJECTIVE

The objective of the course "Digital Game Design" in the New Media and Communication Program at İstanbul Kültür University is to bring the students in the information and ability to develop digital games within the framework of the gamification and game creation techniques and principles. Game and gamification process will be taught through theoretical infrastructure and practical applications during the course.



# GAME DESIGN OPTIONAL UNDERGRADUATE COURSES

TURKEY GAME MARKET REPORT 2020



## TITLE

YEDİTEPE UNIVERSITY

## COURSE NAME

GAME DESIGN 101

## COURSE OBJECTIVE

The objective of the course "Game Design 101" in the Visual Communication and Design Department of Yeditepe University is to introduce students to the fundamental concept and working principles of game design (and overall) design. Going hand in hand with the application and being based on both player focused and cyclical/iterative understanding of design, the course provides theoretical information per week as well as requires the students to develop a (digital and non-digital) game starting from the idea stage till the final product stage. Students will be tested by theoretical courses as well as applications. Students will be actively supported and guided by the lecturers and visiting experts of the course during their game development practices.

## TITLE

YILDIZ TEKNİK UNIVERSITY

## COURSE NAME

3D GAME DESIGN

## COURSE OBJECTIVE

The objective of the course "3D Game Design" in the Graphic Design Undergraduate Program at Yıldız Technical University is to set up an infrastructure on 3D Game Design processes and tools, and to design a 3D game in the light of such information.



# GAME DESIGN OPTIONAL UNDERGRADUATE COURSES

TURKEY GAME MARKET REPORT 2020



|  |  |  |
|--|--|--|
| <b>TITLE</b><br>YAKIN DOĞU UNIVERSITY  | <b>COURSE NAME</b><br>DIGITAL GAME DESIGN        | <b>COURSE OBJECTIVE</b><br>Yakin Doğu University Digital Game Design Undergraduate Course  |
| <b>TITLE</b><br>SAKARYA UNIVERSITY     | <b>COURSE NAME</b><br>DIGITAL GAME ANALYSES      | <b>COURSE OBJECTIVE</b><br>Sakarya University Digital Game Analyses  |
| <b>TITLE</b><br>GAZİ UNIVERSITY        | <b>COURSE NAME</b><br>EDUCATIONAL PC GAME DESIGN | <b>COURSE OBJECTIVE</b><br>Gazi University Educational PC Game Design Course   |
| <b>TITLE</b><br>ANADOLU UNIVERSITY     | <b>COURSE NAME</b><br>PC GAME DESIGN 1           | <b>COURSE OBJECTIVE</b><br>Anadolu University PC Game Design 1 Course  |
| <b>TITLE</b><br>ÇUKUROVA UNIVERSITY    | <b>COURSE NAME</b><br>DIGITAL GAME DESIGN 1      | <b>COURSE OBJECTIVE</b><br>This course provides practical and conceptual information on digital design and for analyzing them.   |
| <b>TITLE</b><br>GALATASARAY UNIVERSITY | <b>COURSE NAME</b><br>DIGITAL GAME DESIGN        | <b>COURSE OBJECTIVE</b><br>As part of this course, students are expected to improve their analytical evaluation skills at form, content and process management levels for widely varied digital games. |



# GAME DESIGN MASTER'S PROGRAMS

TURKEY GAME MARKET REPORT 2020



|  |   |
|--|---|
| <p><b>TITLE</b><br/>BAHÇEŞEHİR UNIVERSITY</p>      | <p><b>COURSE OBJECTIVE</b><br/>Game Design Master's Program follows an interdisciplinary setup by directing students towards different fields such as game arts, game studies, game production, game economy and gamification beyond the design courses. The program makes a difference with its modular education system and project based course mechanism.</p> |
| <p><b>TITLE</b><br/>İSTANBUL TEKNİK UNIVERSITY</p> | <p><b>COURSE OBJECTIVE</b><br/>Game and Interaction Technologies Thesis Based Master's Degree Program under the department of Game and Interaction Technologies at Master's Education Institute</p>   |
| <p><b>TITLE</b><br/>ODTÜ GATE</p>                  | <p><b>COURSE OBJECTIVE</b><br/>Middle East Technical University Game Technologies Master's Program</p>  |
| <p><b>TITLE</b><br/>HACETTEPE UNIVERSITY</p>       | <p><b>COURSE OBJECTIVE</b><br/>One of the limited game development master's programs in our country is Computer Animations and Game Technologies Thesis Based Master's Program (started in 2012) at Hacettepe University in Ankara.</p>   |



# GAME DESIGN MASTER'S PROGRAMS

TURKEY GAME MARKET REPORT 2020



## TITLE

MUĞLA SITKI KOÇMAN UNIV.

## COURSE OBJECTIVE

DIGITAL Game Design and Technologies Thesis Based Master's Degree

## TITLE

IŞIK UNIVERSITY

## COURSE OBJECTIVE

IŞIK UNIVERSITY Computerized Graphics and Animation Master's Program. Computerized Graphics and Animation Master's Program at the Institute of Science and Technology of Işık University in İstanbul is one of the educational programs that pay regard to the gaming sector.

## TITLE

MARMARA UNIVERSITY

## COURSE OBJECTIVE

Even though game development education can't be provided directly in the Computer and Instructional Technologies Teaching Department at the Atatürk Educational Science Faculty of MARMARA UNIVERSITY, it has courses that investigates fundamental components, types of video games, educational position of the people, psychological and sociological impacts of the games.

## TITLE

İZMİR EKONOMİ UNIVERSITY

## COURSE OBJECTIVE

İZMİR EKONOMİ UNIVERSITY Computer Games and Technology Master's Program. Another master's program that is directly related to game development is the Computer Games and Technology Master's Program of İzmir Ekonomi University.



# GAME DESIGN AND E-SPORTS CERTIFICATE PROGRAMS

TURKEY GAME MARKET REPORT 2020



## TITLE

MIDDLE EAST TECHNICAL UNIVERSITY  
CONTINUING EDUCATION CENTER

## DESCRIPTION

METU SEM offers beginner level education for Unity 3D. 30-hours education continues for 5 weeks.

## TITLE

MIMAR SİNAN FINE ARTS UNIVERSITY  
CONTINUING EDUCATION CENTER

## DESCRIPTION

Continuing Education Center of MIMAR SİNAN Fine Arts University in İstanbul is another educational institution that provides paid trainings for developing games. It provides Unity 3D game engine education at 2 different levels

## TITLE

TOBB ECONOMY AND TECHNOLOGY  
UNIVERSITY CONTINUING EDUCATION  
RESEARCH & TRAINING CENTER, TOBB  
ETÜ SEM

## DESCRIPTION

TOBB ETÜ SEM in ANKARA provides training related to Unity 3D game engine with paid game development courses.

## TITLE

TED UNIVERSITY CONTINUING  
EDUCATION CENTER

## DESCRIPTION

Having become one of the biggest industries in the WORLD AS PART OF THE NEW MEDIA TECHNOLOGIES, Digital Game Design is defined as the sector on which economic crises have the least impact. It's also a new and open area of employment for the young population. It's intended to provide the human resource to meet the needs of the sector in the area of Digital Game Design, and to contribute to our country with the projects and products to be developed in this field.

## TITLE

BAHÇEŞEHİR UNIVERSITY CONTINUING  
EDUCATION CENTER

## DESCRIPTION

It addresses the relation of e-sports with psychology and current literature as part of the SPORTS Psychology and e-sports certificate program.



## OTHER

### TURKEY GAME MARKET REPORT 2020



#### TITLE

EDUCAT HUB

#### DESCRIPTION

This training has been designed to provide our students with accurate information on e-sports, and ensure them to be responsible individuals and team members by bring them in skills of problem solving, quick decision making and collaborative working.

#### TITLE

ATOM

#### DESCRIPTION

ANIMATION Technologies and Game Development Center, a.k.a. ATOM, is a preincubation center founded in 2008 within Middle East Technical University Teknokent.

#### TITLE

INDIGO CONSULTANCY AND TRAINING SERVICES

#### DESCRIPTION

MOBILE GAME WITH UNITY 3D game development courses, 3D character modelling courses. IndiGo is also an Ankara based organization.

#### TITLE

3D ACADEMY ANIMATION AND VISUAL EFFECT SCHOOL

#### DESCRIPTION

3D ACADEMY ANIMATION AND VISUAL EFFECT SCHOOL, is a center that provides 3D modelling, graphic design, visual effect trainings for gaming sector as well as many other sectors.

#### TITLE

BANDIRMA ONYEDİ EYLÜL UNIVERSITY E-SPORTS ECONOMY RESEARCH CENTER

#### DESCRIPTION

The E-sports Literacy training featuring academicians and sectoral experts to analyze EMERGING CONCEPTUAL complexities and increase social awareness were provided in collaboration with İzmir Katip Çelebi University Career Development Center.



## OTHER

### TURKEY GAME MARKET REPORT 2020



#### TITLE

İZMİR KATİP ÇELEBİ UNIVERSITY  
CAREER DEVELOPMENT CENTER

#### DESCRIPTION

The E-sports Literacy training featuring academicians and sectoral experts to ANALYZE EMERGING CONCEPTUAL COMPLEXITIES and increase social awareness were provided in collaboration with Bandırma Onyedi Eylül University E-sports Economy Research Center.

#### TITLE

BAHÇEŞEHİR UNIVERSITY  
(BAU ESPORTS)

#### DESCRIPTION

Online shout-casting training for high school students as well as optional e-sports courses at 5 different high schools were provided by E-SPORTS UNIT of BAHÇEŞEHİR UNIVERSITY until now. The students within the institution are selected via e-sports scholarship application. It provides support for many academic studies in e-sports as well as workshops and applied training.

#### TITLE

BİLİŞİM EĞİTİM MERKEZİ

#### DESCRIPTION

BİLİŞİM EĞİTİM MERKEZİ IS ONE OF THE PAID EDUCATION CENTERS. It provides various software trainings as well as 3D animation trainings at BOTH INDIVIDUAL AND corporate levels. Bilişim Eğitim Merkezi renders services in İstanbul, Ankara, Eskişehir, Konya, Bursa and Antalya.

#### TITLE

BİLİŞİM AKADEMİSİ

#### DESCRIPTION

BİLİŞİM AKADEMİSİ IS ANOTHER PRIVATE EDUCATION INSTITUTION. IT also provides Unity 3D training. It's located in the Yıldız Technical University Teknopark in İstanbul.

#### TITLE

BİLGADAM YOUTH ACADEMY -  
GAME DESIGN AND PROGRAMMING

#### DESCRIPTION

THIS EDUCATIONAL PROGRAM sets OUR CHILDREN up for the most effective, high income and exciting occupations of our age in the field of information by teaching them how to design and develop games. Thus, it brings the youth in skills to guide them while picking a department at university and an occupation.



# INTERNET CAFES

TURKEY GAME MARKET REPORT 2020

- **20,000+** internet cafes (top visited 7,000 - 10,000)
- **7,5 million** players per month visit internet cafes.

**2019**



- **14.500** internet cafe

*Having closed on March 17 throughout Turkey as part of the corona virus precautions released due to the **Covid-19**, the internet cafes haven't operated in 2020. Many of our internet cafes had to end their business against the costs and taxes.*

**2020**



# INTERNET CAFE COMPUTER SYSTEM PROPERTIES

TURKEY GAME MARKET REPORT 2020



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

2019



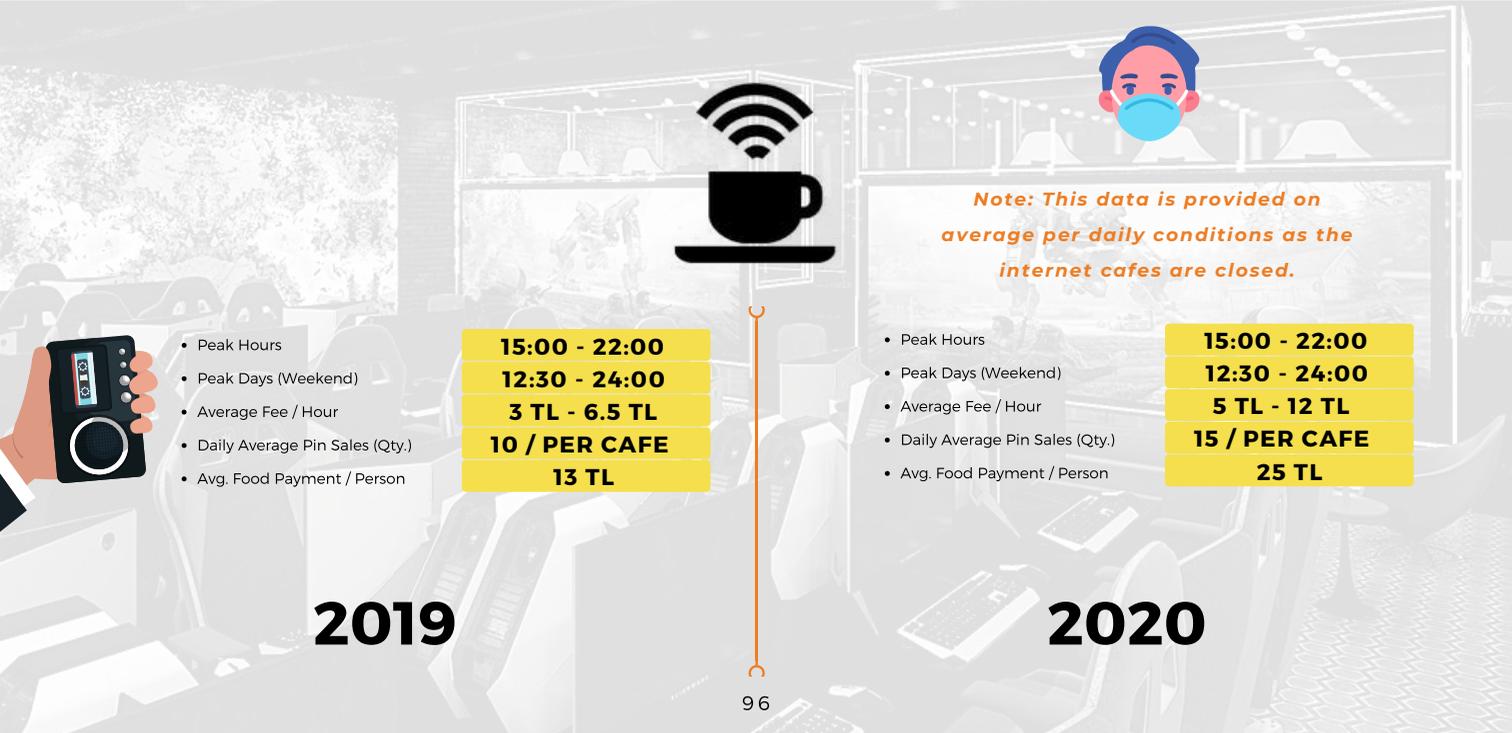
|                  |       |       |       |       |        |
|------------------|-------|-------|-------|-------|--------|
| • Processor      | i3    | i5    | i7    | i9    |        |
| • Percentage     | 10%   | 60%   | 29%   | 1%    |        |
| • Ram            | 4 GB  | 8 GB  | 16 GB | 32 GB | 64 GB  |
| • Percentage     | 10%   | 50%   | 30%   | 8%    | 2%     |
| • Internet Speed | 16 MB | 24 MB | 32 MB | 64 MB | 100 MB |
| • Percentage     | 5%    | 10%   | 15%   | 25%   | 45%    |

2020



# DAILY INTERNET CAFE STATISTICS

TURKEY GAME MARKET REPORT 2020





# TOP GAMES PLAYED IN INTERNET CAFES

TURKEY GAME MARKET REPORT 2020

- PUBG
- Steam Oyunlari
- League Of Legends
- Valorant
- Fortnite

- GTA
- Silkroad
- Blade & Soul
- Wolfteam



- PUBG
- League Of Legends
- Fortnite
- CS: GO
- ZULA
- CS: GO
- GTA
- Call Of Duty
- Free Fire



*Note: This is the data accessed in the time period until March 17, in which internet cafes were open.*

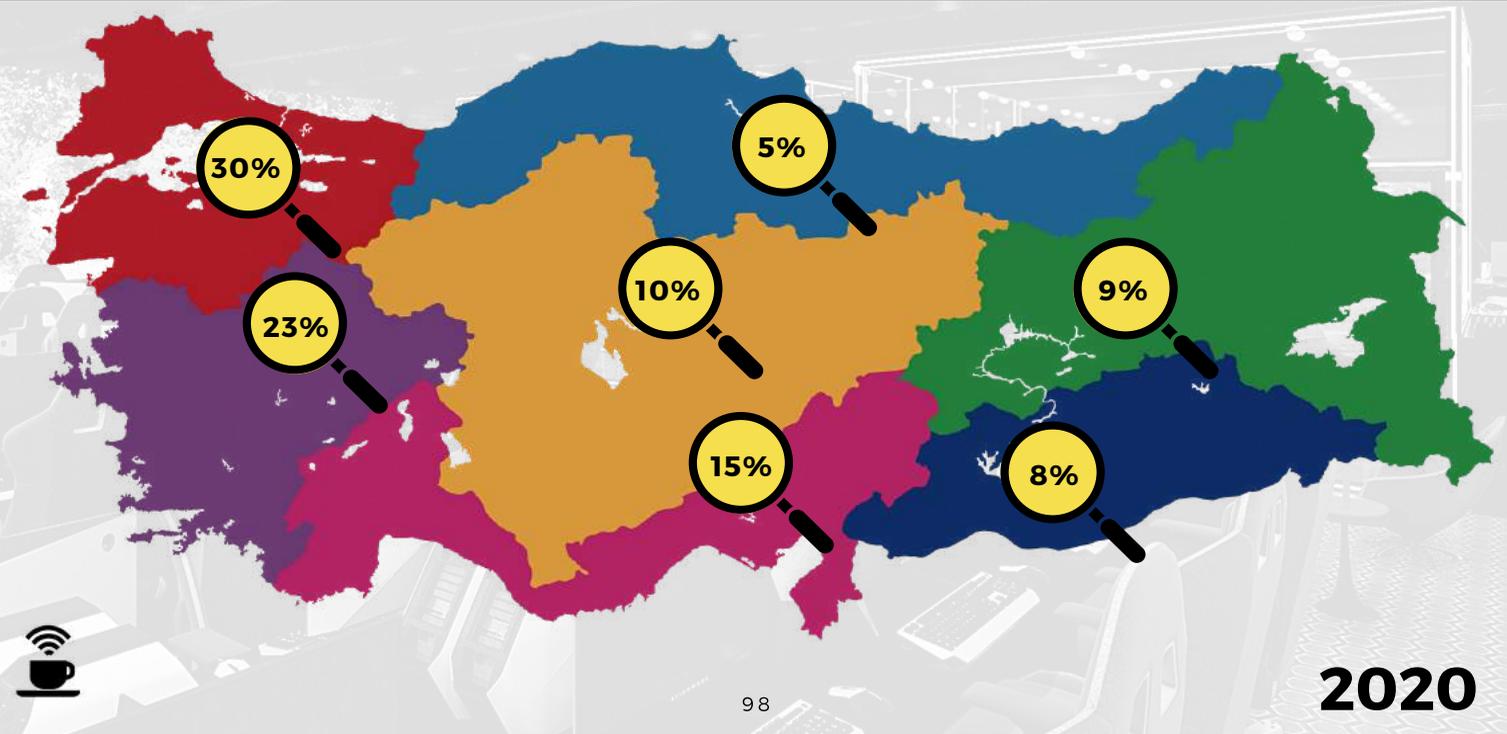
**2019**

**2020**



# BREAKDOWN OF INTERNET CAFES IN TURKEY

TURKEY GAME MARKET REPORT 2020





# ESPORTS TEAMS IN TURKEY

TURKEY GAME MARKET REPORT 2020

- **1907 Fenerbahçe** - League of Legends, FIFA, Pubg, Wolfteam, NBA2K
- **5 Ronin** - League of Legends
- **52 Orduspor FK** - FIFA Pro Club
- **836 Locale** - Pubg, Valorant
- **9INE** - CS:GO
- **ABB Aski Espor** - Zula
- **ADANASPOR E-SPOR** - FIFA Pro Club
- **Alkaralar** - FIFA Pro Club
- **Altay Espor** - FIFA Pro Club
- **Alyada Espor** - FIFA Pro Club
- **Anatolia Esports** - FIFA Pro Club
- **Anatolian Boy** - FIFA Pro Club
- **Antalyaspor** - FIFA Pro Club
- **As4eGamesCrew** - FIFA Pro Club
- **Atmacalar** - FIFA Pro Club
- **Attack On Pandas** - Pubg, Valorant
- **BAU Raiders** - FIFA Pro Club
- **BB Erzurumspor** - FIFA Pro Club
- **BBL Esports** - Valorant
- **Beşiktaş Esports** - League of Legends, FIFA Proclubs, PUBGM, Valorant, Zula



