



GAMINGINTURKEY

TURKEY GAME MARKET 2021 REPORT



Report Contents

Sponsors	5
Partners	6
Prologue	7-11
2021 Turkey Overview	12-13
Estimated 2021 Media and Advertising Investments in Turkey	14-16
The Most Used Social Media Platforms in Turkey	17-19
Preferred Brands in Turkey	20
Turkish Mobile Player Habits	21-25
World of Android Gaming in Turkey	26-27
The Importance of Localization in Turkey	28-29
Games and Music in Turkey	30-32
Characteristics of Turkish Players	33-35
What's the Status of Turkish Gaming Market?	36-41
Investments in the Gaming Industry	42-44
Turkish Esports Federation TESFED	45-51
Riot Games	52-53
Cem Bölükbaşı Interview	54-56
Metaverse and Gaming Sector	57-58
Blockchain and Games	59-61
AI In Gaming	62-63
Turkey Game Market 2020 - 2021 Comparison	64-85
Popular Gaming Companies in Turkey	86-87



Report Contents

Local Gaming Companies in Turkey	88-95
Popular Streamers in Turkey / Twitch TV	96-97
Popular Youtube Channels in Turkey	98-99
Popular Instagram Influencers in Turkey	100-101
Active Payment Organizations	102
Active Electronic Fund Organizations	103
Associations	104
Game Exhibitions	105
GIST 2022	106-108
GAMEX 2022	109-111
Sectoral Education in Turkey	112-116
Game Design Optional Undergraduate Courses	117-119
Game Design Master's Programs	120-121
Game Design and E-sports Certificate Programs	122
Other Game Design Programs	123-124
Internet Cafes and Details	125-129
Esports Teams in Turkey	130-133
Number of Licensed Players and Teams	134
Esports Teams That Make Best Use of Social Media	135-138
Online E-sports and Game Events Organized in Turkey	139-140
Brands Investing in E-sports and Gaming	141
Esports Games	142

Report Contents

Turkish Esports Media Channels	143
Top Gaming Sites	144
Top Online Sales Sites	145
Top Online Gaming Platforms	146
Gaming Magazines in Turkey	147
Expert Opinions	148-200
Coca-Cola	201-202
fastPay	203-204
Monster Notebook	205-206
Türk Telekom	207-208
Gamer Arena	209-210
Türkiye Bilişim Vakfı	211-212
Polity	213-214
UGC90	215-216
What About Middle East Game Market?	217-218
References	219
Information Note	220
Gaming in Turkey - Gaming and Esports Agency - New Generation Game Publisher	221

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Turkey and Middle East

OZAN AYDEMİR

PRESIDENT / CEO

2021, unfortunately, was a duplicate of 2020, when the pandemic continued and we could not carry out our social activities most of the time. Of course, even though the first shock we experienced has been overcome, there is still an uncertain situation for all of us, such as when the pandemic will end and when we can really return to our social lives.

However, on the bright side, we somehow adapted to this new order. Yes, although we all waited with great hope for it to end, the survival instinct of human beings somehow kept us going forward in this difficult situation. The digitization process, which accelerated in 2020, started to bear fruit in 2021. The concept of "Metaverse", which our industry is already familiar with but generally reaches everyone, left its mark at the end of the year.



Turkey and Middle East

OZAN AYDEMİR

PRESIDENT / CEO

Sectorally, at the beginning and middle of 2021, it was slightly more stagnant in terms of income than in the previous year. In fact, when we compared periodically, for the first time there was a downward momentum. But in the last quarter, revenues started to go up again. Our expectation was growth with a stable percentage for 2019 and after. But the impact of the pandemic on the gaming market was that most of this growth was pre-loaded by 2020. This year, especially at the beginning and middle of the year, has been a slightly more stable balancing year. But as I said in the beginning, 2021 surprised us again in the last quarter and revenues increased. By 2023, our prediction for the global market is that revenues will be over \$200 million.

You know, this process has changed our entire business life and the way we work. This includes game developers too. Due to some disadvantages of remote working, especially the construction processes of high-quality PC and console games called AAA have been prolonged and therefore the release dates of many of these games have been postponed. The global chip shortage has caused some difficulties in sourcing the hardware products needed for next-gen consoles and high-end PCs.



Turkey and Middle East

OZAN AYDEMİR

PRESIDENT / CEO

The main factor shaping the industry is mobile. Mobile gaming will be the fastest-growing segment in the coming years; The Mobile Game Industry is growing at an incredible rate and it is almost impossible to stop this growth. More than \$90 billion of total global revenues in 2021 is from mobile.

Console and PC games were slowed down due to the delays they experienced at the beginning of the year, but soon all the delayed games started to be released with a tight schedule. This again both increased PC and console sales and stopped the revenue decline in these segments.

Investments in our sector continued in 2021, both in our country and globally. The speed of the crypto world spreading to our industry has increased, the concept of NFT has taken its place in the industry. Finally, with Metaverse, all eyes have turned to our industry.



Gaming in Turkey

OZAN AYDEMİR

PRESIDENT / CEO

If we look at the developments on our side; As Gaming in Turkey Gaming and Esports Agency, we've reached our 6th year anniversary mark this year. We have served and still keep serving more than 25 game companies simultaneously. Our activities in both Turkey and the Middle East continue.

We continue our way as Coca-Cola's official gaming and esports agency in 25 countries. One of the other good news of 2021 was Türk Tekeom for us. As Gaming in Turkey, we are now the agency of Türk Telekom. And we will undertake very successful projects and works with them in 2022. At the moment, our infrastructure preparations continue at full speed.

I can say that 2021 has been the year for us to transition to a complete corporate structure. Of course, we suffered the sweet pains of this, but we started to reap the benefits and fruits of it. With the participation of valuable brands, the number of our team has reached 30 people. We are also still in a search for missing positions in our team. Of course, this growth will continue to progress in direct proportion to our globalizing structure.



Gaming in Turkey

OZAN AYDEMİR

PRESIDENT / CEO

When we look at income, we broke our own record by growing by more than 250% compared to the previous year. By increasing the number of our strategic partnerships globally, we have opened the doors of big markets such as China and Iran, which are very difficult to enter, for game companies and of course for ourselves.

What we couldn't do last year was the game development due to this overcrowding. I hope this year will be the start of our game development department. And the last decision we made is game publishing. Considering the team's 13 years of experience in game operations and marketing, we will start both the development of our own games and the publication of games of different game companies in our own region.

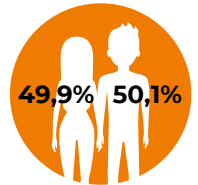
2021 Turkey Overview

In 2021, the population of Turkey increased compared to the previous year. As of 31 December 2021, the population residing in Turkey increased by **1 million 65 thousand 911 people** compared to the previous year and reached **84 million 680 thousand 273 people**.

While the annual population growth rate was **5.5 per thousand** in 2020, it became **12.7 per thousand** in 2021.

While the male population is **42 million 428 thousand 101 people**, the female population is **42 million 252 thousand 172 people**. In other words, 50.1% of the total population are men and 49.9% are women.

The population of Istanbul increased by **378 thousand 448 people** compared to the previous year and became **15 million 840 thousand 900 people**. Istanbul, where 18.71% of Turkey's population resides, is followed by Ankara with 5 million 747 thousand 325 people, İzmir with 4 million 425 thousand 789 people, Bursa with 3 million 147 thousand 818 people, and Antalya with 2 million 619 thousand 832 people.



2021 Turkey



**TOTAL
POPULATION**
84.680.273



**FEMALE
POPULATION**
42.252.172



**MALE
POPULATION**
42.428.101



**INTERNET
USERS**
70.000.000+



**SOCIAL MEDIA
USERS**
62.000.000+

POPULATION RATE AGE 16 - 74
%82.6







BY GENDER
MALE 87.7%
FEMALE 77.5%

38.000.000 FACEBOOK
49.000.000 INSTAGRAM



Estimated Media and Advertising Investments in Turkey

According to the figures in the Turkey Estimated Media and Advertising Investments 2021 Report prepared by the **Advertisers Association**, the highest increase in TV advertising investments in the last 20 years was experienced. Digital advertising investments, on the other hand, have the highest share among all investments. When we look at the breakdown, we see that it is 68% Mobile and 32% Desktop.

	Channel	Market Share 2021	Market Share 2020
	TV	28%	34,7%
	Press	1,7%	2,9%
	Outdoor	3,4%	4,6%
	Radio	1,4%	2,1%
	Cinema	-	0,4%
	Digital	65%	55,3%



Estimated Media and Advertising Investments in Turkey

When we look at the distribution of digital advertising channels, we see that search engine ads, impression, and click-based ads, and video ads are the most frequently used ones.

	Digital Breakdown	Percent
	Impression / Click	38%
	Video	27%
	Search Engine	28%
	Advertisement	1%
	Other	6%



Estimated Media and Advertising Investments in Turkey

While so much investment is being made in digital in Turkey, user habits are also changing. Users between the ages of 16-64 always search the internet before purchasing, and more than 12% of the users state that the ads they come across are effective. It is estimated that around 30%+ internet users in Turkey use Ad Blocker.

● Video ● Interstitial ● Banner ● Playable

Playable advertising models, which are very popular globally, have now become a preferred method by many brands and game companies in Turkey.

While the Interstitial ad model draws attention as the most used model, as in 2020, the video format and standard banner ad models remain popular.

Interstitial Ad Model: *Interstitial ads, which is a display ad format, are used in mobile applications (and websites), allowing advertisers to reach their target audiences.*



Most Used Social Media Platforms in Turkey

- YouTube
- Instagram
- Facebook
- TikTok
- Twitter
- Facebook Messenger
- Snapchat
- LinkedIn
- Pinterest

In 2021, Turkey has risen to the position of the country that uses Instagram most actively all over the world.



Notable 2021 Social Media Usage Habits Data in Turkey

- While the average age of the world is 31.4, the average age of the population in Turkey is 32.2.



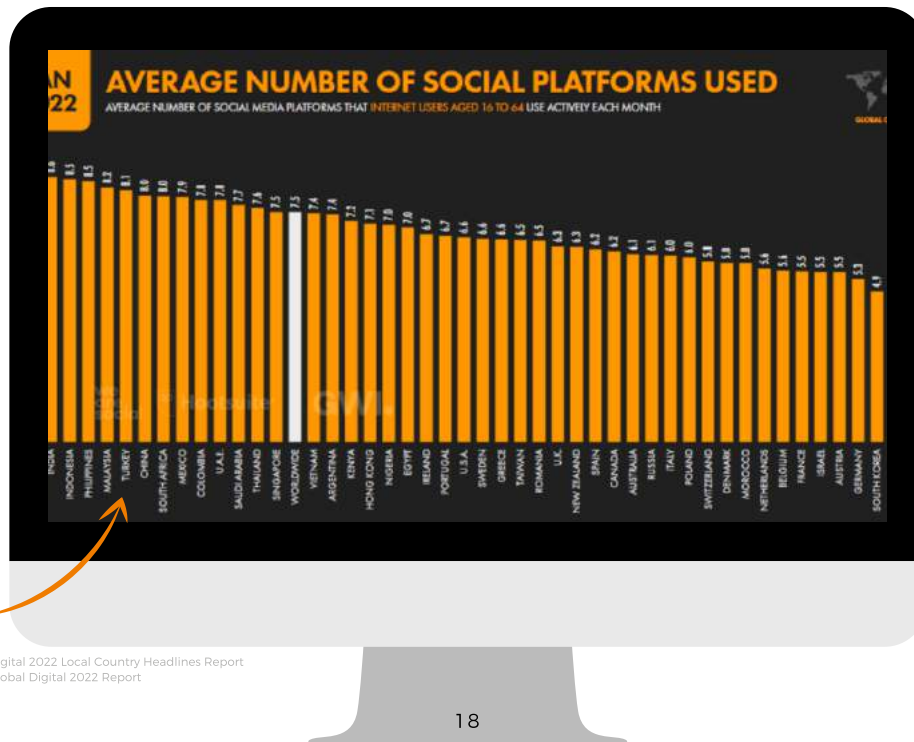
Average Time Spent on Social Media Per Person in a Day in Turkey

- The average time internet users spend on social media is 2 hours and 27 minutes.
- In our country, each internet user has an average of 8.1 social platforms.
- One out of every two internet users uses social media for brand research, and 13 out of 100 people on average follow an Influencer on social media.
- The rate of those who use social media for business is close to 1 in 3.
- More than half of the country's population has access to Facebook.



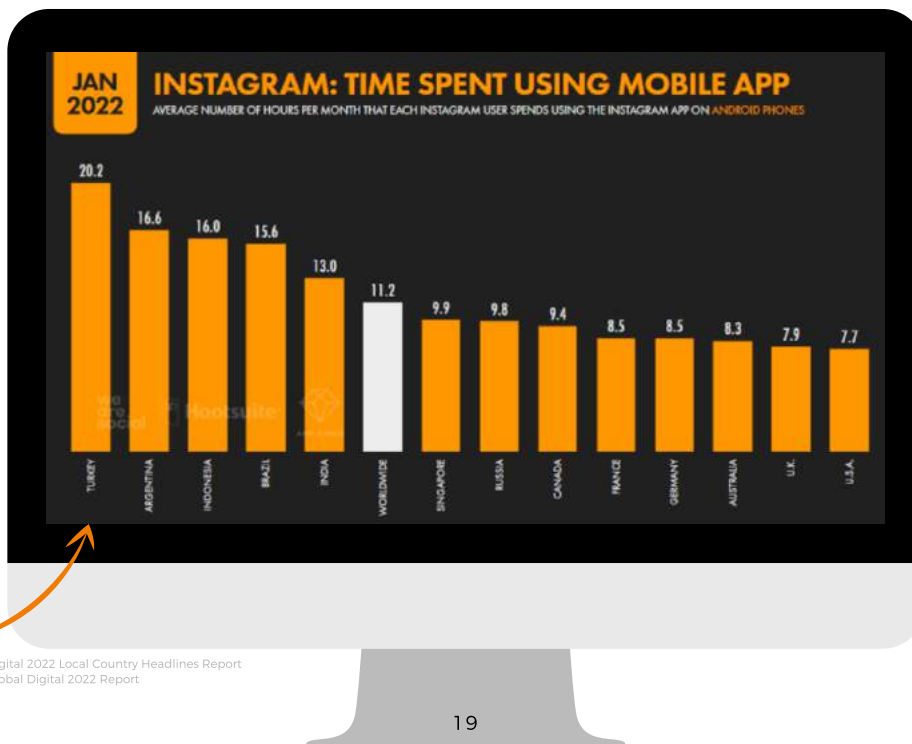
Most Used Social Media Platforms in Turkey

Turkey is the 6th country in the world that uses social media most actively. The countries that use social media most actively in the world are Brazil, India, Indonesia, the Philippines, Malaysia, Turkey, and China.



Most Used Social Media Platforms in Turkey

YouTube access rate is close to 73%. Instagram reach rate is 76.5%. This figure puts our country at the top of the global Instagram reach rankings.

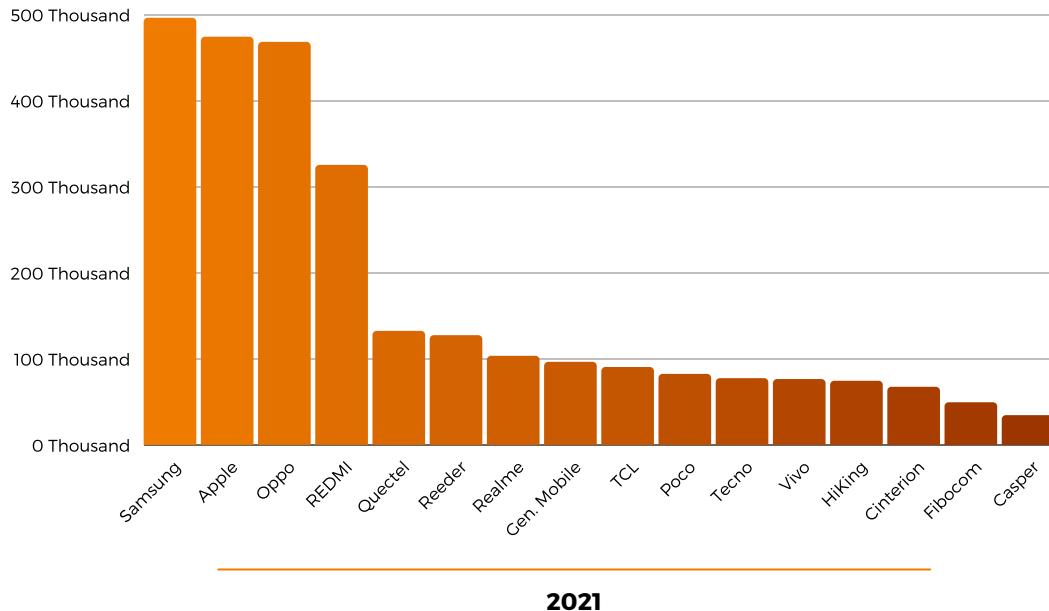


Source: We Are Social Digital 2022 Local Country Headlines Report
Source: We Are Social Global Digital 2022 Report



Preferred Brands in Turkey

The use of smartphones and telephones in Turkey is quite high. As of the end of September 2021, there are a total of 86,946,183 mobile subscribers, including machine-to-machine communication (M2M) subscribers, which corresponds to a prevalence rate of approximately 104%.



Source: BTK - 2021 Market Data Report 3rd Quarter - Number of IMEI Registered Mobile Devices by Brands



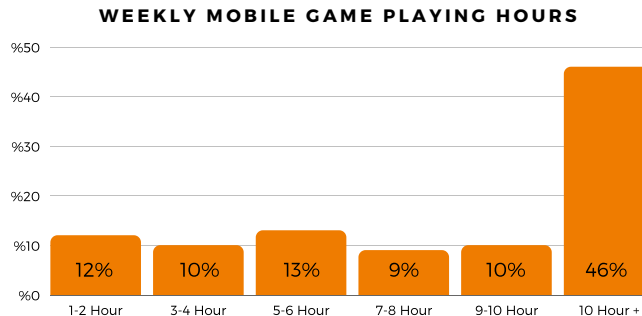
Turkish Mobile Player Habits

According to AdColony and Nielsen's 2021 research and the data we have, masses of all ages are playing mobile games in 2021, just like in 2020. The demographic characteristics and behavioral habits of mobile players in Turkey are as follows;

- 78% of adults in Turkey play mobile games.
- 52% of mobile gamers in Turkey are men and 48% are women.
- Percentage distribution of age range of mobile players in Turkey:
 - 10-20 years – 28%
 - 21-35 years old – 44%
 - Ages 36-50 – 29%



The number of hours that players spend on mobile games on a weekly basis is quite high.



Turkish Mobile Player Habits

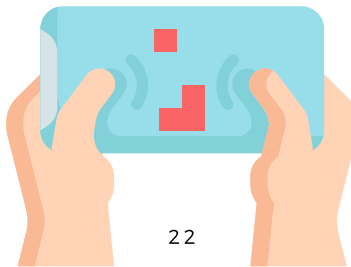
As the favorite game genre of mobile players in Turkey, Puzzle/Trivia/Word games ranked first with 48%, while Action/Adventure games, which were in first place last year, dropped to 3rd place with 37%.

Favorite Game Genres

Puzzle/Trivia/Word 48%
 Card Games 37%
 Action/Adventure 37%
 Strategy 33%
 Sports/Racing 33%
 Shooter Games 28%
 Social 22%
 Role-Playing Games 19%

Why Do They Play Mobile Games?

60% Because It's Fun
 57% Because It Relieves / Relieves Stress
 37% Because It Makes You Feel Free
 Progression / Enhancement / Creation 30%
 Friendship 29%

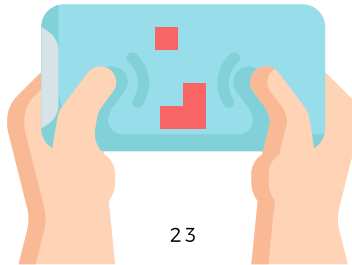


Turkish Mobile Player Habits

Apart from the fact that mobile players choose a game genre or genre because they like it, it is also an important issue that they play which game due to which in-game factors.

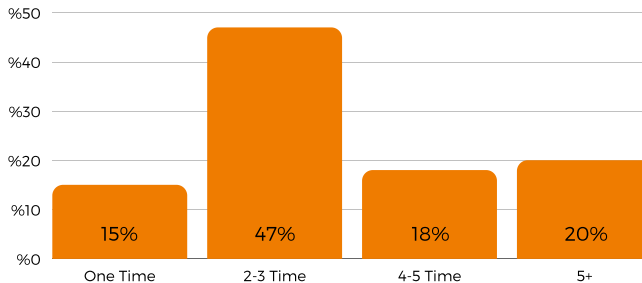
What In-Game Motivation Triggers Players' Choices?

- Free Download of the Game
- Having Ads In The Game In A Way That Doesn't Disturb
- Ability to Play Online with Friends
- Ability to Play Standalone Offline
- Making Friends / Chatting / Chatting
- Knowing and Trusting the Producer Company
- Continuous Innovation
- Having a Competitive Environment and Showing It Well

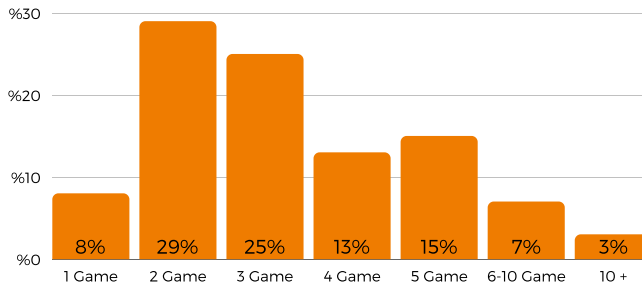


Turkish Mobile Player Habits

DAILY MOBILE PLAYS



NUMBER OF MOBILE GAMES PLAYED



Source: Turkey Mobile Game Research 2021 - AdColony - Nielsen



Turkish Mobile Player Habits

When we look at the personal interests of mobile players, there is not much variation in fact. Music, Social Media Usage, Television is now in the 2nd screen position. 80% of the players continue their mobile game while watching a program, series, or show on TV. Only 20% play games during commercial breaks.

Mobile Gamers Personal Interests and Concurrent Activities

Listening to Music 67%
 Watching TV 51%
 Social Media 46%
 Movie/TV 44%
 Watching Videos Online 33%



World of Android Gaming in Turkey

There are **more than 2.636** Turkish publishers among 158.096 game publishers on Google Play.

Among the 424.964 games on Google Play, there are **more than 8.890 games** offered by Turkish publishers. (In 2020, this figure was 8,055.)

The average score of over 8.890 games by Turkish publishers on Google Play is 3.97 out of 5 (up from 3.94 in 2020). This is better than the overall average score of 3.90 for all mobile games.

3% of Turkish publishers' games are in the paid category, 81% contain ads (up from 87% in 2020). In-app payments are used in 26% of their games. (In 2020, this figure was 28%.)

Only 21% of Turkish publishers' games are available on both Google Play and App Store. (In 2020, this figure was 18%.)



World of Android Applications in Turkey

There are **more than 5529** Turkish publishers among 869,320 publishers on Google Play.

Among the 2.757.563 applications on Google Play, there are **more than 20.000** applications offered by Turkish publishers.

The average score of more than 20.000 applications by Turkish publishers on Google Play is 3.85 out of 5. This is better than the overall average score of 3.63 for all mobile apps.

5% of the applications of Turkish publishers are in the paid category, 46% of them contain advertisements. In 14% of the applications, in-app payments are used.

When we look at the application distribution of Turkish publishers; We see that 69% are applications in different categories and 31% are games.



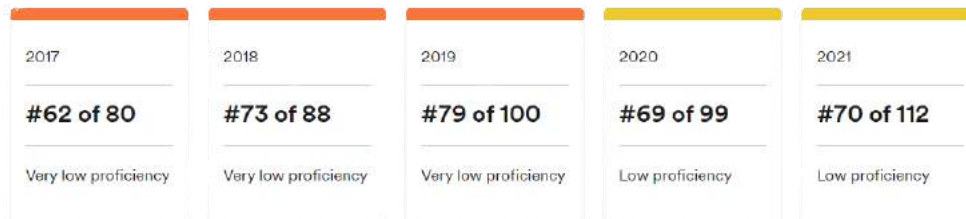
Why is Localization Essential for Turkish Players?

According to [Education First English Language School's](#) 2021 English Proficiency Index, which was carried out with the participation of 112 countries from all over the world, Turkey seems to be in the same place compared to the previous year.

According to the table, the Netherlands is still number 1 in English speaking rate, as in previous years. Turkey, on the other hand, has dropped one place from 69th place to the 70th in the list of 100 countries.



Proficiency Trends



Why is Localization Essential for Turkish Players?

Turkey was in 62nd place in 2017 and fell 11 places to 73rd place in 2018. In 2019, we were in 79th place. While it was 32nd in 2012, our country, which has been regressing every year since then, went up 10 places in 2020, but in 2021 we are down one place.

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 team that specialized in gaming 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

SPOTIFY 2021 SUMMARY

MOST STREAMED SONGS & ARTISTS VIA GAME CONSOLES

The Most Listened Artists in Turkey

- Ezhel
- UZI
- Travis Scott
- XXXTENTACION
- cakal
- Pop Smoke
- Batuflex
- Drake
- Murda
- Lil Nas X



The Most Streamed Songs in Turkey in 2021

- Masked Wolf / Astronaut In The Ocean
- UZI / Krvn
- Lil Nas X / MONTERO (Call Me By Your Name)
- UZI / Makina
- CJ / Whopty
- Batuflex, Lvbel C5 / ralli
- UZI / Umrumda Değil
- Cakal / Lütfen
- Ezhel / Bul Beni
- Coolio, L.V. / Gangsta's Paradise



Music is an Indispensable Part of Gaming

SPOTIFY 2021 SUMMARY

MOST STREAMED SONGS & ARTISTS VIA GAME CONSOLES

The Most Listened Music Genres in Turkey in 2021

- Turkish Trap Pop
- Turkish Hip Hop
- Turkish Pop
- Pop Rap
- Turkish Trap
- Rap
- Trap
- Hip Hop
- Pop
- Southern Hip Hop



The Most Listened Video-Game Soundtracks in Turkey in 2021

- Gustavo Santaolalla / The Last of Us
- Gustavo Santaolalla / The Last of Us Part II (Original Soundtrack)
- C418 / Minecraft - Volume Alpha
- Marcin Przybyłowicz / The Witcher 3: Wild Hunt
- Bear McCreary / God of War (PlayStation Soundtrack)
- John Paesano / Marvel's Spider-Man: Miles Morales
- Various Artists / The Music of Red Dead Redemption 2 (Original Score)
- Mick Gordon / Doom (Original Game Soundtrack)
- Hans Zimmer / Interstellar (Original Motion Picture Soundtrack)
- Johan Söderqvist / Battlefield 1 (Original Soundtrack)



Music is an Indispensable Part of Gaming

SPOTIFY 2021 SUMMARY

MOST STREAMED SONGS & ARTISTS VIA GAME CONSOLES

Most Streamed Spotify Playlists in the Gaming Tab

- Top Gaming Tracks
- Ultimate Pop Gaming
- Hip Hop Controller
- Power Gaming
- Ultimate Rock Gaming
- Ultra Gaming
- Retro Gaming
- Heavy Gamer
- Game On
- League of Legends Official Playlist



Characteristics of Turkish Players



01

Players Aged 30 - 40



02

Players Aged 25 - 30



03

Players Aged 18 - 24



04

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.