# ESPORTS TEAMS IN TURKEY

TURKEY GAME MARKET REPORT 2020

- **Bilgi Espor** - FIFA Pro Club
- **Black Bear** - FIFA Pro Club
- **Blaze Esports** - Pubg, Csgo Women, Rocket League, FIFA, Tekken
- **Bogalar** - FIFA Pro Club
- **Brand Eleven** - FIFA Pro Club
- **Bucaspor Esports** - FIFA Pro Club
- **Bursa Espor** - Zula
- **Bursaspor** - FIFA Pro Club
- **Catanaklar** - FIFA Pro Club
- **Cybereapers** - FIFA Pro Club
- **Dadaslar** - FIFA Pro Club
- **Dark Passage** - League of Legends, Valorant
- **Destination PEL** - Pubg
- **Digital Athletics** - Pubg, CS: GO
- **Digital Stars eSpor** - FIFA Pro Club
- **Dijital Akrepler** - FIFA Pro Club
- **Dostlar Vadisi** - FIFA Pro Club
- **Eskişehir Espor** - FIFA Pro Club
- **Etiget** - Pubg
- **Fastpay WildCats** - FIFA Pro Club, League of Legends, Wild Rift, Valorant, CS:GO





# ESPORTS TEAMS IN TURKEY

TURKEY GAME MARKET REPORT 2020

- **Flawless Impact** - FIFA Pro Club
- **Fox River Fc** - FIFA Pro Club
- **Futbolist** - FIFA FUT, FIFA Pro Clubs, PES, PUBGM, Hearthstone, TFT, LoR, VALORANT
- **Fifa Bonito TR** - FIFA Pro Club
- **Galakticos** - League of Legends, Valorant
- **Galatasaray Esports** - Zula, League of Legends, PES, FIFA Proclubs, NBA2K
- **Gamers of Future** - Zula
- **Gaziantep FK Esport** - FIFA Pro Club
- **GeceKonu** - FIFA Pro Club
- **Gençlerbirliği** - FIFA Pro Club
- **Giresunspor** - FIFA Pro Club
- **Gokturk Esport** - FIFA Pro Club
- **Göztepe Gaming** - FIFA Pro Club
- **G'OLD** - CS: GO
- **Hatayspor** - FIFA Pro Club
- **Hawks Esports Tr** - FIFA Pro Club
- **Hekimoğlu Trabzon** - FIFA Pro Club
- **Hodri Meydan** - FIFA Pro Club
- **Hooligans FC TR** - FIFA Pro Club
- **InterrailTR Esport** - FIFA Pro Club





# ESPORTS TEAMS IN TURKEY

TURKEY GAME MARKET REPORT 2020

- **Istan Bulls Esports** - FIFA Pro Club
- **Istanbul Esport** - Zula
- **Kapalı Kale** - FIFA Pro Club
- **Kara Kartal** - FIFA Pro Club
- **Karagümrük Esport** - FIFA Pro Club, FIFA FUT, PUBGM, Sabotaj, PUBG, Rocket League
- **Kasımpaşa Esport** - FIFA Pro Club
- **Kayserispor** - FIFA Pro Club
- **King of the North TR** - FIFA Pro Club
- **Kocaelispor** - FIFA Pro Club
- **LLC Esports** - FIFA Pro Club
- **LOG Esports** - CS: GO
- **Last Wolves** - FIFA Pro Club
- **MKE Ankaragücü** - FIFA Pro Club
- **Meiwa Fc** - FIFA Pro Club
- **MindFielders Esports** - FIFA Pro Club
- **Mod-Z Esports** - FIFA Pro Club, Valorant, Zula
- **Muglaspor Esport** - FIFA Pro Club
- **NASR ESPORTS TÜRKİYE** - League of Legends
- **Nimo 57. Alay** - Garena Free Fire
- **No Other Way** - Pubg



# ESPORTS TEAMS IN TURKEY

TURKEY GAME MARKET REPORT 2020

- **Not Fair** - Pubg
- **Papara SuperMassive** - League of Legends, FIFA FUT
- **PayHesap Kütahya** - FIFA Pro Club, PUBG, NBA2K, F1
- **RB Izmir** - FIFA Pro Club
- **RISE E-Sport** - Dota 2
- **Rare Esports** - FIFA Pro Club
- **Regnant Esports** - CS: GO, Zula, PUBG
- **Royal United 07** - FIFA Pro Club
- **Sakaryaspor** - FIFA Pro Club
- **Sangal Esports** - CS:GO, Valorant
- **Scorpions Esports TR** - FIFA Pro Club
- **Sedu Fc** - FIFA Pro Club
- **Sivasspor Espor** - FIFA Pro Club
- **Siyah Bayrak** - FIFA Pro Club
- **Steel Tactics** - CS: GO, Sabotaj,
- **Steel Tactics** - Zula
- **Tatangalar** - FIFA Pro Club
- **Team Aurora** - FIFA Pro Club, League of Legends, Valorant
- **Team Power** - FIFA Pro Club
- **Timsahlar** - FIFA Pro Club





# ESPORTS TEAMS IN TURKEY

TURKEY GAME MARKET REPORT 2020

- **Trabzon Esports** - FIFA Pro Club
- **Trabzonspor** - FIFA Pro Club
- **Turkish Cowboys** - FIFA Pro Club
- **Uzunkopru** - FIFA Pro Club
- **Velocity Esports Club** - FIFA Pro Club
- **X4 Four** - Garena Free Fire
- **Yozgatspor 1959 FK** - FIFA Pro Club
- **Yılport Samsunspor** - FIFA Pro Club
- **Çamlıca Esports** - FIFA Pro Club
- **Çamlıca Esports** - FIFA Pro Club, CS:GO, Pubg, Rocket League, NBA2K, CS:GO
- **Çaykur Rizespor** - FIFA Pro Club
- **İstanbul Başakşehir** - FIFA Pro Club, FIFA FUT
- **İstanbulspor** - FIFA Pro Club





# NUMBER OF LICENSED PLAYERS AND TEAMS

TURKEY GAME MARKET REPORT 2020



There are **125+**  
licensed  
e-sports teams  
in Turkey.



TESFED  
TÜRKİYE E-SPOR  
FEDERASYONU



There are  
**2439+** licensed  
e-sports  
players in  
Turkey.

*\* Including 194 female players, 2,439 e-sports players were licensed by TESFED in 2 years. In the meantime, the number of licensed clubs increased to 125, and the number of e-sports halls, which was 3 in 2019, increased to 19.*





# ESPORTS TEAMS THAT MAKE BEST USE OF SOCIAL MEDIA

TURKEY GAME MARKET REPORT 2020

## INSTAGRAM

|                       | FOLLOWERS | AVG. NUMBER OF CONTENT PER WEEK | AVG. POST LIKES | ENGAGEMENT RATE |
|-----------------------|-----------|---------------------------------|-----------------|-----------------|
| 1907 FENERBAHÇE ESPOR | 45K+      | 2                               | 1487            | %3,34           |
| GALATASARAY ESPORTS   | 176K+     | 6                               | 1395            | %0,80           |
| BEŞİKTAŞ ESPORTS      | 162K+     | 3-6                             | 3868            | %2,41           |
| PAPARA SUPERMASSIVE   | 48K+      | 1-3                             | 1736            | %3,70           |
| DARK PASSAGE          | 31K+      | 1-10                            | 1777            | %5,82           |





# ESPORTS TEAMS THAT MAKE BEST USE OF SOCIAL MEDIA

TURKEY GAME MARKET REPORT 2020

## YOUTUBE

|                       | SUBSCRIBERS | TOTAL VIEWS |
|-----------------------|-------------|-------------|
| 1907 FENERBAHÇE ESPOR | 12.9K+      | 962K+       |
| GALATASARAY ESPORTS   | -           | -           |
| BEŞİKTAŞ ESPORTS      | 1.84K+      | 86K+        |
| PAPARA SUPERMASSIVE   | 26.1K+      | 2.84K+      |
| DARK PASSAGE          | 37.1K+      | 5.89M+      |





# ESPORTS TEAMS THAT MAKE BEST USE OF SOCIAL MEDIA

TURKEY GAME MARKET REPORT 2020

## FACEBOOK

|                       | PAGE LIKE | AVG. NUMBER OF CONTENT PER WEEK | AVG. POST LIKES | ENGAGEMENT RATE |
|-----------------------|-----------|---------------------------------|-----------------|-----------------|
| 1907 FENERBAHÇE ESPOR | 49K+      | 1-7                             | 23              | %1,26           |
| GALATASARAY ESPORTS   | -         | -                               | -               | -               |
| BEŞİKTAŞ ESPORTS      | 62K+      | 4-10                            | 33              | %2,03           |
| PAPARA SUPERMASSIVE   | 86K+      | 1-3                             | 125             | %0,99           |
| DARK PASSAGE          | 140K+     | 1-6                             | 36              | %2,44           |





# ESPORTS TEAMS THAT MAKE BEST USE OF SOCIAL MEDIA

TURKEY GAME MARKET REPORT 2020

## TWITTER

|                       | FOLLOWERS | AVG. NUMBER OF CONTENT PER WEEK | AVG. POST LIKES | ENGAGEMENT RATE |
|-----------------------|-----------|---------------------------------|-----------------|-----------------|
| 1907 FENERBAHÇE ESPOR | 96K+      | 8                               | 225             | %3,68           |
| GALATASARAY ESPORTS   | 62K+      | 15                              | 191             | %2,11           |
| BEŞİKTAŞ ESPORTS      | 64K+      | 18                              | 263             | %3,71           |
| PAPARA SUPERMASSIVE   | 47K+      | 1-9                             | 1330            | %9,87           |
| DARK PASSAGE          | 40K+      | 27                              | 425             | %3,32           |





# ONLINE ESPORTS AND GAME EVENTS ORGANIZED IN TURKEY

## TURKEY GAME MARKET REPORT 2020

### Event Name

- Antalya Provincial Directorate of Youth and Sports Zula Republican Championship
- BAU Hybrid Party
- Bitexen TEFED Turkish Cup
- ESL Turkey Weekly Tournaments
- ESL Turkey Championship League of Legends Tournament
- GAMEHYPE Events
- Hepsigamer ESA Esports PUBG Tournament
- İncehesap.com PUBG Tournament
- Intel ESL Turkey Championship Winter Season
- Intel ESL Turkey Championship Summer Season
- Intel Gaming Fest
- İstanbul Rumeli University PUBG Mobile Tournament
- Kocaeli Metropolitan Municipality Zula Tournament
- Vestel Cup
- NEXT Level Gaming Talks (Webinar)
- Online Youth Festival Sports İstanbul Youth and Entertainment Festival
- Oyun Başlasın Turkey - OBT Online Tournament Series

### Event Name

- Oyunun Yıldızları
- Pro Elite League
- PUBG Mobile News Year's Eve
- Razer Gold Mobile Legends: Bang Bang Tournaments
- Razer Gold PUBG Mobile Shining Stars Tournament
- Sports İstanbul Youth and Entertainment Festival
- TEFED TSL #StayHome Cup
- Turkish E-sports Football League
- Valorant First Strike
- Virtual Pro League
- Vodafone FreeZone Champions League Turkish Grand Final
- Zula Republican Cup
- Zula Stay Home Tournaments
- Zula Clans Tournament
- Zula Little Caesars Tournaments
- Zula Super League





# BRANDS INVESTING IN ESPORTS AND GAMING

## TURKEY GAME MARKET REPORT 2020

- Acer
- AOC
- Armas Hotels
- ASUS
- Bahçeşehir College
- Bahçeşehir University
- BENQ
- Bero-Host
- Bitexen
- BKM Express
- Bloody Gaming
- Borusan Otomotiv
- BTC Türk
- Burger King
- ByNoGame
- CarrefourSA
- Coca-Cola
- Cooler Master
- Defacto
- Dlive
- Doğuş University
- Epin
- Fastpay
- Formahane
- FOX
- FunnyToken
- GEO College
- Gillette
- HDI Sigorta
- Head & Shoulders
- Hepsiburada
- HyperX
- incehesap.com
- ininal
- Intel
- Maximum Kart
- itopya
- JBL Quantum
- KFC
- Lenovo
- LG
- LimeSoda
- Little Ceasers
- Logitech
- McDonalds
- Migros
- Monster Energy
- Monster Notebook
- n11.com
- NAU Drinks
- Nimo.tv
- OMEN By HP
- Opet
- Papara
- Paribu
- payhesap
- Playstation
- Popeyes
- Puma
- Rampage
- Razer Gold
- Red Bull
- Sapphire
- SenpAI
- SteelSeries
- Supradyn Energy
- Tahsildaroğlu
- TeknoSA
- THY
- TOSLA
- TurkTelekom
- Turkcell
- Twitch TV
- Ülker
- Vertagear
- Vestel
- Vodafone
- Western Digital

*\* This list has been generated via the activities we monitored throughout the year. There might be missing brands.*



# ESPORTS GAMES

## TURKEY GAME MARKET REPORT 2020

- Age Of Empires 2
- Apex Legends
- Arena Of Valor
- Basketball Arena
- Brawhalla
- Brawl Stars
- Call Of Duty Mobile
- Counter-Strike Global Offensive
- Dota2
- FIFA 2020
- Fortnite
- Garena Free Fire
- Hearthstone
- Kafa Topu 2
- League of Legends
- League of Legends Teamfight Tactics
- League of Legends Wild Rift
- Legends Of Runeterra
- Mobile Legends: Bang Bang
- NBA 2K
- Overwatch
- Playerunknown's Battlegrounds (PUBG)
- Pro Evolution Soccer
- PUBG Lite
- PUBG Mobile
- Rocket League
- Starcraft 2
- Tekken
- Tom Clancy's Rainbow Six Siege
- Valorant
- Wolfteam
- ZULA



# TURKISH ESPORTS MEDIA CHANNELS

TURKEY GAME MARKET REPORT 2020

- 5Mid
- Dijital Sporlar
- Elektronik Sporlar
- Sporlar
- Espor Analyst
- Espor.online
- Esporcu
- Esporfix
- Esporin
- Esports 360 Mag
- Esports Life
- Fanatik Espor

- Flank Esports
- Gamer People
- GG Espor
- Hubogi
- Hürriyet Espor
- Medya Espor
- Multiplayer
- Mynet Espor
- Only A Gamer
- Playerbros
- SporX Espor
- Thats Game Bro



- 5Mid
- Dijital Sporlar
- Elektronik Sporlar
- Espor Analyst
- Espor Gazetesi
- e-Spor.com
- Espor.online
- Esporfix
- Esporin
- Esport Times
- Esports 360 Mag
- Esports Life
- Fanatik Espor
- Flank Esports
- Gamerbase
- Hubogi
- Hürriyet Espor
- Medya Espor
- Multiplayer
- Mynet Espor
- Only A Gamer
- Playerbros
- Save Butonu
- SporX Espor
- Thats Game Bro

**2019**

**2020**

*\*Sorted alphabetically.*



## TOP GAMING SITES (2020 TRAFFIC)

TURKEY GAME MARKET REPORT 2020



- Bölüm Sonu Canavarı
- Espor Gazetesi
- eSports360
- Fragtist
- Gamer
- Hubogi
- LeaderGamer
- LEVEL
- Mavi Kol
- Merlinin Kazanı
- Mobidictum
- Only A Gamer
- OyunGezer
- Playerbros
- Save Butonu
- TurkMMO
- Turuncu Levye

*\*Sorted alphabetically.*



# TOP ONLINE SALES SITES (2020 TRAFFIC)

TURKEY GAME MARKET REPORT 2020



- gamesatis.com
- midasbuy.com
- gpay.com.tr
- gold.razer.com
- bynogame.com
- foxngame.com
- epin.com.tr
- playsultan.com.tr
- perdigital.com
- klasgame.com
- mtcgame.com
- joyalisveris.com
- oyunfor.com
- oyunalisveris.com
- bursagb.com
- durmaplay.com
- kabasakalonline.com

*\*Sorted alphabetically.*



# TOP ONLINE GAMING PLATFORMS (2020 TRAFFIC)

TURKEY GAME MARKET REPORT 2020



- Steam
- Epic Games Store
- itch.io
- Rockstar Games - Socialclub
- Playstore
- GOG
- Origin
- Humblebundle
- Ubisoft Store



# GAMING MAGAZINES IN TURKEY

TURKEY GAME MARKET REPORT 2020

Oyungezer



Level



2019



2020



**2020**



**EXPERT  
OPINIONS**

# TURKISH GAMING SECTOR EXPERT OPINIONS

## TURKEY GAME MARKET REPORT 2020



**ALPER AFŞİN  
ÖZDEMİR**  
PRESIDENT OF  
TEFED

Covid-19 has been such a long process that we never expected and got us off-guard, not only in our country but also around the world. It has left quite distinctive impressions on both our personal life and business life. I believe that pandemic will leave its marks behind when it ends and thereafter cause a certain amount of transformation in every sphere of life. Looking specifically at gaming and e-sports, they were shown increased interest naturally due to the fact that they are in an online environment and provide a sort of safe way of socialization, along with the increased time people stay at home. The number of new players and e-sports viewer rates increased by 20% on average. Efforts were made to support the stay-home times of the people in this period with the special tournaments organized by either our federation or gaming companies. TEFED scored many significant victories in 2020 to spread e-sports in Turkey and to make Turkey a trademark country in the international field. I expect a rapid recovery process in 2021. In this sense, we plan to continue our efforts from where we left off and in line with our goals. The primary goal of TEFED is to make Turkey one of the well-known e-sports countries in the world. So far, we've taken important steps in this direction, and also achieved international success specifically in the previous year. We'll further push and continue our efforts to win new victories and championships in the international arena, and spread e-sports to wide masses within the country. To this end, we'll take significant steps in 2021.



**ERDİNÇ İYİKÜL**  
RIOT GAMES  
TURKEY COUNTRY  
MANAGER

Unfortunately, we faced the coronavirus at early 2020, having a deep impact on all of us both individually and as the entire sector. The gaming sector has taken roots in the daily life as one of the leading fields in this challenging process. With the increased time spent at home due to pandemic, people started to paid more attention to digital games and e-sports, and we observed that the contents drew attention of Y and X generations in addition to the Z generation. This attention also showed itself in numbers, and the global gaming market achieved an annual growth of 9.3 percent in 2020. According to Newzoo, global gaming market reached up to 159 billion dollars as of 2020. The number of mobile players, found to be 2.7 billions, is expected to exceed 3 billions in 2023. People turn towards games, particularly mobile games, to have fun time and I believe that this momentum will maintain in 2021. We see that the play time in total, play time during a session and in-game purchases have increased worldwide in the studies carried out. More than 40% of the new players say that they'll continue playing. Surely, the time we spent at home will decline again, but this growth of the gaming sector is a grounded reality that starts many game-related trends and draws giant brands in with the e-sports side rather than empty bubbles we see periodically in certain sectors.