Characteristics of Turkish Players

TURKISH PLAYERS' PERSPECTIVES AGAINST THE GAMES

- A Visual World / Universes with Different Visuals
- Inspiring with It's Story
- Taste of Every Style
- Every Emotion Experienced at a High Level
- The Beauty of Trading Within the Distinctive Rules of a Game World
- Friendship and Teaming
- Entertainment / Hobby
- Rivalry; Winning / Losing
- Prestige / Being Famous In-Game
- Constantly Renewing Worlds, Discoveries
- Being a Hero in the Worlds of Your Dreams
- Opportunity to Become a Professional Player

EMOTIONS

- Excitement
- Stress
- Victory
- Pleasure
- Anger
- Sadness
- Wonder
- Happiness
- Impatience
- Greed
- Struggle
- Collapse
- Responsibility
- Habit



What's the Status of Turkish Gaming Market?

While leaving 2021 behind, the pandemic process, which has deeply affected every area of our lives for 2 years, continues to affect the game industry. When we look at the first half of the year, 2021 was a bit more stagnant in terms of income compared to the previous year. In fact, when we compared periodically, for the first time there was a downward momentum. But in the last quarter, revenues started to go up again.

THE EFFECT OF COVID-19 CONTINUES IN EVERY WAY!



Gaming Market in Turkey

2021 has been a replica of 2020, in which the pandemic process continued and we could not perform our social activities most of the time. The digitization process, which accelerated in 2020, started to bear fruit in 2021. The concept of "Metaverse", which our industry is already familiar with, but has reached everyone in general with the attention of the mainstream media, also made a lot of noise in Turkey and left its mark at the end of the year.

When we look at the first half of the year, 2021 was more stagnant in terms of income compared to the previous year. In fact, when we compared periodically, we experienced a sectoral downward momentum for the first time. The prolongation of the development times of high-quality PC and console games, which we call AAA in particular, due to the pandemic, caused the release dates to be delayed, and there was a slowdown in revenue on the PC and console side.

Our expectation was growth with a stable percentage for 2019 and after. But at this point, the impact of the pandemic on the gaming market was that most of this growth was pre-loaded by 2020. When we evaluate 2021 compared to the first six months, we had a period that provided a slightly more stable balance. But the last period of the year surprised us again and revenues increased.



Gaming Market in Turkey

Hyper-casual and casual games have become a trend for gamers as in previous years. Hardcore players preferred Battle Royale, FPS, Strategy, and MOBA game genres as they did for the last 2 years.

Players in Turkey preferred the games we wrote below and similar ones in 2021; PUBG Mobile, Brawl Stars, Candy Crush Saga, ROBLOX, Clash of Clans, 101 Okey Plus, eFootball PES 2021, Mobile Legends: Bang Bang, Canak Okey, Head Ball 2, Okey by Peak Games, Garena Free Fire, Call of Duty: Mobile, Lords Mobile, Crasher: Origin, State of Survival...

In PC games; League Of Legends, Valorant, Counter-Strike: Global Offensive, PUBG, Roblox, Minecraft, Euro Truck Simulator, Rocket League, Knight Online, Metin 2, Zula were the leading games.

Along with Steam, Epic Games Store, Xbox Game Pass PC, EA Play, Uplay, Origin became important platforms for Turkish players.

In general, the main factor shaping the sector is mobile. Mobile games will continue to be the fastest-growing segment in the coming years; In 2021, more than 600 million dollars of total revenues in Turkey were obtained from mobile games.



Gaming Market in Turkey

Top Eye-Catching Major Events in 2021

Cem Bölükbaşı - From Esports to Real Tracks

Cem Bölükbaşı started his esports career with I-Racing. He was then selected for the Fernando Alonso team, making it to the top twenty among 70,000 people in F1 Esports. He ranked fifth in the world in Abu Dhabi in 2017, and second in the world with the Red Bull Toro Rosso Team in 2018 (in esports F1). In 2019, Borusan Otomotiv Motorsport took the real track for the first time. He competed in all 15 races with the BlackArts Racing team in the 2021 F3 Asian Championship and finished the championship in 9th place with a total of 61 points. In the rookie's classification, he placed second after Ayumu Iwasa. With this rise, he will compete in the Charouz Racing System team in Formula 2 in 2022.



CEM BÖLÜKBAŞI

TEMÜÇİN ÜNALP
FOUNDER & CEO - TEM AGENCY



Gaming Market in Turkey

Top Eye-Catching Major Events in 2021

Dream Games Receives \$155 Million Investment

Turkish game company Dream Games, which was founded in 2019, received an investment of 7.5 million dollars in November 2020 under the leadership of the Makers Fund. The company doubled its value with an investment of \$ 50 million under the leadership of Ventures in February 2021. In the Series B investment round held in June 2021, Dream Games managed to receive a total of \$155 million in investment from Index Ventures, Makers Fund, Balderton Capital, IVP, and Kora. Thus, reaching a valuation of 1 billion dollars in 2021, it became Turkey's new unicorn together with Peak Games and Getir. *(At the beginning of 2022, Dream Games' valuation was announced as \$2.75 billion, with a new investment of \$255 million.)*



SONER AYDEMİR



Gaming Market in Turkey

Top Eye-Catching Major Events in 2021

Twitch Bit Scandal - Turkish Publishers in Judgment

One of the most important events in the gaming industry in 2021 was money laundering and bitcoin events in Twitch, led by Twitch Turkey. It was revealed that many publishers were involved in money laundering from stolen credit cards with Twitch Bit in the event that first exploded on the Knight Online forums and then was widely announced by names such as Jahrein and Pqueen. The police's detention of several publishers was also widely covered in the traditional press.



Investments in the Gaming Industry

According to the Startup Centrum 2021 Turkey Startup Ecosystem Investment Report; One of the most talked-about sectors of 2021 was the gaming sector again. In 2021, 54 startups in the game industry received investments. Although it is not talked about as often as the game industry in the ecosystem, 46 startups that offer artificial intelligence solutions that are always related to the industry received investments. Data & analytics took third place with 39 startups.



While the Turkish entrepreneurship ecosystem received a total investment of 1.1 billion dollars in 2021, 266 million dollars of this amount belongs to the gaming industry. The vast majority of investments are made in-game studios, especially mobile game studios. Dream Games alone received a total investment of \$205M. The remaining 53 startups split the total investment of \$61M.

Of the 54 startups that received investment in 2021, 48 are game studios, while the remaining 6 are from blockchain-based video game platforms to assistants that improve your gameplay with artificial intelligence. Of the 48 game studios that received investment, 22 produce mobile games in the hyper-casual genre.



Investments in the Gaming Industry



Company

Amount of Investment

Investor

Dream Games	\$205 Million	Index Ventures, Makers Fund, Balderton Capital, IVP, Kora
Libra Softworks	\$30 Million	Actera Group
Panteon	\$10 Million	Teknasyon'un Kurucu Ortakları Mustafa Vardalı, Burak Sağlık ve Mustafa Sevinç
Ace Games	7 Million Dollars	NfX, Kristian Segerstrale, Alexis Bonte, Kaan Cüney
hadi	5.2 Million Dollars	Tripledot
Brew Games	\$4 Million	Actera Group
Enucuzoyun.com	300 Thousand Euro Investment	23 Studios
Fomo Games	17 Million TL	Voodoo
Publishme	69.82% Majority Share	Nazara Technologies
HEY Games	1.2 Million Dollars	Ludus Girişim Studio
Paxie Games	1 Million Dollars	Ludus Girişim Studio
Maestro Games	500 Thousand Dollars Seed - 500 Thousand Dollars Marketing	Ludus Girişim Studio
Fortune Mine	850 Thousand Dollars Pre-Seed	Ludus Girişim Studio
Stardust Games	450 Thousand Dollars Pre-Seed	Ludus Girişim Studio
UDO Games	420 Thousand Dollars	WePlay Ventures - Lima Ventures
Gnarly Game Studio	Investment Over 5 Million TL Valuation	WePlay Ventures
Madcraft Studios	Seed Investment Over 2 Million TL Valuation	WePlay Ventures - Matchingham Games
Funmoth Games	Investment over 10.5 Million TL Valuation	WePlay Ventures
Hoody Studios	Seed Investment Over 1.8 Million TL Valuation	WePlay Ventures
Forge Games	Investment over 2.6 Million TL Valuation	WePlay Ventures
Gorilla Softworks	Seed Investment Over 2.5 Million TL Valuation	WePlay Ventures
Teleporter	Investment Over \$12 Million Valuation	ARYA Investment Platform - TR Angels - Individual Investments
Tiplay Studio	\$500K at \$25M Valuation	Re-Pie Portfolio, Kerim Kotan, Saruhan Tan



Investments in the Gaming Industry


2021

Company

Amount of Investment

Investor

Company	Amount of Investment	Investor
Inooster	700 Thousand Dollars Investment	TechOne VC, Logo Ventures, APY Ventures Fintech GSYF, APY Ventures Start-up GSYF
Zerosum	Purchased	Zynga
The Academys	Investment Over 12.5 Million TL Valuation	---
Abrakadabra Games	Investment Over \$5 Million Valuation	WePlay Ventures
Cyroscooping Games	Seed Investment Over 2.2 Million TL Valuation	WePlay Ventures
Hero Concept	Investment Over \$3 Million Valuation	WePlay Ventures
Apphic Games	1.4 Million TL Investment	WePlay Ventures
Gulliver's Games	750 Thousand Dollars Investment	Boğaziçi Ventures - March Capital
Fiber Games	3 Million TL Investment	Boğaziçi Ventures
Mafia Games	3 Million TL Investment	Boğaziçi Ventures
Funrika	2.75 Million TL Investment	Boğaziçi Ventures
Tosby Games	Investment over \$500 Thousand Valuation	Keiretsu Forum Turkey
Settings Labs	800 Thousand TL Investment	Individual Angel Investors
Ela Game Studio	Investment Over 1.4 Million Euro Valuation	Roman Kaiser (Individual)
Uncosoft	Purchased	Rollic
Creasaur Entertainment	Purchased	Rollic
Bytetyper	Purchased	Rollic
Hungrı Games	1.1 Million Dollars Investment	Triple Dragon
Veloxia	3 Million Dollars Investment	Collective Spark
Tiramisu	20% Share Purchase	Erdem Yurdanur (Individual)
Agave Games	Financial Details Not Shared	500 İstanbul, Akın Babayiğit (Bireysel)
Click Game Studio	Financial Details Not Shared	Netmarble Turkey
Moon Star Games	Investment Over 10 Million TL Valuation	Individual Angel Investors



Turkish E-sports Federation

TESFED

Interview

Short Evaluation Notes Of Our Federation President For 2021

Gaming and esports are much loved in our country, which is distinguished by its young population. When Covid-19 first started, an increase in time spent at home reflected positively on the gaming sector. With the mitigation of measures, live esports tournaments started again yet partially.

Organizations draw great attention even if they are currently brought to life with a limited number of spectators and after all health measures are taken, and live matches in online streaming platforms such as Twitch are watched by plenty of esports lovers. We've seen good examples of game-brand collaborations. This is because gaming and esports have actually become one of the most efficient tools for reaching an audience at a certain age range.



ALPER AŞİN ÖZDEMİR
TESFED FOUNDING
PRESIDENT /
EUROPEAN ESPORTS
FEDERATION
FOUNDING BOARD
MEMBER



Turkish E-sports Federation

TESFED

Interview

Important Headlines

"We will host the Global Esports Games 2022 event. This is a significant development for our country."

"In the 3rd Bitexen TEFED Turkish Cup held in 2021, thousands of esports players from all around Turkey battled in 11 different branches, and the champions had the opportunity to represent our country with their national teams in many different international tournaments."

"Having become champion in the NBA2K tournament in Bitexen TEFED Turkish Cup, our team won the title for two consecutive times by eliminating opposing countries in the international FIBA Esports Open Tournament organized by the International Federation of Basketball."

"Turkey makes progress every passing day in terms of esports. Today, many traditional sports clubs including Galatasaray, Fenerbahçe, and Beşiktaş are expanding their esports branch."



ALPER AŞİN ÖZDEMİR
TESFED FOUNDING
PRESIDENT /
EUROPEAN ESPORTS
FEDERATION
FOUNDING BOARD
MEMBER



Turkish E-sports Federation

TESFED

TESFED Activities In 2021 - What Did We Do As TEFED In 2021?

Primary goals at the beginning were to develop esports in Turkey, make Turkey a global brand in the field of esports, and wave the Turkish flag proudly with the success to be achieved in the international arena. In 2021, we continued all our efforts and activities to stick with these goals at the beginning. For instance,

TESFED Turkish Cup, which is the only official esports cup in Turkey, has come into our lives as a tradition since 2018, and become an organization that provides a significant contribution to the development of esports in our country in a short period of time. The cup organized under the title of "Bitexen TEFED Turkish Cup" this year draws more attention every passing year. Champions in certain branches of the Cup have officially represented our country in international tournaments since last year. Even if the pandemic hasn't just ended actually, we accelerated our efforts by paying an utmost level of attention to taking necessary measures. We completed "Bitexen TEFED Turkish Cup" finals at ISFANBUL Theme Park on August 14-15. In this year's cup, thousands of esports players from all around Turkey battled in 11 different branches, and the champions had the opportunity to represent our country with their national teams in many different international tournaments.



Turkish E-sports Federation

TESFED

TESFED Activities In 2021 - What Did We Do As TEFED In 2021?

Having become champion in the NBA2K tournament in TEFED Turkish Cup, our team officially represented our country for two consecutive times in the international "FIBA Esports Open" tournament organized by the International Federation of Basketball and won the title for two consecutive times by eliminating opposing countries once again.

Many global esports events were brought to life in our country in the past period. Our esports players represented our country in the IESF World Championship held in Eilat, Israel, and in the first GEG World Championship held in Singapore, and we participated in both tournaments as a national team.



Turkish E-sports Federation

TESFED

Interview

What Will TEFED's 2022 Strategy Be?

Our country was chosen to be the host country for Global Esports Games 2022, of which the first event was held in Singapore in late 2021 by the Global Esports Federation. Next year, we'll be hosting the event in our country. This is a significant development for our country as well as an important opportunity to draw the attention of the global gaming and esports ecosystem into our country.

As Turkish Esports Federation, all our efforts are intended to extend the esports base and make our country one of the global brands and recognized esports countries in the world. This year, we'll proceed on our way more confidently after a period of 3.5 years in line with this purpose. To this end, we're doing many things from collaboration with Ministries to esports licensing, and from tournaments to joint projects with gaming companies.

The Esports economy is estimated to be valued at approximately 5 billion dollars within the next 3 years. We, as a country, including game developers, investors, players, and teams must aspire after working at full steam to have a larger share of this cake. As a Federation, we'll keep playing a supportive and catalyzing role to this end in the next period, as well.



ALPER AŞŞİN ÖZDEMİR
TESFED FOUNDING
PRESIDENT /
EUROPEAN ESPORTS
FEDERATION
FOUNDING BOARD
MEMBER



Turkish E-sports Federation TESFED

Interview

What Will TEFED's 2022 Strategy Be?

We have a young population, and playing games is a part of their lives. It's not necessarily about the gaming audience only; our country has now become a center of gaming. We have crucial game producers that are demanded by foreign investors, and we hear about serious purchases.

In the past period, esports really grew and made considerable progress not only in our country but also around the world. It's obvious that this growth will be increasingly higher in the next years. We can say that there is a huge difference between the esports awareness 3,5 years ago and now. Now, esports is a priority for all advertisers, municipalities, streamers, and anyone. It has become the most important tool, particularly for anyone intending to reach an audience aged between 15 and 25.

In numbers, the latest data available shows that approximately 40 million people in Turkey play games. Esports has an average of almost 6 million followers. To give an example in figures in relation to an interest in esports, more than 900 thousand esports fans watched the Bitexen TEFED Turkish Cup organized this year by our federation.



ALPER AŞİN ÖZDEMİR
TESFED FOUNDING
PRESIDENT /
EUROPEAN ESPORTS
FEDERATION
FOUNDING BOARD
MEMBER



Turkish E-sports Federation TESFED

Interview

What Will TEFED's 2022 Strategy Be?

Turkey makes progress every passing day in terms of esports. Now, any university has an esports club and organizes esports tournaments. Our municipalities now prioritize esports facilities.

As a result, the development of the esports sector will yield a serious profit not only for those operating in this field but the entire country. We can say that we'll achieve success, become a recognized esports country in the world and all stakeholders in the ecosystem will benefit from it to the extent we build better infrastructure and take more informed steps in our country.

We, as the federation, will keep making any type of effort for extending the base of and institutionalizing Turkish esports throughout 2022. Thus, we'll accelerate our efforts via various collaborations and projects.



ALPER AFŞİN ÖZDEMİR
TESFED FOUNDING
PRESIDENT /
EUROPEAN ESPORTS
FEDERATION
FOUNDING BOARD
MEMBER



RIOT GAMES 2021

Interview

A Brief Evaluation Of 2021 By RIOT Games

We've become a company that redefines the world of entertainment for gamers with our project Arcane, published by Netflix in the last months of 2021. Arcane's launch has been the starting point for a new period. Arcane has been the most-watched series in exactly 38 countries in the launch week and made it to TOP10 in 87 countries. The series ranked top 5 in many countries such as Turkey, Canada, and South Korea. It reached 130 million views on the Tencent streaming platform in the launch week and has been the most searched title on this platform. It's scored 9.2 in the IMDB as of the final week of January. Considering the gaming part, League of Legends, having managed to be in with gamers in MOBA style for years, will celebrate its 10th anniversary in Turkey this year. We saw that LoL, our first love, continued to increase the number of players in our country with more than 20 million accounts by the end of 2021.

Our league streams were watched for more than 6 million hours in 2021. On the other hand, League of Legends Wild Rift has become one of our most important steps in the mobile world. The year ended with many awards proving its success. Even if it's still in beta, the awards received motivate us a lot. We celebrated the 1st anniversary of VALORANT last year. The year ended with more than half a billion matches in the world. With more than 14 million active PC gamers in the world, VALORANT has become our most loved game, particularly in our country. We also improved the gaming experience by investing in a Turkish server dedicated to our gamers. We always keep improving the contents of the game via new agents, maps, modes, and in-game updates. In summary, 2022 has been a great year for us, exploring many innovations, providing our gamers with new experiences at various platforms, and achieving our goals.



ERDİÑÇ İYİKÜL
RIOT GAMES
TURKEY COUNTRY
MANAGER

**RIOT
GAMES**



RIOT GAMES 2022

Interview

2022 Goals As Riot Games

We, as Riot Games, have evolved into an entertainment company focusing on the games, particularly in the past 3 years. We've become a part of a large entertainment ecosystem from PC and mobile games to console games, music to comic books, huge events to fashion collaboration, by going beyond making the best of letters at the end of our name in terms of products in the past years. In 2022, we intend to continue coming together with wide audiences by differentiating our content as a gaming-focused entertainment company. We want to make an impact on the life of anyone playing our games and continue to provide exciting content for them. We've seen that we're doing quite the right business from the reactions to Arcane lastly, even though we're just at the beginning. 2022 will be the 10th anniversary of Riot Turkey, and brand new adventures such as Project L, Hytale, Valorant Mobile, and several Riot Forge games are waiting for us as we enter into the second decade. We're establishing a dynamic and huge ecosystem built on games. We keep shaping all our plans and structures accordingly. Therefore, I can confidently say that everyone will hear about the name of Riot Games and its products much more in 2022.



ERDİNÇ İYİKÜL
RIOT GAMES
TURKEY COUNTRY
MANAGER

**RIOT
GAMES**



CEM BÖLÜKBAŞI

Interview

A fairy tale that almost the entire gaming industry wanted to see has become reality. We know, it is a story that is too long to fit in the articles, but still, can you tell us your success story from your point of view? How did it start, were there any situations that discouraged you? What were the breaking moments?

My story started when my father's friends noticed my passion for speed and told my father to direct me to motocross. I started motocross at the age of 5 and became the champion of Turkey at the age of 6. Racing on real tracks requires serious financial support and we could not reach this financial support at that time. This was one of the breaking moments, and in the following years, I turned to esports. This situation did not discourage me and even enabled me to gain expertise in a completely different field and to break new ground in the world. I participated in the Formula Esports World Championship in 2017 and became the fifth in the world. I am the first driver to be selected for the Simracing team of Formula 1 champion Fernando Alonso. As one of the top 20 racers among 70,000 people who participated in F1 Esports in 2018, I became the world champion in the ProDraft auditions. I joined the Redbull Toro Rosso Formula 1 team and we came second in the world with the team. After these successes on the esports side of Formula 1, I had the opportunity to race on real tracks in time and I was able to carry my virtual steering control to real tracks. Another breaking moment of my career is my story that I wrote from virtual to reality. I became the first racing driver in the world to take his racing career from virtual to real to Formula 2 level.



CEM BÖLÜKBAŞI
FORMULA 2 DRIVER



CEM BÖLÜKBAŞI

Interview

Our young people are very interested in esports. They follow esports players and we have a lot of young people who want to take them as an example and continue in this field professionally. Now you have shown us that there is another possibility in a completely different field. This is very difficult and a great achievement. What advice would you like to give to young people at this point, what would be your suggestions?

Working hard, being organized and disciplined. While I was getting to this level, I worked day and night for both my school and my racing career. While studying for school exams, I did simulation training for the esports world championships for up to 8 hours a day. As in all advanced sports, getting from zero to a certain level is a long and difficult journey. Although there are many ups and downs on this road, the main goal should be not to give up and have fun. The most important thing is to be able to enjoy the difficulties and successes at every moment of the journey until you reach the end.



CEM BÖLÜKBAŞI
FORMULA 2 DRIVER



CEM BÖLÜKBAŞI

Interview

It is such a story that it makes you say "The Real Match Begins Now". What are your goals after that? What awaits us?

I have dreamed of being a Formula 1 driver since I was little. I am now, one step away from Formula 1 level. My biggest goal right now is to do my best in the Formula 2 World Championship, which will start at the end of March. It will be a different excitement for me to race on the same tracks in the same weeks as Formula 1. Exciting races await us on the best tracks in the world for 14 weekends. My biggest dream is to be the first racing driver in Turkey to compete in Formula 1.



CEM BÖLÜKBAŞI
FORMULA 2 DRIVER



METaverse AND GAMING SECTOR

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Full Article!](#)



Interview

There is an incredible amount of misinformation about the Metaverse, which was first introduced in sci-fi novels in the 90s. Especially in Turkey, it is observed that there is a misunderstanding of the concept of Metaverse, which is tried to be engraved in this mind, and the idea of making unfair profits through different businesses.

In-game product placement or in-game advertising models that we have been making for brands for years have been named Metaverse by those who want to gain an unfair advantage. This is not a correct orientation. It would be wrong to narrow down the concept of the metaverse. The imagined Metaverse does not yet exist. The concept to be created is based on an online, 3D universe that combines multiple different virtual spaces - digital worlds, and removing the boundaries of the physical world and the digital world. Many big companies, especially Facebook's umbrella company Meta platform, are currently working on this issue.

The concept of Metaverse claims to be a decentralized online universe that gathers, covers, and combines all these worlds in one place. The easiest way to understand the Metaverse is through movies. The best movie made on this subject is 2018's "Ready Player One" directed by Steven Spielberg. Technically, currently used hardware products and internet infrastructure are not suitable for Metaverse. Everything that Facebook uses in its promotion or that we see in movies is just fiction right now. Time will tell if it will come true.



OZAN AYDEMİR
CEO
GAMING IN TURKEY
GAMING AND
ESPORTS AGENCY

METaverse



METaverse AND GAMING SECTOR

Interview

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Our current internet and computer infrastructure are not available for Metaverse. We are still in the "M" of the Metaverse. Virtual reality helmets are currently used for the virtual universe. Virtual reality helmets allow you to feel in a virtual environment with 3D imaging technology. Helmets are very heavy, very difficult to carry on our heads for a long time, have very low resolutions and most of them have to work connected to computers. Also, a feeling or an experience is not very possible, you are just where you are. It provides a limited interactive experience in the virtual world or games with certain movements such as bending over, getting up, going back and forth in the virtual world.

Game companies combine their own worlds with other virtual worlds and offer very different content to the players, such as the inclusion of heroes from the movies, concerts, independent of the game. Giant game companies make big investments and include other game companies and games within their own structure. Apart from all these, there are also game systems with blockchain infrastructure. Such games also offer players the opportunity to play games with crypto infrastructure, as well as to buy, sell and earn real money in a completely virtual universe. On the other hand, work has also started in Turkey. Domestic companies started to make crypto-based games and teams that could only serve crypto infrastructure were formed. I think that we will see more clear and concrete steps by the game companies in Turkey at the end of 2022 or in 2023. Domestic entries were made and continue to be made in the world of NFT.

The game industry is the only industry that will dominate if the imagined Metaverse world can be created, and in every sense; Fun, competition, and income. Games, gamified worlds form the basis of this work.



OZAN AYDEMİR
CEO
GAMING IN TURKEY
GAMING AND
ESPORTS AGENCY

METaverse



BLOCKCHAIN AND GAMES

Interview

The blockchain system is one of the most functional methods of today's technology. Basically, when looking at history, the integration of cryptography, which dates back 6,000 years to cuneiform, into today's world is extremely successful. So much so that the blockchain system is used in areas where many different technical data such as finance, health services, logistics are processed. The blockchain is both transparent and reliable, making this technology extremely valuable. In parallel with the impact of blockchain on the banking and financial world, the effects on the billion-dollar gaming world have been positive too. With the use of blockchain technology, the functionality of virtual assets that have existed in the gaming world for many years has been increased and made faster and more controllable.

There are centralized models that have been used in the gaming world for years, and the models are based on the control of all data in the game by game managers. This situation results in the fact that all assets (virtual assets, in-game items, collections, etc.) in the game are connected to the company that owns the database, causing the players to not actually own the assets they actually own. Blockchain technology gives players full control over their accounts and virtual assets and access to freedom of trade with these assets. The adventure of converting virtual assets in blockchain games into real assets makes these games extremely attractive. Virtual assets such as cards, characters, plots, equipment, etc. in the game can be reciprocated as NFT or cryptocurrency. As a result of this situation, players spend more time in the game in order to obtain these assets, and the system to earn money by playing appears as the **Play to Earn** model.



SERHAT BEKDEMİR
FOUNDER
COLLEGIATE
ESPORTS LEAGUE

IESF
EDUCATION AND
YOUTH
COMMISSION
PRESIDENT

BLOCKCHAIN



BLOCKCHAIN AND GAMES

Interview

CryptoKitties debuted in 2017 and is one of the most popular blockchain-based games. Players can buy and sell cat NFTs with different characteristics to get unique kittens. This is entirely up to the player. These NFTs are manufactured with the ERC-721 standard. This is the opposite of the ERC-20 because every token produced in the ERC-721 is a unique piece. CryptoKitties' use of the ERC-721 protocol makes the game one of the most popular games.

Another blockchain-based game, Axie Infinity, allows users to compete in-game as both PvE and PvP use Axie's they own. As a result of this competition, the SLP (Smooth Love Potion) token is obtained. Axie Infinity uses the ERC-20 standard, the first version of the Ethereum protocol.

Although it is the first protocol, ERC-20 and ERC-721 form the basis of blockchain games today when factors such as user habits, adaptation to the revealed game, and costs are considered. On the other hand, ERC-1155, unlike ERC-721, can allow many transactions at once instead of taking a single transaction for each transaction. Therefore, ERC-1155 is more convenient and efficient than ERC-721. Considering all these processes, it can be predicted that there is a power behind blockchain technology that can change the World one day.



SERHAT BEKDEMİR
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EDUCATION AND
YOUTH
COMMISSION
PRESIDENT

BLOCKCHAIN



BLOCKCHAIN AND GAMES

Interview

Large gaming companies offering AAA-level games have started to invest in NFT. In December 2021, Ubisoft announced Ubisoft Quartz, which uses blockchain technology.

On the company side, project managers Nicholas Pouard and Didier Genevois explained their system as the ability to sell items, outfits, or equipment obtained after a completed game through Quartz.

Thanks to this situation, the exchange of virtual assets that already exist in-game can be extended to an even wider range, so only one game-specific asset can be transferred to other games using blockchain technology.



SERHAT BEKDEMİR
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EDUCATION AND
YOUTH
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PRESIDENT

BLOCKCHAIN



AI IN GAMING

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Interview

Artificial intelligence, which is a system with perception, thinking, and action capabilities, has now become almost an indispensable part of games. AI can be applied in gaming in various ways and in two categories: “the fun way”, improving the game for the player; and “the business way”, improving the business for the game developer.

Nobody likes playing against too difficult, easy, or boring opponents. AI can be used to avoid all of these. AI had incredible progress in recent years and reinforcement learning-based bots such as Alpha Go proved that AI can both beat human players and help them improve by challenging them and making the game interesting.

One benefit of having AI-based bots is that they generally try many different action sequences; In this way, AI agents can autonomously try out many different combinations, and their probability of detection is much higher than a human tester.

As the gaming industry is evolving with metaverse, NFTs, and play-to-earn, AI can be utilized more in previously less explored areas; In arcade games that require continuous level and content design, AI can be used to understand the player's style and arrange the building blocks that can be used for a level more challenging for the player. Design and implementation of AI-based bots that are adaptive to the gameplay: One can introduce gameplay, storytelling, or even a dialogue design that is adaptive to the actions of the user. There can be an unlimited variety of NPCs to populate the metaverse.



OĞUZ SİLAHTAR
CO-FOUNDER & CEO
UAHERO
(TARENTUM AI)



AI IN GAMING

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Interview

But what about the impact on the revenue in games? AI can play a big part when it comes to maximizing revenue generation.

Monetization: By using AI, you can understand the types of users that churn and build real-time strategies such as offering discount packages or in-game bonuses to prevent possible churns.

Lifetime Value (LTV) Prediction: LTV estimation is critical for User Acquisition. Statistical inference and machine learning can boost the accuracy of LTV predictions using the available revenue information (from day 1, day 3, day 7 to day 30 and day 360), along with contextual and behavioral data.

Marketing Optimization: While optimizing marketing campaigns, AI can help in allocating campaign budgets and optimizing bidding strategies, based on ROAS, installs, and retention all predicted by the help of machine learning. Moreover, it is also possible to understand the feasible ROAS targets that boost the volume of the campaign and still generate good revenue. AI can also help evaluate the performance of existing creatives, and provide insights into designing successful creatives.



CEM ORHAN
HEAD OF AI
UAHERO
(TARENTUM AI)

AI



2020



2021

**Turkey Game
Market 2020
&
Turkey Game
Market 2021
Comparison!**





POPULATION

TURKEY GAME MARKET REPORT 2021

- 2020 Population: **83.614.362**
- **22,8%** Age 0 - 14
- **67,7%** Age 15 - 64
- **9,5%** Age 64+



- 2021 Population: **84.680.273**
- **22,4%** Age 0 - 14
- **67,9%** Age 15 - 64
- **9,7%** Age 64+

2020

2021



INTERNET USERS

TURKEY GAME MARKET REPORT 2021

- Internet Users:

66.055.000+

- 79% of the population is online

* Individuals in the 16-74 age group

* Internet access at home %90,7

* Internet usage rate by gender
Male 84,7% - Female 73,3%

2020



- Internet Users:

70.000.000+

- 82,6% of the population is online

* Individuals in the 16-74 age group

* Internet access at home %92

* Internet usage rate by gender
Male 87,7% - Female 77,5%

2021



SOCIAL MEDIA USERS

TURKEY GAME MARKET REPORT 2021

• Active Social Media Users: **55.000.000**

- The average time that internet users aged 16-64 spend on social media every day is **2 Hours 57 Minutes**

2020



• Active Social Media Users: **65.000.000+**

- The average time that internet users aged 16-64 spend on social media every day is **2 Hours 27 Minutes**

- Facebook: 42 Million Users (+/-)
- Youtube: 60 Million Users (+/-)
- Instagram: 64 Million Users (+/-)
- Tiktok: 27 Million Users (+/-)
- Twitter: 16.5 Million Users (+/-)
- Snapchat: 13 Million Users (+/-)
- Twitch TV: 5.7 Million Unique Viewers Monthly

2021

Source: We Are Social Digital 2022 Local Country Headlines Report



MOBILE USERS

TURKEY GAME MARKET REPORT 2021

- 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

2020



- Mobile Users: **87.000.000+**
- **104%** Mobile / Population
- **75 -80%** Smartphone / Mobile
- Smartphone Users:

Number of subscribers whose device and SIM card are suitable for 4.5G service

59.000.000 (+ / -)

- 4.5G Subscribers: 80.8 Millions
- 3G Subscribers: 4.1 Millions
- Other: 2G and M2M

2021

Source: Information Technologies and Communications Authority (BTK)
Turkish Electronic Communications Sector 2021 3rd Quarter Market Data Report



PLAYERS

TURKEY GAME MARKET REPORT 2021

- 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 TL

2020



- Players: **42.000.000+**
- Total Game Revenue:
1.200.000.000 USD (+ / -)

- Mobile: 620.000.000 USD (+ / -)

- PC: 300.000.000 USD (+ / -)

- Console: 280.000.000 USD (+ / -)

1 Dollar = 8,9 TL

2021



PLAYERS

TURKEY GAME MARKET REPORT 2021

Players Breakdown (Estimated)

• **MOBILE:** 35 Million Players



• **PC:** 22 Million Players



• **CONSOLE:** 17 Million Players



• **MOBILE:** 40 Million Players

• **PC:** 24 Million Players

• **CONSOLE:** Million Players

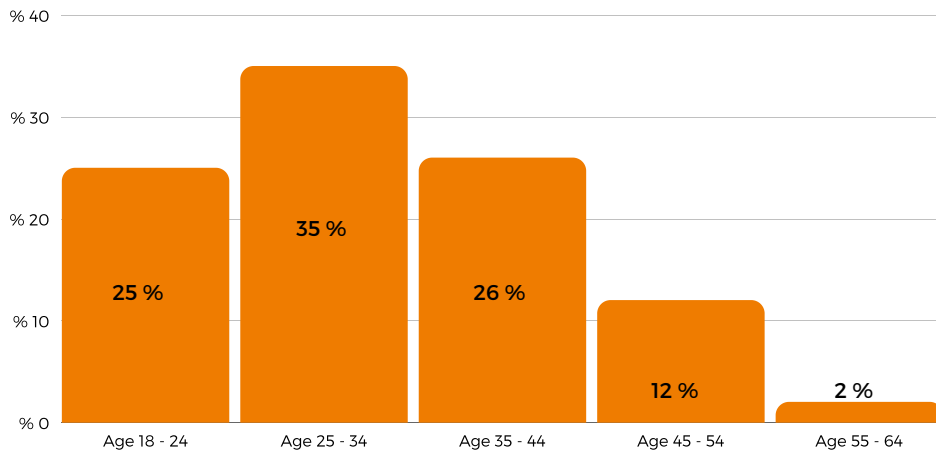
2020

2021



PLAYERS BY AGE

TURKEY GAME MARKET REPORT 2021



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 Age 2021

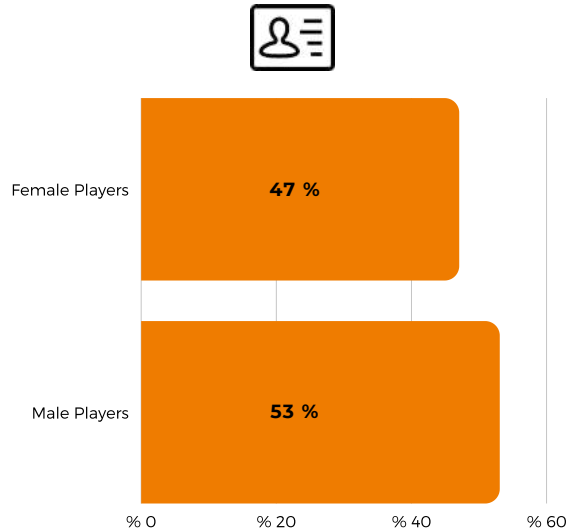
Age 18 - 24	25 %
Age 25 - 34	35 %
Age 35 - 44	26 %
Age 45 - 54	12 %
Age 55 - 64	2 %

2021



PLAYERS BY GENDER

TURKEY GAME MARKET REPORT 2021

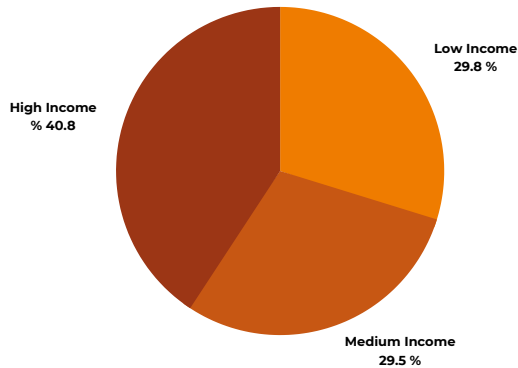


2021

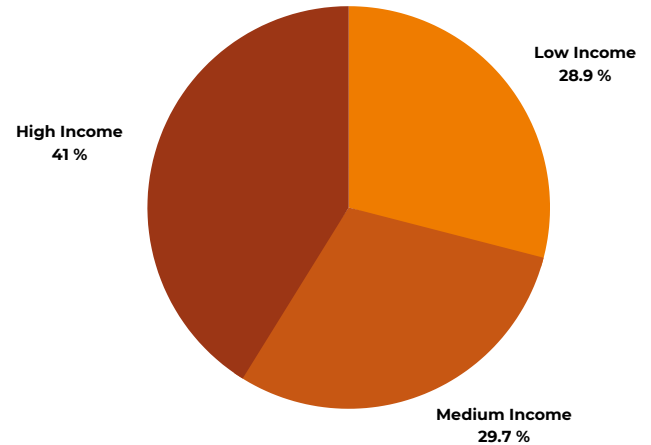


PLAYERS BY INCOME

TURKEY GAME MARKET REPORT 2021



2020



2021



TOP 15 MOBILE GAMES - FREE GAMES DOWNLOAD

TURKEY GAME MARKET REPORT 2021



1	PUBG Mobile - Tencent	9.000.000 +
2	Brawl Stars - Supercell	6.000.000 +
3	Subway Surfers - Sybo	6.000.000 +
4	PK XD - Movable	6.000.000 +
5	Going Balls - Supersonic	5.500.000 +
6	UNO by Mattel 163 - Mattel 163	5.500.000 +
7	ROBLOX - Roblox	5.000.000 +
8	Among Us! - InnerSloth	5.000.000 +
9	Kafa Topu 2 - Masomo	5.000.000 +
10	Tiles Hop: EDM Rush - Amamotes	5.000.000 +
11	Candy Crush Saga - King	4.750.000 +
12	Bridge Race - Supersonic	4.750.000 +
13	Phone Case DIY - Crazy Labs	4.500.000 +
14	My Talking Tom Friends - Outfit7	4.500.000 +
15	Hair Challenge - Rollic	4.500.000 +



TOP 15 MOBILE GAMES - REVENUE

TURKEY GAME MARKET REPORT 2021



1	PUBG Mobile - Tencent	19.000.000 USD +
2	101 Okey Plus - Zynga	13.000.000 USD +
3	Crasher: Origin - 4399 Games	10.000.000 USD +
4	Mobile Legends: Bang Bang - Moonton	9.700.000 USD +
5	Free Fire - Garena	9.500.000 USD +
6	Brawl Stars - Supercell	9.000.000 USD +
7	Lords Mobile - ICG	8.000.000 USD +
8	Call of Duty: Mobile - Activision Publishing, Inc.	7.500.000 USD +
9	State Of Survival - KingsGroup	7.000.000 USD +
10	ROBLOX - Roblox Corporation	6.500.000 USD +
11	Hero Wars - NEXTERS GLOBAL LTD	6.000.000 USD +
12	Fun Okey 101 - Quick Game	5.750.000 USD +
13	Clash Of Clans - Supercell	5.500.000 USD +
14	Game Of Sultans - Mechanist	5.000.000 USD +
15	Top War: Battle Game - Topwar Studio	5.000.000 USD +



TOP 15 MOBILE GAMES - PAID GAMES DOWNLOAD

TURKEY GAME MARKET REPORT 2021



1	Minecraft Pocket Edition - Mojang	75.000 +
2	Hitman: Sniper - SQUARE ENIX	45.000 +
3	Mesih - Fatih Beceren	45.000 +
4	Construction Simulator 2014 - Astragon	35.000 +
5	RFS - Real Flight Simulator - RORTOS	30.000 +
6	The Sun Origin: Post-apocalyptic	30.000 +
7	Earn To Die - Not Doppler	25.000 +
8	Football Manager 2021 - SEGA	20.000 +
9	Grand Theft Auto: San Andreas - Rockstar Games	20.000 +
10	Plague Inc - Ndemic Creations	20.000 +
11	Grand Theft Auto: Vice City - Rockstar Games	15.000 +
12	Justice Gun 2 - Rigbak	13.000 +
13	Earn To Die 2 - Not Doppler	12.000 +
14	Real Steel - Reliance Anil Dhirubhai Ambani Group	10.000 +
15	Geometry Dash - RobTop	10.000 +



TOP 15 MOBILE GAMES - PAID GAMES REVENUE

TURKEY GAME MARKET REPORT 2021



1	Minecraft Pocket Edition - Mojang	850.000 USD +
2	Football Manager 2021 - SEGA SAMMY	190.000 USD +
3	Football Manager 2022 - SEGA SAMMY	80.000 USD +
4	Grand Theft Auto: San Andreas - Take Two Interactive	80.000 USD +
5	Farming Simulator 20 - Giants Software	75.000 USD +
6	Space Shooter : Galaxy Attack - OneSoft	70.000 USD +
7	Rfs - Real Flight Simulator - RORTOS	40.000 USD +
8	Grand Theft Auto: Vice City - Take Two Interactive	40.000 USD +
9	Hitman: Sniper - SQUARE ENIX	30.000 USD +
10	Tank Hero - Siege Camp	20.000 USD +
11	Stardew Valley - Chucklefish	20.000 USD +
12	Red Ball 4 - FDG Entertainment	20.000 USD +
13	Bloons TD 6 - Ninja Kiwi	20.000 USD +
14	Construction Simulator 2014 - Astragon	17.500 USD +
15	Goat Simulator - Embracer Group	17.500 USD +



THE MOST POPULAR TURKISH MOBILE GAMES OF 2021

TURKEY GAME MARKET REPORT 2021

The games are also included in the list before investment and/or purchase.

- Kafa Topu 2 - Masomo / Miniclip
- 101 Okey Plus - Peak Games / Zynga
- Hair Challenge - Rollic
- Bus Simulator - Zuuks Games
- Words Of Wonders - Fugo
- Truck Simulator : Ultimate - Zuuks Games
- Truck Simulator 2018 - Zuuks Games
- Traffic Racer - Soner Kara
- Paper Fold - Good Job Games
- Traffic Rider - Soner Kara
- Batak: Card Game like Spades - Fuzzy Mobile Games
- TRT Bil Bakalım - Turkish Radio and Television Corporation
- Fashion Battle - Apps Information Technologies
- Arrow Fest - Rollic
- TRT Çocuk Kitaplık - Turkish Radio and Television Corporation
- Wordhane - Word Search Puzzle - Aybars Yalçın
- Drift Max Pro - Tiramisu



THE MOST DOWNLOADED MOBILE APPS IN TURKEY

TURKEY GAME MARKET REPORT 2021

1	E-Nabiz - Ministry Of Transport, Maritime and Communications	14.000.000 +
2	TikTok - ByteDance	13.000.000 +
3	Getir - Getir	13.000.000 +
4	HES - Life At Home - Turkey Ministry Of Health	13.000.000 +
5	Trendyol - Trendyol	12.000.000 +
6	Instagram - Instagram	11.000.000 +
7	MHRS - Turkey Ministry Of Health	10.500.000 +
8	WhatsApp Messenger - WhatsApp	10.500.000 +
9	Telegram - Telegram	9.000.000 +
10	E-Devlet - Ministry Of Transport, Maritime and Communications	9.000.000 +
11	Yemek Sepeti - Yemeksepeti	9.000.000 +
12	Hepsi Burada - Hepsiburada	8.500.000 +
13	Facebook - Meta	7.500.000 +
14	CapCut- ByteDance	7.500.000 +
15	Snapchat - Snap	7.000.000 +





TOP MOBILE APPS IN TERMS OF MONEY SPENT IN TURKEY

TURKEY GAME MARKET REPORT 2021



1	TikTok - ByteDance	15.000.000 USD +
2	Azar - Hyperconnect	12.000.000 USD +
3	LivU - Riley Cillian	10.000.000 USD +
4	Tango Live - Tangome	9.000.000 USD +
5	BIGO LIVE - BIGO	8.000.000 USD +
6	Live Chat - Riley Cillian	7.000.000 USD +
7	Tinder - Match Group	6.000.000 USD +
8	Connected2.me - C2M	5.500.000 USD +
9	Yalla - Yalla	5.500.000 USD +
10	YouTube - Google	3.000.000 USD +
11	CuteU - Asia Innovations	2.500.000 USD +
12	Lamour - Asia Innovations	2.500.000 USD +
13	letgo - letgo	2.000.000 USD +
14	Bermuda - Bermuda Inc	2.000.000 USD +
15	Storytel - Storytel	2.000.000 USD +



MOST PREFERRED PC GAMES IN 2021

TURKEY GAME MARKET REPORT 2021

- Age of Empires IV
- Among Us
- Apex Legends
- Arma 3
- Assassin's Creed Odyssey
- Assassin's Creed Valhalla
- Assetto Corsa
- Back 4 Blood
- Baldurs Gate
- Battlefield 1
- Battlefield 2042
- Battlefield V
- Black Desert Online
- Borderlands 3
- Brawlhalla
- Business Tour
- Call of Duty: Black Ops 4
- Civilization VI
- Counter-Strike
- Counter-Strike: Global Offensive
- Crab Game
- Cyberpunk 2077
- Dead by Daylight
- Death Stranding
- Destiny 2
- DEVOUR
- Don't Starve Together
- Doom Eternal
- Dota 2
- Dying Light
- eFootball PES 2020
- eFootball PES 2021
- eFootball PES 2021 Season Update
- Escape From Tarkov
- Euro Truck Simulator 2
- Europa Universalis IV
- FI 2020
- Fall Guys
- Far Cry New Dawn
- Feign
- FIFA 21
- FIFA 22
- Football Manager 2020
- Football Manager 2021
- Fortnite
- Forza Horizon 4
- Frostpunk
- Garry's Mod
- Grand Theft Auto V
- Hades
- Halo: Infinite





MOST PREFERRED PC GAMES IN 2021

TURKEY GAME MARKET REPORT 2021

- Hearts of Iron IV
- Human: Fall Flat
- It Takes Two
- League of Legends
- Left 4 Dead 2
- Mafia: Definitive Edition
- Metin2
- Monster Hunter World
- Mortal Kombat 11
- Mount & Blade II: Bannerlord
- Mount & Blade: Warband
- Muck
- NBA 2K20
- Need For Speed Heat
- New World
- Paladins
- PAYDAY 2
- Phasmophobia
- PUBG: BATTLEGROUNDS
- Pummel Party
- Raft
- Ready Or Not
- Red Dead Redemption 2
- Resident Evil Village
- RISK: Global Domination
- Roblox
- Rocket League
- Rust
- Sea of Thieves
- Sekiro
- Star Wars Jedi Fallen Order
- Stardew Valley
- Stick Fight: The Game
- Super People
- Team Fortress 2
- The Crew 2
- The Forest
- The Witcher 3: Wild Hunt
- Tom Clancy's Rainbow Six: Siege
- Tower Unite
- Unturned
- Valheim
- Valorant
- Vampire: The Masquerade
- War Thunder
- Warframe
- Wolfteam
- World Of Warcraft
- Zula





MOST PREFERRED PC GAMES IN 2021

TURKEY GAME MARKET REPORT 2021



Shooter - FPS



Strategy



Adventure



Sandbox



Battle Royale



Racing



Role-Playing



Platform



Sport



Arcade





MOST PREFERRED CONSOLE GAMES IN 2021

TURKEY GAME MARKET REPORT 2021

- Among Us
- Apex Legends
- Assassin's Creed Valhalla
- Battlefield 1
- Battlefield 2042
- Battlefield V
- Brawlhalla
- Call of Duty: Black Ops 4
- Call of Duty: Black Ops Cold War
- Call of Duty: Black Ops III
- Call of Duty: Modern Warfare
- Call of Duty: WWII
- Days Gone
- Destiny 2
- EA Sports UFC 3
- eFootball 2022
- eFootball PES 2020
- F1 2020
- Fall Guys
- FIFA Series (20-22)
- Fortnite
- Forza Horizon 4
- Forza Horizon 5
- Genshin Impact
- Ghost of Tsushima
- God of War (2018)
- Gran Turismo Sport
- Grand Theft Auto V
- Horizon Zero Dawn
- It Takes Two
- Marvel's Spider-Man
- Minecraft
- Mortal Kombat 11
- Mortal Kombat X
- NBA 2K21
- NBA 2K22
- Need for Speed
- Overwatch
- PUBG: BATTLEGROUNDS
- Red Dead Redemption 2
- ROBLOX
- Rocket League
- Shadow of the Tomb Raider
- Star Wars Battlefront II (2017)
- Tom Clancy's Rainbow Six: Siege





TURKEY IN WORLD REVENUE RANKING

TURKEY GAME MARKET REPORT 2021

- World Ranking - Total

18 - 19

- World Ranking - Mobile

18 - 19

2020



- World Ranking - Total

18

- World Ranking - Mobile

18

2021



POPULAR GAMING COMPANIES IN TURKEY

TURKEY GAME MARKET REPORT 2021

- 2K Games
- 4399
- 89Trillion
- Ahoy Games
- Amanotes
- AMZG
- AppQuantum
- AppQuiz
- Apps Information Tech.
- Arenanet
- Arkane Studios
- Ascella Mobile
- Astragon
- AxesinMotion
- Ayasis
- Aybars Yalcin
- Azur Interactive Games
- Bandai Namco
- Beach Bum
- Beauty Salon Studio
- Bee Games
- Bethesda
- Better World Games
- Bioware
- Blizzard/Activision
- Boke
- BoomHits
- Bubadu
- ByteDance
- Candivore
- Capcom
- CD Projekt Red
- Chess Prince
- Chess.com
- Coda Platform
- ConcernedApe
- COWON
- Crazy Labs
- Crytek
- Critical Force
- Cubinet
- Daily Innovation
- Deep Silver
- Devolver Digital
- Dream Games
- Dress Games for Girls
- EA Games
- Easybrain
- Epic Games
- Etermax
- Facepunch Studios
- Fanatee
- FDG Entertainment
- Fidget Dev
- Fingersoft
- Firaxis Games
- First Touch
- Follow Circles
- ForgeGames
- FromSoftware
- Fugo
- Gamebasics
- Gameforge
- Gameloft
- Garena Online
- Gartic
- Grinding Gear Games
- Good Job Games
- Googame
- Habby
- Halfbrick
- He2 Apps
- HeadUpGames
- Hinterland Games
- Homa
- IGG
- Ilyon Dynamics
- Imangi
- Innersloth
- iPoseidon
- Ketchapp
- King
- KingsGroup
- Klei Entertainment
- Kojima
- Konami
- Kolibri Games
- Kooapps
- Krafton Game Union
- KRAFTON, Inc.
- Larian Studios
- Lilith Games
- Lion Studios
- Lokum
- Lowtech Studios
- Lunime
- Magic Tavern
- Maksim Gamarnik
- Marul Games
- Masomo
- Matchingham Games
- Mattel 163
- Mechanist
- Mediocre
- miHoYo
- Miniclip
- MNO GO APPS
- Mojang



POPULAR GAMING COMPANIES IN TURKEY

TURKEY GAME MARKET REPORT 2021

- Moon Studios
- Moonton
- Mobile
- Mynet
- Naughty Dog
- Ndemic Creations
- Nekki
- Neron's Brother
- Netease
- Netmarble
- NEXON
- New Star Games
- Nfinity Games
- Niantic
- Nika Entertainment
- Nintendo
- Nordeus
- Not Doppler
- Obsidian Entertainment
- Olzhass
- Onemt
- OneSoft
- Orange Studios Games
- Outfit7
- Panoramik Games
- Paradox Interactive
- Paradyme
- Playgendary
- Playmax Game Studio
- Pearl Abyss
- Playrix
- Psyonix
- Psyonix LLC
- Popcore
- Quick Game
- Relic
- Rollic
- Riot Games
- Roblox Cooperation
- Rockstar
- Rovio Entertainment
- RORTOS
- SCS Software
- SayGames
- SEGA
- SeyeonSoft
- Small Giant Games
- smSoft
- SNG ICT
- Social Point
- Soner Kara
- Sony Interactive
- StarUnion
- Square Enix
- Studio Wildcard
- Submarine Apps
- Supercell
- Supergiant Games
- Supersonic
- Sybo
- TapBlaze
- TapNation
- Techland
- Techland
- Tencent
- tinyBuild
- Tiramisu
- Toca Boca
- Top Games
- Topwar Studio
- Ubisoft
- Unico Studio
- Unreal Games
- VERTIGO GAMES
- Valve
- Wargaming
- Wildlife Studios
- Voodoo Games
- Warner Bros. Interactive
- Wooga
- Word Game Studio
- Xbox Game Studios
- X-Flow
- Yalla Game
- Your Story Interactive
- Z&K Games
- Zakeh
- Zego Studio
- Zenlife
- ZPLAY
- Zynga
- Zuuks Games



LOCAL GAMING COMPANIES IN TURKEY

TURKEY GAME MARKET REPORT 2021

COMPANY

- Abrakadabra Games
- Ace Games
- Aden Games
- Agave Games
- Alictus
- Alper Games
- Alfish Games
- Any Games
- Apphic Games
- ArcadeMonk
- Arsh Game Studio
- Aryas Games
- Axell Studio
- Babil Studios
- Backpack Games
- Berzah Games A.Ş.
- Bigger Games
- Blackburne Games Yazılım A.Ş.
- Black Coco
- Blended Games
- Brew Games
- BoomHits

WEBSITE

<https://abrakadabra.com.tr/>
<https://ace.games/>
<https://www.adengames.com/>
<http://www.agave.games/>
www.alictus.com
www.alpergames.com
<http://www.alfgames.com/>
<https://www.anygames.io/>
www.apphicgames.com
www.arcademonk.com
www.arshgames.com
www.aryasgames.com
www.axellstudio.com
www.babilstudios.com
www.backpack.games
www.berzahgames.com
<https://biggergames.com/>
<https://exnaturathegame.com/>
www.blackcoco.net
<https://blendedgames.com/>
<https://www.brew-games.com/>
<https://boomhits.com/>