# TURKISH GAMING SECTOR EXPERT OPINIONS

## TURKEY GAME MARKET REPORT 2020



**BARIŞ ÖZİSTEK**  
NETMARBLE EMEA  
EXECUTIVE  
CHAIRMAN OF THE  
BOARD

The gaming sector maintained its rapid growth in Turkey throughout 2020. Especially in the area of mobile game development, Turkey has become one of the leading countries in the world. The amount of the gaming company sales until today reached up to 2.4 billion dollars. The figures indicate that the most successful information sector vertical in Turkey is gaming. We successfully develop and sell around the world. Also, the field of e-sports is one of the most promising fields due to young and high number of players in Turkey. E-sports initiatives will be born and raised in Turkey, and will expand overseas. I think that the opening of the ESA, the biggest e-sports arena in Europe and Middle East, in Maslak was one of the significant developments in 2020.

In 2021, the gaming will sustain its rapid growth with the inflow of talents and financial funds. For e-sports, I anticipate a year in which brands will be very active. Brands are discovering the "New Media". E-sports with the high number of viewers come forward as a member of the most valuable media. Marketing managers started to get a better understanding of this field, and we'll see that the budget to be allocated in 2021 will rapidly increase. More precisely, brands allocating budget to this field will win.



**OZAN AYDEMİR**  
GAMING IN TURKEY  
PRESIDENT  
FOUNDER

In terms of sectors, the gaming sector is going through this period with pretty significant growth. Playing times have increased by 30%. Game play rates has seen a major increase during the days we stay at home. The fact that we all must stay at home leads not only the young people but anyone into watching movies, reading books and playing games. People spend more time online. The biggest change in terms of the e-sports is that all offline activities are canceled and the organizations are fully transferred to online platforms due to pandemic. There are either big or small sized tournaments for players almost every day. These tournaments can be organized not only by gaming companies but also brands. While some brands organize tournaments to satisfy their customers and boost sales, other brands organize intracompany or intercompany online tournaments to satisfy their teams. Now, not only PC games but also mobile games have a part in the e-sports arena undoubtedly. We're in times of uncertainty in terms of both our social life and financial status. We can't estimate the new conditions accurately. This period showed us that the digital transformation, which is our inevitable future, will be a part of our life much more quickly after this test. I think, the important phrase here is the concept of "SPEED". Those who quickly adapt themselves to the technology will survive. It's not just that; those utilizing technology and digital world to be "QUICK" will become one up on others. The companies that are innovative and can adapt themselves to this speed of changes will have a more active role against innovations and potential new problems.

# TURKISH GAMING SECTOR EXPERT OPINIONS

## TURKEY GAME MARKET REPORT 2020



**NİLAY ALTAN**  
TÜRK TELEKOM  
FIXED SERVICES  
MARKETING  
DIRECTOR

Digital gaming sector evolves rapidly in our country as it does worldwide. Specifically, during the pandemic which caused us to spend much more time at home in 2020, one of the fields with faster growth rate has been digital gaming sector. We started spending most of the time we make for entertainment as well as working from home and distance education in the online world due to the digital games. Internet usage of our customers increased by 58% with the impact of spending more time at home in this period compared to the previous year.

As Türk Telekom, we maintained uninterrupted communication with our solid infrastructure in this process and stood by game enthusiasts with the fast internet we provide in 81 cities. We continue to increase our contribution to the digital gaming universe due to the high speed we provide for our fiber internet users. We are a party to the excitement of the game enthusiasts for a period longer than 10 years with the Playstore, our digital game platform that we launched within our body as Turk Telekom.

Ranked 18th in the world by the rankings per the revenue generated through gaming sector, our country has a substantial potential in the field of gaming particularly with the young population it has. As the leading telecommunications company in Turkey, we recognize this power and we'll continue to strengthen our infrastructure throughout the country for extended use of fiber internet, which is the fundamental requirement of the digital games, and keep making contributions to the sector with our offerings and products for the game enthusiasts.

# TURKISH GAMING SECTOR EXPERT OPINIONS

## TURKEY GAME MARKET REPORT 2020



**YEŞİM ALGAN**  
 RAZER TURKEY  
 COUNTRY  
 GENERAL MANAGER

2020 has been an absolute turning point for the gaming world to evolve and provide services at higher levels. With the Covid-19 outbreak that took the entire world by storm, many sectors were affected negatively from this pandemic while the gaming industry proved to be a security blanket and was the most popular choice among the investors. We see that the components "customer satisfaction" and "more content" gained importance for players who are at their homes and spent more time playing games.

Starting in 2020, the pandemic cause many brands to take a defensive position. We meticulously and closely monitored the developments that affect the final user, such as dismissals, suspended projects, restriction of services. All of our teammate put their heads together, talking about how to convert this year into a success story. This brainstorming sessions turned into continued success in any region, not only Razer Turkey. We managed to present the favorite contents for players safely and quickly for an entire year and became one of the most preferred services in the gaming ecosystem. We held the top "E-sports at Home" events in terms of viewers, followers and attention. 2020 wasn't a handicap for us, and on the contrary, it was a challenge that is right down our alley!

We know what the Turkish players want in our Mena/Turkey operations with Razer and fintech structure Razer Gold, and strive to provide them with the richest contents by the fastest, most reliable and most convenient means. We'll introduce the Razer brand more to our clients with both our hardware and fintech structures by boosting our power, efforts and brand collaborations in 2021.

# TURKISH GAMING SECTOR EXPERT OPINIONS

## TURKEY GAME MARKET REPORT 2020



**DAVID HALEGUA**  
SR. ASSETS,  
PARTNERSHIPS &  
SPONSORSHIPS  
MANAGER, EURASIA  
& ME

2020 will be remembered as the year marked by tens of events, each of which can be considered a turning point for the world history, particularly Covid-19. Perhaps, the only positive progress has been in the gaming field this year during which we rewrote the history books altogether. The sectoral growth that we have spoken about for years reached to its highest levels when we're locked in our homes, and we had the opportunity to have the stats that we expect to achieve few years later in 2020. In my opinion, Covid-19 has been one of the greatest blessings in gaming for these reasons. We'll remember this year, when many records were broken with both games and platforms in terms of player count, play time, view time and turnovers, as the year in which gaming is placed exactly at the core of brands, and as for Coca-Cola, we'll remember it as the year in which we continue to apply our strategy (by expanding its coverage) of meeting the players where they are to take part in gaming ecosystem again two years ago.

Looking at year 2020, it's expected that the period of pandemic continue under similar conditions and the time we'll stay at home is sustained for the first half of the year at least. This means that all the stats which have been at peak points with the speed it gained in the previous year will continue to rise with a similar speed and we'll continue to see new records throughout the year. I believe that gaming will have the biggest share in the entertainment sector and serve as a catalyzer for transformative process of its competitors such as music, sports and cinema, due to the domino effect to be created by these gradually rising stats by the new players in particular. In this process of change, we'll display our presence within the ecosystem with further formed and adapted version of our strategy. In conclusion, I believe that 2021 will be a year in which Coca-Cola and gaming will not only hold but also carry the flag up to a point that is hard to reach.

# TURKISH GAMING SECTOR EXPERT OPINIONS

## TURKEY GAME MARKET REPORT 2020



**BURAK SEZERCAN**  
TÜRKİYE İŞ BANKASI  
RETAIL BANKING  
MARKETING  
MANAGER

As İş Bankası, e-sports grabbed our attention as a new generation of economy among the evolving business models in the digitalizing world. It is the new world of entertainment of the digital age that is emerging and differs from the conventional fields of consumption with its contents. Also, we needed a tool to show that we understand them for the sake of maintaining and reinforcing our contact with the new generation through a sincere communication.

E-sports could serve as a successful bridge between the new generation and our brand due to the fact that it is the new rising content and media of the digital world. I can outline the starting point of our decision for making investments into e-sports.

We've incessantly continued our efforts in the E-sports field until today from January 2017 when we first positioned ourselves in this field. Our objective within the context of our strategy and roadmap, which are clear since the first day, was to create our own community through unique contents on our Maximum Gaming platforms, and to create a specific payment system for them that complements gaming experience of the E-sports players and their other life experiences with what we've learned from the community.

We made progress by collaborating digitally with other significant stakeholders of the ecosystem such as E-sports teams, gaming companies, clubs, streamers and event hosts in the process of creating a community.

As a result of these efforts, we realized products that are specific to the game enthusiasts with what we've learned from our community and stakeholders of the ecosystem.

Digital Code Shop, where people can buy game codes, in the Maximum Mobil app, our Maximum Gaming Card that is designed specifically for e-sports players and the entire audience interested in digital games, and also the Fenerbahçe fan card version of the Maximum Gaming Card are our important contact areas as part of the daily experiences of the E-sports players. We continue our efforts to add Maximum Gaming Cards with shared logo for the other teams we sponsor.

We also provide support for the initiatives in the field of e-sports and gaming as part of the Workup Entrepreneurship Program, which we support since 2017.

Just like many trends rising from the bottom with the Covid-19 pandemic, digital experiences will also be one of the fields to guide digitalization in the next period and as such, the gaming ecosystem will increase its growth rate.

# TURKISH GAMING SECTOR EXPERT OPINIONS

## TURKEY GAME MARKET REPORT 2020



**ÖMER SUNER**  
CEO  
OZAN ELEKTRONİK  
PARA A.Ş.

The period of pandemic which we unfortunately experience and wished to end as soon as possible affected the lives of not only the youth but anyone in every aspect. Due to the facts that more time had to be spent online and outdoor entertainment activities are restricted, there has been a great increase in demand for the world of gaming and e-sports.

Thanks to all the preparations we made over the year as a team, we'll display our passion for the gaming ecosystem by creating a world that we work on and will convert to platform in 2021. This will be a world that a player would imagine. Ozan Mode: ON

Ozan SuperApp will stand by the young people at any moment they need, such as when they look for music, entertainment and education as well as by fully supporting the e-sports teams and ecosystem, creating our own e-sports ecosystem, creating game-specific opportunities for users, bringing them together via online/offline (I hope) events. The most important point is that this world we'll create will also be the voice of young people and players. We'll change as their dreams change, and we're building a platform to evolve consistently to build a world exactly as they wish over time by paying attention to their experience.

With "Ozan SuperApp" app, young people will be able to complete their financial transactions easily and safely at any time. Ozan SuperApp will contain many functions such as opening account, 24/7 fund transfer, payment via QR, domestic and international invoice payment, trading stocks for companies such as Amazon and Tesla, trading cryptocurrencies, and purchasing game codes (e-pin). You'll be able to use Ozan SuperApp not only for the gaming world but also any activity touching life.

In a nutshell, as Ozan SuperApp team, we'll stand by both local and foreign gaming companies as well as our stakeholders in the entire gaming ecosystem from the individual players who play conventional "games" to e-sports teams. We'll always be there for them by opening significant doors with the world of advantages to be designed for many areas beyond gaming, from catering to clothing and education to travel, rather than in-game needs / worlds of the players or e-sports players.

We might only be there for them online for a period of time, but I hope that we'll pull through this challenging period and our lives will be normal in all aspects as soon as possible. Then, we'll actually and properly meet our young people and players.

# TURKISH GAMING SECTOR EXPERT OPINIONS

## TURKEY GAME MARKET REPORT 2020



**BORA AKSOYLU**  
TR & ME ESPORTS  
MANAGER  
PUBLISHING &  
BUSINESS  
DEVELOPMENT

As Riot Games, 2020 has been a year in which we had more communication with our viewers. We boosted the TBF and Worlds experience of our viewers with the campaign and contents we provided in the digital world. We invited anyone to share the spirit of TBF as a whole with the campaign #bizolankazansın (let us win together), and we built the first digital E-sports museum of our country as a result of 40-days communication through social media platforms by transferring this spirit into the period of Worlds 2020. As for the social media interactions, we helped Papara SuperMassive, our representative, to be the 8th most discussed team among 22 teams that attended the Worlds this year.

Lucky us that our increased number of efforts for communication has made a contribution for e-sports to become one of the greatest areas of interest for the young people in our country. Therefore, brands' attention to and support for e-sports continue to increase day by day. In 2020, we had the chance to work with global and local brands that aren't already in our ecosystem. As Riot Games, we always try to provide a better experience for our players with the support from brands and our collaborations.

The fact that new teams emerge with First Strike, the first official tournament of VALORANT, also enabled our communications to reach a wider audience. Besides, it expanded our pool of players with the discovery of new talents.

# TURKISH GAMING SECTOR EXPERT OPINIONS

## TURKEY GAME MARKET REPORT 2020



**ARAS ŞENYÜZ**  
MILDMANIA  
PARTNER

2020 has been a year in which digital games clearly hit the peak points of the entertainment sector in terms of consumption both worldwide and in our country. Closure of the cinemas and being able to go out less increased the consumption for console and PC platforms for which we couldn't find any time during busy days in particular. In this period, we observed that puzzle games maintained its leading position among mobile games in 2020 while FPS/TPS type of games, which we call shooter games, started to compete for the top position.

Demanding a great amount of studio contents, this type tries to achieve loyalty of the players to the game via various modes, events and cosmetic items as it generally doesn't sell products to turn the in-game scales. Specifically, the mobile shooter category saw an incredible figure of 2.7 billions by achieving 38% increase in revenue and 31% increase in downloads, compared to 2019. Having started in 2018, Battle Royale frenzy had a significant impact on the general statistics of the mobile games this year as well.

The fact that games with highest amounts of revenue in the category are completely free-to-play and players must pay only for cosmetic items is yet another striking aspect. It's ensured that users have a sense of winning with very short and quickly consumable seasons for continuously grabbing attention of the players and that the users return to the game by quickly adding another content when some content is consumed. Each season is supported by cosmetics and game modes to grab attention of the players, resulting in an atmosphere when players can enjoy.

These quality and easily consumable contents provide a return at an unprecedented level for these games. We shouldn't ignore that this growth was achieved in the period when Fortnite, one of the biggest games in the sector, was removed from AppStore. This growth in shooter type, which requires much longer sessions and more attention than the other types of games highlight that players are looking for more meaningful and social experiences.

# TURKISH GAMING SECTOR EXPERT OPINIONS

## TURKEY GAME MARKET REPORT 2020



**BORA ARAS**  
GAME GARAJ  
GENERAL MANAGER

2020 was a year that is full of games. We spent more time at home with the pandemic and restrictions.

Our internet usage increased in many cases such as remote education and work, shopping, and entertainment. Not only the gaming market, but also the computer market grew way above our expectations in general.

Our most important objective as a gaming computer brand is undeniably the customer satisfaction rather than digital sales figures, and we made a great breakthrough in this respect.

pandemic got all of us adopt new habits and we believe that nothing will be same when the pandemic ends. We show more interest into the technology and games than before. We believe that gaming sector in particular will grow in 2021. Gaming PC hardware market has globally reached up to 40 billion dollars approximately. A market of 400 million dollars were created in Turkey with gaming computers, their peripherals and accessories. On the other hand, gaming computers comprised approximately 20% of the total PC market in Turkey. Sales with high turnovers were achieved in Turkey, not only on the hardware part, but also on the game software part.

I wish all the game enthusiasts have healthy days in 2021.

# TURKISH GAMING SECTOR EXPERT OPINIONS

## TURKEY GAME MARKET REPORT 2020



**BURCU GÜZEL**  
TR & ME ESPORTS  
MANAGER  
OPERATIONS &  
PRODUCTIONS

As Riot Games, we have a structure that can quickly adapt to the new conditions and put a signature under groundbreaking innovations. In fact, cancellation of many sports and e-sports organization due to pandemic in 2020 provided us with the opportunity to review these capabilities. With the pandemic, we built a system that allows our players to join matches at their homes. Just like our players, our hosts also initially joined our streams at their homes. After a while, we moved them to a stage without any audience upon taking necessary safety measures and we achieved over 20% view time increase during the period of pandemic.

We blazed another trail by holding the Turkey Grand Final (TBF), the biggest e-sports event of the year, at Demacia Arena, which is identified with the concepts of justice, honor and synergy and is a digital universe designed specifically for the event. While all these challenging conditions persist, we held the first official tournament (i.e. First Strike) for VALORANT. Positive feedback we received from the community and view rates helped us see Turkey's interest in VALORANT e-sports and the potential of players.

# TURKISH GAMING SECTOR EXPERT OPINIONS

## TURKEY GAME MARKET REPORT 2020



**SERHAT BEKDEMİR**  
FOUNDER  
COLLEGIATE  
ESPORTS LEAGUE

IESF  
EDUCATION AND  
YOUTH  
COMMISSION,  
PRESIDENT

E-sports at universities will solve infrastructure problems! Covid-19 is a world-shaking and ground-breaking crisis in the e-sports sector. It's a sector that displayed positive growth in all crises before this one. Gaming sector overcame the crisis with growth, making the entire world comprehend how primitive the education sector is in terms of digitalization, how important it is to provide education through use of technology and how large the cluster of players/students is.

Although schools are closed, they try to grab the attention of the young people as well as continue their operation and give education with all the technological means at hand. The importance of the content and its quality was recognized very clearly around the world. Children, young people, families and organizations can no longer remain unresponsive to the gaming world. This brings us new and various responsibilities. Shared academy and private sector must make a joint effort for preparing the young people for the sector and minimizing the problems.

Global university collaboration networks had great support for development of any technology and trend. We've set off in 2017 by claiming that schools need to be developed in the first place for development of e-sports in Turkey. Having started with only 1 university, CEL Turkey organization now proceed on its way with 41 official university clubs, and provides its students and graduates with business and career opportunities.

2021 is a year in which university/college e-sports will leap forward and get quickly industrialized in Turkey. The school clubs are of great importance to be able to solve infrastructure problem of e-sports at global scale. Bahçeşehir University E-sports Project, which we show as an example from Turkey to the world today, has been a sample model by reaching from amateur to professional level during formal education.

For the sports-related part, İstanbul Technical University, representing Turkey in 2020 UEM, has come back to Turkey with the runner-up cup. Unfortunately, a wide audience of students achieve such success whose importance will be better understood in the next years by their own means. We can expect that university leagues and tournaments for which investment will be made by Tencent Games and other big publishers in 2021 will raise the quality standards.

The way of finding prospective world champions among twelve million students/young players is through making necessary investments for university e-sports to sort out infrastructure problem of e-sports. More young people will be provided with business and career opportunities increase in the number of successful examples.

# TURKISH GAMING SECTOR EXPERT OPINIONS

## TURKEY GAME MARKET REPORT 2020



**SEÇKİN TOPALOĞLU**  
BAU ESPORTS  
COORDINATOR  
BAHÇEŞEHİR  
UNIVERSITY

With the impact of the pandemic, one of the things people preferred most at their homes during the times of lockdown was definitely the digital video games. Another important matter across the world stood out as trying to provide education online. In the same period, one of the obstacles to popularization of e-sports and gaming world in the public spheres was the fact that decision makers comprise earlier generations.

However, digitalization of all tools such as communication, media, education, business management etc. with the impact of pandemic in 2020 both narrowed the gap of utilizing technology between the earlier generations and the youth and made the digital world of the youth more visible and comprehensible.



**GENCO ALP**  
INGAME GROUP  
FOUNDING PARTNER  
CEO

As millions of people started spending more time at home since the pandemic process limits the mobility of the people, any type of digital content consumption has naturally increased. We can say that we have experienced great increase in the number of existing and returning players. While the number of our daily active users increased by 20%, the number of new users acquired per month increased by 15%.