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contact@blackburne.games
contact@blackcoco.net
ilke@blendedgames.com
info@brew-games.com
<https://boomhits.com/>



LOCAL GAMING COMPANIES IN TURKEY

TURKEY GAME MARKET REPORT 2021

COMPANY

- Bytetyper
- CatPath
- Click Game Studio
- Clown Games
- Crania Games
- Crealode Games
- Creasaur Entertainment
- Crescive Games
- Coconut Game
- Cool Pigz
- Dalak Games
- Digitoy Games
- Dream Games
- Ela Game Studio
- Elite Game Studio
- Enrich Games
- enny Games
- Erik Games
- Fabrika Games
- Fiber Games
- Fomo Games
- Forge Games

WEBSITE

<http://bytetyper.com/>
[www.cataeon.com](http://cataeon.com)
<https://clickgamestudio.com/>
www.clown.gs
www.craniagames.com
www.crealodegames.com
www.creasaur.net
www.crescivegames.com
<http://www.coconutgame.com/>
<https://coolpigz.io/>
<http://dalakgames.com/>
www.digitoy.games
www.dreamgames.com
<http://www.elagamestudio.com>
www.ingamegroup.com
www.enrichgames.com
<https://ennygames.com/>
www.erikgames.com
www.fabrikagames.com
www.fibergames.com.tr
<https://fomo.gs/>
<https://forgegames.co>

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<https://bytetyper.com/>
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contact@crealodegames.com
info@creasaur.net
hello@crescivegames.com
coconut@coconutgame.com
<https://coolpigz.io/>
egemen@dalakgames.com
support@digitoygames.com
info@dreamgames.com
info@elagamestudio.com
contact@ingamegroup.com
hi@enrichgames.com
<https://ennygames.com/contact>
info@erikgames.com
contact@fabrikagames.com
info@fibergames.com.tr
hello@fomo.gs
info@forgegames.co



LOCAL GAMING COMPANIES IN TURKEY

TURKEY GAME MARKET REPORT 2021

COMPANY

- Fortune Mine
- FoxPider Games
- Fugo Games
- Funika Games
- Funrika
- Funmoth Games
- Funpac (Mynet)
- Gamebit Studio
- Gamegos
- Gameguru
- GameHub
- Gamester
- Gametator
- Gamikro
- Garawell Games
- Gigantic Games
- Gnarly Game Studio
- Good Job Games
- Gorilla Softworks
- Gram Games
- Günay Studio
- Gulliver's Games

WEBSITE

<https://fortunemine.com/>
<https://www.foxpidergames.com/>
www.fugo.com.tr
www.funikagames.com
<https://www.funrika.com/>
www.funmoth.com
www.funpac.com
www.studiogamebit.com
<https://www.gamegos.com/>
www.gameguru.net
www.gamehub.gs
www.gamester.com.tr
<https://www.gametator.com/>
www.gamikro.com
<https://www.garawell.com/>
<https://gigantic.gs/>
www.gnarlygamestudio.com
www.goodjobgames.com
<http://gorillasoftworks.com/>
www.gram.gs
www.gunaystudio.com/tr/
<https://gullivers.games/>

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info@gamegos.com
hello@gameguru.net
info@gamehub.gs
<https://www.gamester.com.tr/contact>
letgamebegin@gametator.com
info@gamikro.com
info@garawell.com
<https://gigantic.gs/>
info@gnarlygamestudio.com
contact@goodjobgames.com
info@gorillasoftworks.com
other@gram.gs
info@gunaystudio.com
gullivers.games/



LOCAL GAMING COMPANIES IN TURKEY

TURKEY GAME MARKET REPORT 2021

COMPANY

- Gybe Games
- Gyroscoping Games
- hadi
- Hammurabi Games
- He2 Apps
- Heisen Games
- Hero Concept
- Hero Games
- HES Games
- Hey Games
- Hifive Games
- Hoody Studios
- Hungri Games
- HyperFlow Games
- Hyperlab
- HyperMonk
- Hypernova Technology & Gaming
- Imaginite Studios
- Indie-dir Games
- Joker Game
- Koala Game Studio
- Kodobur

WEBSITE

<https://gybegames.com/>
<https://gyroscopinggames.com/>
<https://www.hadi.gs/>
www.hammurabigames.com
www.he2apps.com
www.heisengames.net
<https://heroconcept.com/>
<https://www.herogamestudio.com/>
www.hesgames.com
www.hey.gs/tr/
<http://hifive.games/>
<https://www.hoodystudios.com>
<https://www.hungrigames.co.uk/>
www.hyperflowgames.com
www.hyperlab.games
<https://www.hypermonkgames.com/>
<https://www.hypernova-tech.com/>
www.imaginitesoft.com
www.indiedir.com
www.joker.games
<https://www.koalagamestudio.com/>
www.kodobur.com/tr

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info@hey.gs
<http://hifive.games/>
contact@hoodystudios.com
info@hungrigames.com
info@hyperflowgames.com
hello@hyperlab.games
info@hypermonkgames.com
info@hypernova-tech.com
info@imaginitesoft.com
info@indiedir.com
<http://jokergame.net/support-center>
info@koalagamestudio.com
info@kodobur.com



LOCAL GAMING COMPANIES IN TURKEY

TURKEY GAME MARKET REPORT 2021

COMPANY

- Kraker Studio
- Lacivert Digital Services
- Leartes Studios
- Libra Softworks
- Lokum Games
- MadByte Games
- Madcraft Studios
- Maestro Game Studio
- Mafia Games
- MagicLab Game Technologies
- Mangorama Studio
- Masomo
- Mavis Games
- Mayadem Teknoloji
- Mayaworks
- Metaverse Game Studios
- Midpoly Games
- MildMania
- Mixer Games
- Mobge
- Mobilecraft
- Momentum DMT

WEBSITE

www.krakerstudio.com
www.lacivert.org
<https://leartesstudios.com/>
www.librasoftworks.com
www.lokumgames.com
www.madbytegames.com
www.madcraftstudios.com
<https://maestro.gs/>
<https://mafia-games.com/>
www.maglab.com.tr
www.mangoramastudio.com
www.masomo.com
www.mavisgames.com
www.mayadem.com
www.maya.works
<https://angelicthegame.com/>
<https://www.midpolygames.com/>
www.mildmania.com
<https://www.mixer.games/>
www.mobge.net
www.mobilecraft.net
www.momentum-dmt.com/tr/

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support@masomo.com
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iletisim@mayadem.com
iletisim@multiplayer.com.tr
<https://angelicthegame.com/>
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weare@mildmania.com
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<https://mobge.net/contact>
support@mobilecraft.net
momentum-dmt.com/tr/company/contact-us/



LOCAL GAMING COMPANIES IN TURKEY

TURKEY GAME MARKET REPORT 2021

COMPANY

- Moon Star Games
- MoonStarGames
- Moralabs
- Mythra Tech
- Narcade
- Negentra
- NDC Studio
- Nitrid Game
- no-pact
- Noho Games
- Nowhere Studios
- Omnio Games
- OTTO Games
- Overdose Caffeine
- Oyun Stüdyosu
- Pango Games
- Panteon
- Passion Punch Studio
- Paxie Games
- Peak Games
- Pixega Studio
- Pixofun

WEBSITE

<https://www.moonstargames.net/>
<http://www.moonstargames.com/>
www.moralabs.com
www.mythratech.com
www.narcade.com
www.negentra.com.tr
<http://ndgstudio.com.tr/>
www.nitrid.com
www.nopact.com
www.noho.games
www.nowherestudios.com
<https://omniogames.com/>
<https://www.ottogames.studio/>
www.odcaf.com
www.oyunstudyosu.com
<http://www.pangogames.com/>
www.panteon.games
www.passionpunch.studio
<https://www.paxiegames.com/>
www.peak.com
www.pixegastudio.com
www.pixofun.com

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contact@peak.com
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LOCAL GAMING COMPANIES IN TURKEY

TURKEY GAME MARKET REPORT 2021

COMPANY

- Playable Factory
- Poison Software Studio
- POW Games
- Quok Games
- RealityArts Studio
- Recontact Games
- Revel Games
- Roar Games Studio
- Rockwise Entertainment
- Rog Studios
- Rollic Games
- Ruby Game Studio
- Settings Games
- Simsoft
- SinginGiant
- Sir Studios
- SNG Studios
- Spyke Games
- Stardust Games
- Studio Billion
- Studio Gamebit
- Suji Games

WEBSITE

www.playablefactory.com
www.poisonsoftwarestudio.com
<https://pow.games/>
<https://quok.games/>
www.realityartsstudio.com
www.recontactgame.com
<http://www.revel.gs/>
<http://roar.gs/>
www.rocwise.com
www.rogstudios.com
www.rollicgames.com
www.rubygamestudio.com
<https://settings.games/>
www.simsoft.com.tr
<http://www.singingiant.com/>
www.sirstudios.com
<https://www.sngict.com/>
<https://spykegames.com/>
<https://stardust.gs/>
www.studiobillion.com/tr
www.studiogamebit.com
www.suji.games

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info@rocwise.com
contact@rogstudios.com
<https://www.rollicgames.com/contact>
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<https://spykegames.com/>
<https://stardust.gs/>
info@studiobillion.com
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LOCAL GAMING COMPANIES IN TURKEY

TURKEY GAME MARKET REPORT 2021

COMPANY

- Taba Games
- TaleWorlds Entertainment
- Talus Studio
- Teleporter
- Teta Games
- Tiplay Studio
- Tiramisu Studios
- Tosby Games
- Trifles Games
- Udo Games
- Uncosoft Yazılım
- Upperpik Games
- VantaPlay Games
- Veloxia
- Vertigo Games
- Weez Beez
- Whoops Games
- Yamy Studio
- Ying Yang Games
- Zerosum
- Zuuks Games

WEBSITE

<https://tabagames.com/>
www.taleworlds.com
<http://www.talusstudio.com/>
<https://teleporter.gg/>
www.tetagames.com
www.tiplaystudio.com
www.tiramisu.game
<https://tosbygames.com/>
www.triflesgames.com
www.udogames.com
www.uncosoft.com
<http://upperpik.com/>
www.vanta.games
<https://veloxia.co>
www.vertigogames.co
www.weezbeez.com
<https://whoopsgames.com/>
<https://yamystudio.com/>
<https://yinyang.games/>
<https://zerosum.co/>
www.zuuks.com

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<http://upperpik.com/contact/>
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hey@veloxia.co
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info@yamystudio.com
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<https://www.zuuks.com/contact>





POPULAR STREAMERS IN TURKEY / TWITCH TV

TURKEY GAME MARKET REPORT 2021

TWITCH

TOP 20 POPULAR TWITCH STREAMERS IN TURKEY

	FOLLOWERS	NEW FOLLOWERS	TOTAL VIEWS	AVERAGE VIEWS	MAXIMUM VIEWS	STREAMING HOURS	HOURS VIEWED
#1 Eiraenn	2.8M	873K	42.7M	29.000	103.108	970	28.8M
#2 wtcN	2.6M	647K	38.8M	13.915	94.211	1.035	14.4M
#3 KendineMuzisyen	2.3M	522K	34.6M	18.981	92.142	939	17.8M
#4 UNLOSTV	2M	267K	17M	6.046	34.075	898	5.43M
#5 Pqueen	1.8M	883K	24.3M	8.400	362.223	1.324	11.1M
#6 Jahrein	1.69M	171K	14.5M	18.342	316.703	434	7.96M
#7 Mithrain	1.6M	158K	17M	4.409	16.426	1.402	6.18M
#8 ZEON	1.01M	57.5K	9.80M	1.419	7.732	1.763	2.50M
#9 Elwind	952.000	134K	11M	7.562	26.34	641	4.85M
#10 BerkRipTepe	909.000	195K	11.3M	3.238	27.109	912	2.95M



POPULAR STREAMERS IN TURKEY / TWITCH TV

TURKEY GAME MARKET REPORT 2021

TWITCH

TOP 20 POPULAR TWITCH STREAMERS IN TURKEY

	FOLLOWERS	NEW FOLLOWERS	TOTAL VIEWS	AVERAGE VIEWS	MAXIMUM VIEWS	STREAMING HOURS	HOURS VIEWED
#11 ANNADENİZ	828.800	208K	5.80M	2.068	33.973	392	811K
#12 Adal	803.890	482K	12.8M	3.670	13.37	1.065	3.91M
#13 Alptv	746.417	119K	6.14M	1.542	11.324	1.057	1.63M
#14 Miafitz	721.514	121K	8.18M	1.137	9.647	629	716K
#15 JrokezFTW	589.319	174K	14.4M	4.313	16.318	1.320	5.69M
#16 ThaldrinLol	562.629	7.8K	3.67M	928	13.770	1.384	1.28M
#17 XANTAREScN	547.142	136K	4.79M	7.323	17.467	152	1.12M
#18 EFEUYGAC	541.859	117K	3.79M	5.969	19.723	296	1.77M
#19 elanur	529.747	84.5K	2.61M	1.467	8.485	171	251K
#20 Videoyun	495.603	41.1K	10.8M	1.864	10.369	1.727	3.22M



POPULAR YOUTUBE CHANNELS IN TURKEY

TURKEY GAME MARKET REPORT 2021

YOUTUBE		TOP 20 POPULAR YOUTUBE CHANNELS IN TURKEY			
	SUBSCRIBERS	AVERAGE VIEWS	TOTAL VIEWS	TOTAL VIDEOS	MOST POPULAR VIDEO VIEWS (2021)
#1 SeseGel	3.91M	283.81K	2.2B	2.298	4.8M
#2 Burak Oyunda	3.42M	57.12K	1.17B	2.267	952K
#3 Barış G	3.34M	432.39K	917.02M	990	6.66M
#4 LAZ	3.21M	308.19K	1.52B	1.970	4.60M
#5 Minecraft Parodileri	3.19M	1.178M	2.53B	1.740	13.7M
#6 Baturay Anar	3.15M	526.1K	840.73M	976	753K
#7 MEZARCI	2.93M	244.19K	452.3M	703	2.75M
#8 Kozmik Karınca	2.78M	394.67K	810.15M	870	2.17M
#9 SeseGel Çocuk	2.77M	479.89K	2.56B	473	5.32M
#10 Ümidi	2.64M	127.51K	1.38B	5.360	1.71M



POPULAR YOUTUBE CHANNELS IN TURKEY

TURKEY GAME MARKET REPORT 2021

YOUTUBE		TOP 20 POPULAR YOUTUBE CHANNELS IN TURKEY			
	SUBSCRIBERS	AVERAGE VIEWS	TOTAL VIEWS	TOTAL VIDEOS	MOST POPULAR VIDEO VIEWS (2021)
#11 TÜRKPRO	2.62M	364.47K	1.25B	1.790	3.13M
#12 Oyun Portal	2.53M	52.33K	998.33M	3.280	255K
#13 BARIŞ BRA	2.5M	372.27M	769.16M	1.430	2.7M
#14 Ersin Yekin	2.36M	190.6K	560.97M	1.810	1.5M
#15 Minecraft Evi	2.35M	129.78K	966.74M	2.920	1.8M
#16 Gereksiz Oda	2.32M	239.85K	796.79M	1.930	1.69M
#17 YBJ	2.24M	234.24K	767.71M	1.920	5.31M
#18 Doch	2.21M	195.53K	366.1M	645	2.39M
#19 Han Kanal	2.17M	159.74K	1.77B	3.550	5.14M
#20 Duygu Köseoğlu	2.07M	268.23K	672.09M	825	1.04M



POPULAR INSTAGRAM INFLUENCERS IN TURKEY

TURKEY GAME MARKET REPORT 2021

INSTAGRAM

FOLLOWERS

#1 Elraen	1.2M
#2 Barış G	1.1M
#3 Wtcn	934K
#4 Mezarıcı	901K
#5 Kendine Müzisyen	802K
#6 Tuğay Gök	756K
#7 Hz. Yasuo	754K
#8 Doch	710K
#9 Mervan	694K
#10 Pqueen	686K



POPULAR INSTAGRAM INFLUENCERS IN TURKEY

TURKEY GAME MARKET REPORT 2021

INSTAGRAM

FOLLOWERS

#11 Duygu Köseoğlu	662K
#12 Baturay Anar	609K
#13 Unlost	607K
#14 Sesegel	563K
#15 Ersin Yekin	558K
#16 Miafitz	557K
#17 Emrecan Önal	545K
#18 Egoist Pati	492K
#19 Annadeniz	473K
#20 Barış Bra	455K



ACTIVE PAYMENT ORGANIZATIONS

TURKEY GAME MARKET REPORT 2021



- Aypara Ödeme Kuruluşu A.Ş. (880)
- Ceo Ödeme Hizmetleri A.Ş. (878)
- Dgpara Ödeme ve Elektronik Para Kuruluşu A.Ş. (893)
- Efix Ödeme Hizmetleri A.Ş. (876)
- Elekse Elektronik Para ve Ödeme Kuruluşu A.Ş. (855)
- Faturakom Ödeme Hizmetleri A.Ş. (858)
- Föy Fatura Ödeme Kuruluşu A.Ş. (859)
- Global Ödeme Hizmetleri A.Ş. (884)
- GönderAI Ödeme Hizmetleri A.Ş. (851)
- İstanbul Ödeme Kuruluşu A.Ş. (883)
- Klon Ödeme Kuruluşu A.Ş. (881)
- Moka Ödeme ve Elektronik Para Kuruluşu A.Ş. (857)
- MoneyGram Turkey Ödeme Hizmetleri A.Ş. (871)
- N Kolay Ödeme ve Elektronik Para Kuruluşu A.Ş. (852)
- Nestpay Ödeme Hizmetleri A.Ş. (865)
- Octet Express Ödeme Kuruluşu A.Ş. (874)
- Ödeal Ödeme Kuruluşu A.Ş. (868)
- Paragram Ödeme Hizmetleri A.Ş. (888)
- Pay Fix Elektronik Para ve Ödeme Hizmetleri A.Ş. (882)
- Paybull Ödeme Hizmetleri A.Ş. (892)
- Paynet Ödeme Hizmetleri A.Ş. (866)
- Paytrek Ödeme Kuruluşu Hizmetleri A.Ş. (856)
- Pratik İşlem Ödeme Kuruluşu A.Ş. (860)
- Ria Turkey Ödeme Kuruluşu A.Ş. (879)
- Sender Ödeme Hizmetleri A.Ş. (875)
- Trend Ödeme Kuruluşu A.Ş. (862)
- Tronapay Ödeme Hizmetleri A.Ş. (887)
- Vezne24 Tahsilat Sistemleri ve Ödeme Hizmetleri A.Ş. (885)
- Vizyon Elektronik Para ve Ödeme Hizmetleri A.Ş. (854)
- Western Union Turkey Ödeme Hizmetleri A.Ş. (886)



ACTIVE ELECTRONIC FUND ORGANIZATIONS

TURKEY GAME MARKET REPORT 2021



- Ahlatıcı Ödeme ve Elektronik Para Hizmetleri A.Ş. (894)
- Aköde Elektronik Para ve Ödeme Hizmetleri A.Ş. (836)
- BELBİM Elektronik Para ve Ödeme Hizmetleri A.Ş. (828)
- Birleşik Ödeme Hizmetleri ve Elektronik Para A.Ş. (825)
- BPN Ödeme ve Elektronik Para Hizmetleri A.Ş. (850)
- CEMETE Elektronik Para ve Ödeme Hizmetleri A.Ş. (826)
- D Ödeme Elektronik Para ve Ödeme Hizmetleri A.Ş. (830)
- ERPA Ödeme Hizmetleri ve Elektronik Para A.Ş. (837)
- Fastpay Elektronik Para ve Ödeme Hizmetleri A.Ş. (891)
- Faturamatik Elektronik Para ve Ödeme Kuruluşu A.Ş. (861)
- Hızlıpara Ödeme Hizmetleri ve Elektronik Para A.Ş. (833)
- IQ Money Ödeme Hizmetleri ve Elektronik Para A.Ş. (889)
- İninal Ödeme ve Elektronik Para Hizmetleri A.Ş. (832)
- İyzi Ödeme ve Elektronik Para Hizmetleri A.Ş. (864)
- Lydians Elektronik Para ve Ödeme Hizmetleri A.Ş. (890)
- Ozan Elektronik Para A.Ş. (839)
- Paladyum Elektronik Para ve Ödeme Hizmetleri A.Ş. (834)
- Papara Elektronik Para A.Ş. (829)
- Paytr Ödeme ve Elektronik Para Kuruluşu A.Ş. (863)
- Sipay Elektronik Para ve Ödeme Hizmetleri A.Ş. (838)
- TT Ödeme ve Elektronik Para Hizmetleri A.Ş. (870)
- TURK Elektronik Para A.Ş. (827)
- Turkcell Ödeme ve Elektronik Para Hizmetleri A.Ş. (869)
- UPT Ödeme Hizmetleri ve Elektronik Para A.Ş. (853)
- Vodafone Elektronik Para ve Ödeme Hizmetleri A.Ş. (835)
- Wirecard Ödeme ve Elektronik Para Hizmetleri A.Ş. (831)



ASSOCIATIONS

TURKEY GAME MARKET REPORT 2021

- **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)

2020

2021



GAME EXHIBITIONS

TURKEY GAME MARKET REPORT 2021

- GameX
- GIST (Gaming İstanbul)



All exhibitions have been postponed for the last 2 years due to Covid-19.

In 2022, all exhibitions will meet with the players again!

2020

2021



GIST 2022

Interview

You'll meet gamers again after two years. What's in it for us?

In short? A bigger Gaming Istanbul. Gaming Istanbul now refers to gaming, esports, and youth exhibition. This year, esports and tournament areas within the fair are larger. We're organizing one of the biggest LAN Parties and esports tournaments in our region by collaborating with our global partner and public institutions.

We have a dedicated space for internet streamers; the contracted streamers here will take the stage and meet the fans, along with the twenty biggest streamers under the title #kalkgel Special Edition. Indieway, our gaming and business development ecosystem that started during the pandemic, is now a GIST brand intended for professionals and indies. The new name of our B2B space is Indieway. We continue the tradition this year, too, and provide free space during the fair for indie teams without an investor. In addition to Indieway, Mağara Jam will also be at GIST.

Metaverse, NFT, and new technologies are now a part of life, and we're preparing a dedicated space, seminars, and chat sessions for them in Gaming Istanbul 2022. There are cosplay contests and FRP space again. We're going beyond the closed areas by making use of shifting Gaming Istanbul to September, and I can recommend our visitors to get ready for outdoor activities. There will be a very special guest during the opening ceremony, but let's keep it a secret for now.



CEVHER ERYÜREK
DIRECTOR OF
GAMING ISTANBUL
AND INDIEWAY



GIST 2022

Interview

What are the contributions from Gaming Istanbul to the gaming ecosystem, and what's are its plans for the future?

We, as the sector, were unsettled about it before the pandemic period. We didn't know how digitalized we were, or not as digitalized as we expected. Pandemic proved that for us. Events are the most important parts of the gaming sector. We understood it when the biggest gaming events in the world failed in their online attempts. Gamers and professionals want to meet in real life.

The first contribution from Gaming Istanbul to the ecosystem has been making this great meeting possible. We, as 92,000 gamers, are coming together. This meeting provides the opportunity of making a great breakthrough, developing business and marketing for gaming and hardware companies, brands intending to reach gamer and young segments, and anyone else.

Just like Germany, France, China has leading fair brands, Turkey has Gaming Istanbul. GIST is now an established brand in the global sector and draws a minimum of three thousand professional visitors every year. Its contribution to the ecosystem is apparent, and we calculate its financial contribution and foreign exchange input as approximately 5 million Euros per year.



CEVHER ERYÜREK
DIRECTOR OF
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AND INDIEWAY



GIST 2022

Interview

What are the contributions from Gaming Istanbul to the gaming ecosystem, and what's are its plans for the future?

Of course, I have to say that Gaming Istanbul hasn't made it alone. We've first become a part and then, the main event of the ecosystem with support from the sector and gamers. This is the joint effort of anyone investing in the sector, including gaming and esports brands, agencies, and professionals. We created the ecosystem together, and Gaming Istanbul is its name.

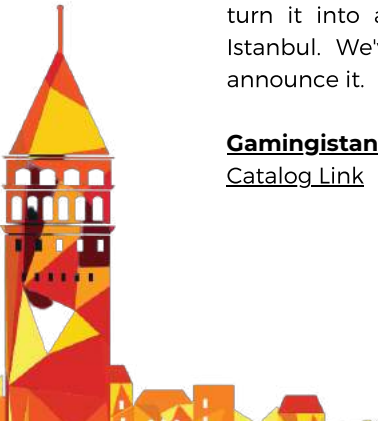
We've got a simple plan for the future; we're the biggest game event in the region, and one of the eight biggest gaming events in the world. Our purpose is to be ranked within the top three and to extend Gaming Istanbul beyond fairgrounds to turn it into a larger network of events held simultaneously in various parts of Istanbul. We've made significant progress in this respect, but it's too early to announce it.

Gamingistanbul.com

[Catalog Link](#)



CEVHER ERYÜREK
DIRECTOR OF
GAMING ISTANBUL
AND INDIEWAY



GAMEX 2022

Interview

After Two Years, You Finally Meet The Gamers Again, What Awaits Us?

GameX, an International Digital Gaming and Entertainment Fair, will be held at Istanbul TUYAP Fair and Congress Center on 19-22 May 2022. Attended by more than 100 thousand young people at any age every year, GameX is again expected to gather more than 100 thousand gamers together during the Commemoration of Atatürk, Youth and Sports Day on 19 May 2022.

To be held with the contribution from strong sponsors, each of which is leading in its own sector, and the great support from printed, visual and digital media, GameX 2022 will feature various sections such as Cosplay Contests, Esports Tournaments, Geek Bazaar Space, GameX Campus Universities Space, Drone Races, Robot Wars, Indie Game Space, Board Games, Comic Book, Anime, Manga (Sub-culture) Space, Influencer Meetings, Esports Team Activities, Simulator, and VR Spaces, where visitors can have fun to repletion at B2C halls. Celebrating its sixteenth anniversary, GameX will be widely attended by many international and domestic game and gaming technology brands. GameX, our International Digital Gaming and Entertainment Fair, is an organization professionally hosting the most visitors in the region from Eastern Europe to Asia. Along with the Gaming and Technology companies, social media phenomena as well as big international and domestic brands targeting the esports players and young audience participate in our fair and make promotions. Constituting the roof and being the biggest platform of Digital Gaming and Entertainment World, GameX is to be held in a total area of 22,500 m2, including 5 Halls and Open spaces, close to E5, and right next to Metrobus station.



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GAMEX 2022

Interview

After Two Years, You Finally Meet The Gamers Again, What Awaits Us?

Attended by the Union of Esports Clubs in the past years, GameX will host the biggest esports clubs of Turkey, and their teams and players this year. In addition to the spaces where esports clubs and the most loved influencers in Turkey will meet and chat with thousands of fans, and have photographs taken, breathtaking show matches will be played in GameX 2022. Also, visitors will join games with plenty of rewards in tens of esports tournaments to be held during 4 days, and compete for both winning and having fun.

A visitor profile qualified by young, well-trained, tech-savvy people who want to buy the right product at the right price comprises the biggest force of the fair. Our country provides companies with unique opportunities via a young and dynamic gamer audience of more than 40 million people and a rapidly growing digital entertainment market. Our visitors have the opportunity of visiting each stand due to our fairground layout and organizations. So, thousands of visitors have the opportunity of testing hundreds of products and services promoted during the fair.



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GAMEX 2022

Interview

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The biggest cosplay contest in the region will be held here!

Like every year, a cosplay contest, which is a costume performance where game, movie, and anime characters are imitated, will be held in GameX in 2022. Cosplayers to attend from all around Turkey will both have fun and compete for the big prize before the spectators and the jury for 4 days.

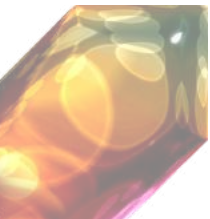
Stakeholders of the gaming sector will meet!

Stakeholders of the gaming sector will meet in the GameX 2022 B2B business halls to be organized with the partnership of Game Factory, an incubation center dedicated to game developers. Sector professionals will be provided with various possibilities such as special networking areas, meeting halls, conferences, presentations, and panels to be attended by domestic and international speakers in the GameX 2022 Business section including 2 halls within the fairgrounds and a controlled entry point.

Gamex.com.tr



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SECTORAL EDUCATION IN TURKEY

TURKEY GAME MARKET REPORT 2021



Times are changing fast, and so are the mechanics and dynamics of the gaming sector. Especially Turkey is in great competition with both the world and itself. We proudly share a new success story almost every week from unicorns to exits, investments.

Surely, this news unbelievably motivates and encourages successors and new teams. Turkey's unstable economy further fuels this rapid organization. Everyone wants to "pull-through" first, and then win. The common issue is the same: qualified human resources.

Even if I say that the famous young population of our country has found its profession/sector many times as of now, we're still away from training qualified personnel, or rather providing personnel with the speed and qualities expected by the market.

Don't get it wrong; we don't mean the need for game developers, designers, and artists, and now personnel is required for many roles from game-specific human resources experts to public relations officers. As you see, things have changed.

EDUCATION
WITH AN EXPERT'S
COMMENT



GÜVEN ÇATAK
FOUNDER DIRECTOR AT
BAHÇEŞEHİR UNIVERSITY
GAME LAB (BUG)



SECTORAL EDUCATION IN TURKEY

TURKEY GAME MARKET REPORT 2021



Here, people surely look after training. Being a self-taught person and improving oneself could be a solution at the time, yet the sector is in the hopes of a standardized and self-renewing system, a training line. No matter very good steps are taken in the past 10 years for game design, universities aren't agile enough to meet sectoral expectations, and perhaps, they shouldn't be. By definition, a university must be an intersection where ideas and people meet, and new visions and initiatives are designed. We can set such a course for master's programs at least.

However, undergraduate programs must definitely get ready for the creation of human resources and update themselves accordingly. We now have 12 undergraduate programs for Digital Game Design in Turkey; all but one are foundation universities and more or less all have the same problem regarding the sector, meaning human resources.

Just like the sector is looking for qualified professionals, universities are looking for qualified academicians, and that's where we get into a vicious cycle. This is because programs where those academicians will study need to be opened first. Unfortunately, there are pending programs due to failure of finding staff despite the being approved.

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We're making arrangements for a doctoral program titled "Gaming Studies" as both it's been asked for years and could be the cure for this problem. We hope that "Dr. BUC" will start in the next fall semester. A quite new development for exiting this vicious cycle is that Digital Game Design programs will now be considered as "applied" programs (why it wasn't considered so in the past is still a mystery) and can hire Instructors, meaning that fellows without a doctoral degree but a master's degree and/or sectoral experience will be able to be hired as staff, yet only if they have proficient ALES and YDS scores.

These scores and types might be quite bothersome, but it's a significant step towards the resolution of the human resource problem. Unfortunately, the fact that many programs are attempted to be opened in a hurry is another problem. It's important to keep up with the rising trend of the gaming sector and be in the groove, but a certain vision, a game plan needs to be executed while doing so, and that's only possible with an infrastructure. Otherwise, it wouldn't be possible to keep up with daily changing trends and integrate them into education, let alone open a program. Today, we rock our brains over blockchain games and NFT while we were occupied with the hypercasual production line yesterday.

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WITH AN EXPERT'S
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SECTORAL EDUCATION IN TURKEY

TURKEY GAME MARKET REPORT 2021



In this context, it's required to deliver a dynamic and visionary curriculum. Another need is to open Vocational Schools (MYO) for game development and the art of gaming because only these two-year vocational schools can close the production gap of the sector a tiny bit, and raise good operators. There are certification programs opened with the same intentions, but they're not enough. An inclusive system is required for meeting the demand.

As four-year undergraduate programs try to address 360-degrees game production from the conceptual stage to business development (at least ideally), these programs might be expected to provide (and they do) more teams, initiatives, and innovative games. This type of division of labor would be much more optimal on the academic side.

Recently increased number of game pre-incubation, incubation, and acceleration programs can provide a great variety of training under the roof of mentorship. To say the least, fine-tuning such a self-taught team admitted to this type of program would help them learn the fundamentals and solve the fundamental problems.

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SECTORAL EDUCATION IN TURKEY

TURKEY GAME MARKET REPORT 2021



The only way for this type of program to be sustainable is to activate a "learn-teach" model by establishing a closed-circuit system, and selection of the incubation teams to be admitted is important in this sense. Likewise, it's good to select the companies to provide external consultancy according to this model.

Finally, communities foster both education and the sector, and it's vital that they're supported in this sense. We, as educators and professionals, must supervise and observe the communities to test the water, collect data and be able to intervene while at the bottom of the ladder, because access to the base starts with them.

It'll be much better and is only a matter of timing and coordination, but it's a fact that we certainly don't step back now even though we take baby steps in some topics!

EDUCATION
WITH AN EXPERT'S
COMMENT



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GAME DESIGN OPTIONAL UNDERGRADUATE COURSES

TURKEY GAME MARKET REPORT 2021



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. The 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 2021



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 Yildiz Technical University is to set up 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 2021



TITLE YAKIN DOĞU UNIVERSITY	COURSE NAME DIGITAL GAME DESIGN	COURSE OBJECTIVE Yakin Doğu University Digital Game Design Undergraduate Course
TITLE SAKARYA UNIVERSITY	COURSE NAME DIGITAL GAME ANALYSES	COURSE OBJECTIVE Sakarya University Digital Game Analyses
TITLE GAZİ UNIVERSITY	COURSE NAME EDUCATIONAL PC GAME DESIGN	COURSE OBJECTIVE Gazi University Educational PC Game Design Course
TITLE ANADOLU UNIVERSITY	COURSE NAME PC GAME DESIGN 1	COURSE OBJECTIVE Anadolu University PC Game Design 1 Course
TITLE ÇUKUROVA UNIVERSITY	COURSE NAME DIGITAL GAME DESIGN 1	COURSE OBJECTIVE This course provides practical and conceptual information on digital design and for analyzing them.
TITLE GALATASARAY UNIVERSITY	COURSE NAME DIGITAL GAME DESIGN	COURSE OBJECTIVE 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 2021



TITLE

BAHÇEŞEHİR UNIVERSITY

COURSE OBJECTIVE

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.

TITLE

İSTANBUL TEKNİK UNIVERSITY

COURSE OBJECTIVE

Game and Interaction Technologies Thesis Based Master's Degree Program under the Department of Game and Interaction Technologies at Master's Education Institute

TITLE

ODTÜ GATE

COURSE OBJECTIVE

Middle East Technical University Game Technologies Master's Program

TITLE

HACETTEPE UNIVERSITY

COURSE OBJECTIVE

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.



GAME DESIGN MASTER'S PROGRAMS

TURKEY GAME MARKET REPORT 2021



<p>TITLE MUĞLA SITKI KOÇMAN UNIV.</p>	<p>COURSE OBJECTIVE DIGITAL Game Design and Technologies Thesis Based Master's Degree</p>
<p>TITLE IŞIK UNIVERSITY</p>	<p>COURSE OBJECTIVE IŞIK UNIVERSITY Computerized Graphics and Animation Master's Program. The 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.</p>
<p>TITLE MARMARA UNIVERSITY</p>	<p>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 investigate fundamental components, types of video games, the educational position of the people, psychological and sociological impacts of the games.</p>
<p>TITLE İZMİR EKONOMİ UNIVERSITY</p>	<p>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.</p>



GAME DESIGN AND E-SPORTS CERTIFICATE PROGRAMS

TURKEY GAME MARKET REPORT 2021



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

MİMAR SİNAN FINE ARTS UNIVERSITY
CONTINUING EDUCATION CENTER

DESCRIPTION

Continuing Education Center of MİMAR SİNAN Fine Arts University in İstanbul is another educational institution that provides paid training 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 in 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 2021



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 bringing 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 modeling 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 training for the 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 was provided in collaboration with İzmir Katip Çelebi University Career Development Center.



OTHER

TURKEY GAME MARKET REPORT 2021



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 was provided in collaboration with Bandırma Onyedi Eylül University Esports 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 was 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 training 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 skills to guide them while picking a department at university and an occupation.



INTERNET CAFES

TURKEY GAME MARKET REPORT 2021



• 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



• 10.250 internet cafe

Our Internet cafes opened on April 10, 2021. However, they were closed again by the provincial administration on April 14, 2021, by law enforcement. On July 20, 2021, they reopened with 3 PCs empty in 4 rows, 1 PC full. HES codes to be queried and closed at 18:00 in the evening, and subject to constant inspection by law enforcement. Unfortunately, this difficult process has caused too many cafes to close or take over. On October 25, 2021, these heavy conditions were removed and activities started again with the classic HES code control.

2021



INTERNET CAFE COMPUTER SYSTEM PROPERTIES

TURKEY GAME MARKET REPORT 2021



• 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



• Processor	i3	i5	i7	i9	
• Percentage	8%	30%	60%	2%	
• Ram	4 GB	8 GB	16 GB	32 GB	
• Percentage	0%	3%	65%	32%	
• Internet Speed	16 MB	24 MB	32 MB	64 MB	100 MB
• Percentage	0%	3%	15%	60%	22%

2021



DAILY INTERNET CAFE STATISTICS

TURKEY GAME MARKET REPORT 2021



Note: This data is provided on average per daily conditions as the internet cafes are closed.



- Peak Hours
- Peak Days (Weekend)
- Average Fee / Hour
- Daily Average Pin Sales (Qty.)
- Avg. Food Payment / Person

15:00 - 22:00

12:30 - 24:00

5 TL - 12 TL

15 / PER CAFE

25 TL

- Peak Hours
- Peak Days (Weekend)
- Average Fee / Hour
- Daily Average Pin Sales (Qty.)
- Avg. Food Payment / Person

17:00 - 21:00

13:00 - 18:00

7 TL - 20 TL

4 / PER CAFE

18 TL

2020

2021



TOP GAMES PLAYED IN INTERNET CAFES

TURKEY GAME MARKET REPORT 2021



- PUBG
- League Of Legends
- Fortnite
- CS: GO
- ZULA

- CS: GO
- GTA
- Call Of Duty
- Free Fire



- PUBG Mobile *Emulator*
- Free Fire
- Steam Oyunlari
- CS: GO
- Valorant
- League of Legends
- Roblox
- Epic Games Oyunlari
- Xbox Game Pass Oyunlari

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

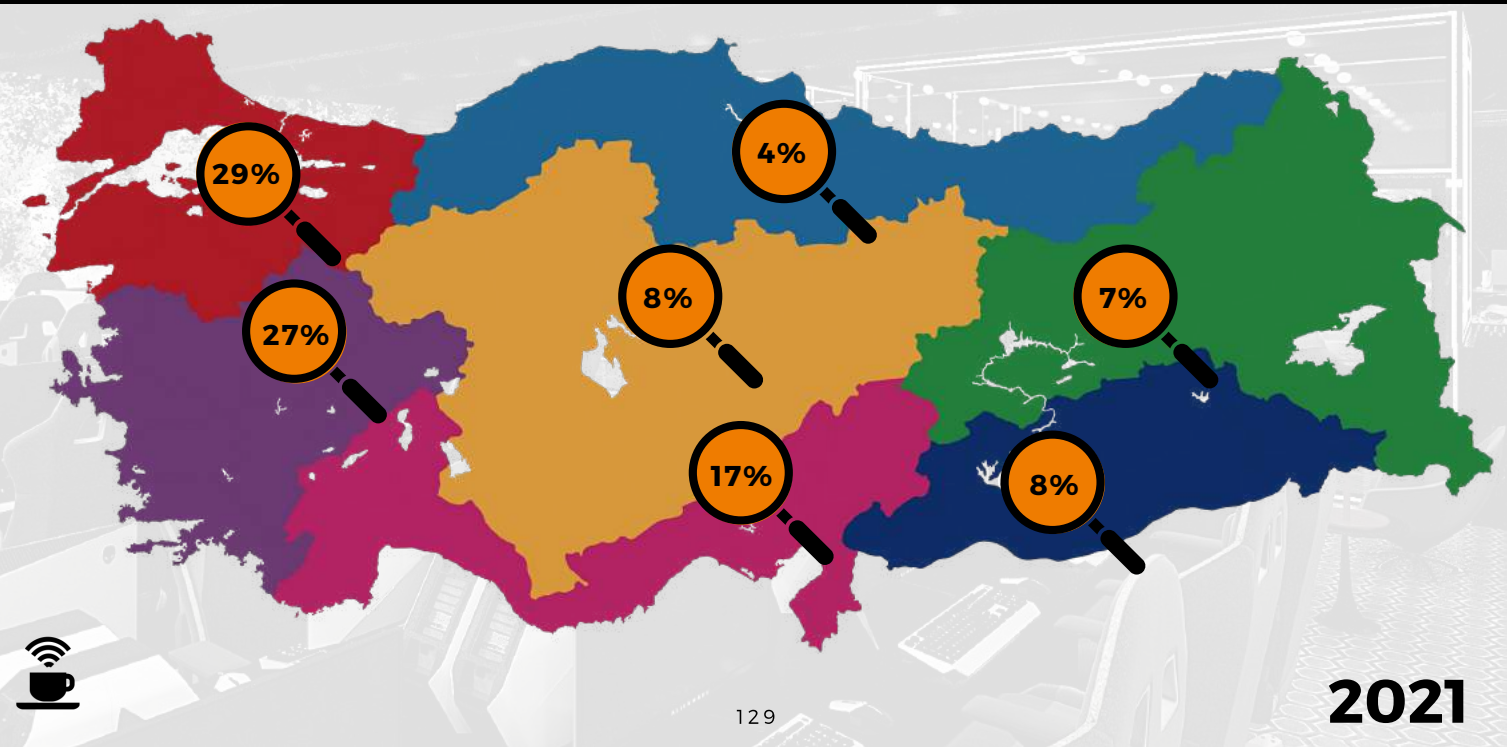
2020

2021



BREAKDOWN OF INTERNET CAFES IN TURKEY

TURKEY GAME MARKET REPORT 2021





SOME OF THE ESPORTS TEAMS IN TURKEY

TURKEY GAME MARKET REPORT 2021

- **5 Ronin** - League of Legends
- **52 Orduspor FK** - FIFA Pro Club
- **Adanaspor** - FIFA Pro Club
- **Altay** - FIFA Pro Club
- **Antalyaspor** - FIFA Pro Club
- **AS4 Esports** - FIFA Pro Club
- **Balıkesirspor** - FIFA Pro Club
- **BB Erzurumspor** - FIFA Pro Club
- **BBL** - Valorant
- **Ben Esports** - PUBG Mobile
- **Beşiktaş Esport** - League of Legends, Valorant, PUBG Mobile, FIFA Pro Club, 2K22
- **Bilgi Esport** - FIFA Pro Club
- **Bursaspor** - FIFA Pro Club
- **Çaykur Rizespor** - FIFA Pro Club
- **Dark Passage** - League of Legends
- **Deep Esport** - PUBG Mobile
- **Digital Athletics** - Valorant, PUBG Mobile, PUBG: Battlegrounds, Wild Rift
- **Digital Sports Esports** - FIFA Pro Club
- **Eskişehirspor Esport** - FIFA Pro Club
- **Eternal Fire** - Valorant, CS: GO





SOME OF THE ESPORTS TEAMS IN TURKEY

TURKEY GAME MARKET REPORT 2021

fastPay Wildcats - League of Legends, Valorant, PUBG Mobile, PUBG: Battlegrounds, CS: GO, FIFA Pro Club, Wild Rift, Rocket League, 2K22

Fenerbahçe Esport - League of Legends, Valorant, PUBG Mobile, PUBG: Battlegrounds, FIFA Pro Club, FIFA, 2K22

- **Fire Flux** - Valorant, PUBG Mobile
- **Fury Esports** - PUBG Mobile
- **Futbolist** - Valorant, PUBG Mobile, PUBG: Battlegrounds, FIFA Pro Club, FIFA, Wild Rift
- **Galakticos** - League of Legends, Valorant, PUBG: Battlegrounds, FIFA Pro Club
- **Galatasaray Esport** - League of Legends, PUBG Mobile, FIFA Pro Club, FIFA, 2K22
- **Gamebedel Esports** - PUBG Mobile
- **Gaziantep FK** - FIFA Pro Club
- **Gençlerbirliği** - FIFA Pro Club
- **Getso Esports** - PUBG Mobile
- **Giresunspor** - FIFA Pro Club
- **Hatayspor** - FIFA Pro Club
- **Interrail Esport** - FIFA Pro Club
- **İstanbul Başakşehir** - FIFA Pro Club
- **İstanbulspor** - FIFA Pro Club
- **Kafalar Esports** - Valorant
- **Karagümrük Esport** - Valorant, PUBG: Battlegrounds, FIFA Pro Club, FIFA, Rocket League
- **Karşıyaka Esport** - FIFA Pro Club, 2K22
- **Kasımpaşa** - FIFA Pro Club



SOME OF THE ESPORTS TEAMS IN TURKEY

TURKEY GAME MARKET REPORT 2021

- **Kayserispor** - FIFA Pro Club
- **Knockout** - PUBG Mobile
- **Kocaelispor** - FIFA Pro Club
- **NASR Esports** - League of Legends, Wild Rift
- **Next Rüya Gaming** - PUBG Mobile
- **Oldunity** - PUBG Mobile
- **Orgless 5** - CS: GO
- **Other Side** - Valorant, PUBG Mobile, 2K22
- **Parla Sports** - FIFA, Wild Rift
- **Poprater Esport** - PUBG Mobile
- **Regnum Carya** - Valorant, PUBG Mobile, FIFA Pro Club, Wild Rift, 2K22
- **Respect Esports** - PUBG Mobile
- **S2G Esports** - PUBG Mobile
- **Şahangiller** - PUBG Mobile, CS: GO
- **Sakaryaspor** - FIFA Pro Club
- **Sangal Esports** - CS: GO, Wild Rift, Valorant
- **Sivasspor** - FIFA Pro Club
- **Sıkıntı City TR-** FIFA Pro Club
- **Skaters** - PUBG: Battlegrounds
- **Spartan Warriors TR-** FIFA Pro Club



SOME OF THE ESPORTS TEAMS IN TURKEY

TURKEY GAME MARKET REPORT 2021

- **SuperMassive Blaze** - League of Legends, Valorant, PUBG Mobile, PUBG: Battlegrounds, FIFA Pro Club, FIFA, Rocket League, Arena of Valor, 2K22
-
- **Surreal Esports** - Valorant, PUBG Mobile
 - **Team Aurora** - League of Legends, Valorant, FIFA Pro Club
 - **Team Lixa** - Valorant
 - **Thunderbolts Gaming** - Valorant, CS: GO
 - **Trabzonspor** - FIFA Pro Club, 2K22
 - **Vice Versa** - CS: GO
 - **WEDA Esports** - Valorant
 - **World of Wonders** - PUBG Mobile
 - **Yeni Malatyaspor** - FIFA Pro Club
 - **Yilport Samsunspor** - FIFA Pro Club
 - **Zero Zone** - Valorant, PUBG Mobile, CS: GO





NUMBER OF LICENSED PLAYERS AND TEAMS

TURKEY GAME MARKET REPORT 2021



There are **165+**
licensed
e-sports teams
in Turkey.



TESFED
TÜRKİYE E-SPOR
FEDERASYONU



There are
8126+ licensed
e-sports
players in
Turkey.

** In 3.5 years, a total of 8.126 esports players, of which 2.467 were women, were licensed by our federation. During this period, the number of licensed clubs increased to 165, while the number of esports halls rose to 57 as of this year. Representative offices of the Federation were established in 68 provinces and the number of trainers has reached 64 as of today.*





ESPORTS TEAMS THAT MAKE BEST USE OF SOCIAL MEDIA

TURKEY GAME MARKET REPORT 2021

INSTAGRAM

	FOLLOWERS	AVG. NUMBER OF CONTENT PER WEEK	AVG. POST LIKES	ENGAGEMENT RATE
GALATASARAY ESPOR	185.000	5	1200	0,66%
BBL ESPORTS	119.000	2	18924	16,22%
FUTBOLIST	59.000	11	706	1,25%
FIRE FLUX ESPORTS	58.300	1	13081	23,48%
PAPARA SUPERMASSIVE BLAZE	55.000	5	1103	2,04%
ETERNAL FIRE	52.300	2	5294	11,56%
FENERBAHÇE ESPOR	47.600	6	1666	3,55%





ESPORTS TEAMS THAT MAKE BEST USE OF SOCIAL MEDIA

TURKEY GAME MARKET REPORT 2021

YOUTUBE

	SUBSCRIBERS	TOTAL VIEWS
DARK PASSAGE ESPORTS	51.300	9.223.704
ETERNAL FIRE	40.400	2.778.659
FUTBOLIST	37.000	3.852.439
PAPARA SUPERMASSIVE BLAZE	36.100	4.584.104
FENERBAHÇE ESPOR	15.700	1.832.342
BBL ESPORTS	14.900	814.431





ESPORTS TEAMS THAT MAKE BEST USE OF SOCIAL MEDIA

TURKEY GAME MARKET REPORT 2021

FACEBOOK

	PAGE LIKE	AVG. NUMBER OF CONTENT PER WEEK	AVG. POST LIKES	ENGAGEMENT RATE
İSTANBUL WILDCATS	140.541	5	8	0,01%
DARK PASSAGE ESPORTS	133.214	3	110	0,12%
PAPARA SUPERMASSIVE BLAZE	82.501	5	6	0,02%





ESPORTS TEAMS THAT MAKE BEST USE OF SOCIAL MEDIA

TURKEY GAME MARKET REPORT 2021

TWITTER

	FOLLOWERS	AVG. NUMBER OF CONTENT PER WEEK	AVG. POST LIKES	ENGAGEMENT RATE
FENERBAHÇE ESPOR	113.900	6	420	0,44%
BBL ESPORTS	106.731	5	3400	3,19%
GALATASARAY ESPOR	80.600	7	350	0,50%
PAPARA SUPERMASSIVE BLAZE	70.500	5	650	1,13%
DARK PASSAGE ESPORTS	45.500	10	380	0,88%
ETERNAL FIRE	37.300	6	500	1,61%
FUTBOLIST	36.700	7	80	0,27%





ONLINE ESPORTS AND GAME EVENTS ORGANIZED IN TURKEY

TURKEY GAME MARKET REPORT 2021

Event Name

- 2nd Sports Istanbul Youth and Entertainment Festival
- ESA Esports Cup Vestel
- ESA Cup Vestel Tournament
- ESA x TOSLA PUBG Domination
- ESL Turkey Championship Summer
- ESL Turkey Championship Winter
- FIFA 21 Vestel Cup
- Fortnite Vestel Cup
- Gamification Meetup - Gamfed Turkey 5th Gamification Conference
- Garena Free Fire Semester Cup
- Garena Free Fire Turkey Ramadan Cup
- INDIEWAY Events (6 Times Held Between February - December 2021)
- Intel Monster Reloaded Rocket League
- Intel Monster Reloaded VALORANT
- INTEL UET Clash Royale Turkey Championship
- INTEL UET LoL LCQ 2021

Event Name

- INTEL UET LoL Ranking Tournament
- INTEL UET LoL Turkey Championship
- INTEL UET LoL Tournament
- INTEL UET Rocket League Turkey Championship
- INTEL UET VALORANT Fall Tournament
- INTEL UET VALORANT University Spring Tournament
- INTEL UET Summer Camp Legends of Runeterra Tournament
- INTEL UET Summer Camp LoL Tournament
- INTEL UET Summer Camp Rocket League Tournament
- Izmir Game Festival (Offline)
- Migros Esports Fall Guys Cup
- Migros Esports Rocket League
- Migros Esports Season 4 Bralk Stars Cup 1
- Migros Esports Season 4 Brawl Stars Cup 2
- Migros Esports Season 4 PUBG Mobile Cup 1
- Migros Esports Season 4 PUBG Mobile Cup 2





ONLINE ESPORTS AND GAME EVENTS ORGANIZED IN TURKEY

TURKEY GAME MARKET REPORT 2021

Event Name

- Migros Esports Season 4 Zula Cup 1
- Migros Esports Season Sezon 4 Zula Cup 2
- Migros Esports Season Wild Rift Cup 1
- Migros Esports Season Wild Rift Cup 2
- MLBB 515 Show Night
- MLBB Turkey Championship
- Mobidictum Business Network #1 (Webinar)
- Mobidictum Business Network #2 (Webinar)
- Paribu Campus Challenge PUBGM Turnuvasi
- PMCC Turkey 2021
- PMCO 2021 Fall Split
- PMCO 2021 Spring Turkey
- PMNC Turkey 2021
- PMPL Season 1 2021 Turkey
- PMPL Season 2 2021 Turkey

Event Name

- Pro Elite League
- Protality Series
- PUBG Squad PC Vestel Cup
- PUBGM Vestel Cup
- Red Bull Campus Clutch VALORANT
- Red Bull Flick CS:GO
- Red Bull Solo Q 2021 LoL
- Rocket League Vestel Cup
- SteelSeries CS:GO Tournament
- Faceit CS:GO Tournament Sponsored by SteelSeries
- Valorant Tournament Sponsored by SteelSeries
- Supradyn Energy Protality Series
- TESFED Turkish Cup
- VALORANT Champions Tour Turkey
- VFSL
- VFSL Academy League





BRANDS INVESTING IN ESPORTS AND GAMING

TURKEY GAME MARKET REPORT 2021

- Acer
- Altinyıldız Classics
- AOC
- Arko Men
- Asist Analiz
- Asus
- Axe
- Bacar Automotive
- Bahçeşehir Üniversitesi
- bilcee
- Biocore
- Bitci.com
- Bitexen
- BKM Express
- Borusan Otomotiv
- BursaGB
- Bynogame
- CarrefourSA
- Chupa Chups
- Coca-Cola
- Corsair
- Doritos
- ESA
- Eti
- fastPay
- Gamesatış
- Getir
- Gillette
- Gökrail
- Grimelange
- Hawk
- HDI Sigorta
- Head & Shoulders
- Hepsiburada
- Hi2Games
- HyperX
- İnce Hesap
- ininal
- İtopya
- Karnaval
- KFC
- Little Caesars
- Logitech G
- Maximum
- Migros
- Monster Notebook
- MSI
- Nescafe
- Nimo TV
- Old Spice
- Olips
- Omen By HP
- Opet
- Ozan Superapp
- Papara
- Paribu
- Puma
- Rampage
- Razer
- Razer Gold
- Red Bull
- Regnum Carya
- SteelSeries
- Sunny
- Supradyn Energy
- THY
- TikTok
- Tosla
- Türknet
- Vestel
- Vodafone
- Wulfz
- Yemeksepeti
- Zio