2021 will be a year in which we'll start new gaming projects. Thus, we plan to expand in terms of employment for both our offices in Turkey and Berlin. We'll have global launch within 2021 for the Zula Mobile, from which we have great expectations. Thereby we hope that we have yet another globally successful new game find the gaming enthusiasts. To further please the enthusiasts of Zula, which is our PC game in MMOFPS type, we've created more content and will continue to do so. Online e-sports tournaments will be diversified, leading up to a point where competition is maximized.

# TURKISH GAMING SECTOR EXPERT OPINIONS

## TURKEY GAME MARKET REPORT 2020



**İLHAN YILMAZ**  
MONSTER  
NOTEBOOK  
FOUNDER AND CEO

Due to the facts that specifically the time spent online increased and outdoor entertainment activities are restricted, there has been a great increase in demand for the world of gaming and sports. The growth curve recorded by the sector in the recent years continued vertically in 2020. Thus, we had a quite busy year as one of the best known actors of the gaming and e-sports ecosystem in Turkey. We met e-sports fans in the "Monster Reloaded" tournament that we organized in collaboration with NVIDIA for the game enthusiasts staying at home at the beginning of the pandemic. In the next period, we shared the joy of e-sports through biggest e-sports organizations in Turkey such as "Red Bull Solo Q", "Red Bull Flick" and "Intel ESL Turkey Championship" held with the main sponsorship of Monster Notebook. We supported more than 20,000 amateur or professional e-sports players during these events followed by more than 5 million e-sports fans during the year.

As Monster Notebook, we're the first brand that comes to mind when it's about gaming computer in our country, with our high performance laptops and gaming equipment designed to provide players at any level with the best gaming experience. We do our diligence to thoroughly meet the responsibility of this recognition. We intend to strengthen the bond with our users year by year and maintain our connection for life, and lead the sector with our after sale services in particular. For instance, we revolutionized the digital shopping by not compromising user experience even under partial lockdown conditions. Users can make instant and personal video calls with any sales representative on our website without any booking system.

2021 will be a year in which we'll continue to make contributions to the gaming world that is growing year by year and covering larger masses. We'll continue to share and boost the joy of games and players at the highest level this year as we did in the previous years, with the purpose of discovering the opportunities this world contains and converting them into added value for the gaming sector in Turkey.

# TURKISH GAMING SECTOR EXPERT OPINIONS

## TURKEY GAME MARKET REPORT 2020



**BORA KOÇYIÇİT**  
SERIAL INVESTOR

2020 has been a year that has almost nothing good to remember as part of our memories. One of the few sectors without any damage due to pandemic is the gaming sector. The economic growth expected to be achieved before the pandemic was exceeded by 10%. Gaming sector in Turkey managed to get a share of this growth. We achieved growth despite the increase in rate of TRY/USD parity, and saw the signals that it'll exceed 1 billion USD in 2021.

Turkey is in the leading position around the world with an extremely high number of mobile game users and high mobile game usage rate. As the number of mobil games in our lives increase in recent years, Gaming Sector in Turkey started to benefit from this increase positively. There has been an exceptional increase in the number of early stage gaming studio initiatives following successful exits. We started to see funds and investment companies founded for the purpose of making investments specifically for the gaming sector.

This development plan cleared the way for the young people who have ideas and motivation but can't enter the sector due to financial challenges. E-sports has been one of the sectors that has been affected both positively and negatively by the pandemic. E-sports continued to be involved in our lives during the days when almost all sports matches were delayed. Therefore, we've seen great increases in the view counts. However, sponsorship revenue that is of great importance in the sector declined. That put the e-sports clubs, of which revenue is largely dependent on sponsorships and financial structure is weak, in a tight spot. I presume that radical changes will happen in the Turkish e-sports scene in 2021.

# TURKISH GAMING SECTOR EXPERT OPINIONS

## TURKEY GAME MARKET REPORT 2020



**MUSTAFA UYAR**  
LOGITECH TURKEY,  
COUNTRY MANAGER  
FOR MIDDLE AND  
WEST ASIAN  
COUNTRIES

E-sports trail millions in Turkey as it does around the world, and our country, Turkey, make its power in e-sports felt far better in the recent years. Overall gaming sector as well as e-sports grow strongly and Logitech is a significant part of this sector around the world and in Turkey, as a company that personally exists within the world of gaming and e-sports...

With our brand Logitech G, we develop products with the players and personalize our products per game and player with the software. We strive to make the maximum contribution to the performance of our users and sector professionals, and also shape the sector by designing products to go beyond their expectations. We cater to players and streamers at any level with our products (such as top level keyboard, mouse, headset, microphone, camera) of innovative design and advanced technologies, and simulation equipment (such as steering wheel, joy stick).

As Logitech G, we have a wide range of efforts around the world and in Turkey. Globally, we have partnership with the teams leading in their leagues and games such as Na'Vi, Astralis, G2, DAMWON Gaming, TSM. We also work closely with prominent leagues such as LEC. In addition, we continue our Logitech McLaren G Challenge tournament series, in which we embrace the global race ecosystem through collaboration with McLaren, and build the organization's Turkey leg. We work towards maintaining the investments that we make in the global arena with our brand Logitech G, also in Turkey.

In this respect, we sponsored League of Legends TBF. Besides, we make contributions to the performance of the team and sportsmen by means of our ongoing collaboration with Supermassive while also trying to support recognition and popularization of e-sports in our country. On the other hand, we're among the supporters of the first virtual reality lab in Turkey started in collaboration with Bahçeşehir University and Crytek. We always support innovative ideas and initiatives in this field. In addition to those, we're glad to meet our users in events such as GIST in our country and see them experience our cutting edge products.

# TURKISH GAMING SECTOR EXPERT OPINIONS

## TURKEY GAME MARKET REPORT 2020



**LALE ERGİN**  
ESA ESPORTS &  
MEDIA  
FOUNDING PARTNER  
AND CEO

2020 has been a very dynamic year for gaming and e-sports sector both in the world and in our country. We came across both issue and exceptional opportunities due to pandemic. Interest in games and e-sports increased with the pandemic. People steer towards e-sports especially because physical sports can't be performed, and brands better understood that this segment has become a strategic segment for many sectors. Migration from TV channels to digital channels accelerated.

According to Nielsen's report, 4 out of 5 people staying at home during pandemic played a video game. Global gaming market reached up to 175 billion dollars with a growth rate of 19.6% in 2020. Again, the interest in e-sports tournaments in our country during this period and the number of people downloading a game increased by 30 percent according to Next in Turkey data.

Turkey started to become a critical actor in the global gaming market. The fact that Peak Games is acquired by Zynga and is the first unicorn in our country has been a factor that encourages and motivates the ecosystem in Turkey.

Surely, covid has negatively affected the sector of physical tournaments and events, and marketing and sponsorship budgets of the brands declined significantly in this period. On the other hand, e-sports enthusiasts are sick for physical tournaments, getting excited and socializing as far as we see in the studies. Therefore, we expect a significant amount of interest to be shown into the physical e-sports tournaments once the impacts of covid vanish. We hope that this impact can be observed gradually starting from the second half of 2021 even though it definitely depends on the developments related to the pandemic.

As ESA Esports & Media company, we intend to make contribution to the development and consistency of the Turkish e-sports ecosystem via regular league and tournament series for different games that we'll organize with our brand. Besides, creating entertaining and instructive content for overall audience of the video games and introducing the brands with this audience through right and quality contents are among our important objectives. In brief, 2021 will be a year of structuring and branding for us to get prepared for future.

# TURKISH GAMING SECTOR EXPERT OPINIONS

## TURKEY GAME MARKET REPORT 2020



**GÜRAY YOLUKAR**  
JOBUM  
FOUNDING PARTNER

Educators, psychologists and theoreticians have investigated the subject and concept of game for centuries. Despite absence of a universal definition of a game, researchers agree that there are a number of qualities that define a game and differentiate it from the other behaviors. This concept of game that can be grouped under the title of entertaining, instructive, constructive activities is positioned at a significant point at many phases from pedagogies to corporate trainings, not just only for entertainment. With the rapid development process of the digital world, gaming sector has correspondingly come into our lives as background modelling at the point where it has reached today. Today, we all know and feel the importance of the concept of Gamification in business life. Considering the issue with regard to Human Resources, many organizations started utilizing gamification in terms of effective evaluation of the candidates during recruitment processes. Interviews with gamification enable not only finding the right candidate but also reaching talented people easily. Jobuum is a mobile app in accordance with this next generation of the concept. Recruitment processes was designed by taking the concept of gamification into consideration while modelling, and a major change has been made through online unilateral video interview on mobile phone, replacing the habit of job application via CV. Besides, mediating for easy and quick access to right and talented candidates through use of not only video interview but also game experience in the development process will be an exciting journey for us.



**SERTAÇ PIÇAKÇI**  
VP OF PRODUCT  
MASOMO

2020 has been a positive year for the gaming sector. The growth rate of the gaming sector, which is already on the rise, has further accelerated. In a world where many people couldn't get out of their homes, even the people who never played games met the gaming sector and targetable market has further grown. One of the most important reasons for gaming companies to increase their revenue within this period is that the money spent for games is the leading entertainment tool in terms of efficiency. The entertainment time you acquire by spending 1 dollar for a game is way more efficient than the other entertainment tools you can experience at home. One of the outstanding developments in 2020 especially in the mobile game sector was that the gaming companies from far east transferred console-grade quality games to mobile platforms. Genshin Impact's dive into the lists of top earner games around the world is one of the best examples for this. Making a difference with their high production quality, these games will continue to be one of the great methods that far east companies can utilize to conquer the west in 2021 as well. This will be one of the fields western companies will have hard time challenging due to high costs of game development.

As expected, 2020 has been a year of increased competition. In-game ad and real money spending setups have become further segment specific for the sake of getting maximum benefit from any player in every segment as much as possible. Applying a single revenue or in-game economy model for any player from any country is now beside the point. Maximizing revenue and loyalty via country specific optimizations further increased the importance of Live Ops teams. We'll continue to see more particular segments as well as revenue and loyalty models for these segments in 2021.

# TURKISH GAMING SECTOR EXPERT OPINIONS

## TURKEY GAME MARKET REPORT 2020



**DR.  
METE TEVETOĞLU**  
DIRECTOR OF  
TECHNOLOGY AND  
INTELLECTUAL  
PROPERTY LAW  
RESEARCH CENTER  
TESFED BOARD  
MEMBER  
LAWYER

Pandemic had a great impact on e-sports just like many other sectors. The fact that virus spread from China, a country of e-sports, specifically boosted this impact. Extensive organizations such as League of Legends, Dota2 and Overwatch were postponed. Playoffs for LCK 2020, IEM Katowice 2020 were played without spectators. Interest in online e-sports events was high and once more proved what a large audience e-sports appeal to. Total gaming market turnover of Middle East in e-sports was 8 billion USD in 2020 while total gaming market turnover of Turkey (particularly football) reached up to 830 million USD. In this context, we must say that Turkey moves faster than its neighbors. The fact that sports events can be organized digitally under the umbrella of e-sports despite a long period of pandemic indicates that interest in e-sports will exponentially increase in the next periods. Accordingly, it's one of the expected results to be obtained in a short period of time that sports managers and clubs steer towards the field of e-sports and increase their investments.

If the conditions get any better, some tournaments might be held in person while playing some small sized tournaments online can gain currency. Legally, the importance of managing and controlling remote matches fairly is better understood. The most significant opportunity of this period is clarification of the different between game and e-sports. It's because that digitalization of sports due to pandemic enables reinforcement of this difference by boosting the sports character of e-sports. I think that wearable and augmented reality technologies, and hybrid games that include location based physical interaction have the potential to clarify this difference. I anticipate that this will deepen the information, intellectual property and e-sports law, further bringing the need for legal subjects and agreements characterized by e-sports copyrights, licensing, e-sports player and streaming agreements to the agenda.

# TURKISH GAMING SECTOR EXPERT OPINIONS

## TURKEY GAME MARKET REPORT 2020



**KAYRA KERİ KÛPÇÜ**  
MONSTER  
NOTEBOOK  
GAME PROJECTS  
MANAGER

Digital game culture that started to rise quickly especially in the recent years is of interest to much wider masses due to the fact that everyone is at home during the period of pandemic. We witnessed that a lot of users that don't play games for various reasons before and don't follow game streams or e-sports events took a dive into the world of gaming in this period when entertainment and socialization activities are restricted. The influence area of the digital gaming culture has expanded with the impact of addition of this new group to the existing gaming community. In short, the world of gaming that is considered to appeal to Y and Z generations until recently is now a phenomenon that includes all age groups.

Looking at the sectoral aspect of this increase on the part of end users, we see a promising market in our country. The number of local gaming studios that achieve international success increases day by day and will continue to do so. However, we can't expect to have such success in its regular course. So, entrepreneurial ecosystem must be supported and it must be ensured that ecosystem encourages further investment by creating awareness in this field. Also, there is a significant pool of talents with a wide coverage from high school students to experience software engineers in this field. As Monster Notebook, we built Monster Gaming Lab to create opportunities for these talents and provide a strong employment to contribute to added value production in our country. Thanks to this program, we provide support in the forms of software, hardware, working area, financial aid, training and mentorship during the game development processes of the initiatives, and help more people to enter the world of gaming in our country.

As Monster Notebook, we have the gaming knowledge and culture accumulated over years. Recognizing that the world of gaming quickly turns into one of the biggest sectors, we enhance our support and efforts for our country to do a good job in this field as well. We utterly want our country to gain an important position in the gaming sector and games released in our country to be awarded with a place in "TOP" lists and prizes.

# TURKISH GAMING SECTOR EXPERT OPINIONS

## TURKEY GAME MARKET REPORT 2020



**ALİ SAYIN**  
VERTIGO GAMES  
CO-FOUNDER

Mobile gaming sector sustained its incremental growth in 2020 with the impact of the pandemic. We estimate that the same growth will continue incrementally in 2021. The most important point of 2020 has been the change experienced in the field of hyper-casual games. As the interest in casual games increased, so did the competition. We think that this transformation will be clearer this year and certain casual games will dominate the market. Unfortunately, it seems that hyper-casual games that are alike as peas in a pod will be replaced by Match 3 / Puzzle games that are also alike as peas in a pod.



**MURAT SAYIN**  
VERTIGO GAMES  
CEO

We aim for the sky for our game Critical Strike in 2021. Our loyal users, downloads and revenue increased by minimum 3 times from the second half of the year in particular. We plan to reach 200 million people in 2021. Beside all these objectives, 2020 has been a year in which we made efforts for training as well as reaching people. We learned through experience that qualified people are much more important than the qualified masses and the number of people. So, we concentrated on online trainings and conversations. We'll continue these efforts also in 2021. We'll do our best for our country to develop in terms of human potential.

**Note: Shared Opinion**

# TURKISH GAMING SECTOR EXPERT OPINIONS

## TURKEY GAME MARKET REPORT 2020



**İLKEY TEPE**  
STEELSERIES  
TURKEY  
COUNTRY MANAGER

First of all, it has really been an awful year for the world and Turkey. I only wish that we get over the Covid-19 outbreak as soon as possible and return back to ordinary lives of ours. Nevertheless, 2020 has been the most lucrative year ever for gaming sector. The lockdown time is a period of increased interest in games, and a good gaming year in which many new games and consoles were launched.

Gaming sector generated a turnover more than twice the global turnover of music and film sectors this year according to Newzoo, a company doing gaming and e-sports analysis as well as market research. A revenue of approximately 150 billion dollars is being reported. It's estimated that almost 160 billion dollars were spent. Global revenue estimation of the sector is to exceed 200 billion dollars in 2023.

As SteelSeries, the steps we took for the sake of being the first brand in the premium grade of the growing market in Turkey until 2023 brought results this year. 2021 will be our 20th anniversary and I can say that it will bear many surprises.

Frequent prize tournaments will be on our agenda. Again, we'll introduce innovative gaming equipment that everyone will love to the game enthusiasts.

# TURKISH GAMING SECTOR EXPERT OPINIONS

## TURKEY GAME MARKET REPORT 2020



**İLKER KARAŞ**  
 ESPORTS360  
 BRAND  
 COMMUNICATION  
 MANAGER

HÜRRİYET  
 SPOR ARENA  
 ESPOR COLUMNIST

2020 was a really weird year. We had to be more agile than ever, create alternative scenarios for all plans and most importantly, feel ourselves safe with every new plan. We had to start with a clean slate for our LEGO and ego. We worked on various projects with local and foreign teams that we've never met. We were closer than ever with both brands and various business lines in this process, and experienced that the most important way for survival is to act in unison. Being there for people when they turn to games, online events and contents more as they stayed locked down at home, sharing this experience with brands and being able to say that "We're still alive and fine." at the end of the day were most invaluable part.

We started taking new and big steps as our muscle memory adapts to the environment. As a team, we made a deal with tournament platform ESPL specifically for mobile game tournaments in 2020. We got into a partnership on the part of content creation specifically for Gaming and E-sports at Hürriyet Spor Arena. For PUBG, we organized the events PUBG SPRING CUP, Algida Boom Boom PUBG Summer Cup, PUBG OCTOBER 29 CUP and PUBG NOVEMBER 29 FALL CUP. Then, we realized PROTALITY SERIES, which is the long term Premium PUBG project of our country, designed by eSports360 to start in 2020 and end in 2021 and with a prize pool of 50,000 TRY thanks to strategic collaboration with WeSportsmedia. As our most valued project, PROTALITY achieved more than 2,5 million Live Views on Twitch alone. For Season 1, as Supradyn Energy PUBG Protality Series, we've arrived at a strong position under the main sponsorship as well as support from the brands AXE, WD Black and Olips. We think that there will be more interest in future PROTALITY seasons.

Another important effort we made was DROPSTARS - PUBG Solo Tournament. It was realized by eSports360 in 2020 with streams in Turkish, English and Arabic languages, under the sponsorship of Seagate with a prize pool of 4,000 \$ and as available to be joined by 22 countries including Turkey and those in Middle East and South Africa. It gained a place in the archives as the first project developed by eSports360 outside Turkey, with a solo format in which participants are entitled to represent their region during the grand final after joining and succeeding in the open qualifying round organized in their regions.

I remember only February and December within an entire year. Rest of it was spontaneous and it happened just like that, not only for us but for the entire world. Most of the gaming studios are now adapted to the COVID-19 related stress and capable of predicting how to do business in the rest of their lives. E-sports have made the greatest breakthrough of all times in 2020 when sports-related contests were stopped and gradually restarted. We said that e-sports is the future of sports, and we were proved right once more. There are 2 things I feel sorry at this point. The first one is the fact that we don't know when we will see fairs and offline e-sports events that are great in every sense such as Gamescom. The other one is the fact that the teams organizing these fairs and being a part of the supply chain actually have financial difficulties. I hope that life returns back to normal in every sense as soon as possible.

# TURKISH GAMING SECTOR EXPERT OPINIONS

## TURKEY GAME MARKET REPORT 2020



**KAMER KEMERKAYA**  
COFOUNDER CEO  
MORALABS

The entire world lost its joy in 2020 due to pandemic. The world goes through a rough period due to the anxiety caused by uncertainties on one hand and limitation of freedoms on the other hand. Just at this point, gaming sector comes to help people and provides them with a great type of entertainment. I also take pleasure in being in this sector exactly for this reason. Looking at 2020 reports, we observe that download and play rates of the games increased worldwide. Specifically, the increase in investments of local companies in Turkey over the past years and development of games for global companies by the small gaming companies enabled a serious boost in ratings for the Turkish gaming sector in 2020. The number of people who played a game at least once on their phone reached almost 65%.