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



ESPORTS GAMES

TURKEY GAME MARKET REPORT 2021

- 2K21
- 2K22
- Arena of Valor
- Basketball Arena
- Brawlhalla
- Brawl Stars
- Call of Duty Mobile
- Clash Of Clans
- Clash Royale
- COD Warzone
- Counter-Strike
- DOTA 2
- EFootball
- FI
- FIFA 21
- FIFA 22
- FIFA Online 4
- Fifa Mobil
- Fortnite
- Free Fire
- Hearthstone
- Kafa Topu 2
- League of Legends
- Legends of Runeterra
- Mobile Legends
- PES 21
- PUBG
- PUBG Mobile
- PUBG: New State
- Rocket League
- Teamfight Tactics
- Tekken
- TFT
- VALORANT
- Wild Rift
- World of Tanks
- Zula



TURKISH ESPORTS MEDIA CHANNELS

TURKEY GAME MARKET REPORT 2021

- 5Mid
- Dijital Sporlar
- Elektronik Sporlar
- Espor Analist
- 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



- Acunn Medya
- Dijital Sporlar
- Elektronik Sporlar
- Espor Analist
- Espor Gazetesi
- Esporin
- Esporkolik
- Esport Times
- Esports 360 Mag
- Fanatik Espor
- Gamerbase
- Hubogi

- Hürriyet Espor
- Invade Espor
- Medya Espor
- Migros Espor
- Mobidictum
- Multiplayer
- Mynet Espor
- Onedio Gaming
- Playerbros
- Red Bull Espor
- Save Butonu
- Thats Game Bro

2020

2021

** Sorted alphabetically.*



TOP GAMING SITES (2021 TRAFFIC)

TURKEY GAME MARKET REPORT 2021



- Bölüm Sonu Canavarı
- DonanımHaber
- Espor Gazetesi
- eSports360
- Fragtist
- Gamer
- Hubogi
- LeaderGamer
- LEVEL
- Mavi Kol
- Merlinin Kazanı
- Mobidictum
- OyunGezer
- Playerbros
- Save Butonu
- ShiftDelete
- TurkMMO
- Turuncu Levyeye
- Webtekno

**Sorted alphabetically.*



TOP ONLINE SALES SITES (2021 TRAFFIC)

TURKEY GAME MARKET REPORT 2021



- bynogame.com
- gamesatis.com
- kabasakalonline.com
- perdigital.com
- playstore.com
- oyunfor.com
- durmaplay.com
- gpay.com.tr
- foxngame.com
- midasbuy.com
- epin.com.tr
- vatangame.com
- dijipin.com
- g2a.com
- klasgame.com
- playsultan.com.tr
- oyunalisveris.com
- mtcgame.com
- gold.razer.com
- bursagb.com
- joyalisveris.com

** Sorted by total traffic.*



TOP ONLINE GAMING PLATFORMS (2021 TRAFFIC)

TURKEY GAME MARKET REPORT 2021



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



GAMING MAGAZINES IN TURKEY

TURKEY GAME MARKET REPORT 2021

Oyungezer



Level



2020



2021



2021



**EXPERT
OPINIONS**

TURKISH GAMING SECTOR EXPERT OPINIONS

TURKEY GAME MARKET REPORT 2021



**ALPER AFŞİN
ÖZDEMİR**

TESFED FOUNDING
PRESIDENT /
EUROPEAN ESPORTS
FEDERATION BOARD
MEMBER

Gaming and esports are much loved in our country, which is distinguished by its young population. When Covid-19 first started, an increase in time spent at home reflected positively on the gaming sector. With the mitigation of measures, live esports tournaments started again yet partially. Organizations draw great attention even if they are currently brought to life with a limited number of spectators and after all health measures are taken, and live matches in online streaming platforms such as Twitch are watched by plenty of esports lovers. We've seen good examples of game-brand collaborations. This is because gaming and esports have actually become one of the most efficient tools for reaching an audience at a certain age range. Turkey makes progress every passing day in terms of esports. A total of 8,126 esports players, including 2,467 women were licensed by our Federation in the past 3.5 years. In the meantime, the number of licensed clubs increased to 165, and the number of esports halls, which was 3 in 57, increased to 19. Agencies were started for federation in 68 cities, and today, there are 64 trainers. As a result, the development of the esports sector will yield a serious profit not only for those operating in this field but the entire country. We can say that we'll achieve success, become a recognized esports country in the world and all stakeholders in the ecosystem will benefit from it to the extent we build better infrastructure and take more informed steps in our country.



ERDİNÇ İYİKUL

RIOT GAMES
TURKEY COUNTRY
MANAGER

The gaming and esports sector kept growing both in our country and all around the world in 2021. As one of the most invested sectors around the world, the gaming sector received significant support from both private companies and public institutions. According to Newzoo Global Gaming Market Report, the global gaming sector reached 180.3 billion dollars in 2021, with a 1.4 percent increase compared to the previous year. An annual increase was seen in in-game incomes as well as the number of players.

An increase in the number of players continued along 2021, reaching 3 billion players with a 5.33 percent increase. Looking at the esports market, we see that esports is followed by more than 465 million people with a 6.7% annual increase around the world. Approximately, 230 million of them are esports fans. Many of these fans are looking forward to getting back to physical esports events after the market switches to digital-only during the pandemic. Considering all the data and technological developments, I believe that the sector will keep growing more stably in 2022 and that Turkey will increase its share of this important cake due to the investments made in our country and the young population.

TURKISH GAMING SECTOR EXPERT OPINIONS

TURKEY GAME MARKET REPORT 2021



BARIŞ ÖZİSTEK
JOYGAME
CHAIRMAN OF THE
BOARD

Turkey has become one of the most important game development ecosystems in the world. The most talented human resources in the country stream into the gaming sector. Creative and entrepreneurial Turkish people rise rapidly, reinforcing their position in the gaming sector. We had a year when investments increased. Venture capital funds, particularly Boğaziçi Ventures, completed a great number of investments in the gaming sector. What's more important is that investments were made into the thriving gaming companies with a high valuation that would accelerate their global growth.

2021 has been a year in which a quite significant period of change was experienced by Joygame. Founded in 2009, Joygame afforded the first purchase in Turkey by a global gaming giant in 2013. 8 years of experience in the Netmarble family has contributed greatly to us and the ecosystem in terms of vision and experience. Having started as of 2020, our strategy for developing mobile games via domestic gaming studios in Turkey, and publishing them in the global market started bringing results. Our successful games ranked in top positions in the US and other important markets. In parallel with these developments, Joygame declared its independence again at the beginning of 2022 with the new investment. We'll return to the Joygame brand and continue waving the Turkish flag in the international market while continuing our partnership with Netmarble, the biggest gaming company in South Korea. We're focused on introducing and entertaining millions of players by also completing localization efforts for target markets for mobile games developed in hyper-casual, hybrid-casual, casual, and mid-core segments through partnerships with gaming studios, particularly in Turkey and Eastern Europe region.

A new business model to fundamentally change the entire world of gaming was introduced to us in 2021. The sector will grow with NFT Gaming. We witnessed that new initiative from scratch and those intended to create new opportunities achieved billion dollars worth of evaluations in a short period of time. With an average annual growth rate of 12%, the sector will gear up with NFT gaming. We can estimate the market size to be around 320-350 billion dollars in 2025. NFT fundamentally changes many concepts such as game design, economy, and business model, and known facts are being rewritten. A very important process of change started, and companies keeping up with it will grow very fast. We, as Joygame, started our new projects in the field of NFT, and we'll introduce our NFT games and platforms to the players within 2022.

TURKISH GAMING SECTOR EXPERT OPINIONS

TURKEY GAME MARKET REPORT 2021



OZAN AYDEMİR
GAMING IN TURKEY
PRESIDENT
FOUNDER

Considering the sector, it's been a little quiet in terms of income at the beginning and middle of the year 2021 compared to the previous year. In fact, there was an acceleration of fall for the first time, when compared periodically. However, incomes started to increase again in the final quarter. Our expectation was actually a growth at an ever-consistent percentage for 2019 and later on. But the impact of pandemic on the gaming market was like down payment of most of this growth in 2020. This year has been more like a year of stabilization at the beginning and middle, and as I mentioned at first, the final quarter surprised us and the incomes increased. Our prediction for the value of the global market in 2023 is over 200 billion dollars.

As you know, this process changed our entire life and the way we work. That includes the game producers. Production times were extended particularly for the top quality (so-called AAA) PC and console games, or release dates of this type of game were delayed. Due to certain disadvantages of working remotely.

Global chip problem resulted in partial difficulties in the supply of hardware products required for next-gen consoles and premium PCs.

Mobil is the main factor that guides the sector. Mobile gaming will be the most rapidly growing segment in the next years. The mobile gaming sector grows at an incredible pace and it's almost impossible to stop this growth. We expect more than 90 billion dollars of the total global income to come from mobile in 2021.

Console and PC games were slowed due to delays at the beginning of the year, but all the games delayed were started to be released into the market with a busy timeline in a short period. Again, this both increase PC and console sales and stopped the income decrease in these segments.

Investments into the sector continued in both our country and globally in 2021. The rate of expansion of the crypto world into the sector increased, and the concept of NFT secured its position in the sector. Finally, all the people have an eye on the sector once again with the Metaverse.

TURKISH GAMING SECTOR EXPERT OPINIONS

TURKEY GAME MARKET REPORT 2021



SERKAN TURAN
GENERAL MANAGER
FASTPAY A.Ş.

The gaming industry, which grows by more than 10% each year with the total number of users exceeding 35 million, is vertical which is important to us and intersects with our user profile to a great extent.

As fastPay, we provide payment solutions to the gaming industry through both the wallet application and our merchants. fastPay users can easily purchase game codes within seconds using the fastPay application and use them instantly. We also provide payment solutions to our merchants operating within the gaming industry.

We are proud of the achievements of the Turkish companies operating in the gaming industry, which were established within the country, then opened up to the world, and received significant investments. As in 2021, we will continue to contribute to the growth of the sector in the upcoming period as well.



**HASAN KEMAL
UYSAL**
MENA REGION
HEAD OF FB&D &
OPERATIONS

Covid pandemic results in many permanent changes in our lives and a positive one of them are digital entertainment. Stated at the bottom of the list or even not included in the list at all when the entertainment sector is in question, "gaming" is now a part of life for almost everyone. Everyone somehow taps into gaming via mobile, console, or PC. As such, games keep changing shape and becoming more diversified.

Today, most gaming companies appreciate this change and are in an evolving period in compliance with this new ecosystem. We, as Riot Games, gave clues for our own evolution with the first season of the animated series Arcane, published in 2021, making a great surprise. The gaming sector grew so much in the period when we were locked down at our homes in 2020 that we had doubts about whether we can surpass this rapid growth or not at the beginning of 2021. However, we then realized in the middle of the year that growth in 2020 was actually a quick "start". I believe that we'll all witness the rise of a new entertainment culture to which the gaming sector is integrated in the short period of time ahead. It seems like we'll witness many exciting cases, from esports turning into an Olympic sport to conventional television becoming a multiplayer platform.

TURKISH GAMING SECTOR EXPERT OPINIONS

TURKEY GAME MARKET REPORT 2021



GÜRHAN ÇAM
NEOHUB GENEL MD.
& FASTPAY AŞ. YK
ÜYESİ

We are still experiencing the effects of the difficult process that started in 2020. The economic challenges of the pandemic have been a big test and lesson for all of us.. We have seen that the digital world is now an inseparable part of humanity, that it has proven to be the locomotive of the economy, and that the Turkish gaming industry has risen in this direction. We have witnessed again and again that times of crisis trigger innovation and fuel human creativity.

We established NEOHUB to produce innovative business models with the appropriate collaborative culture and the requirements of the technologies of the future and to implement financial technology solutions that will contribute to the ecosystem. Neohub's arms; Forces such as Deniz Akvaryum Innovation and Entrepreneurship Center, Deniz Ventures Venture Capital Investment Fund, fastPay are working to guide the entrepreneurship ecosystem and financial technology sector. Therefore, with fastPay, our mobile wallet, we attach great importance to our focus on the gaming sector and the investments we make in this field. In 2020, we believe that we have taken a critical step for the development of esports by sponsoring Istanbul Wild Cats, one of the oldest esports teams in our country.

The gaming industry will be the most important resource for today's rising trend Metaverse to come true in the imagined sense. At this point, we believe that the pioneering initiatives of the Turkish Gaming Industry, which are admired in the world, will continue to lead in innovative fields such as Metaverse. Especially with Metaverse taking the concept of "ownership" from game companies and making it transferable to users thanks to blockchain technology, new applications open to development in this field began to emerge. With the release of play to earn themed games, we see that the financial and gaming sectors are becoming more and more intertwined. With the concept of decentralization leaving the area of use of cryptocurrencies, thanks to smart contracts and NFT standards, and including items with art and in-game usage, we are becoming able to reach the Metaverse dimension.

At this point, for myself, I see an important future where the financial and gaming ecosystems can grow by supporting each other. As NEOHUB and fastPay, we will continue our constructive, sharing, and support efforts in 2022 with both our investments and collaborations to support this future.

TURKISH GAMING SECTOR EXPERT OPINIONS

TURKEY GAME MARKET REPORT 2021



İLHAN YILMAZ
FOUNDER AND CEO
MONSTER
NOTEBOOK

The gaming and eSports ecosystem continued to grow in 2021, as it has been doing in recent years. The digital gaming culture has reached a much wider audience with the accelerating effect of the pandemic and is now embraced by users of all ages and profiles. As one of the leading players in the gaming ecosystem in Turkey, we continue to support gamers both with the partnerships we form with other stakeholders and with the activities we carry out at Monster Notebook. With our strategic partners such as Intel, NVIDIA, and Microsoft, we develop projects to deliver the most popular games to our users. Our support for eSports increases every year. In 2021, we participated in large-scale eSports events both in Turkey and abroad. We expanded the scope of Monsters Reloaded, the eSports tournament we launched in the first year of the pandemic and turned it into a large-scale 6-month gaming and eSports event in 2021 in partnership with Intel. Nearly 10,000 gamers participated in the tournaments held as part of Intel Monsters Reloaded, and prizes with a total value of 300,000 TRY were awarded. Millions of gaming enthusiasts watched the 100-hour live stream of the event.

In the gaming ecosystem, supply chain challenges caused by the global chip crisis, and the fluctuations in the exchange rate left their mark on the gaming equipment and high-performance gaming computers sector in 2021. On the other hand, in 2021, Monster Notebook continued to focus on users and take firm steps towards its goal of becoming a global brand from Turkey, with the advantages brought by its investments in previous years, despite the increasing costs in production and operation processes. We led the high-performance laptop market with the products we introduced in 2021, which were enhanced with Intel's 11th generation processors and offer twice the performance of their predecessors, thanks to NVIDIA's RTX 30 Series graphics cards. In fact, we have become the most popular gaming computer brand in 2021. In a market study conducted in cooperation with Digital Report magazine and DORinsight Research, 45 percent of participants chose Monster Notebook as the best brand in the gaming computer category. Not only our laptops but also the new accessories we added to the range of Pusat gaming equipment are popular among users. While reinforcing our dominant and leading position in the gaming market in Turkey, we continued to make international investments as well. We launched major initiatives in e-commerce, which has already been one of our strengths. We strengthened our Germany-based European operations and built the infrastructure for our operations in the UK, which will start very soon. Since our brand has always drawn strength from its bond with its users, user experience was at the top of our agenda in 2021. Even though we predict that Turkey will have difficult times in 2022, just as the rest of the world; as Monster Notebook, we will continue to invest in user experience and develop projects focused on meeting and exceeding the expectations of gamers.

TURKISH GAMING SECTOR EXPERT OPINIONS

TURKEY GAME MARKET REPORT 2021



NİLAY ALTAN
TÜRK TELEKOM
FIXED SERVICES
MARKETING
DIRECTOR

With the spread of internet usage around the world and the acceleration of technological developments, the gaming world began to reach a wide audience. Current researches show that there are 3 billion gamers in the world and close to 40 million in Turkey. We can observe that both the number of players and revenue in the game market will continue to grow and the importance of our country in the region will increase day by day.

In recent years, the gaming industry has grown rapidly thanks to the major companies of the gaming industry working collaboratively. Our country is the 7th most video game-playing country in the world. This will also pave the way for significant developments for gaming companies, players, and the gaming industry. We anticipate that the development and growth in the sector will continue the side of both computer and mobile games and console games.

With the development of the sector, players now want to have an experience that is more connected to each other and reflects the team spirit. Multiplayer games are a feature that drives players to get better and allows them to enjoy games more.

Gaming viewership is also an important part of this fun world. Accordingly, the esports and live streaming markets achieved great success in 2021.

For the player, broadcaster, and viewer, the "internet" is one of the most basic needs related to gaming. As Türk Telekom, Turkey's leading information and communication technologies company, we will continue to be with game lovers all over Turkey with our game brand GAMEON, which we have implemented to support players 360 degrees with campaigns, devices, game brand collaborations, tournaments, and more.

TURKISH GAMING SECTOR EXPERT OPINIONS

TURKEY GAME MARKET REPORT 2021



KERİM YILMAZ
CEO & CO-FOUNDER
GAMER ARENA

Aside from the increasing number of gamers during the pandemic period, the increase in the time that players spend playing games, and the newly released Turkish games, 2021 was a year in which we heard the news of the investments received by the gaming companies in Turkey. The more interesting part is that most of these investments or sales were made by investor companies outside Turkey.

Many game studios I know and interview have started to achieve success abroad and have started to evaluate and reject incoming investment requests. As someone who has been in close contact with investors in the gaming and esports sector for nearly 5 years, it is very exciting for the future to see companies start to choose investors from a position where they couldn't find investments, and this proves that the gaming sector in Turkey will grow much bigger.

Over the past few years, metaverse and play-to-earn (P2E) concepts have become very popular in the gaming world and attracted a lot of attention in the industry. I think metaverse needs more time to become what it was launched to be. But I think in 2022 the Play-To-Earn model will lead to changes in the gaming world both globally and in Turkey and increase the time that gamers spend playing games.

I think that the impact of blockchain technology on the gaming sector will increase much more with this year and that companies that prepare themselves for these effects and changes can achieve very serious growth.

TURKISH GAMING SECTOR EXPERT OPINIONS

TURKEY GAME MARKET REPORT 2021



FARUK ECZACIBAŞI
TÜRKİYE BİLİŞİM
VAKFI YÖNETİM
KURULU BAŞKANI

The fact that learning can be a difficult and boring process from time to time, always makes me think about making teaching more attractive and permanent with games. What is learned by playing or living becomes much more easily internalized, permanent, and becomes useful. Based on this idea, we thought about games, software, educational institutions, and education with games under the umbrella of the Türkiye Bilişim Vakfı. Especially with today's conditions and facilities, we have focused on education with digital games that can be the most effective way of teaching&learning and started a competition program called KOD Eğitim Oyunları Ödülleri.

As Türkiye Bilişim Vakfı, which works to transform Turkey into an information society, we aimed to create the KOD Eğitim Oyunları Ödülleri project in 2018, by the curriculum of the Ministry of National Education' 4+4+4 system, which is called K12, covering primary, secondary and high schools. We also aimed to encourage and reward the presentation of mathematics and science to students as an "educational game". All the participants who participated in the competition with hundreds of ideas and products in 4 years, who put their mind, idea, and creativity in teaching with the educational games, whether they won or not became winners for us and made a very important contribution to the path to the development of our country with education. With this competition program, I believe that we have made important contributions to the future of our country's entrepreneurship ecosystem and to encourage young people to gain an innovative perspective.

We are evolving this idea of 5 years, into the academy format, which we believe will be more effective in 2022 and contribute much more to both the education system and the world of game software. Our mission is the same, but our path will be stronger, outputs will be efficient and multi-user.

TURKISH GAMING SECTOR EXPERT OPINIONS

TURKEY GAME MARKET REPORT 2021



TUNGA SANALP
CEO & FOUNDER
JIB GAMES

2021 was a year when virtual worlds came to the fore again, namely Metaverse with its new name. In fact, Metaverse invites mankind to take a break from the general real adventure that it has been pursuing since 600 BC and to explore and build virtual worlds. It is obvious that the world we have created is no longer sufficient for us as it used to be. That's why some are after going to Mars, while others are after grabbing land in the Metaverse. Of course, man cannot deny his nature, we always aspire for more.

Just as times change, people and needs change as well. This leads to the evolution of games and various platforms over time, and many things are changing from yesterday to today and tomorrow. Games are no longer platforms where people just kill time or have a good time, but have become places where they create a second life, perhaps a second chance, where they freely share their dreams and ideals.

In 2018, as JIB Games, we actually anticipated this change and started to develop Polity, in 2021 we opened Polity for Early Access on Steam. The reason we chose the Steam platform was to reach the core players and perform our early-stage tests (Close and Open Beta Tests) with our players. In particular, we played Polity with many publishers and game developer teams from America and Europe, as well as performing the quality control (QA) and micromarketing (Micromarketing).

Starting from the second quarter of 2022, Polity will be released in beta on the App Store. In addition to presenting game content to our future players, we aim to help them with development issues such as education from adolescence and then choosing a specialization/profession. We see this as our main responsibility with our developer team, we think that our goal is not only to make money but to take a role in a more meaningful formation.

TURKISH GAMING SECTOR EXPERT OPINIONS

TURKEY GAME MARKET REPORT 2021



BURAK GÜNSEV
CHIEF EGO
OPERATOR
UGC90

It is possible to find a new IGO (initial game offering) almost every day in the NFT gaming sector, or better named, the GameFi sector in a broader sense. In countries such as the Philippines, Taiwan, and Vietnam, hundreds of thousands of people have left their normal lives and jobs behind to play these games in hopes of a better living. In 2021 these people made around \$800-\$1000 monthly which was enough incentive to make P2E gaming a viable full-time job. The GameFi sector now hosts around 1.2 M players per day, when compared to mobile and console gaming, 1.2M is but a measly fraction of their users. Despite the minuscule size of the sector in terms of players which is gaining momentum with each passing day, GameFi has become a sector for astronomical amounts of investment. Game studios and gamers that discover the world of NFTGaming flock here, so to speak... And in the current conjecture, those that are watching outside are left wondering "Where do I even start?" (Token, private sale, public sale, whiteList, game guild, etc.). Rapid growth and high demand create a unique, "free" market. The real key to this free economy is that in the GameFi sector, games can be self-funded through tokenization and NFT sales. As of the beginning of 2022, the amount of funds for the Game-fi sector is \$ 4.83 billion.

To briefly wrap up the current status: "Games are being developed very swiftly with really serious budgets but no one plays them..!?" The reason for this contradiction is that the games are based on complex mathematical and financial calculations. Despite this, the problem stems from the fact that games, where people can earn money, consist of relatively simple and repetitive game mechanics. Industry-leading P2E games, do not fully fit into the habits of the consumer of the known gaming industry. GameFi P2E (Play to/and Earn) players game with the sole intention of making money. Whenever "&Enjoy" is added next to the phrase Play-and-Earn, that's exactly when we'll experience the real force of the GameFi industry. As UGC90, we aim to realize P&E&E games that are fun to play and provide financial freedom with our leading game studios. Drawing in the consumers of the conventional gaming industry to the world of GameFi, and have them play high-quality, enjoyable games all the while making them earn money as they play. We believe that the Turkish game ecosystem with a player base of 35M and strong game studios ready for action will contribute to the country's economy by earning. Turkey is ready to meet P2E.

TURKISH GAMING SECTOR EXPERT OPINIONS

TURKEY GAME MARKET REPORT 2021



MERİÇ ERYÜREK
VARDİYA
GAMES MARKETING
AGENCY
CO-FOUNDER

2021 gaming sector has two different dimensions: Esports have achieved amazing financial success on the side of competitive games and mobile, hyper-casual, indie game development, and game hardware sales. Everyone in the gaming sector expected pandemic conditions to be reflected positively on sales and playtimes, but only very few of us could predict such a big impact. This was the rosy scenario.

We have seen the negative impact on the side of AAA games and big productions. Pandemic conditions and measures slowed down AAA project processes that can't be completed via a remote working model. In gamers' words, there was a minimum six-month "lag", and that caused a global slow down in the sector. We'll keep feeling the impact in 2022.

Metaverse and blockchain-based games also started to point our direction in the future map. After the .com impact that causes white noise is mitigated, 2022 will come with an unexpected pace due to these technologies in the gaming sector.

I expect a real boom in gaming and esports events; the pandemic showed us that our social identities aren't as virtualized as we assumed. People want to come together and have fun. Gaming events are the only type of event that brings two worlds together. I recommend everyone aiming at young segments and the gaming sector to find out how to swim in these two lanes. The cliché "The game starts now" had never been more meaningful for the finance world.

TURKISH GAMING SECTOR EXPERT OPINIONS

TURKEY GAME MARKET REPORT 2021



İSMET GÖKSEL
RÖNESANS
FUARCILIK VE
YAYINCILIK A. Ş.
FOUNDER / YK
BAŞKANI

Although 2021 was not a very pleasant year for physical activities, we felt that we were approaching the end of the closures brought by the pandemic. Especially in the last quarter of the year, some offline activities started to gain momentum. We can say that the game industry completed the year 2021 online as in 2020. However, it continued to accelerate on the online side and brought us good news despite all kinds of negativity. We not only followed the success of the game studios of our country but also witnessed the global acquisitions and the release of new games.

I think the year 2022 will be more open about the coming together of the sector. It seems that the most important fairs of the regions will be opened for face-to-face meetings in 2022. We are working to bring the GAMEX Digital Game and Entertainment Fair together with the players after 2 years. The fair, which we plan to hold between 19 - 22 May, will be held in May for the first time this year.

Especially the Youth and Sports Day week we have chosen is planned in accordance with the general characteristics of GAMEX. Turkey's most rooted fair, after the 2-year Pandemic break, will bring games and players together again and bring the industry together. Especially with the increase in game studios in the last period, Turkey has come to a prominent position in the world.

At this point, I believe that fairs play an important role in bringing games to players and investors. That's why we opened our fairground to game makers, and together with Game Factory, we will support game companies at GAMEX. I fully believe that the Turkish gaming industry will accelerate and grow in 2022, just like the previous years. I hope that 2022 will bring together meetings with both GAMEX and all stakeholders of the gaming industry that will make them forget the impact of the pandemic.

TURKISH GAMING SECTOR EXPERT OPINIONS

TURKEY GAME MARKET REPORT 2021



ARDA GENÇ
FOUNDER & CEO
LIVAD
TECHNOLOGIES

Web 1.0 democratized internet users' access to information by moving content consumption to the digital world. Web sites with content have been at the center of discovery for website users and created an important opportunity for brands to reach customers in both measurable and scalable ways.

With web 2.0, internet users started generating content and creating online communities as well as consuming content. With these new opportunities, platforms focused on content generated by users such as Facebook and Instagram have become an attractive alternative to websites. Now, the most important place of discovery is social media. Not only access to information but also the generation of information has been democratized and thus, brands shifted a significant part of their marketing efforts to these platforms and the creators generating content in these platforms.

2021 has been quite an interesting year, as the fact that concepts that exist for some time such as NFT and Metaverse have become the mainstream media allowed Web 3.0 to gain currency. Even though Web 2.0 provided more advanced opportunities than Web 1.0, one of its pain points was that big technology companies are positioned to be owners of the contents and control the user data. The idea that is promised by Web 3.0 and excites the internet entrepreneurs and investors is that digital ownership becomes possible with a decentralized structure. With the change, virtual worlds will be positioned as platforms where acquired income can be used at other virtual worlds and even in the real world, rather than being environments where people spend time for entertainment.

An increasingly larger part of the internet users prefers games to socialize, access information, and share it. In particular, Gen Z discovers the music, agenda, fashion trends through games such as Fortnite, GTA V. This shift in user tendency has just started and will continue increasingly in the next years. As always, brands will follow user tendencies and try to exist in these spaces to gain a competitive edge. We started seeing its examples, and I predict that there will be a great increase in the investments into in-game ads and content generators at virtual universes, particularly in the next years.

TURKISH GAMING SECTOR EXPERT OPINIONS

TURKEY GAME MARKET REPORT 2021



MURAT K M RC 
CEO
BYNOGAME

Growing consistently every passing year, the gaming sector has left behind the American music industry after Hollywood once it reaches the peak with the impact of the pandemic, and is now ranked first in the world as of 2021. We, as ByNoGame, have been investing in the gaming sector and also building ourselves since the days when no one saw and believed in (including the money we spent in atari saloons during our childhood).

Almost 13% increase was expected for the in-game purchases market in 2021, and yet we completed 2021, which is our 14th anniversary," with a way higher rate of 74%. Gamers are generally extraordinary people with mental agility. They don't want to be just a customer and spend money; they also want to be a seller on top of it and earn money while playing a game. We, as ByNoGame, are very happy to keep gamers together for all their needs, and accordingly, position ourselves as an "A Technological Company Selling Trust".

2022 will be a year that the entire world will talk more and make sense of metaverse (I hope it meets the expectations. :) It'll be a year in which the world of NFTs are further pampered, more people lose their crypto assets, and are sorry; however, the grain will be separated from the chaff in time and we'll have more concise and explicit meaning in time.

ByNoGame will be involved in Metaverse as it did in the "Gameverse" for years, and I'd like to say proudly that we're just ready for this with the technologies we developed.

We've been analyzing the needs of gamers every day for 15 years and further improving our services and ourselves accordingly. Right now, we have a user experience that we improve continuously with artificial intelligence-powered customer services, data science-based digital marketing, and user behavior analyses. We'll open all our idealized services for the benefit of all global players, and 2022 will be the year of globalization and representation of our country abroad for ByNoGame. Sincere regards.

TURKISH GAMING SECTOR EXPERT OPINIONS

TURKEY GAME MARKET REPORT 2021



BURAK ÇEVİK
THE ACADEMY'S
FOUNDER AND
GENERAL BOARD
MEMBER

The year 2021 has been an efficient year of which impact for gaming and esports sector will be felt in the future. 266 million dollars were invested into the gaming sector in Turkey within 2021 due to our gaming studios achieving international success and completing record-breaking exits. Gaming and esports sector-specific VCs were brought to life. Initiatives such as LIVAD, ESA, and Publishme received investments and appraisals. Compared to the other sectors, the esports sector was in the leading position despite a year full of economic crisis and depression experienced by our country.

Here, utterly different opportunities arose with the popularization and rise of crypto. We've seen many collaborations seizing the opportunities in our country. I believe that esports will accelerate more than the past periods along with the continued popularity of the crypto world in 2022. I qualify 2022 as a year of preparation for fundamental changes, in which the entrepreneurial ecosystem is fed abundantly.

Besides the Nerf IT! app that we, as The Academy's, will launch within 2022, we'll continue making efforts for qualified training, gender equality, and decent work purposes.



**DR.
METE TEVETOĞLU**
TECHNOLOGY AND
INTELLECTUAL
PROPERTY LAW
RESEARCH CENTER
DIRECTOR - TESFED
BOARD MEMBER -
LEGAL EXPERT

2021 was quite successful for the gaming sector. Gaming companies managed to stand out amount technological companies by receiving significant domestic and foreign investments at many levels both within and outside our country. On the side of esports, steps continued to be taken for institutionalization. Gaming project models where blockchain products are integrated and tokenization increased were strikingly higher in 2021. Funding gaming initiatives via ICO-IDO yielded quite successful results and this will increase exponentially. Metaverse and increase in wearable tech are the supports for interest in gaming as well as sectoral growth in 2021. Surely, these all created very clear reflections in the field of law for all regulatory, legal arrangements, agreements, and sometimes disputes.

Monitoring the issue on the basis of sector and product on one side and regulatory, legal, contractual, and judicial aspects on the other side, and seeing the objectives achieved and pointed out by the gaming ecosystem in 2021 more clearly and crisply are very motivating and satisfying for me as a lawyer working in this field for years. I believe that the gaming sector will continue its development in 2022 with huge steps in terms of investment, product, technology, and penetration via hardware product and service developments as well as metaverse and blockchain.

TURKISH GAMING SECTOR EXPERT OPINIONS

TURKEY GAME MARKET REPORT 2021



KAYRA KERİ KÜPÇÜ
GAMING PROJECTS
MANAGER
MONSTER
NOTEBOOK

The esports and digital gaming culture reached a much wider audience during the pandemic. In 2021, businesses invested more in eSports and digital games, which occupied a bigger place in the everyday life of individuals. Similarly, Facebook's decision to rename its parent company as "Meta" after Metaverse and its announcements that it will invest more in Metaverse has led Metaverse to become one of the most popular topics of discussion in the technology and gaming ecosystem. The concepts of NFT and Metaverse, which are frequently discussed by those who want to invest in the future, were mostly embraced by those who are not quite familiar with the developments in the gaming world. Today, it is not as easy as it seems to have a clear understanding of the mechanism of these technologies, the opportunities that they can offer, and the future possibilities. Yet, I noticed that individuals and businesses that do not want to miss the opportunity to invest in these areas are influenced by the general opinion on these concepts and the excitement around them. An unrealistic trend is created with a sense of panic, without sufficient knowledge of what the Metaverse has to offer. Most of the studies conducted on this topic are short-term and experimental studies. On the other hand, video game enthusiasts are not only familiar with the Metaverse world, but they have also played an active role in many developments that are considered to be part of the Metaverse world today.

The technology ecosystem, which is dynamic by nature, is improving day by day. It is critical to follow innovative developments closely before making an investment, in order to make a difference in this field. The innovative aspects of successful initiatives, the factors behind their success, and the reasons for the failure of unsuccessful ones should be analyzed in detail. The gaming industry is at the heart of these developments. I believe that those who explore the potential of these technologies should trust the foresight of gamers who have been working on these developments for years, instead of that of those who are new to the concept of meta. The foresight of these gamers and the analysis of successful initiatives can help take firmer steps towards investments in the Metaverse technology. Metaverse and NFT are only the tips of the iceberg. Exciting developments are taking place in many fields, from artificial intelligence to Blockchain. The developments that have taken place during the pandemic accelerate the spread of all these technologies and expand their reach. 2022 will be even more exciting. The gaming world has a precious ecosystem, which drives innovation. As Monster Notebook, we strive to contribute to the development and enrichment of this ecosystem.

TURKISH GAMING SECTOR EXPERT OPINIONS

TURKEY GAME MARKET REPORT 2021



ULUÇ ALİ KIRANGİL
HEAD OF
GAMING IN TURKEY

Although 2021 did not cause much change in terms of income compared to 2020, unlike many other sectors, it was a year in which the gaming industry accelerated in Turkey. We have witnessed many times that the game industry has grown even more in times of crisis, but in 2021, with the introduction of different technologies and their more usability, there has been an increase in both the numbers of playing games and the number of studios. Although the rapid rise in 2020 seems to have stabilized in 2021, I believe that the acceleration in 2022 with NFT games will be the same as in 2020. It is necessary to think of the game industry as a whole, including many subjects such as studios, players, games, game fairs. Game fairs have worked for 2 years to switch from offline to online, many brands came together online and worked for the continuity of the industry in B2B panels. In 2022, it will progress with more hybrid models and there will be a return to its former state in time, but for now, we will still experience the global effects of the pandemic in the sector. This shows that the crisis period continues and the gaming industry will reach higher numbers than expected.

2022 may be the year of games accelerated by new technologies. Especially with the introduction of Blockchain and NFT into our lives, content prepared with different game infrastructures began to appear before us. I think such formations will be more visible in the 3rd and 4th quarters. For now, we are in a transition period, although there are countries that say the Play to Earn model is not directly focused on games with a system based on making money by eliminating entertainment, and there are companies that do not put NFT games in their stores. The adaptation of these new technologies to the game world can lead us towards different applications and directions. For this reason, we are moving towards an order where companies that will not stay away from it and act on the logic of how we use it in our own business will win. In the near future, with the launch of Web 3.0, we will also start to enter Metaverse, which is now the most popular term for brands. Today, a suitable environment needs to be prepared for this. The work done so far and the concept of Metaverse, which many brands in Turkey have been trending, is not a game integration. We cannot enter the Metaverse by advertising inside the games. It's also not a Metaverse for 5 people to have a conversation with their avatar in a single room. It's all preparation. For now, our technology is insufficient for the concept of Metaverse, but as I said, we will both talk and produce a lot about this concept in the near future.

We look forward to 2022 full of new technologies, new studios, new games and new ideas. Turkey has now become one of the world's most important centers in the game industry. We have no doubt that our industry will accelerate in the coming period with the wind it receives from successful businesses. With the big brands changing their perspectives on the industry, it seems that both more advantageous and entertaining for the players and wider player communities will be created for the studios. In addition to the brands that already exist in this sector, I hope that those who prefer the game industry to reach their audience will also win a year.

TURKISH GAMING SECTOR EXPERT OPINIONS

TURKEY GAME MARKET REPORT 2021



**MESUT CAN
COŞKUNÇAN**
GROWTH &
PARTNERSHIP LEAD
AT PLAYABLE
FACTORY

2021 has been a year in which growth continued for the gaming sector in both Turkey and the world, and big purchases and investments were made. I predict that the gaming world will continue this growth momentum, and expand its area of influence by feeding associated sectors as well as drawing non-sectoral players into the sector.

2021 has been quite intensive, efficient, and fast for us, as Playable Factory. We have produced a total of 1,000 playable ads this year. A total of 7,000 different versions were created on the Gearbox platform, where ads we created can be edited by our customers. Also, we reached 500 different B2B users worldwide.

This year has been a game-changer in terms of the business we did. We extended our business to include non-gaming brands and collaborated with Lego, Hasbro, Trendyol, Unilever, WPP, and many other brands and agencies. We created playable ads for smart TVs for the first time. Also, we launched two new features on Gearbox, our main platform, for our users: "Gearbox Insights", where published ads can be tracked and ads based insights can be obtained, and "Gearbox Graphics Editor", where you can easily create a new version by adding visual effects and filters to you existing playable ad. For us, the year 2022 will be a "game-changer", in which we'll focus on our R&D and growth strategies, and make new investments. We'll launch "Gearbox Video", a tool that accelerates and facilitates our gameplay video production process, for the gaming world in addition to the production of playable ads this year. Thus, we become a creative technology company that provides much faster, holistic, and technology-focused service.

Finally, more non-gaming brands discover the world of playable and interactive ads every passing day. Currently, we closely monitor the developments in the world of the metaverse, NFT, and P2E. We'll certainly continue leading the ads world for both gaming and non-gaming brands by adapting our company in the fastest and most accurate way for these new developments in the gaming world throughout the next year.

TURKISH GAMING SECTOR EXPERT OPINIONS

TURKEY GAME MARKET REPORT 2021



YEŞİM ALGAN
RAZER TURKEY
COUNTRY MANAGER

2021 has been a year of economic instabilities and hyperinflation in Turkey, but it was also a little preoccupied and a little exciting year in which we talked about developments such as Metaverse and NFT. In this process, we allow gamers in Turkey to make payments for hundreds of game content and digital entertainment platforms via a single instrument due to our safer, faster, and more beneficial compound credit structure. We have justified happiness of having touched almost all the players in Turkey despite the economically challenging year of 2021 for Turkey, with our team.

We, as Razer, aren't a brand that manufactures only peripherals for gamers. We know it very well that dear gamers just don't spend their lives in front of a computer, a mobile device or a TV connected to a console. A gamer is one of us and continues his/her life just like any other person who lives their daily life without playing games. Right at this point, we, as Razer, are here to cover any space a gamer might need in his/her life. We have peripherals to have top-quality time while playing games, clothing, and textile products for the most stylish appearance, monetization tools for the safest and fastest payment needs, and more at dear gamer's disposal.

We'll continue to push more gamers together with the most loved brands, make the most beneficial offers in hotly-anticipated productions for Razer Gold products and deliver Razer green to all players in Turkey to touch more players and have them feel the happiness of being a Razer fan. As we stated in our mottos: "For Gamers. By Gamers." and "Whatever you play, pay with Razer Gold"

TURKISH GAMING SECTOR EXPERT OPINIONS

TURKEY GAME MARKET REPORT 2021



SERTAÇ PİÇAKÇI
VP OF PRODUCT
MASOMO

According to 2021 data published by Newzoo, the mobile gaming sector comprises more than half of the global video game market with a volume of 93 billion dollars. From the past till today, the mobile gaming sector served as a locomotive in the growth of the global gaming sector with an annual compound growth rate of 11.4% between 2019 and 2024. We're talking about a world in which competition is fiercer every passing year, as it is in every growing sector. At this point, your experience in the sector becomes one of the important factors that distinguish you from your competitors. Gaining the ability to do business above the world standards in areas such as product development, product management, design, marketing, player management is a time-consuming process. The cost of trial and error methods used for achieving certain success in the past was lower. Even though current game development tools have been improved for fast entry into the market, the increased cost in the areas of human resources and marketing are the high-cost items for companies that just enter into the sector and try to gain experience. I can say that companies with previous experience in these fields will take more solid steps towards the future. You become a much more competitive actor in this sector when you combine your own experience with a company that had big success in the global arena, in an environment where consolidation is further important as big companies buy the small companies in the sector. We'll continue seeing its examples in 2022.

The pandemic period affected the global mobile gaming sector positively. In a situation where people can't get out of their homes, an audience that already plays games started playing more, but more importantly, an audience that never stepped into the world of gaming started testing particularly the mobile games for the first time. This actually enabled the market to grow. Surely, you start feeling the adverse effects of every good development at a point after years pass. Economic shrinkages and pressure of inflation that come upon the entire world after the pandemic can take people to a point where they review the expenses and reduce entertainment-related expenses. We currently don't feel it much, but this might come up as one of the factors that affect the mobile gaming sector in terms of incomes in the next months. Nevertheless, 2022 will be a year of growth even though it will be less than the previous year.

The acquisitions of very large companies that we hear since the beginning of 2022 will turn out to be a year in which foundations for different game experiences will be laid. The acquisition of Zynga, which had quite remarkable success in the field of mobile games, by Take-Two, which is quite successful in the area of PC and console games will make console and mobile games to be closer to each other. That might become the start of years when players will have much more different experiences.

Acquisition of Activision - Blizzard by Microsoft for an amount of approximately 70 million dollars is alone a quite significant development in terms of expressing where the gaming sector is. Increased marketing costs and the actions were taken by Apple within the scope of user privacy in the field of measuring the performance of a marketing activity force companies to build their own content strongholds. So, companies plan to do this more effectively in the long term by acquiring content creators in an environment where more effective marketing campaigns can be carried out less. And that leads to an environment where more company acquisitions will take place within 2022.

In sum, 2022 will be a year when growth will continue for the gaming sector, big players will have a louder voice, and companies that fail to gain the support of global companies and investors will further sweat.

TURKISH GAMING SECTOR EXPERT OPINIONS

TURKEY GAME MARKET REPORT 2021



LALE ERGİN

ESA ESPORTS &
MEDIA FOUNDING
PARTNER AND CEO

2021 has been a year in which esports increased the momentum it achieved at the global level and has become one of the fastest-growing sectors worldwide. Continuing pandemic conditions resulted in the sector, having started the online transformation in 2020, becoming digitalized quickly and online tournaments becoming the sectoral norm. The increasing momentum of the sector continued in the areas of investment and creating value. The fact that FaZe Clan, one of the most popular esports teams in the world, went public with a value of 1 billion USD in the US, and that the procedures for ESL and FACEIT groups being acquired with a value of 1.5 billion USD in combination by the Savvy Gaming Group are started were the most significant developments in 2021.

We, as ESA Esports & Media, had an extremely successful year and took concrete steps toward becoming the best corporate and leading esports organization company in the sector. We have become exclusive VALORANT Ecosystem Business Partner of the Riot Games for three years with an agreement made with the Riot Games, as specific to the VALORANT, which was released in 2020 and is currently on the way to becoming the most popular FPS game in the world. So, we have taken a very significant step towards adding continuous, quality, and global branded esports organizations to the Turkish esports ecosystem, which is one of the most important objectives from the establishment of ESA. As part of this agreement, ESA brings the first Turkish National league for the game VALORANT in 2022. "In addition, it holds community tournaments for this game, and also enables esports lovers to access the most important esports organizations for the game VALORANT throughout the year by assuming live Turkish broadcast of regional and global VALORANT esports tournaments."

2022 will be a year in which ESA Esports & Media continues the growth momentum in the best way, and top quality organizations are held in the field of esports in Turkey, and the esports in any group from women to professionals and amateurs will be drowned in uniquely competitive tournaments. Intended to continue the long-term league and tournament series formats for various games, ESA will become a medium that is followed with pleasure by the community due to esports organizations and entertainment contents added to the esports sector and aimed to be turned into an international brand.

TURKISH GAMING SECTOR EXPERT OPINIONS

TURKEY GAME MARKET REPORT 2021



ÖMER SUNER
CEO
OZAN SUPERAPP

The pandemic continued in 2021 and made the masses much more digitally connected. Games are one of the elements that connect us, especially generation Z. After this change, the sector has grown rapidly and is expected to continue to grow.

Today, the global gaming industry is worth \$178.5 billion. By 2025, this figure is expected to reach approximately 220 billion dollars. On the other hand, Turkey ranks 18th in this market with 1.2 billion dollars. In our country, the gaming sector is developing and growing day by day. Research shows that 43.2 million people play games in our country of 85 million people. We know that a significant portion of this audience makes in-game purchases. On the other hand, we hear more and more about the news that our initiatives in the gaming sector are receiving investments at high valuations, and we are proud. It is possible to talk about an all-out developing and growing ecosystem. As Ozan Elektronik Para A.Ş., we carefully follow this growth; and we develop our products and services by targeting the gaming world.

As a global fintech, we will offer financial services and daily life-facilitating services to 43 million players in our country and then millions of players around the world with Ozan SuperApp. Through Ozan SuperApp, we offer services such as instantly opening a free TL/USD/EUR account, sending, and receiving money between accounts at any time without a fee, and making a 24/7 free of charge money transfer to their own bank account. We have finally introduced the long-awaited prepaid Ozan SuperCard, which has no monthly dues, to our users. We will offer Ozan SuperCard owners the opportunity to earn cashback instantly as they spend, in many areas that touch everyday life, from game purchases to e-commerce, from buying plane and bus tickets to grocery shopping.

We design all the functions we have developed for Ozan SuperApp and Ozan SuperCard entirely in line with the needs and usage habits of the gamers. We aim to be the favorite financial service of the entire game ecosystem, from individual players to esports teams. Through our collaborations with gaming brands, we will continue to consistently offer deals such as game world-specific discounts, the cheapest e-pins, game codes, and ensure that our users profit from all their purchases. We aim to develop a wide range of cashback opportunities throughout the year and bring them to our users to be with them not only on the game axis but also in all areas of this audience's daily life.

TURKISH GAMING SECTOR EXPERT OPINIONS

TURKEY GAME MARKET REPORT 2021



ALİ BARUTÇUOĞLU
LOCPICK
CO-FOUNDER
& CEO

The interest in the Turkish game market exceeded all of our expectations during 2021. Back in 2017, when LoCPICK was still in its first year, we were telling foreign companies about the Turkish market and elaborating on the importance of Turkish localization at events like Gamescom. The fact that dozens of foreign companies now reach out to us on their own accord for Turkish localization proves how much the perception of the Turkish game market has changed worldwide.

Colossal games like Disco Elysium, Dying Light 2 and Baldur's Gate 3 getting official Turkish localization would have been developments that we would have difficulty imagining only a couple of years ago. Story-rich games like these titles, which contain hundreds of thousands of words, receiving Turkish language support is truly amazing. These developments signal the advent of a new age for both the Turkish gamers and the industry stakeholders.

On the other hand, free-to-play online games such as League of Legends, Fortnite and Valorant are as popular as ever in Turkey. All in-game and out-of-game contents related to these games being localized into Turkish plays no small part in the success of these titles in our country.

We also continued to help local game developers reach gamers all around the world through localization. We localized Turkish games such as Mayhem Brawler into 10+ languages for the enjoyment of players in a great number of countries. We are not about to slow down in 2022 either, with the localization, voice-over, and music production projects already on our plate and numerous games almost ready to be experienced by gamers both in Turkey and all around the world in their native languages.

TURKISH GAMING SECTOR EXPERT OPINIONS

TURKEY GAME MARKET REPORT 2021



HAMZA SÖNMEZ
MANAGING PARTNER
SANGAL ESPORTS

After the rebranding process that we completed in 2020, the year 2021 passed with expansion and opening to new markets for Sangal Esports. Especially with the second half of the year, we took the first step by first moving our corporate structure to the Netherlands, and now Sangal's steps have started to resonate in Europe. In the ongoing process, we have been looking for young, promising players who will contribute to our club for many years in our CS: GO team, which is our flagship and we enjoy supporting it, and we decided to continue with a team of players mostly living in Europe.

With all these changes, we have now turned our direction to the European region and by participating in many esports events in both the Netherlands and France during the year, we saw how well our vision and goals were accepted and that we were on the right track.

Our actions are not limited to CS: GO only. We are included in the League of Legends: Wild Rift esports in the mobile games category. Our team, which came together in a short time, achieved significant success in international tournaments towards the end of the year.

The last important development for 2021 was a women's team for VALORANT esports. With our team, which will be announced in 2022, we aim to compete in VCT Game Changers and represent our country in the best way, and we want to be one of the stable teams that have continuity in this ecosystem.

After 2021, when we started to recover from the effects of the pandemic, Sangal Esports, will focus more on our overseas business partnerships and implement a strategy of expansion in 2022.

TURKISH GAMING SECTOR EXPERT OPINIONS

TURKEY GAME MARKET REPORT 2021



CEM NAHİT KONE
NETMARBLE PC
DEPARTMENT
DIRECTOR

We witnessed in 2021 that the gaming sector continued its way ahead of all the other entertainment sectors in terms of income and user counts. This leadership and even growth continued in many subcategories. It seems that the gaming sector, where new subcategories are created, will keep creating further resources and content. We need to highlight that investors' interest in this field and subcategories continue. Here, I'd like to talk about subcategories that gained growth acceleration in the sector:

- VR and AR: We've seen that there's been a huge increase in sales and content in the fields of virtual reality and augmented reality, particularly after the META announcement of Facebook. Oculus store alone announced an income of over 1 billion dollars, and I predict that the amount of income and the number of users will keep increasing as the days pass.
- Play to earn (NFT Gaming): Even though this category is still in its infancy period, I believe that it will come to a significant point for users and game developers within 10 years. I'm sure that we'll see a high number of NFT gaming users within time even if it's still perceived as a non-reliable environment in the eyes of gamers and many small investors.
- Membership systems: Platforms offering many games to the users within themselves through membership systems continue growing. While we had Xbox Game Pass, now Playstation gives the signals that it can enter into this field. "Online game streaming" platforms must also be added to membership systems, and I believe that more users will benefit from these platforms with the increase of internet speed within 10 years.

Considering globally, I believe that there will be very fierce competition and many small and big initiatives and investments which fail or knocked out within this year in these categories I mentioned. At this point, having good developments in the sector in Turkey makes me happy and I'm sure that we'll have further successful initiatives in the mobile field.

TURKISH GAMING SECTOR EXPERT OPINIONS

TURKEY GAME MARKET REPORT 2021



**BURAK GÜVEN
AKMENEK**

FRAGTIST.COM &
FİBER PR FOUNDER
GAME PRODUCER

We can say that 2021 was like a continuation of the previous year in Turkey. We witnessed that more and even excessive mobile game companies were founded. In fact, it has been a year in which even the rokiest mobile game developers in the country were hired with high salaries, and companies stole personnel from each other.

While we had companies trying to balance their current staff on one hand and employees switching positions for better facilities, escape abroad also continued even if it decreased. While we observed these on the side of employees working on the mobile side, I can say that the PC side is relatively still. I think, 2021 has been a year when certain things were defined in the sector in Turkey. However, I believe that the big bang will happen in 2022. This is because the sector developed not only in terms of investors and studios but also relevant Ministries and law firms.

Now, more books are being published in the field of game law in our country. We'll see that more opportunities are created at universities, particularly in 2022. Another sector-related development was sure about the games built on the Blockchain structure, altcoins, NFT, and Metaverse. This topic can be discussed for so long that the text here won't be enough, but it created many other opportunities in the sector and led to discussions about uncertainties. Communication with society requires a simpler and more descriptive method so that the terms above have a concrete meaning while trying to explain esports etc. dimensions of an already "virtual" sector.

In sum, the gaming sector continues to develop rapidly by stepping up its excitement. I'm happy to have started my efforts on the PC side by founding Singin Giant, my own gaming company, in the last month of 2021.

TURKISH GAMING SECTOR EXPERT OPINIONS

TURKEY GAME MARKET REPORT 2021



BİLGE KARAGEYİK
HEAD OF
MARKETING
GAMING IN TURKEY

The conventional marketing techniques are about to reach saturation both in the world and in our company. With many brands completing their digital transformation, digital marketing techniques have been adapted to all sectors through media channels. At this point, we can say that the gaming sector is considered as an alternative channel owing to its dynamism, and it is focused on by the brands.

As social media constitutes such a big part of our lives, the marketing channels emerge in an ever reachable and measurable form on the living platforms. Gaming is a part of our lives and has become a lifestyle for many people. In order to address the worlds of the gamers audio-visually and take steps aimed at their needs, it is necessary to have a good command of their languages and worlds. The technological developments are effective in the gaming sector's growth, but we should not underestimate the effects of social media and live stream platforms. The development of live stream platforms is important for the marketing channels to increase.

Data has recently become the most important thing with the development of digital marketing. Thus, we can measure that the gamers spend how much time on which platforms as well as what and how much they consume and tend to consume. Influencer marketing is a concept that gathers gamers on livestream platforms and creates a sense of togetherness. This way, the brands are able to reach their audiences through alternative channels as long as the consumer perceptions, expectations, and trends are measured accurately.

TURKISH GAMING SECTOR EXPERT OPINIONS

TURKEY GAME MARKET REPORT 2021



BIROL SÜLÜK
LOGITECH TURKEY
AND MIDDLE EAST
MARKETING
MANAGER

We live together with the gaming sector as a brand that closely monitors and leads the technological innovations and developments inspiring the sector. As increased gaming habits become permanent with the period of pandemics and are seen as a more important means of entertainment every passing day, the gaming sector continues its development at a fast pace. Surely, the investments into the gaming sector are increasingly higher from this point of view.

Logitech is a brand that serves as a model and creates trends in the sector with its innovative investments, and designs, performance, and functionality of its products. Thus, we act on the belief that we should be in the leading position, exactly within the world of gaming and esports and beyond the expectations of the sector. Developments in the field of esports continue without slowing down in Turkey as it does throughout the world. We make many efforts in various fields in the world and Turkey to maximize the gaming experience and improve the sector with our brand Logitech G, which is used for manufacturing gaming equipment.

Globally, we have partnerships with the teams leading in their leagues and games such as Na'Vi, Astralis, G2, DAMWON Gaming, TSM. We also work 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 much anticipated Turkey leg.