I think that this rise will continue similarly in 2021. All these developments are quite encouraging gaming sector, particularly for Gaming Sector in Turkey. My dream is that Turkey becomes one of the game development centers in the world. I think that this dream is quite realizable as we have very talented, ambitious and motivated game designers, visual designers and developers on one hand and lower costs on the other hand. It's true that we'll accomplish this objective sooner with an increase in incentives to be provided in this field by the government. Wishing the best of luck to any developer and studio developing games fearlessly with all the energy and without giving up despite all the challenges.



**CEM NAHİT KONE**  
NETMARBLE PC  
DEPARTMENT  
DIRECTOR

2020 has been a year of ups and downs for gaming sector. We can say that it has been a very important year for Turkey, particularly for game studios. The size of mobile gaming sector reached to a point that is bigger than the sum of sizes of pc and console gaming sectors.

2020 has been a year in which people were locked at their homes due to pandemic. The pursuit of entertainment at home environment canalized playing and non-playing masses into playing games. Mobil gaming sector sustained growth by accelerating due to friendliness of mobile devices and their quickly consumable games. Likewise, types such as multiplayer, party games that are competitive and played online got a lot of attention. I must point out that influencers who can address wide masses by using social media products have a huge share in this exponential growth. For Turkey, big financial investments into the game studios made both many people from various sector within the country and investors abroad steer towards large and small game studios in Turkey.

I anticipate that same growth trend will sustain in 2021. Especially, the games with social contents and making good use of influencers will leap forward. I also anticipate that online e-sports activities will increase and the sector will grow in this field. I have no doubt that game studios in Turkey will win new victories and investments.

# TURKISH GAMING SECTOR EXPERT OPINIONS

## TURKEY GAME MARKET REPORT 2020



**HAMZA SÖNMEZ**  
MANAGING PARTNER  
SANGAL ESPORTS

As Sangal Esports, we started 2020 with rebranding and restructured staff. We set off with a sharp and clear strategy to achieve our objectives as a team that is committed to its job with passion. We had opportunity to access and inspect many local and international examples while defining this strategy. From this point of view, we took very important lessons on what not to do.

We won 1x ESL Turkey Championship (CS:GO) and 1x ESEA Advanced S35 European Championship (CS:GO) in 2020 when our team chemistry is settled and our investments in necessary digital environments started to yield results slowly. We've become a team to compete for the top position at any time in not only Turkey but also in international arena for FPS games with our Valorant and Zula squads that we built towards the end of year.

Looking at statistics at this point, Sangal Esports is identified as a team whose matches in the leagues it joined in Europe are streamed in 4 different languages, whose live views for any match are approximately 100,000 even if the match is in the late hours of the night due to time difference and whose social media activities address millions of people per month and most importantly, whose connection with the fans are strongest compared to the other e-sports teams.

In 2021, we intend to further increase these investments, make e-sports that is one of the biggest parts of the digital entertainment sector out of its shell more, and become one of the greatest stories in Turkey with our professional team identity.

Another expectation is that pandemic tapers off and then, we start procedures to open our gaming base where we'll have the opportunity to work side by side with our team. We intend to have a structure that responds all of the player needs and makes great contribution to their career development with this base.

# TURKISH GAMING SECTOR EXPERT OPINIONS

## TURKEY GAME MARKET REPORT 2020



**BURAK GÜVEN  
AKMENEK**

FRAGTIST.COM &  
FIBER PR FOUNDER  
GAME DEVELOPER

No matter the past "cursed" year caused fundamental changes in our lives, it was good for gaming sector in particular. Everyone turned to technological devices that are the easiest entertainment center to reach as they had to stay at home. Internet tariffs were frequently exceeded while mobile phone, and particularly computer and complementary product sales increased. This actually brought hardware and games, which are two sector that trigger each other, to forefront. Let's set manufacturing and logistic issues related to hardware sector and their details aside. Mobile game development boomed. The interest in investments, which is the biggest trouble faced by every game producer, was at the peak point. Such that producers started to choose companies rather than companies choosing game producers. In 2021, we'll see that seeds spread become green at many places.

Since interest in mobile is based on the urge for quick move into profit, it's a highly reasonable choice from investors' point of view. Also, large company sales made in our country and probably mentioned by anyone commenting on the sector whet appetite. However, we should also remember that two big companies sold are few in number with regard to tens of existing gaming companies. Everyone talks about the successful one. No one speaks of failures. Considering the government aid at hand, we must say that our universities do a good job here. Unfortunately, it's hard to say that the pc/console game production, which requires more investment and time, has a similar momentum. It seems that problems of required know-how and insufficient human resource will continue in the next years for the pc part. I can't say that I follow the electronic sports very closely. However, I see that operations here are completely moved to online platforms easily. They integrated quickly. Let me make a short explanation concerning "communication", which is another field that I work in: Social media is now more important than ever. It's because that our communication is almost completely virtual. Therefore, I believe that expressing oneself accurately has become much more important than before. We should be much more precise when choosing words.

Envisioning 2021 is not that easy in a world that is just put in order and in Middle East that consistently goes through crises. With the most reliable estimation, I believe that rise in 2020 will continue in 2021 at our sector, where all you need a notebook and internet connection to be at office. Just hoping that we stay healthy.

# TURKISH GAMING SECTOR EXPERT OPINIONS

## TURKEY GAME MARKET REPORT 2020



**CİHAN ÇELİKÖRS**  
DIRECTOR  
IGG

2020 was another year of many events and in-game updates for IGG. With Lords Mobile, which is always ranked in top 5, Fetih, which consistently increase the number of players, and Dress Up: Time Princess, our new game, we made great progress in terms of adding any type of player into our platforms for various types of games. We issues new contents and organized social media events for many games of us in line with the feedback from the players. Unfortunately, we couldn't hold our conventional events due to corona in 2020, but we'll reciprocate as the conditions hopefully get better in 2021.

In 2021, we'll maintain this vision with 8 new games, and with our existing games, exceed the download target of 12 millions in total in Turkey. When Turkish translation of Dress Up: Time Princess is added to the game, I'm sure that it'll draw great interest from Turkey. Also, we'll continue to provide competitive mobile game experience that is ongoing for more than 5 years by continuing both online and offline events for Lords Mobile and Fetih: Altınçağ. IGG's journey in the Turkish market which started with Castle Clash will continue to strengthen and develop each year with more games that are always rich in terms of visual quality and content. I hope that 2021 would be a vivacious year for gaming sector, and the year when corona finally ends.



**SEMA YILDIZ**  
ACER TURKEY  
MARKETING  
MANAGER

2020 has been a year in which all of our habits changed with the impact of pandemic. We adapted to the conditions that changed due to restrictions, and moved all of our processes to online, particularly the mandatory ones. First of all, the increased amount of request for computers due to working from home and distant education in this period resulted in an unprecedented increase in the pc category both in Turkey and globally. One of the fundamental factors that contribute to the increased amount of request for pc's has been usage for entertainment purposes. At this point, all gaming computers from beginner to top level had an increase in the amount of requests. We increased the amount of sales for gaming laptops with both Nitro series and Predator, which is the first gaming brand that is awarded with Red Dot brand prize in 2019, at a rate much higher than the 2020 pc sales increase rate in Turkey.

While we take part in the gaming sector via products that meet the needs and requests of the players, we provide a platform where competitive players and casual players can join e-sports matches via our next generation e-sports platform, Planet9. Besides, we are the only official pc partner of IEM events of ESL, the biggest e-sports company in the world, with our brand Predator since 2016. We had completed our entire integration digitally as a result of the decision that IEM finals to be held physically in Katowice in 2020 February would be played with spectators, just one day before the organization. We can say that interest in e-sports increases year by year, considering that the view count of this event for which pandemic required digitalization, increased to 63 millions while it was 23 millions in 2018. We'll see that a part of the physical events if not all of them will be replaced by the digital events in 2021 and the following years.

# TURKISH GAMING SECTOR EXPERT OPINIONS

## TURKEY GAME MARKET REPORT 2020



**ASLI KARABULUT**  
PRODUCT  
MARKETING  
MANAGER  
ROVIO STOCKHOLM

Last year has been one of the most unpredictable years in the entire history of humanity. Curfews imposed due to pandemic has dramatically increased the time spent across screens. Games increased the life quality of millions of people worldwide during the COVID-19, and played a significant role in the entertainment and social connection vertical as the fundamental way of removing the tension caused by pandemic. People spent more time than ever to play games in 2020, and gaming market has seen interactions at an unprecedented level in the first half of 2020.

Ten years ago, we were discussing that the young people abandoned the traditional media for social media. This year, we started discussing that they abandoned social for the highly interactive experiences offered by games. Fortnite hosted a concert while Animal Crossing hosted a talk show. Again this year, we witnessed that World Health Organization (WHO) highlighted games as a recommended social activity during the pandemic.

Mobile games continue to help games reach to a wider audience around the world by going through hoops. Last year alone, more than 90 million new "mobile" players entered into the ecosystem. We can say that sustained growth of hyper-casual games is one of the most significant factors that contributed to this growth. This year, it's in question that "hybrid-casual" model, which we started to discuss when hyper-casual game segment achieved saturation, made a breakthrough, and we'll see that more hyper-casual game developers will take steps to increase the game lifetime.

Besides, we can say that the "visuals" will be the new king as the upcoming IDFA changes will modify our view of marketing. Adaptation of traditional marketing methods to today's gaming world will be an interesting experience for all of us.

# TURKISH GAMING SECTOR EXPERT OPINIONS

## TURKEY GAME MARKET REPORT 2020



**BATURHAN GÜRBÜZ**  
GAME DESIGNER  
KODOBUR

2020 has been an active and effective year for us, game developers, even if it has been a challenging and painful year in general. Increase in the number of gaming companies opened in Turkey and quality game production led to the fact that both global headhunters and many local and global investors that want to make an expansion into the MENA region in particular to notice and scrutinize the values in our country, and launch investment activities in our country.

The fact that substantial increase in the number of users and sales for us, console game developers, in this period played a significant role for inflow of foreign currency to our country is of importance to us. Besides, the increase in the sales rate for the console products is an indicator of the fact that a much larger gaming audience will meet us in 2021 and we'll have an positive increase in inflow of foreign currency. For 10 years, we're leading and proudly performing the task of creating a pool of information and experience in relation to the console sector on behalf of our country as a company that collaborates with Nintendo and Sony PlayStation even though the fact that console sectors are like a wild card and it's hard to get market data makes it harder to enter into a sector like diamond mine.

In the console sector, the increase we saw over the past year with regard to multiplayer, role playing and party game categories and cross-platform games is an indicator of both the fact that they'll be the "top" categories in 2021 and that people's need to socialize has increased. In this case, it seems that a process in which social player type and mechanics related to this player type will be important awaits us.

Release of PS5 and the new market it created for console developers like us crack the door open for a significant process, which is an important development in 2020-2021 for console developers. As one of the first graduates in this field, observing that awareness of the gaming sector increased in Turkey both elates me and gets my hopes up for the future.

# TURKISH GAMING SECTOR EXPERT OPINIONS

## TURKEY GAME MARKET REPORT 2020



**EMRE ATEŞ**  
MARKETING  
MANAGER  
PAYBYME

Looking back on the past, we'll likely remember 2020 as a turning point with plane crashes, earthquakes, fires, and surely the pandemic and the consequential economic crisis. Despite all the problems, pandemic has enabled many innovations in finance and technology sectors. It has caused generation of new solutions unavoidable while accelerating the digital transformation. Yet, we can say that all the economic crises didn't prevent the gaming sector from development, and even accelerated its growth like a catalyzer when we look back on the past.

This recurred in 2020. Curfews and closure of the place of entertainment change the course of entertainment sector. We passed a year in which the time spent with game consoles, computers and/or mobile devices increased, records were broken in terms of concurrent players for games, and acquisition of new players and revenues (game purchases and in-game purchases) peaked.

On the basis of the figures in the report, we see that generation Y dominated the gaming sector by exercising the purchasing power. However, we have no doubt that generation Z will penetrate into the sector so quickly since we know how inclined it is to digital transformation. Therefore, it's not rocket science to estimate that user penetration, total player count, size of Turkish market and spending per user will rapidly increase in the next 5 years. Such a growth of the sector also cultivates the culture of game video streams and e-sports.

Millions of viewers follow e-sports tournament and the streamers they like on YouTube, Twitch and other platforms. And that turns the video games into profitable "entertainment" planned as a sports organization rather than just a network activity. Once a niche hobby has now turned into a billion dollar entertainment sector and also, one of the most important sectors in the world. On behalf of my company, I can say that we'll continue to seize the most important place in the triangle of game, player and payment as part of the competition in the global and local market with our next generation alternative and impeccable payment methods.

# TURKISH GAMING SECTOR EXPERT OPINIONS

## TURKEY GAME MARKET REPORT 2020



**BATUHAN AVUCAN**  
FOUNDER &  
MANAGING  
DIRECTOR  
MOBIDICTION

In 2020, mobile game sector sustained development in our country. The fact that the games developed by Turkish game studios hit the top, and that streamers supported the studios with foreign currency per prototype made a contribution to creation of many other new game development studios. When the shares of Rollic, a hyper-casual game developer and publisher, are sold to Zynga, Turkey officially proved its success in this field and the world steered towards Turkey.

International hyper-casual game developer companies wants to have a share of this market by recruiting Turkish business developers and working with Turkish game studios. However, many subjects such as increased competition, improved game mechanics, extended period of time for prototyping raised the bar for being successful in this sector.

I believe that the trend of acquisition of small studios by the large studios to expand their player networks will further popularize in 2021. Also, I'm of the opinion that publishers will be more careful during prototype based agreements, and therefore employees in many small studios will switch to studios that already have a successful game.

Hyper-casual game trend will continue and Turkish game studio maintain their success. Nevertheless, studios which get tired of this competition and those which want to take a breather will turn to more settled types of games which we call casual&mid-core, have longer playing time and bear mechanical profoundness.

# TURKISH GAMING SECTOR EXPERT OPINIONS

## TURKEY GAME MARKET REPORT 2020



**TANSU KENDİRLİ**  
OYUNDER  
PRESIDENT

Considering gaming startups which were founded in the past two years and reached almost 150 in number, and more experienced companies which continue to get investments, we can easily say that gaming sector will be the favorite sector and this trend will sustain in the next period.

Millions of new players and viewers has become users of Steam, Mobile platforms, YouTube, Twitch and new gaming sector services. It can definitely be said that this is a direct result of the pandemic, but it's no secret that a significant part of these players will become irreversible players.

We'll see this more clearly within approximately 2 months when profitability of the game companies is announced for 2020. It won't change with or outside Turkey. It also applies to e-sports sector as well as the increased revenue and profits achieved by game publishers and developers. In 2020, e-sports sponsorship agreements increased up to a total of 584 million dollars around the world while revenue yielding media rights increased to 163 million dollars.

Player age demographics are evolving: (In the research published by Statista) here is the breakdown of rates per age group of top game players according to the latest research for the age range 18-64 in Turkey: Age: 25-34 Rate: 33.4%, Age: 35-44 Rate: 27.4% and Age: 18-24 Rate: 24.7%. Especially the increase in the rate of the age group 35-44 clearly reveals that prospective permanent impact of this transformation will be a significant group of players in 5 years who will then be at the age of 50. I can say that the increased interest from the young students, as people with this process, will irreversibly boost this transformation and production, the amount and quality of investments within a period of few years. Any new data presented by this type of research which is done periodically by Oyunder and regularly by Gaming in Turkey support that.

An advice of top priority for investors who grew fond of this field is that they should try to understand fundamental operating principles and business processes of the gaming sector.

# TURKISH GAMING SECTOR EXPERT OPINIONS

## TURKEY GAME MARKET REPORT 2020



**ÇINAR ERGİN**  
AGENCY PRESIDENT  
ARİSTO İLETİŞİM

Even though the adaptation rates of the companies differ, digitalization over the past years continued to increase around the world. The pandemic we faced suddenly in 2020 accelerated the digitalization even if it caused a chaos at first, and all sectors had to get digital. Gaming sector has grown further in this period. Play time per person increased by almost 30 percent while the number of players around the world increased to 2.7 billion people. The brands that saw the potential of the sector and took action before the pandemic had the edge on.

Other brands started building their own e-sports teams, designing collaborations with gaming sector, and making efforts that improve motivation by organizing in-house tournaments, in this field where they just discovered.

Brands focused on how they could be more involved in this part of the digital world (where returns are easily measurable). All brands maintained their routine efforts while they tried to pull out stronger from the pandemic by renewing themselves. This challenging period also made communication professional go through the hoop.

Next generation media and social media journalism has become more popular while conventional communication methods slowly taper off. The sectors that dominate the digital world gained further importance for the collaborations that inspire interest in the target audience.

Collaborations with the gaming sector has become one of the most effective communication methods for any brand not just those who discovered it. We wouldn't exaggerate if we say that brands have to align with gaming sector and shift their projects towards this field to put a signature under effective projects in 2020 and 2021.

# TURKISH GAMING SECTOR EXPERT OPINIONS

## TURKEY GAME MARKET REPORT 2020



**HARUN ÇAY**  
OPERATION &  
ESPORTS MANAGER  
NFINITY GAMES

As Nfinity Games family, we primarily wish that everyone remains healthy in 2021. 2020 had caused many difficulties. The impacts of process of Covid-19, which affected our lives at most, in Turkey and around the world, and specifically the periods of lockdown made us go through a really tough year psychologically. However, our biggest supporter in these challenging times was the gaming world again. As Nfinity Games, we changed this negative atmosphere starting in the second quarter of 2020 a little bit by making much closer connections with our players. We started providing services 24/7, and provided support for our players through all channels. We've been the first company that provide local in-game language support in Azerbaijani language among the popular and rooted games by implementing Azerbaijani language support at the beginning period of the pandemic. Having pioneered for many things in the past years in Turkey, our company added a brand new dimension to the logic of in-game purchases in the early 2020 and introduced our app name TAM Store to our players. We included our new members from the European countries into our well-established community by taking another huge step as we approach the final days of 2020. Looking at the e-sports part, we continued enabling our players enjoy the thrill of e-sports with our casual tournaments even if we paused our league. As the challenges faced in 2020 start to create a new order, we witness that gaming sector has a very important place in this order. As Nfinity Games, we'll be in full flow for our efforts for the world of gaming and our players to enjoy more advanced experiences in 2021. We wish everyone a good year.



**ERAY UYGUN**  
SENIOR PUBLISHING  
MANAGER  
FUNPAC GAMES

We passed a year in which studios had one investment after another, foreign publishers used Turkey as a source of software experts, and new young graduates entered into the gaming sector at full speed. We got used to see our titles in the ranking for most downloaded games in the world. Now, everyone knows that we're in a non-negligible position specifically in the Hyper Casual type. While all these prepared the Turkish game sector for a beautiful future, 2020 has also been a year which shows us that we've have a lot to do. The fact that we have a few games that are in the world ranking in terms of revenue for Mobile Casual/Midcore categories, that big names in the sector prefer going abroad for better opportunities and that PC/Console game developers still struggle for months to find necessary investments (and mostly fail to do so) show us that we have actually a lot more to think about. Regardless of the platforms, realizing long term projects whose development processes are at least 6 months long and making investment to enable this will not only contribute to maturity of the sector but also ensure eventual fulfilment and proliferation of positions such as Game Design, Level Design, Monetization, and Live Operations, which is one of the biggest deficits in our sector. We wish that 2021 will be a year in which we see our unnoticed weaknesses and make efforts to improve them.

# TURKISH GAMING SECTOR EXPERT OPINIONS

## TURKEY GAME MARKET REPORT 2020



**CİHAN AĐAĐIŐIŐI**  
OVERSEAS  
PUBLISHING  
DIRECTOR  
WIZARD GAMES

First of all, congratulations everyone for completing the 2020 safe and sound. We did it. Many sectors including the gaming sector went through radical changes in this period when we had the weirdest days of our lives. Online casual games, which we are used to see on mobile platforms, started making an impact on all platforms with the increased amount of request for games at from every walk of life during the period of pandemic. We're going through a period in which low-budget games have bigger success than huge-budget games. In the forthcoming period, we'll see what type of impacts this situation will have on the gaming sector together.

Besides, big acquisitions in Turkey by the global companies both draw global attention for Turkey and present a source of motivation for Turkish game producers. We see more local startups related to digital games as days pass. This is something that we really want to see for years and a source of happiness for all of us. It's no more a romantic approach to expect for digital game projects to make an impact in the world rather than just Turkey in a short period of time. As Wizzard Games, we'll speed up our Turkey-specific investments in 2021 to be a part of Turkish gaming sector, which quickly grows in all aspects.



**BűŐRA SU TűREYYEN**  
MARKETING & TALENT  
MANAGER  
GAMING IN TURKEY

I think that the increase we saw most clearly with the release of new games by Riot and many other gaming companies in 2020 was of service to streaming and youtuber sectors. We can say that the gaming sector really had a golden year even if many areas were closed or became smaller due to COVID-19 especially in the group of other sectors. Due to pandemic in 2020, both the number of new users and current games and surely, the number of alternatives specific to influencer marketing increased in the gaming sector. So, we look forward to seeing new talented figures and streamers also in 2021 and believe that we'll see more due to acceleration it gains accordingly. If we exemplify that we convert overall marketing efforts of brands that start advertising efforts in the gaming sector in 2020 into show-like formats, we can say that the new figures in the world of Twitch and YouTube within this year have professionally created a new career path and business line.

With 2021, we entered a year in which we wish the developments in the marketing world continue at the same speed and frequency, and we're following the developments. See you in the next report.

# TURKISH GAMING SECTOR EXPERT OPINIONS

## TURKEY GAME MARKET REPORT 2020



**TUNGA SANALP**  
CEO & FOUNDER  
JIB GAMES

The rise of interest in gaming due to large purchases and lockdown was great for the sector in 2020. However, many games had delays and postponements due to shift to remote working in less than no time and health measures. We're going through a period in which entertainment moved from streets to homes and cinema and tv contents fell short. Pandemic also moved the gaming from entertainment sector to needs sector.

As Jib Games, we consider qualified human resources as one of the biggest problems of Gaming Sector in Turkey. Therefore, we realized Jib Academy to encourage newly graduated young talents to develop games. In 2021, we'd like to provide physical training in addition to our online tutorials. We have a human relations expert working only on this matter to be able to reach more people.

Polity has further accelerated due to 2 very valuable investments in 2020 and Jib Academy. Polity, on which we're working for 2 years, is a multi-user platform to host tens of different games on it. Players can establish and manage their own countries and choose one of tens of occupations. Moreover, the character they create can continue the game when they're not in game. Besides, we'll present training focused contents in the next period on Polity and by making use of the technology it contains. We intend to introduce Polity to Tier1 players at first on Steam this year and then on mobile platforms.



**UMUT ERSARAÇ**  
AMAZON WEB  
SERVICES (AWS)  
TERRITORY MANAGER  
- TURKEY

We are excited by the growth and continued innovation of the games industry in Turkey. In 2020 we saw further acquisitions of leading Turkish developers, which highlighted the momentum of our local gaming industry and speaks further to the global significance of Turkey as a center of excellence in game development. Behind great games, developers of all sizes are using AWS Game Tech to build games faster, operate smarter, and create immersive experiences for players all over the world. Today, we see thousands of game developers are utilizing cloud technology to invent and deliver the next generation of games. They are breaking free from traditional on-premises solutions, moving production processes to the cloud, using data and analytics to better understand player experiences, and building connected worlds that scale to millions of players at launch and support milli-second low latency multiplayer sessions, wherever and however they play. As we move into 2021, mobile game developers will continue to thrive, and the next generation of hardware and GPU's will see a flurry of new PC and console projects. This will likely prompt a rise in the number of accelerators, incubators and VCs working with game developers, giving a welcomed boost to the number of game studios numbers in the startup ecosystem.

# TURKISH GAMING SECTOR EXPERT OPINIONS

## TURKEY GAME MARKET REPORT 2020



**CENK ÇELEBİOĞLU**  
FOUNDER  
COMPOSER  
25M2

We spent 2020 mostly at our homes due for the reasons you know. We tried to manage anything from our businesses to lives under the same roof. This led to many innovative approaches and solutions. As I always say, the definition of innovation is as follows: it's the process of necessarily realizing the ideas generated in short and tough times. Many sectors such as music, idea (agency) made further investments into technology so that they can survive. For instance, we converted music production into an online format. We completed the records digitally instead of meeting in the same studio environment. We moved our entertainment needs to digital environment for preserving our psychology while doing our business with technology. We moved almost anything from concerts, matches/gaming tournaments to conversations with friends to online environment. We all suffered and are suffering from its negative aspects and difficulties. On the other hand, it had positive outcomes such as more dedicated use of time, increase in the amount of concurrent works, and more importantly, generation of effective business results in my opinion. I wish we hadn't suffered from such a pandemic for these positive discoveries. I hope that our lives will return to their regular course soon, but I don't think that we'll change these business manners and entertainment consumption models even then.

I think that the gaming sector made great profit in the light of all these developments. Gaming industry, which is one of the sectors that allow people to have good time at their home, has already passed the film industry. Gaming companies continue game production at full speed with the advantage of production in closed areas and online unlike many other production areas. That increased the number of our options, which was already high. The gaming sector, which got into a lot of action with PS5 and new Xbox series, had a good year on both gaming part and e-sports part in 2020. We create and consume together due to the technology... My expectation from 2021 is to meet again in the e-sports tournaments where we overflow in the crowd once the pandemic ends as we played our games healthily at the comfort of our homes with pleasure. I wish everyone healthy, beautiful days with plenty of players!

# TURKISH GAMING SECTOR EXPERT OPINIONS

## TURKEY GAME MARKET REPORT 2020



**METİN REDJEPE**  
DLIVE GLOBAL  
COMMUNITY  
MANAGER AND  
GROWTH DIRECTOR

As DLive, we were ready for a rapid growth while planning for 2020, but start of the pandemic and the lockdown very quickly led us and the sector up to an utterly different point. The fact that people spend more time at home caused a significant change in the way people experience new things. We focused on the people who entered into this world for the first time by closely monitoring this process, and created content for people who were recently introduced to our sector along with existing investments into games and streamers. We enjoyed the excitement of the cancelled European cups with a big online football tournament joined by 24 celebrities and football players in the first days of the lockdown period. Starting with this, our events during the lockdown introduced an important audience who has never watched online game streams to our sector. With the extension of the lockdown period and faster integration of the people to the digital world, not only people who consume content but also those who create content have increased considerably. Focused on a few games only before the lockdown, online streaming sector has evolved into a field where many more games draw attention due to the fact that people spent more time playing games and new players joined. Non-game streams and sectoral streams also had a chart of big growth. Even if these developments are triggered by the pandemic, we believe that people will continue their experience after the lockdown, and that lockdown period didn't create a temporary hype and only accelerated the adaptation process. We intend to sustain our growth chart without slowing down in 2021.



**ERCÜMENT SUBAŞI &  
FERİDUN EMRE  
DURSUN**  
MADROOSTER GAME  
AUDIO LAB  
FOUNDERS

2020 has been a year in which global gaming sector ramped up with the expansion of the player community due to pandemic. Turkish game developers also made use of this movement and achieved great success worldwide. As MadRooster Game Audio Lab, we worked hard too, and involved in some of these successful projects with our sound and music. In 2021, differentiating in the eyes of the users will be more difficult in this market where competition gets tougher day by day. Therefore, sound design and music production, which is a significant part of the game development, will have more impact than ever for the games to stand out. We're sure that it will be a year in which we'll unveil many new global brands.

# TURKISH GAMING SECTOR EXPERT OPINIONS

## TURKEY GAME MARKET REPORT 2020



**ÖYKE CAN ASAAD**  
ESPORTS  
MARKETING  
EXECUTIVE  
BENQ

The New Normal, Valorant, Cyberpunk77. Those three headlines were the most impactful ones if we are to talk about gaming industry in 2020. As the time we spend outside has been limited due to the lockdowns all over the world, the time we spend for games increased for everyone even though slightly or drastically. Digital marketing, events and content became a strong foothold over the past decade for gaming and esports. Due to the fact, gaming industry showed a great agility to adapt itself to the new normal.

Valorant made flashy entrance to the esports. Become one of the most popular FPS games in the market if it's not the top. The localization and overall organization experience Riot has from LoL played an important part of the successful start of Valorant.

Cyberpunk77 unfortunately couldn't meet the expectations of the fans. It's hard to say that if the problem was the overstated hype or the premature state on the release of the game with gigantic bugs and glitches or both... On the other hand, AC Valhalla played his part silent but deadly. Even though the fans criticized the Assassin Viking concept in the beginning, the game actually got very positive criticism after the release.

In 2021, we will witness a new rivalry, CS:GO - Valorant, as it was a fair competition in between Dota - LoL which pushes both franchise further until now. CS:GO was dominating the FPS Games genre so long, it became monotonous and "forgotten by valve" some fans says. I think as the visibility of Valorant increases in the market, Valve will have to make some major actions to get in competition.

# TURKISH GAMING SECTOR EXPERT OPINIONS

## TURKEY GAME MARKET REPORT 2020



**ALİ BARUTÇUOĞLU**  
LOCPICK  
CO-FOUNDER  
& CEO

We witnessed that the interest in Turkish game market increased at an unprecedented pace as the gaming sector grows quickly in 2020. As Locpick, one of the greatest sources of evidence was the fact that the number of our game localization projects increased exponentially and more companies than ever contacted us to be able to offer their games to the new players with localization into Turkish language.

We saw that competitive games that are both free-to-play and localized into Turkish language such as League of Legends, Fortnite, and Valorant were in top demand in Turkey this year as well. However, I think that breakthroughs such as Game Pass and GeForce Now will remove two barriers (hardware and pricing) in time for players in our country to be able to experience various games. The language barrier, which is the third barrier, is being removed as more companies turn to localization into Turkish language every day.

On the other hand, 2020 has also been a year in which our local game developers quickly covered a lot of ground. Our country's success in the field of hyper-casual games is already apparent. We hope to see similar success increasingly more often with pc and console game developers.

As Locpick, we keep in touch with local and independent game development teams and do our best to be able to support them accordingly. We'll continue to share our know-how and resources with our independent game developers so that they can expand worldwide in 2021.

We intend to provide more support than ever in 2021 to our developers in the fields ranging from narratives to vocalization, arts design to original music production for games developed by our country so that they have higher product values in any field.

# TURKISH GAMING SECTOR EXPERT OPINIONS

## TURKEY GAME MARKET REPORT 2020



**ULUÇ ALİ KIRANGİL**  
HEAD OF  
GAMING IN TURKEY

Turkish gaming sector would achieve growth in 2020 as in 2019 as a result of standard expectations. However, the pandemic hadn't been planned. This period caused the sector go beyond the standard growth curve in terms of both turnover and the number of players. At this point, online gaming ecosystem expanded while organizations and cafes in the offline world were badly damaged in this process as many places were closed down. Therefore, gaming sector itself had to invent new digital channels. As Gaming in Turkey, we have been trying to tell the brands over the years that the audience in gaming sector is actually the audience they want to reach on via various media. In 2020, we saw that brands realized that and shifted their marketing investment from outdoors to digital games. We can't deny that this will increasingly continue in 2021. Sector will keep growing globally and in Turkey. This growth indicates that advertisement spending also needs a change now. Just like shift from conventional media to digital, a part of the digital must shift towards games. It's normal for brands to fall behind in a period when conventional ad agencies yet fail to get a hold of gaming sector, but there are companies allowing for brands and players to meet. Now, it's time for brands to leave their comfort zone.

It's clear that we have different means of accessing players with the increase in internet speed over the next years, but I think that sector will continue its growth through games again rather than the platforms as more games will be released for the increased number of players in 2021. At this point, Turkey will be the starting point for companies due to its young population above the average of Europe as well as the fact that it's a transition route for Europe and has impact on the Turkic Republics. Having started its journey in a small room 5 years ago, Gaming in Turkey will continue to reinforce its link to the gaming sector with operations spanning over 3 continents in 2021 and we'll continue to introduce various players to games. Even though the steps we were about to take in the Middle East were delayed in 2020, it seems that 2021 will wipe this delay out. Particularly, certain areas of interest in Europe draw the agency's attention. As Gaming in Turkey, we have a team that makes good use of the opportunities, and we'll keep expanding by adding new colleagues to this strong team in 2021. I wish that 2021 is a year of both welfare and success for anyone.

# TURKISH GAMING SECTOR EXPERT OPINIONS

## TURKEY GAME MARKET REPORT 2020



**FARUK FURKAN  
AKINCI**  
FIBER GAMES  
FOUNDING PARTNER

2020 has been a year in which Turkish game sector made great progress. Specifically the success and sales in mobile game production and streaming made the investors and bureaucracy pay particular attention to the gaming sector. It's yet difficult to say that it has become an industry, but I believe that we've got over a very critical threshold: Now, the gaming sector has a socio-economic correspondence in our country. From this point on, it's in our power to turn our sector in a multi-layered industry where production of intellectual property is further valuable. On the other hand, I think that hyper-casual business model has made a very good transition into the production ecosystem of our country. It has enabled a great starting point for many young entrepreneurs to enter the sector.

Mobile game production will continue increasingly in 2021, but innovative studios will stand out more among the crowd. Developing visible games for players, regardless of its type such as hyper-casual, casual or mid-core, becomes more difficult day by day. The number of contents uploaded into the app stores per day is constantly on the rise. So, especially the designers who develop ideas for main game mechanics, level designers, arts designers will be the outstanding departments in game production. Finally, being able to draw the player into a game and then keeping that player in-game though live operations will become more difficult than it is before. I think that teams working in coordination with each other, and studios that can transfer their creative and intellectual processes clearly into practice will achieve success.

Our country presents vital opportunities for both local and foreign investors. Doors to a rock solid sector that is not affected by pandemic or crisis were opened for them. The resiliency and sustainability of the creative content sectors has been proved once more in this pandemic environment for many people or organizations that are known to be skeptical about the sector until today. Any investor who can establish an organic bond with its studio will gain success.

# TURKISH GAMING SECTOR EXPERT OPINIONS

## TURKEY GAME MARKET REPORT 2020



**SİNAN AKKOL**  
FIBER GAMES  
FOUNDING PARTNER

In 2020, the world witness the things that it has never seen before... as the humanity, we found ourselves in the first year of a dystopic future from the Deus Ex, a memorable sci-fi game, all together. It was quite natural that the games came into prominence as the only occupation that will ensure getting rid of the stress caused by the situation for people who suddenly found themselves deprived of social life that they are used to. We found a way of feeling good either in the world of sophisticated world of virtual reality or in the easy to play yet relaxing hyper-casual games.

Consequently, 2020 was a positive year for Turkish gaming sector as well. The fact that first unicorn of Turkey is a gaming company (Peak), young companies that sold shares following a very good position in terms of valuation in a very short period of time (Rollic), and a PC game that acquired a community and sales support at a sufficient level for competing against AAA games (Mount & Blade Bannerlord) made the players in the static economy of our country bore into gaming sector. Our country started competing for the world leadership in the category of hyper-casual games in terms of both production rate and quality, and foreign exchange inflow. These were the developments that will pave the way for and gear up the new success stories in the gaming sector of our country in the short and mid-term.

I believe that Turkish gaming sector will grow without slowing down in 2021. Maybe, we'll not talk about big financial figures as we did in 2020, but we'll frequently hear small and medium sized company acquisitions, mergers and new success stories, and this will be just the beginning of a story of growth in Turkish gaming sector! Our gaming sector that grows constantly as the lack of experienced staff, which we currently suffer from, is made up for by both universities and the young people who improve themselves, and new initiatives meet single-minded investors, will proceed towards being one of the most important economic actors in Turkey, which we stated in quiet until today.

I know that we had a tough year. However, we're yet at the beginning of our journey for the hardworking, ambitious and young Turkish gaming sector, and the road ahead is quite bright.

# TURKISH GAMING SECTOR EXPERT OPINIONS

## TURKEY GAME MARKET REPORT 2020



**BURAK AKAR**  
DIRECTOR OF  
OPERATIONS - CCM  
TELEPERFORMANCE

The pandemic that affected our lives by all means in 2020 had both positive and negative impacts on gaming sector. Postponing big productions due to restrictions and social distance rules was brought to agenda while some games were released in an incomplete status. We witnessed that people show more interest in old-fashioned games and online games in these days when we stay at home. Players like me, who previously didn't have much time to try out older games, had the opportunity to do so. Increased interest in online games allowed for further growth and development of online gaming sector.

Increase in player support requests were observed around the world with the increase in the number of experiences. Some gaming companies preferred to extend support hours while others changed the response times to balance the costs. As Teleperformance, we expanded our player support teams by considering the serious demand growth in Turkey while monitoring all these changes closely. We both prioritized the health of our employees and their families since the first day of the pandemic, and increased the business sustainability of our brands. The teleworking model we built helped us increase the motivation of our player support teams as well as maximize our efficiency.

In 2021, we expect the pandemic to taper off and gaming sector to achieve growth in our new normal by being more successful due to the learnings. Other the other hand, we hope that all big organizations that were cancelled or held online to come back into our lives.

# TURKISH GAMING SECTOR EXPERT OPINIONS

## TURKEY GAME MARKET REPORT 2020



**BATUHAN ÖZMEN**  
HEAD OF  
COMMUNITY &  
INTERNAL  
OPERATIONS  
GAMING IN TURKEY

2020, last year, has been a year that affected the entire world deeply, couldn't be predicted and resulted in losses regardless of the sectors. In 2020, games started to appeal to people from almost any generation, and managed to be a field in which people spent much more time than the past years. Play times, in-game purchases and naturally the overall gaming sector managed to take its place among the rising stars in 2020.

Considering the conditions of the past year, increase in social media usage is also among the visible stars. People visited social media channels much more frequently, generated content and levelled up their interactions with each other, throughout the period in which they stayed at home. E-sports, which is the rising trend in the world, made its mark more clearly as of 2020. It has become an ecosystem into which brands, companies and large organizations started to enter. Offline organizations that can't be held due to pandemic were moved to online environment. Brands organized online tournaments and events to boost interaction with players, who started to play more over the year. Some corporate companies held intracompany or intercompany online tournaments and events to be able to provide motivation for their own staff.

The unavoidable rise of gaming sector that continues over years seems to set sail for new horizons by further accelerating as of 2020. Gaming sector is all set to become one of the biggest ecosystems in the world with the producers, streamers, advertisers and brands in it.

# TURKISH GAMING SECTOR EXPERT OPINIONS

## TURKEY GAME MARKET REPORT 2020



**GÖKÇEN ORHAN**  
BUSINESS  
DEVELOPMENT  
MANAGER  
NEST LANGUAGE  
SERVICES

Combined with the impact of pandemic, increased access to mobile and desktop devices worldwide resulted in an extreme momentum for the gaming sector in 2020. Our country turns into an increasingly more important market in the region with its dense population for this rapidly growing sector.

As Nest Dil Hizmetleri, we had the opportunity to experience this growth at first hand by rendering translation, localization, copywriting and quality control services at 11 languages since 2016. We completed localization process of many games including those games which manage to be ranked among the top downloaded games in the world and in Turkey, and helped foreign games meet millions of Turkish players as well as made a contribution for Turkish games to be introduced to players from various countries in the US, Europe, Far East and MENA regions.

We defined our mission as helping Turkish gaming community go beyond the language barrier though gaming focused content generation and distribution by involving in gaming platform projects of the world's giants that gain more presence in the gaming sector in addition to gaming companies. Accordingly, we created a exclusive team dedicated to the gaming sector, comprising 20 employees including translators, quality control and desktop publishing experts, with expertise in game localization in 11 languages. We see that access to games in player's language is no more a requirement but a pre-requisite for players particularly in the past few years, and in this sense, we believe that making great localization efforts incorporating target markets and cultures is one of the most important steps to be taken by all producers and ecosystem stakeholders that want to expand their market and grow their product in 2021 and later on.

# TURKISH GAMING SECTOR EXPERT OPINIONS

## TURKEY GAME MARKET REPORT 2020



**ENIS SARGIN**  
MARKETING &  
BUSINESS DEV.  
MANAGER  
GAMING IN TURKEY

With the impact of pandemic, 2020 provided the players with an allowance to purchase more games. The gaming sector, which is unrivaled in the category of "entertainment" throughout the year, also acquired many new players. People developed their player identities with free games, which are both easily accessible and have characteristics of a "demo" into the gaming sector. However, another impact of the pandemic was actually time in addition to allowance. The activity of playing games, which is probably ranked as the third or fourth activity in terms of entertainment, ranked up to first place for the people. It's because the fields where people can spend time and the experience they provide couldn't fill in empty time. People who just joined the community won't lose their identities when this period is over, because many people realized that games provide different experience. While many activities in the category of entertainment was based on experiencing the content, games allow for those participating in the activity to create their own field of experience. Thus, it allows for people who found the right game for entertainment experience to have a new identity that they can't give up on.

The impact of pandemic prompted many companies to try out various strategies and new working models in the background of the sector. Since games that are the biggest products of the sector are already digital products, habits in the digital world could easily be maintained out of office. As operational efficiency increased for those completing these processes successfully, this allowed them to realize their project whether they are successful or not. The most outstanding titles are as follows: Valorant, Cyberpunk 2077, PS5, Xbox Series X, Nvidia GeForce Now, Xbox Game Pass and Epic Games free-to-play games. It's not a great prophecy to predict that business models will continue to change over the next years. However, it's my greatest desire that global governmental structures that have traces of centuries and evolve very slowly to have a position to support these procedures legally in many countries. As the gaming sector grows, innovations and perspectives that started in Europe and the US will spread over the entire world.

# TURKISH GAMING SECTOR EXPERT OPINIONS

## TURKEY GAME MARKET REPORT 2020



**İSMET GÖKSEL**  
RÖNESANS  
FUARCILIK VE  
YAYINCILIK A.Ş.  
FOUNDER / CEO

Like rest of the world, Turkey is dealing with an extreme period of pandemic for the past one year . Along with the curfews and various measures, organizations were postpone one by one, and the fair sector had such a quite year that it never expected. Organizations were postponed not only in the gaming sector but in all sectors in 2020.

At this point, we had to postpone GAMEX 2020 International Digital Games and Entertainment Fair, which is one of the tech fairs we hold for exactly 40 years without any break and is one of the biggest and most visited fairs in Turkey, until September 2021.

No matter how much Digital Game Sector grew in 2020, supporters and business partners of the sector failed to make contribution to growth at the same rate. Expectation from 2021 is naturally to have a healthy and peaceful year at first. Our country fights against this virus, which emerged last year, and tries to come off this process with minimum damage.

We've already started our preparations and efforts with our business partners and strong sponsors; we'll bring GAMEX and gaming sector together again with the Turkish players and large masses in the healthy days of 2021, and relish the entertainment, game and zestful shows together. We'll maintain our contribution to the growth of the sector from now on, as we did in the past years.

We are a proud  
supporter of the industry  
and the gamers for

**10 years**  
with  
increasing investment



TADINI ÇIKAR™

# COCA-COLA



**Coca-Cola's** journey in Turkey started in 1964, with the famous "World Famous Coca-Cola, Now Is In Our Hometown" slogan. Coca-Cola Turkey System, which celebrated its first factory opening with a Coca-Cola Caravan that passed through to Taksim Square on 18 Sep 1964, is now producing in 11 factories.

Coca-Cola, represented by Coca-Cola Soft Drink Marketing Consulting Inc. Tic. Inc. (Coca-Cola Turkey) in Turkey, Coca-Cola Turkey; managed under a business unit covering 25 countries in several regions including Caucasus, Pakistan and The Middle East. Turkey operation stands out as the largest operation in the region in terms of number of employees and market size.

## **Brands in our product portfolio in Turkey**

Our rich soft drink portfolio in Turkey includes **Coca-Cola**, Fanta, Sprite, Schweppes, Cappy, Nature, Fusetea, Powerade, Damla Miner, Damla Water brands and their different variants.

The responsibility of the production, sale and distribution of our brands belongs to Coca-Cola Beverage Co. Ltd., which operates in a total of 10 countries together with Turkey and is also traded on the Istanbul Stock Exchange. For more information about Coca-Cola Beverage Co. please [click here](#).



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# GAME GARAJ

OVUN YENİDEN BAŞLIYORI



# GAME GARAJ



**Game Garaj** was founded as a group company of Eksa Elektronik Bilgi İşl. A.Ş., one of the biggest distributors of Desktop Computer-Oem products in Turkey.

The mission of Game Garaj, which utilizes Eksa's 19-years experience and know-how, is to provide quality, high performance and accessible gaming computer, accessories and ultra fast business station solutions as unique desires and needs of each individual by prioritizing customer satisfaction.

We intend to provide the best service when our customers experience any issue while purchasing or using our products. We opened our first Showroom in İstanbul at the end of 2020 to provide the best possible experience. We started live chat on our website to boost communication with our customers, from 09:00 to 24:00 through Monday-Saturday. We keep expanding our product family day by day. Almost 70% of the gaming computers, components and equipment are the products imported by our company or a group company.

In 2020, we launched the top gaming equipment for players in Turkey simultaneously as they're launched around the world. We gained a market share over 50% during the launch of RTX 30 series graphics cards.

## **Our Mission**

- **Indisputable customer satisfaction**
- **Smooth and quick communication**
- **Expanded product family**
- **Competitive and price/performance driven gaming computers and equipment**





# JOBUUM



**Jobuum** was founded in 2020 to offer process related innovation for conventional CV submission and job application processes.

Enabling online unicast video interview via smart matching, the app find the most appropriate candidate for the job, and prevents loss of time and money. Human resources can place a recruitment ad, and then watch interviews and make a decision quickly. They can determine the candidate to be employed in a single step. They can also file the interviews of the candidates with potential due to the ranking system to watch via QR codes. Jobuum moderates the intensive meeting and interview processes of human resources units. It provide an advantage in terms of both time and costs. Thus, human resources can spent more time for other operational processes.

In the eye of candidates, they can stand out more easily and quickly before the employer due to **Jobuum**. Jobuum provides the candidates with the opportunity to reveal and display the their potential/energy directly.

The app also enables the people to follow the companies they like and want to work at. We also support human resources departments of companies to manage Employer Brand perceptions due to the social career platform.



logitech 

# PLAY TO WIN

G513



G502



PRO X



PLAY ADVANCED

# LOGITECH



Founded in Switzerland in 1981, **Logitech** is a leading global tech company that connects people to the digital world, and design and manufacture innovative products. Taking firm steps forward in this field for 40 years, Logitech connects people to the digital world by designing leading global products such as mouse, keyboard, webcam, speakers etc., which are a part of their daily lives. Hardware and software products of Logitech, which has a service area that cover information processing, communication and entertainment platforms, enable people to have experiences such as digital navigation, listening to music, watching videos, playing, social networking, video and voice calls over internet, video security and home entertainment control.

Focused on innovation and quality, Logitech design personal peripheral devices to help users have a better experience in the digital world. Starting its business by designing mice, Logitech has become the top selling mouse manufacturer brand in the world by streamlining operation in interaction with personal computers. Assembling its expert gaming equipment under the Logitech G brand, the company expanded its product family with the companies it acquired later such as Ultimate Ears, Jaybird, Astro and Blue Microphones.

Extending the scope of its expertise into other product designs, Logitech developed a rich family of peripherals that interconnects computers, game consoles, digital music and home entertainment systems. Personal peripherals from Logitech include mouse, trackball, keyboard, webcam, speakers, headsets, microphones, interactive gaming devices, network music systems, video conference and video security solutions as well as advanced remote controllers. As the market leader in the field of wireless peripherals, Logitech offers wireless products for PC's, game consoles, portable music players, tablets and smartphones. As organizations need more in terms of operational processes and employee efficiency in these days when hybrid work culture develops rapidly and ways of conducting business change, Logitech makes a difference also in this field via high performance, easy to setup and use, and practical video conference system that removes the distance between and enable fast data flow.

**Logitech** brings together important and required technologies with innovative industrial design for its products with a perfect value-based perspective by having strategic partnerships with leading computer and tablet manufacturers. With a family of innovative employees over 7,000, sales offices in certain cities in North America, Europe and Pacific Asia, and the distribution network that includes more than 100 countries around the world, Logitech is among the companies that dictate the sector.



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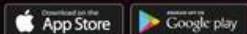
# Create your Maximum Gaming Card, and use it right away, win **5% GamingPoints**

Apply for Maximum Gaming Card on Maximum Mobil, get your digital prepaid card right away and start using without waiting for its delivery. Spend as much as you load, win 5% GamingPoints on selected e-commerce shopping. Also, no card fees!

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**MAXIMUM  
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For details: [maximum.com.tr](http://maximum.com.tr)

5% Gaming Points campaign is valid through 31.06.2021. Includes shopping transactions using Maximum Gaming Cards on selected e-commerce sites only. Türkiye İş Bankası is only the intermediary in payment transactions. T. İş Bankası reserves the right to amend campaign terms&conditions, and/or cancel the campaign. For details and additional terms: Maximum Mobile and [maximum.com.tr](http://maximum.com.tr)

# MAXIMUM GAMING



Leading the development and popularization of digital banking in Turkey with the brand **Maximum Gaming** by İş Bankası in e-sports, Türkiye İş Bankası makes investments uninterruptedly since 2017 into the field of e-sports that it considers un digital transformation activities. It considers e-sports as one of the most outstanding innovations brought into our lives by the digitalization and as a sort of digital entertainment and content where technology and innovative thoughts are influential.

İş Bankası started its investments in the field of e-sports via sponsorship support under the brand Maximum Card for teams Beşiktaş, 1907 Fenerbahçe Derneği and Galatasaray, which compete in the League of Legends Turkish Championship League. It increased its support as a sponsor for e-sports teams of such national sports clubs in games such as Valorant, FIFA, PUBG, APEX, and NBA2K.

It maintained its support for events and leagues through 2017 and 2019 League of Legends Turkish Championship League Grand Final events, 2017 GameX, 2019 TESFED (Turkish E-sports Federation) Vodafone FreeZone Turkish Cup final event, 2020 Gaming Istanbul Game Fair sponsorships and 2020 League of Legends Türkiye Vodafone FreeZone Championship League payment systems sponsorship.

Driven by unique content generation strategy, İş Bankası created the **Maximum Gaming** platform on the social media to be able to reach the target audience directly, and become a brand that they love and know; talked to followers about games by meeting e-sports enthusiasts as a young, dynamic and trend-tracking social media account, and enabled e-sports teams and players to meet.

Providing intermediation services for selling game codes such as Riot Points, Steam Wallet codes, Zula in the Digital Code Market within the Maximum Mobil app, İş Bankası launched Maximum Gaming Card, which is a pre-paid card product that is dedicated to e-sports players, constantly earns points through any game code purchases and online purchases, and enables use of the points earned for purchasing game codes again, in line with the insights and consuming habits of the target audience.

İş Bankası intends to grow the e-sports ecosystem in Turkey by further reinforcing its connection to e-sports players through solutions provided in the field of payment systems.



[maximum.com.tr/TR](http://maximum.com.tr/TR)



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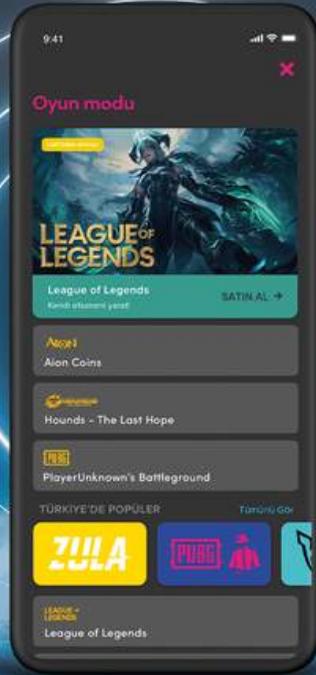


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# Change your mode with Ozan SuperApp

Explore most common games in the world. Meet Ozan Mode **ON**

Discover popular games and entertainment packages in Ozan SuperApp.



Ozan SuperApp



# OZAN SUPERAPP



**Ozan** Elektronik Para A.Ş (Ozan), a next generation financial technology initiative, was founded in İstanbul to provide individual users as well as small and medium scale businesses with financial services. Being granted an electronic fund license by BRSA as per the law no. 6493, and rendering services under the inspection and supervision of TRCB since January 2020, Ozan launched Ozan SuperApp in February 2021, and Virtual POS products in March for its users.

Continuing its required license and infrastructure efforts to provide services in England, European Union countries and the US as well as Turkey, Ozan has official become a member of Visa in February 2021.

While aiming at providing its customers with services such as opening account within seconds, transferring money to accounts, creating virtual cards, making payments via QR code, making local and international invoice payments and game code access via **Ozan SuperApp**, Ozan also renders fast and secure online payment collection service for SMB's and freelancers that seek for effective solutions to their existing business and new business ideas via Virtual POS product in addition to these solutions. Getting ready to launch Ozan Card for use of users soon, Ozan intends to be Turkey's first "SuperApp" that meets all expectations from the users with its highly technological infrastructure, strong business partners, global relations and experienced team.



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**WHATEVER YOU PLAY**  
**PAY WITH RAZER GOLD**



# RAZER GOLD



**Razer Inc.** made an investment into leading game services, including Gamesultan and Rixty, both within and outside Turkey in 2018 through 100% acquisition. It provided gaming enthusiasts with the product Razer Gold in 2019 through subsequent rebranding efforts. As the biggest virtual credit system for players in the world, Razer Gold overcome issues faced by players in many markets such as not having a credit card for payment, not wishing to use a credit card or multiple and unsecure payment systems in games.

Gaming enthusiasts and digital users in Turkey can now purchase over 2.000 games, in-game items, entertainment and digital products from Blizzard, Tencent, NetEase, Wargaming, Riot, Steam and many other publishers easily through the large library comprising the brand new PC and Mobile game titles, with a single Razer Gold account. Popular games supporting Razer Gold payments include: PUBG Mobile, Lords of Mobile, Mobile Legends, Crossfire, World of Warcraft, DOTA 2, CS:GO, Zula, League of Legends etc. And on social media platforms; Bigo TV, Huya Limited, Twitch, Azar, Who, Connected2me, LiVU, LiveMe etc.

Razer Gold can be obtained through gift cards on the online website, at stores and from over "3.5 million" physical sales points around the world. Players can make use of Razer Gold specific rare in-game items (weapons, costumes and more) or discounts for game titles. For instance, exclusive Razer parachutes for Razer users only and this year, ScarL Razer weapon for game enthusiasts were provided due to our global collaboration with Tencent.

It renders services to game enthusiasts and digital content users with "For Gamers By Gamers" via Razer and with the tag line "Whatever You Play, Pay with **Razer Gold**" via Razer Gold. Its users also benefit from the advantages of the loyalty rewards system, known as Razer Silver. People earn Razer Silver each time they use Razer Gold, and Razer Silver can also be used for collecting rewards such as gift cards, digital contents/costumes or Razer hardware products.



<https://gold.razer.com/>



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# Level up with Türk Telekom Fiber

Fiber internet that takes the fun of gaming  
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Değerli Hissettirir



# TÜRK TELEKOM



Having a deep rooted history of 180 years, **Türk Telekom** is the first integrated telecommunications operator in Turkey. In 2015, the company has converted into a "customer focused" and integrated structure by keeping its legal entities Türk Telekomünikasyon A.Ş., TT Mobil İletişim Hizmetleri A.Ş., and TNET A.Ş. as they are, and fully complying with the governing rules and regulations, in order to meet its customers' rapidly changing communication and technological needs through strongest and smartest means. Having a wide service network and rich product range in the field of individual and corporate services, Turk Telekom gathered its mobile, web, telephone and TV products and services under the roof of a single brand "Turk Telekom" in January 2016.

**Türk Telekom**, the "Multiplayer in Turkey", renders services to 16.3 million fixed access line users, 13.4 million broad band users, 3.1 million TV users and 23.2 million mobile subscribers as of 31 December 2020. Türk Telekom Group companies provide services with 34,748 employees in 81 cities in line with the vision of introducing new technologies to Turkey and accelerating the process of turning into an information society.

Türk Telekomünikasyon A.Ş. provides PSTN and collective broad band services, and it has 100% of the shares of TT Mobil İletişim Hizmetleri A.Ş., a mobile operator, TNET A.Ş., a provider of retail internet service and IPTV, Satellite TV, Web TV, Mobile TV, Smart TV services, Argela Yazılım ve Bilişim Teknolojileri A.Ş., a convergence technologies company, Innova Bilişim Çözümleri A.Ş., an IT solutions provider, Sebit Eğitim ve Bilgi Teknolojileri A.Ş., an online education software company, AssisTT Rehberlik ve Müşteri Hizmetleri A.Ş., a call center company, TT Ventures Proje Geliştirme A.Ş., a project development and corporate venture capital company, TTES Elektrik Tedarik Satış A.Ş., an electric supply and sales company, TT International Telekomünikasyon Sanayi ve Ticaret Limited Şirketi, a bulk data and capacity service provider, and TT Destek Hizmetleri A.Ş., an in-house combined support services provider, directly; and 100% of the shares of TT International Holding BV subsidiaries, companies of Net Ekran, a provider of television broadcasting and video on demand (VOD) services, TT Satış ve Dağıtım Hizmetleri A.Ş., a device sales company, TT Ödeme ve Elektronik Para Hizmetleri A.Ş., a payment services company, 11818 Rehberlik ve Müşteri Hizmetleri A.Ş., a consultancy services company (in liquidation), and APPYAP Teknoloji ve Bilişim A.Ş., a web portal and computer programming company, indirectly.



[www.turktelekom.com.tr/](http://www.turktelekom.com.tr/)



[facebook.com/TurkTelekom](https://facebook.com/TurkTelekom)



[instagram.com/TurkTelekom/](https://instagram.com/TurkTelekom/)

# WHAT ABOUT MIDDLE EAST GAME MARKET?

Middle East countries featured by game revenue statistics

**AS GAMING IN MENA, WE'RE ALSO IN THE MIDDLE EAST!**





# MIDDLE EAST

## COUNTRY RANKING BY REVENUE

- Turkey: 880 Mio USD
- Saudi Arabia: 1 Billion USD +
- Iran: 570 Mio USD +
- Israel: 470 Mio USD +
- Egypt: 370 Mio USD +
- United Arab Emirates: 340 Mio USD +
- TOTAL: 5,4 Billion USD 2020 Revenue



- Population: 1.800.000.000 +
- Online Population: 660.000.000 +
- Number of Players: 380.000M+

Source: Newzoo - 2020 Free Global Game Market Report

# 2020



2021

Gaming in Turkey  
Gaming and Esports Agency

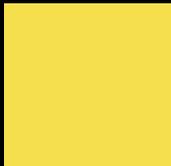


LEVEL  
UP

With Us



# Who We Are?



# Gaming in Turkey

Gaming in Turkey, operating in Turkey for five 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 also serve many major brands in Turkey. With Gaming in MENA Middle East office, we serve the entire Middle East.



- Purple Pan – Creative Agency



- Gaming in Turkey – Gaming and Esports Agency



- T.I.P Effect – Influencer Marketing Agency



- Hubogi – B2B Game Industry Blog



- Tricksy Games – Mobile Game Development



- OBT – Free Gaming and Entertainment Event



- Gaming in MENA – Dubai Office



- GIT Esports

- Gaming in Europe – 2021 – 2022

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

# 01

Game  
Marketing

Art  
Design

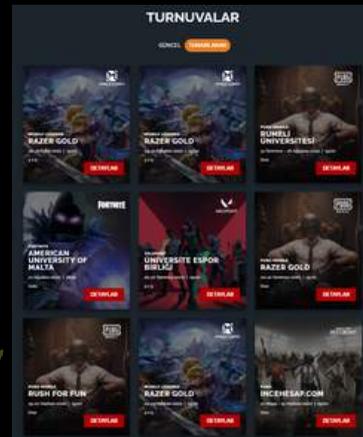
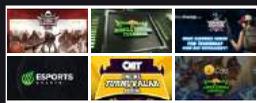


- Localization
  - Influencer Marketing
  - Media Planning
  - Video Production
  - Brand & Strategy
  - Digital Marketing
  - User Acquisition
  - Social Media Management
  - Creative Designs
  - Digital PR & PR
  - Partnerships
- Concept Design
  - Character Design
  - Illustration
  - Marketing Assets
  - 3D Modeling
  - 2D Animation
  - 3D Animation

# 02

Esports  
Organizations  
Tournaments

- Esports Organizations
- Offline Tournaments
- Online Tournaments
- In-Company Tournaments
- Sponsorships
- Team Management
- Internet Cafe Events
- Tournament Marketing
- GIT Esports Tournament Platform



# 03

Game  
Operation

QA Services

IT  
Services

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

- Cross-Platform Testing
- Device Screen Size Test
- Operating Sys. Compatibility Test
- Product Functional Controls
- Design & UI Controls
- Usability Tests
- Bug & Fixes
- Full Test Before Launch





OZAN AYDOĞAN



ELIF ÇELİKKAYA



VAHİT ALI ÖZGENEL



BÜLENTHAN ÇORUCU



SERKAN BEKDEMİR



DOĞAN ÖZDOĞAN



DİLEK SARIKAN



BORA SÜLEYMANLI



BEKİR BOĞAZKAYA



BEKİR AYDEMİR



CÜNEYT TULUMAZ



EMRE ŞAKARIK



MUSTAFA CEM DURMAZ



OKTAY ARIOĞLU



BERKANT NİSRAN



UZEL KAFA



NİSA PİREL



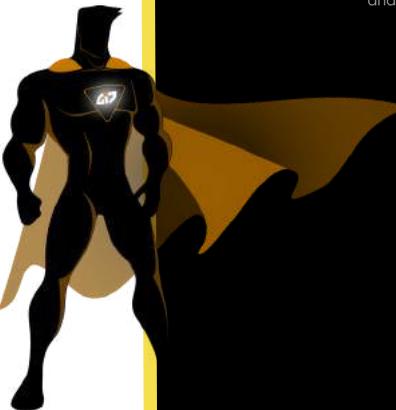
KEZBAN ŞAHİNÇELEBİ



ALP OFLAŞ



NİHAN ŞİŞİR/JAN



BAU ESPORTS EKİBİ



HAZAL AKTAS

"Talent wins games, but teamwork and intelligence win championships."

G.I.T  
TEAM



40

Game  
Publishing

42

Million  
User

90

Thousand  
CCU

59

Awards

25

New Brand

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



**XIGNCODE3™**

Gaming Security  
Solutions



BAU Esports

**ESPORTS**  
CHARTS

Analytical Services



Collegiate Esports  
League



Twitch Student  
Program

**RUSH**  
FOR FUN

Esports Arena  
Kuwait

**INNOFUN**

China Mobile Gaming  
Industry Publishing  
Partner



Cafe Bazaar MENA  
Mobile Game  
Publishing Partner

**FACET**  
CHALLENGE YOUR GAME

International  
Esports Tournament  
Platform



GlassHouse  
IT Service

Our strategic partners with whom we work together globally





### JOYGAME 4. TÜRKİYE TURU

AĞUSTOS-EYLÜL 2013

**Fanta HAYDI OYNA!**

|   |  |  |  |   |
|---|--|--|--|---|
| <br>Zaccari - Kadıköy | <br>Adana - Beşiktaş  | <br>Yozgat                  | <br>Edirne            | <br>Kocaeli  |
| <br>Sakarya           | <br>Alın Net İnternet | <br>Çankaya Online İnternet | <br>Dünya - Çoban Net | <br>Bakırköy |
| <br>Dünya             | <br>Marina            | <br>Zonguldak               | <br>İzmir             | <br>Marmara  |



Patos ve Chips Master Paketlerinde

JOY GAME OYUN KODLARI  
VEYA  
WOLF TEAM OYUN KARTLARI

**HEDİYE!**

**CEREZOS**

JOY GAME OYUN KODU'nu bul,  
veya  
Oyun Kartı, **TOP** ya da **FORMA**

**KAZAN!**

Samsung Galaxy S3 Mini  
Wolfteam'çilerin seçimi!

Herkese  
**₺50** Tük  
indirim hakkı  
kurttartonusuyor.com

**VIVIDENT XYLIT**

**GÖLEY**

VIVIDENT İLE  
"FANTASTİK HEDİYELER"E HAZIR MISIN?  
VIVIDENT FANTASTİK DÖRTLÜ TEMALİ PAKETLERDEN ÇIKAN  
ŞİFREYİ YOLLA, "FANTASTİK HEDİYELER" KAZAN!

Ad:

Soyad:

İsim:

E-Posta Adresi:

Adres:

Telofon:

100 ADET VIVIDENT HEDİYE PAKETİ

2 ADET 2 KİŞİLİK  
BARCELONA SEYAHATI +  
HELİKOPTER TURU + PORT AVENTURA  
TEMA YAKA GİSESİ

FANTASTİK  
SADECE SİNEMALARDA

LYS sınavına oyun oynar gibi hazırlan,  
**30 TL** promokod kazan!

Turkcell Akademi'ye gel, ayda 9,99 TL'ye  
im sınavda bir adım önde ol, hem de **30 TL**  
promokodunun olsun!

Promokod kazanmak için;

LYS GÖLEY --53--> 8151

LYS WOLFTEAM --53--> 8151

LYS MSTAR --53--> 8151

**GÖLEY** **WOLF TEAM** **nu)star**

**TURKCELL**  
AKADEMİ

**opet**

**opet'le wolfteam'de gücünü göster**

Sırtı opet'le Facebook sayfasını beğen, wolfteam'de 25 TL'lik hediye kuponunu kazan. gücünü herkeze göster!



**SAYFAYI BEĞEN KAZAN!**

25 TL Değerindeki pokal (İçerdiği: 815B-1 Öl, Long Claw, 52-55B MC, ZIGANA 1, Yarıdan Doğru Süresi Sifirleme, Infiltr Engelleme, Lin malling, İfyodor 1 Günebakan)

**GNC GAMER**

**OYUNDA LEVEL ATLA**

KURALLARI SEN KOY! RAKİPLERİNDEN ÖNDE OL!  
OYUN İÇİ AVANTAJLARDAN VE İPUÇLARINDAN İLK SEN HABERDAR OL!

**ÜCRETSİZ GNC GAMER → 2222**

AVANTAJLAR: **AVANTAJ** **WOLF TEAM** **ÇİFT KAZAN** **RAKİPLERİN** **ZARF** **YARIN**

**gnctrkcll**

**RENAULT**



**Renault ile Wolfteam'de Gücünü Göster!**

Sırtı Renault Facebook sayfasını beğen, Wolfteam'de 25 TL'lik hediye kuponunu kazan. Gücünü herkeze göster!

**Renault**

**GNCTRKCLL UYGULAMASINI CEBİNE İNDİR  
HEDİYE WOLFTEAM KUPONUNU AL!**



TELEFON NUMARANI GİR:

XXXX XXXX XXXX

**KAYDET**



**ÜÇ KAZANMAK İÇİN  
FORMU DOLDUR!**

AD: \_\_\_\_\_

TELEFON: \_\_\_\_\_

YAKLAŞIK YAŞ: \_\_\_\_\_

E-POSTA: \_\_\_\_\_

**KODU GİR**

HEDEF KAZANIM: **5000** **5000** **5000**

**ROKO İLE KAZAN**



**MİLYONLARCA  
HEDİYE**



**PUBG MOBILE**  
100k

**LORDS MOBILE**  
100k

**MIA ONLINE**  
50k

**WCL TEAM**  
20k

steelseries ARCTIS 1

**BLOODRAPPER**

**WCL**  
BIRILIS

**DIGITAL OYUN KODU EN KOLAY NASIL ALINIR!**

**MIGROS**

**NESCAFE 301 arada EXTRA**

**#SABAH LAROLMASIN VAYINI SAAT 2.1.00 DA**

**ZEONIN**

**2 X 100 STEAM WALLET 1 X 3620 RP**



As Gaming in Turkey, we are the official gaming and esports agency for all brands of **Coca Cola** in 25 countries.



# Case Studies





## PUBG MOBILE

### Influencer Marketing

PUBG Mobile Special Influencer Project  
Yaparsın Aşkim



## OBT GAME EVENT

[www.oyunbaslasin.com](http://www.oyunbaslasin.com)

OBT Let The Games Begin Turkey  
Online and Offline Free Gaming and  
Entertainment Event



- Link 1
- Link 2
- Link 3



## BLAST PRO SERIES

### Esports Organization

- Marketing
- PR & Digital PR
- Sponsorships
- Website and Social Media Management
- Influencer Marketing





## GAME EXHIBITIONS

### Operation / Marketing

- Booth Design
- Operation Team
- Marketing Team
- Communication and PR





## TİK TOK

### 360 Degree Marketing

We made 360 degrees marketing on behalf of our partner Tik Tok, one of the most popular entertainment applications in the world.

- Influencer Marketing
- Social Responsibility Campaign
- Outdoor
- Media Plan
- Digital Marketing



www.rokoilekazan.com

**PUBG MOBILE ROKO'LARDA BOŞ YOK!**

ROKO ÇUBUKLARINDA MİLYONLARCA MİLYONLARCA

**HEDİYE**

**PUBG MOBILE**

**ÜÇ KAZANMAK İÇİN FORMU DOLDUR!**

AD: \_\_\_\_\_

TELEFON: \_\_\_\_\_

E-MAİL: \_\_\_\_\_

ŞİRKET ADI: \_\_\_\_\_

**HEDİYENİ AL**

KURUMSAL İLA. ÜZERİNDEN

## PUBG MOBILE

Brand – Game Partnership

PUBG Mobile – GOLF Roko  
Ice Cream CODE  
Campaign





## LORDS MOBILE

### 360 Degree Marketing

IGG - Lords Mobile 360 Degree Marketing Campaigns

- TV Media Plan
- Outdoor
- Influencer Marketing
- PR & Digital PR
- Digital Marketing
- Game Exhibition





steelseries ARCTIS 1

**PUBG**  
MOBILE  
100 ₺

**LORDS**  
MOBILE  
100 ₺

**MIA**  
ONLINE  
50 ₺

**WOL**  
TEAM  
20 ₺

## STEELSERIES

Brand - Game Partnership

SteelSeries Game Pack  
Campaign - 270 TL Game  
Pack





## PUBG MOBILE

Game Activity

PUBG Mobile 1st Year  
Party Organization



STEEL TALENTS HALK OYLAMASI YARISMAÇILAR HAKKINDA INFLUENCER REJİSİRE GİRİŞ İLETİM

# GLOW UP

## STEEL TALENTS HALK OYLAMASI BAŞLADI

JURİ

İzzemce Thetaz Davut Boştaş Akagreen

HEMEN OY VER

|  |   |  |  |
|--|---|--|--|
| <br>Arda Can Özel<br>"ArdaCanOzel"<br><a href="https://www.twitch.tv/ardacanozel">Twitch.tv/ardacanozel</a>      | <br>Aybars Algın<br>"AybarsAlgın"<br><a href="https://www.twitch.tv/aybarsalgın">Twitch.tv/aybarsalgın</a>            | <br>Aybuse Uslu<br>"AybuseUslu"<br><a href="https://www.twitch.tv/aybuse">Twitch.tv/aybuse</a>             | <br>Busemur Comboy<br>"BusemurComboy"<br><a href="https://www.twitch.tv/warlock">Twitch.tv/warlock</a> |
| <br>Davut Boştaş<br>"DavutBostas"<br><a href="https://www.twitch.tv/00taboxtas">Twitch.tv/00taboxtas</a>         | <br>Furkan Nis<br>"FurkanNis"<br><a href="https://www.twitch.tv/impulso">Twitch.tv/impulso</a>                        | <br>Halilcan Çayın<br>"HalilcanCayin"<br><a href="https://www.twitch.tv/wenestran">Twitch.tv/wenestran</a> | <br>Koray Güler<br>"KorayGuler"<br><a href="https://www.twitch.tv/sakallias">Twitch.tv/sakallias</a>   |
| <br>Mertcan Yalçuoğlu<br>"MertcanYalçuoğlu"<br><a href="https://www.twitch.tv/yalçuoğlu">Twitch.tv/yalçuoğlu</a> | <br>Mustafa Oğuz Topoğlu<br>"MustafaOguzTopoglu"<br><a href="https://www.twitch.tv/colombian">Twitch.tv/colombian</a> |  |  |

## STEELSERIES

Steel Talents Influencer Project

Steel Talents Influencer Competition



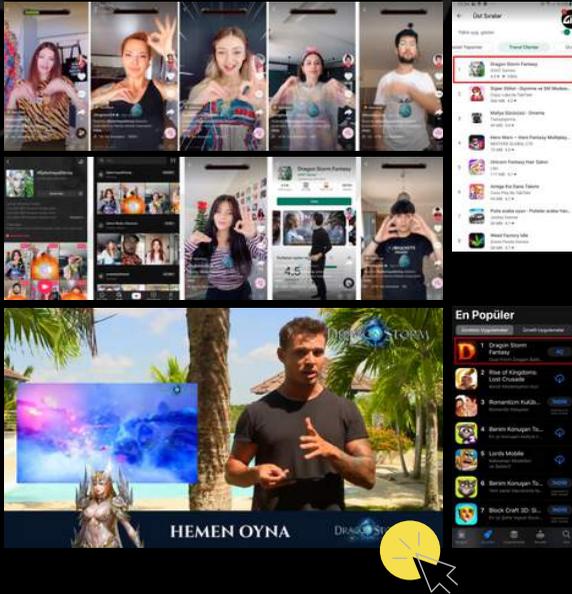


## RAZER GOLD

Offline Event Management

Razer Gold - Migros  
Festival, Operations and  
Stand Design





# DRAGON STORM

## 360 Degree Marketing

Mobile RPG Game 360 Degree Marketing Plan

- TV - Media Plan - Production
- Digital Marketing
- Influencer Marketing
- PR





# MOBILE LEGENDS

Online / Offline Esports

Mobile Legends Turkey Finals  
2019 Online and Offline  
Tournament / Marketing





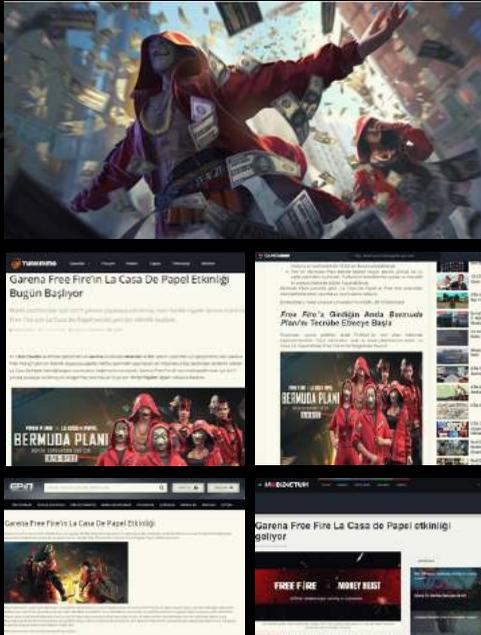
# WORLD OF WARSHIPS

## 360 Degree Marketing

360 Degree Marketing for Wargaming's famous game World of Warships

- Digital Marketing
- Influencer Marketing
- PR
- Field Activations





# GARENA FREE FIRE

La Casa de Papel Event PR

Garena Free Fire La Casa de Papel In-Game Event PR and Promotion Activities





## RISE OF KINGDOMS

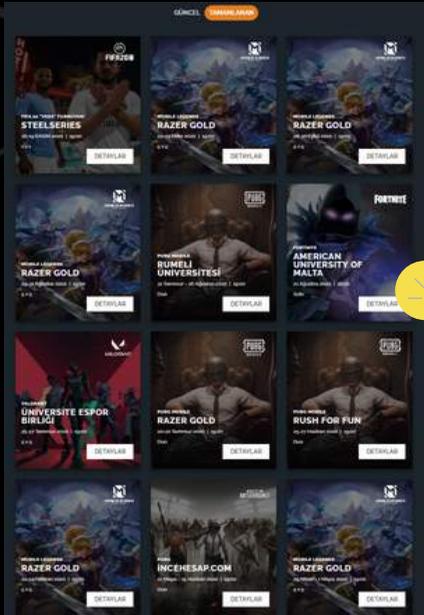
### Influencer Marketing

Influencer campaign with 20 major influencers.

Rise Of Kingdoms - Lilith Games

Motto: Dünyayı Titreten Çılgın Türkler





## GIT ESPORTS

### Online Tournaments

Online tournaments we run on Git Esports.





## SOCIAL MEDIA

SM Management

SM Management and Design

Examples



**PLEASE CLICK TO  
SEE ALL OUR  
WORKS ...**





Press news about  
Gaming in Turkey



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# Gaming in Turkey

Gaming in Turkey, an agency built entirely on esports and gaming is serving since six years in Turkey. For the last 5 years, we have been preparing sectoral reports that can be shared free of charge for everyone in order to provide information about the sector in an open-source manner to both the brands that want to invest in the sector, and to the game companies that want to get to know our region closely.

The information contained in this report is for general information purposes. With this report, Gaming in Turkey Gaming and Esports Agency does not provide any investment advice or investment consultancy service to any person or institution. We would like to point out to your attention that any initiatives or investments you will make in the field of Gaming and Esports may require professional support to make decisions about them. This report is not personal and institutional specific. It is a game-esports ecosystem review of a general nature and is intended for sectoral promotion and support. Likewise, the persons or institutions whose opinions are included in the report are not informed about the entire report. Each person or institution only contributes to the report with their own declaration and support; therefore, it is not possible for the persons or organizations whose name or title is included in the report to make any commitment or be held liable for any other information or interpretation in the report.

All sources of information in the report are indicated at the bottom of their pages and in the "References" section. All the information collected is open source information and Gaming in Turkey's expert team has created this report by blending it with all industry information. Expert Opinions are the opinions given by individuals or on behalf of their own companies and they are not investment advice, consultancy and do not bind any other person or institution. All opinions are included in our report unchanged.



GAMINGINTURKEY

# TURKEY GAME MARKET 2020 REPORT