We work towards maintaining the investments that we make globally with our brand Logitech G, also in Turkey. In this context, we sponsored VFCL in 2021. Besides, we make contributions to the performance of the team and sportsmen by means of our ongoing collaboration with Supermassive while also supporting the recognition and popularization of esports in our country. Finally, we had the equipment sponsorship for the Sangal Esports team, which represents Turkey at an international level.

On the other hand, another topic that we handle sensitively is the rate of female players in the gaming ecosystem, and what to do for increasing this rate. We, as Logitech G, started a beautiful awareness project titled "Equal Game" in addition to designing products to represent the own style and performance of the female players. This project is intended to emphasize that women play a serious part and make quite successful efforts in the gaming ecosystem, and bring more female players into this world in this way.

We'll keep making efforts to sustain our support for the ecosystem in the next period.

TURKISH GAMING SECTOR EXPERT OPINIONS

TURKEY GAME MARKET REPORT 2021



CİHAN ÇELİKÖRS
DIRECTOR
ICG

2021 was quite full of action for Turkey, especially in the mobile sector. We witnessed big advertisement/marketing campaigns of not only ICG but also many gaming companies, and many games had more domestic events than the previous years throughout Turkey.

Being in a position that is as important as the European market, particularly in terms of the number of players, Turkey kept up in terms of turnover in the mobile game field. The number of players didn't decrease even though we witnessed that many games were affected negatively by the foreign exchange rate change.

If it's possible to have better economic conditions in 2022, I believe that it will make a huge impact on the entire gaming sector. I observe that people concentrate on solutions such as local payment campaigns and local payment methods in the meantime.

This will create an overall positive impact for the mobile gaming sector. Besides, Turkey displays a much more aggressive growth in the Hyper Casual field and makes its name better every passing year. I believe that there will be a huge increase in investments in the Hyper Casual field.



SEMA YILDIZ
ACER TURKEY
MARKETING
MANAGER

The demand for gaming computers, which we faced as one of the categories that contribute to the increased PC demand in 2020, also increased in 2021. We announced our products, equipped with the latest technology and intended for various audiences, during our global press conferences both at CES and in May and October last year. In 2021, we ensured that temperatures of laptops are kept under control even during the most challenging games by integrating our 5th-Gen AeroBlade 3D fan, allowing for a 10 percent performance increase compared to the previous generation, and advanced thermal technologies into our Predator laptops. We were among the top three countries that provide the highest number of participants in the Predator SIM Racing Cup held in 16 EMEA countries/regions and rewarded the top three racers in the national ranking with our Predator products, including Predator desktops and monitors.

We believe that the lead time in 2022 will be better than the previous year, and we'll deliver our newest products to the users in a shorter period of time. We'll see diversified elegant designs for gaming laptops as well as devices with slimmer frames and higher screen/case rates. We'll see that the graphics cards at gaming laptops are used at our ultra-thin Swift series.

TURKISH GAMING SECTOR EXPERT OPINIONS

TURKEY GAME MARKET REPORT 2021



CİHAN AĐAĐIŐI
OVERSEAS
PUBLISHING
DIRECTOR
WIZARD GAMES
GLOBAL LIMITED

2021 has been a year when people lived on the edge in the gaming sector. In this year when we continued to feel the negative impacts of the pandemic, many AAA games that we looked forward to with great expectations, unfortunately, disappointed us. In addition, we continued to suffer from supply issues with the next-gen consoles this year. Things get interesting right at this point. Having reached the peak point in 2020 when lockdowns were more frequent, the gaming sector managed to grow in 2021 despite the fact that people slowly return to their regular lives and pandemic-related issues of production and supply.

In the face of the problems, we had a year when huge purchases were made by the leading companies in the sector and competition became tougher. On the other hand, overall trends such as NFT, Play to Earn, Cloud Gaming, subscription-based playing occupied both the gaming world and the business world a lot. I believe that people will talk more about these trends and we'll start seeing more tangible efforts in these fields in 2022.

The Turkish gaming sector continues its rise at full steam, particularly in the field of mobile gaming. Turkish gaming companies continued to be the center of attention for foreign investors last year. I believe that the success achieved will continue serving as a model for current and future entrepreneurs and that the sector will keep growing in Turkey.

We, as Wizard Games, follow the developments excitedly and work at full steam to introduce our games to Turkey and other western countries within a short period of time.

TURKISH GAMING SECTOR EXPERT OPINIONS

TURKEY GAME MARKET REPORT 2021



**MEHMET UMUT
ERMEÇ**
CO-FOUNDER & CEO
AT TIPLAY STUDIO

2021 has been an amazing year for the Turkish gaming ecosystem. Turkey's AppStore and PlayStore domination strengthened its grip on the video game industry, which constitutes a rock-solid foundation for other gaming verticals such as blockchain, play-to-earn, and instant games. As the powerhouse of the habitat, Turkish hypercasual game developers and publishers will be the main source of growth in 2022.

"Hyper casual mafia" will be empowering more gaming entrepreneurs, indie producers, and studios in order to let them reach mass audiences through a diverse set of genres and subgenres. Ideation, creativity, and development capabilities will become even more important as expectation sets and competition grow into more demanding factors. Moving forward, I expect to see more and more people invest in our ecosystem because of its unmatched skillsets, insight, and vision, triggering a wider product surface and bigger presence in the global arena.

I strongly believe that vocational education in the video game industry will be another important growth channel for Turkey. Unorthodox upskilling and reskilling programs such as incubators, accelerators, boot camps, and apprenticeship programs will offer hundreds of thousands of educated yet unemployed young people viable pathways for successful careers.

I believe professionals from other creative industries such as film, animation, and software will flock to the Turkish gaming ecosystem as well. I am confident that Turkey will transform its mobile gaming success into a more holistic victory in 2022, and emerge as the owner of the fastest-growing slice of the video game industry.

TURKISH GAMING SECTOR EXPERT OPINIONS

TURKEY GAME MARKET REPORT 2021



SİNAN AKKOL
FIBER GAMES
FOUNDING PARTNER

Excitement is in the air!

2021 was a quite dynamic and exciting year both for the Turkish and the global gaming market. While the investments made in our local companies held the gaming sector at the top line again, the global, huge acquisitions by Microsoft (ABK, Take 2), Zynga, etc. both created excitement around the forthcoming winds of change and raised discussions about the monopolization concerns.

I think that 2022 will be more dynamic both for mobile and PC/console games. The giants such as Amazon, Meta, etc. started strategic acquisition negotiations in order to not fall behind Microsoft. Sony is also planning to strengthen its hand with relatively small acquisitions.

This year, we will have the fruits of the increase in the mobile/casual/hypercasual game production volumes and capabilities in Turkey in the last 2 years in the form of both new investments and the new games released. Even if they get a reaction from the end-users, I think that the blockchain-based games will truly start to draw attention from the gamers and investors this year, and this will be possible through the strong ecosystems created by realistic projects. Furthermore, we will also see that the workforce increasing in the mobile field will gradually feed the companies producing more complex PC/console games.

In short, it will be a very dynamic and exciting year for the gaming sector in all aspects!

TURKISH GAMING SECTOR EXPERT OPINIONS

TURKEY GAME MARKET REPORT 2021



TANSU KENDİRLİ
OYUNDER
PRESIDENT

Hundreds of new teams are built every year. Some of them incorporate quickly and get investment, while others embark on their journeys with streamers.

Turkey has one of the most dynamic infrastructures in the world. Our records show that the number of companies is above 500, but this number can grow much bigger within two years considering their speed of establishment and growth. We have a player pool of 40 million people, and that was around 32 million 3-4 years ago. The rapid growth of the mobile game market particularly affected Turkey very positively. As the structure and number of the teams are extremely suitable for growth, particularly in this field, the news you saw within the past 5 years, or today and in the past years are no longer surprises. Turkey is a dynamic country that is taken extremely seriously in the field of Games while it's not one of the countries with the oldest culture in this field in the world. Investors have high interest. It has not only Games but also Game related technologies and strong streamers.

An ecosystem that creates big opportunities for the young people going for this field with gaming sector-specific funds, acceleration, and incubation programs was developed. This world is incredibly different from the point where we were 12 years ago. Entrepreneurs, investors, public and private businesses that are aware of this make non-stop efforts to be more successful in this field. I predict that Turkey will become one of the most reputable ecosystems in the Gaming market within 5 to 10 years. Yet, it's not only me. Almost all the foreign fellows we make contact with predict that.

After all, Turkey's specific problems and general problems of the Gaming sector are interconnected. It's important that the development rate of the talent and labor pool and development rate of the sector and entrepreneurs get closer to each other.

In particular, rising costs of player acquisition in certain areas of games and accordingly, the limitations imposed by platforms on the access with the policy for the protection of personal data of the gamers increase the costs at certain types of games. However, this is a problem experienced not only by us but anyone competing in this field. This necessitates increasing the marketing budgets and keeping them at this level. The solution is the development of infrastructures that might have more information and internalization through understanding how to benefit more efficiently from these infrastructures. It's important that investors can fund the right entrepreneurs as quickly as possible. Investment incentives must be improved and reinforced in this field. The gaming sector will keep growing with quick and strong steps. We, as Oyunder, will continue making contributions in every field for the development of this system.

TURKISH GAMING SECTOR EXPERT OPINIONS

TURKEY GAME MARKET REPORT 2021



**FARUK FURKAN
AKINCI**
FIBER GAMES
FOUNDING PARTNER

2021 was a year in which the gaming sector was affected by the pandemic conditions worldwide and new methods were found to fight against that situation. We saw many projects to be postponed and the big productions coming out with several promises to have their scales reduced significantly. We observed that as being publicly listed companies, the flagship brands of important publishers severely suffered from decreasing share values due to the contents being reduced or failing to be delivered on time. On the other side, we saw an actual boost in the C2C economy, which has been existing in gamer practices for years, under the concept "Play2Earn" with the technologies of NFT and blockchain. I can say that this business model still tries to find its balance. I think that the "Metaverse" concept which also became very popular this year is being used hollowly. Likewise, this concept has been living and evolving in gamers' own practices, as well. I consider that this will turn into a general business model no sooner than five years, and the VR technology will not reach its potential unless it becomes more user-friendly and wearable.

Our field of activity, i.e. the hyper-casual business model, continued to grow. The reason for the "hype" in the market to decrease is that many studios entered into this field due to relatively easy, but then turned to other fields as launching a successful hyper-casual game was actually harder than it was thought. Hyper-casual will maintain its strong presence also in 2022 with new features. In the forthcoming years, it might be somehow shifted, but it will never lose its importance.

TURKISH GAMING SECTOR EXPERT OPINIONS

TURKEY GAME MARKET REPORT 2021



BATUHAN AVUCAN
FOUNDER &
MANAGING
DIRECTOR
MOBIDICTIONUM

2021 has been an incredible year for the Turkish gaming sector. Not only gaming studios but also other shareholders in the sector improved. Investors, streams, service providers could be examples. This indicates that the ecosystem started to blossom. This growth will continue without slowing down in 2022. We already dived into the new year with the big news in January.

The development of blockchain technology seems to guide the course of the sector with NFTs, "play-to-earn" and "play-and-earn" type of games. I think that companies that can take risks will quit the existing mobile game contest, and step into the world of blockchain.

Especially, the companies that dived into the sector with hyper-casual yet couldn't get their way will have a quick transition, and that process already started. On the other hand, developing a game in this field isn't as easy as hyper-casual. Having experience in building a multidisciplinary team, marketing, community management, and finance is required. Managing inflation in this field requires great talent. I think that a little more time is needed for the development of people who can manage such detailed team structures.

In 2022, the sector will definitely keep developing. I believe that hyper-casual will now further slow down. The market is saturated, and thousands of games are being tested every month. Making a hit game isn't as easy as it was 2 years ago. Here we'll start seeing games with stronger meta, which we call hybrid-casual. However, developing this type of game also requires a good level of game design. Studios to handle it will have good success. Those who can't have a hard time. We can see a more consolidated Turkish gaming sector at the end of this entire process.

TURKISH GAMING SECTOR EXPERT OPINIONS

TURKEY GAME MARKET REPORT 2021



BATUHAN ÖZMEN
HEAD OF
COMMUNITY &
INTERNAL
OPERATIONS
GAMING IN TURKEY

The gaming industry, which has been rising unavoidable for years, continued its growth both in Turkey and globally in 2021 with new generations that are changing, developing, and born into the lap of technology. Turkey's gaming industry has unveiled a brand-new unicorn in 2021 as well as in 2020. Turkish gaming company Dream Games, which was founded in 2019, increased its total valuation to \$1 billion with an investment of \$155 million. Cem Bölükbaşı, who started his esports career with I-Racing, will also compete in Formula 2. Thus, on this road from esports to real tracks, a "first" happened. One of the biggest scandals of 2021 in the Turkish gaming industry should not go without mentioning. Money laundering and bit fraud on Twitch, one of the most famous live streaming platforms in the gaming industry, also resonated both in Turkey and globally.

With the Covid-19 pandemic that has continued for the past few years, the mobile gaming market has continued to grow, doubling its current upward trend. People who are already into gaming have started to devote even more of their time at home to games. The masses, who used to remember games only from their childhood memories, also contributed to expanding the ecosystem with the mobile games they played for the first time. Hyper-casual and casual game genres are the most popular genres that mobile players prefer, as they did in 2020; hardcore players, on the other hand, used their game preferences in favor of Battle Royale, FPS, Strategy, and MOBA game genres.

And of course, the concepts of "Metaverse" and "NFT", which occupy both the gaming industry and our daily lives independently, began to be talked about in louder voices. With the investments and projects made in these areas, it managed to attract everyone from A to Z. However, because it is not yet known what these concepts are, the advertisements, product, and brand integrations that we have positioned in the games for years have been mispositioned as "Metaverse" content. Brands and agencies that don't know enough yet claimed that they did the first actions in these universes.

While I think 2022 will be a year where these concepts will be known and understood more, I think that the unstoppable rise of the gaming industry will also be an ecosystem where the world's largest economies will be left behind.

TURKISH GAMING SECTOR EXPERT OPINIONS

TURKEY GAME MARKET REPORT 2021



BATURHAN GÜRBÜZ
GAME DESIGNER
KODOBUR GAME &
SOFTWARE
TECHNOLOGIES

I'd like to point out the issues I saw in the Turkish gaming sector more than the developments in this note. Even though it's an honor that Turkey has become the center of the hyper-casual fields in the world, its dark side is the fact that the sector grows in a single direction. I believe it's good to remind that the gaming sector includes many different devices and types, including the mobile gaming sector.

The common points of the discussions we had over the past years were "the intent of transition into the console sector" and "the intent of making a game with a big budget". The data we obtained show that the support provided doesn't encourage entrepreneurs and company owners to enter into this field and isn't enough.

Having high requirements for entry into the sector makes entrepreneurs go for fields with lower entry prices. In this period of a good acceleration in the gaming sector in Turkey, I believe that provision of support or increase of existing support for the console field in relation to the support provided in addition to the requirement of making further detailed analyses of the issue will help draw the attention of the entrepreneurs into this field and have the success in the mobile sector to be achieved in the same manner in the console sector.

I'd like to finish my words with one of the good developments on our side. We, as KODOBUR, are taking steps in the direction of building a center comprising gaming companies and an incubation center. We believe that our center where we intend to provide facilities in topics such as collaborations, consultancy, training, etc. will contribute to the national income and sector by increasing the quality of the products in the gaming sector.

TURKISH GAMING SECTOR EXPERT OPINIONS

TURKEY GAME MARKET REPORT 2021



EMRE ATEŞ
MARKETING
MANAGER
PAYBYME

The video game industry not only grows but also changes and develops in many ways every passing year. With the increased accessibility of the internet and the development of technologies, the sector shifts its focus from predominantly single-player games to multi-player games, social network games, and hugely popularized mobile games. Mobile games surpassed the incomes of both console and downloaded or boxed PC games by covering 52% of the global gaming market income.

The video game industry not only grows but also changes and develops in many ways every passing year. With the increased accessibility of the internet and the development of technologies, the sector shifts its focus from predominantly single-player games to multi-player games, social network games, and hugely popularized mobile games. Mobile games surpassed the incomes of both console and downloaded or boxed PC games by covering 52% of the global gaming market income.

Interest in "Earn2Play" games supported by NFT or crypto currencies is increasingly higher since late 2021. Will Free2Play and Pay2Play hardcore gamers stop playing the games they played for a long time, and increase the interest by joining this new trend while new players are gradually dragged into these projects? Or, is it still too early for these projects? We'll wait and see about that.

TURKISH GAMING SECTOR EXPERT OPINIONS

TURKEY GAME MARKET REPORT 2021



ENIS SARGIN
MARKETING &
BUSINESS DEV.
MANAGER
GAMING IN TURKEY

2021 was a year when we switched our lives to a slightly more hybrid model. While we still continue to experience the effects of the pandemic in this process, the entertainment industry in the outside world started to revive a little more. The games continued to hold the crown in their kingdom in this process. In this transition period, we started to feel more as if we are turning into digital people with our changing habits. In addition to our physiological needs, our shopping and entertainment concept now continues in the digital world. Big brands, networks, applications, and investors who are aware of this; accelerated their projects such as Metaverse and SuperApp and they announced their future projects and dreams with different expansions one by one.

Games will continue to be the kings and queens of this empire, as they have provided some glimpses of the digital world that people have been dreaming of for a long time. However, this change also started to affect the designs and genres of games. Especially with the inclusion of digital assets such as NFT, concepts such as play-to-earn, which also affect game designs, increased their presence in the sector. Although this digital transformation and the rapid growth of the industry may be very intriguing about the future that awaits us, it has also brought a blockage that is hurting the gaming industry today. Hundreds of new studios were established that want to be a part of this future and want to take their share among the size of the industry. Every player in the industry, big or small, has tended to remain quite infertile in producing new things and to protect their place in the rising competition, instead of opening new doors by presenting similar scenarios. For this reason, thousands of games that say "play me" and are very similar to each other are left in front of the players. I hope 2022 will be a year for players to see creative work that has come out of very different minds.

TURKISH GAMING SECTOR EXPERT OPINIONS

TURKEY GAME MARKET REPORT 2021



ÇINAR ERGİN
AGENCY PRESIDENT
ARİSTO İLETİŞİM

There's almost no field or sector unaffected by Covid-19. Yet, there are such markets where pandemics created a doping effect in those fields. The digital gaming market is also one of the lucky ones in the period of pandemics. Consoles that are used multiple times a week have been the best friends in the period of quarantine as a result of lockdowns, quarantine, spending more time at home, interruption of face-to-face education, increased mobility. Researches reveal that the gaming market had outstanding growth, especially in the past two years following the coronavirus. Games are played for 1 hour a day! According to the "Digital in 2020" report by We Are Social [U1], there are 4.57 billion internet users worldwide, meaning 59% of the world population. Users spend an average of 6 hours 43 minutes online per day and play games for an average of 1 hour 10 minutes within this period. The research shows that Turkey is also a considerable "player" with 58 minutes per day.

Well, what are the most game-addicted countries? According to the same research, Thailand is ranked first with 1 hour 43 minutes per day. It's followed by the Philippines with 1 hour 33 minutes, Saudi Arabia with 1 hour 33 minutes, the US with 1 hour 25 minutes, and China with 1 hour 24 minutes. The dominance of the Asians in the top 5 draws attention. The country that spends the least time playing games is Israel with 22 minutes. While the change in the gaming industry and the ecosystem continues at full steam, not only the time spent across the screen but also the huge purchases and mergers in the sector reveal the growth momentum in the market. As estimated by Drake[U2] Star Partners, an investment company, the purchase of Activision Blizzard for 68.7 billion dollars by Microsoft and the purchase of Zynga for 12.7 billion dollars by Take-Two in 2021 are references to the investors' desire in the sector. In fact, the total value of these two agreements only is rival to the annual level of 2020 when more than a thousand deals were made. In 2021, the figures were about three times that of 2020.

The reasons for that rapid growth marking the last two years are no secret. First of all, the coronavirus pandemic made a significant contribution to the sector as many people stayed home and played games. When the countries ended the pandemic limitations, people turned to mobile games. Companies increased their investments in both desktop and mobile games. While the companies like Microsoft and Take-Two make investments in the sector, Amazon and Netflix have not turned to the gaming industry, yet. However, these two companies are expected to join in the competition and make huge investments in the growing sector this year along with the Asian companies such as Tencent, Netease, and Sony. In other words, the competition in the gaming arena seems to become more challenging in 2022.

TURKISH GAMING SECTOR EXPERT OPINIONS

TURKEY GAME MARKET REPORT 2021



KUDRET ÇORUK
NIMO TV TÜRKİYE
EVENT MANAGER

In the Turkish gaming sector, we must assess the year 2021 in two different aspects including the pandemic and the economic conditions. With the intense pandemic period at the beginning of the year, there was a very high increase in gaming and watching live streams. We observed that content consumption happened more on mobile devices due to the negative domestic market conditions in our country. While the increase was partly reflected as a decline in the sector during summer along with the vaccination, the increase in the community's habits was observed to continue. PUBG Mobile's investments made both in marketing and e-sports fields in Turkey brought the mobile game market in our country to a higher level. As Nimo TV, we continued to be always in touch with the community in many popular mobile games, especially PUBG Mobile, through influencers, our partnerships with the game companies, and our events.

Coming to the forefront with the benefit provided by an FPS-dominated country, Valorant made a significant impact. It reached the peak in the PC category in terms of both gamers and e-sports views by outperforming many games. In our third year in the Turkish market as Nimo TV, we aim to strengthen our position in the PC games, as it is in the mobile games market, through our cooperation with Jahrein and Rekkitz team.



BEGÜM ÖZGİRGİN
HEAD OF DESIGN
GAMING IN TURKEY

In recent years, especially at the beginning of the pandemic process, due to the rapid growth of the gaming sector, many brands from different sectors have made attempts to take part in the gaming world. Brands have also started to attach great importance to the design side in order to attract gamers to their fields, to offer innovations to them, and to take part in their worlds. Now, it's all about the idea of how everything can be done by more appealing to gamers, and even brands that adhere to a strict corporate identity are turning to designs specific to gamers and games.

The simplification in the design fields and the logos and visual languages of a large part of the brands switching to flat design are also reflected in the visuals of the games in the marketing field. Compared to the old days, rather than using very crowded and multi-effects, visuals that can pass the message directly to the gamers and reflect the games in a simpler visual language are preferred. In addition, the use of content images and videos that gamers can interact with also comes to the fore.

TURKISH GAMING SECTOR EXPERT OPINIONS

TURKEY GAME MARKET REPORT 2021



OĞUZ TUNA MAVUŞ
101XP REGIONAL
BRAND MANAGER

In 2021, the year when the pandemic started in 2020 relatively lost its impact, people had a higher tendency towards games, especially considering the economic conditions in Turkey. As EA SPORTS™ FIFA Online 4, we had an opportunity to meet the gamers in Turkey at the last quarter of the year. Although the games dominating both the mobile and the PC/Console fields in Turkey are of FPS/TPS genre, we observed that the investments made by the foreign companies, either opening an office and recruiting a team in Turkey or increasing their ad budgets, also increased in other genres. The increase in the number of games preferable by the game addicts will make it compulsory for the publishers to increase their services over time.

Before EA SPORTS™ FIFA Online 4 had been started to be published in Turkey by 101XP, there was no football game for the game addicts to play with an official Turkish narration. We want to continue to make innovations for the Turkish gamers with EA SPORTS™ FIFA Online 4 also in 2022. The gaming and animation reality will be increased through a series of updates planned to be offered throughout the year.

The gamers will be able to participate in the traditional "Team of the Year" process as of the beginning of the year. Our primary goal for 2022 is to have our place in the E-sport adventure in Turkey by playing football enjoyable to everyone. I hope that we will watch such matches to excite us all together, and make football attractive again both for the game addicts and for the fans of "3 Major Football Teams of Turkey", which have successively bad scores nowadays, through the matches in which we appreciate the competition of the players.

TURKISH GAMING SECTOR EXPERT OPINIONS

TURKEY GAME MARKET REPORT 2021



**CANBERK
GÜVENKAYA**
SOCIAL PETA

2021 was a very different year both for the producers and the advertisers in the mobile gaming sector. If we divide the year into two parts, it will be much more suitable to address them as the pandemic and post-pandemic periods. In 2021, the average growth of mobile game advertisers remained at about 5%, much lower than that of the previous year (44%). Here, we observe that the costs increased significantly. The average CPM in Facebook increased by 34% in 2021. In the US, mobile games still have the highest advertising cost and the average figures are as follows: \$28.18 for CPM, \$4.42 for CPC, and 1.08% for CTR. Here, we observe that the CPM costs increased by 93%. It is important data that the CPM rates also increased in the Asia-Pacific countries because half of the CPM Top 10 list consists of those countries. Moreover, the new IDFA rules following the release of IOS 14.4 on January 2021 have made Android a more preferred ecosystem in terms of mobile game user acquisition. Additionally, there were some changes to target market determinations. At first, companies had difficulties in determining the key markets and they preferred globalization. As the game companies became more experienced in exporting games, they gradually developed special skills to export specific game genres to specific areas.

2022 seems to be formed based on three foundations. The companies wishing to benefit from the mobile games in the best possible way will develop strategies through an in-depth understanding of their target customers and the performance of their ads. In the mobile game market where the competition has risen, it is quite possible to be an increase in the data which will provide success over the competitors. Lastly, due to the changes to the user privacy rules, the advertisers will have to make more efforts to produce and optimize creatives.

TURKISH GAMING SECTOR EXPERT OPINIONS

TURKEY GAME MARKET REPORT 2021



CENK ÇELEBİOĞLU
FOUNDER
COMPOSER
25M2

We live in a world where the needs, focus areas, and consumption always exist, but access to them has changed over time. The patterns, methods, ways, and names are being changed, but that basic focus remains the same. For instance, we have been listening to music for centuries... But the ways to access the music we want to listen to are changing; gramophone records, tapes, CDs, Blu-Rays, and now no physical recorder present... Now, everything is online, everything is digital. Well, is it any better? The answer is yes for some, and no for others. Some say "I access any music through my smartphone only in seconds and it is invaluable", but the others say "There is nothing better than the sound of the older analog records". But the technology never stops; it continues to make breakthroughs in every field.

And so does it in the gaming world. Although I miss the times when I used to go out of the home, walk into the PC shop and wait for the games I chose to buy to load on the discs as a child, the digital gaming platforms opened the doors to hundreds of thousands of games have a special place. In addition to the innovative solutions aimed at eliminating the need for PCs such as Stadia, one of the developments drawn my attention very much in 2021 was the emerging "subscription" solutions taking that platform approach a step further.

Xbox Game Pass and the platform announced later for Playstation by Sony raise the bar at another level for us, namely for the game addicts. In addition, to be able to access any game at any time, we now have access to hundreds of games against such a monthly payment that is lower than the price of a game similar to the logic of Netflix, Spotify, etc. What a wonderful approach for non-archivers! I wonder where and how the solutions will be in the near future, not later than 10 years, for the needs of listening to music, playing games, watching movies, etc.

TURKISH GAMING SECTOR EXPERT OPINIONS

TURKEY GAME MARKET REPORT 2021



ONUR UÇA
CRAZYLABS
TURKEY LEAD

The ongoing pandemic has caused the masses not interested in gaming to become curious about hyper-casual and hybrid casual mobile games. Therefore, the growth, which slowed down in the console and PC gaming sectors, continued to gain momentum in the mobile game sector last year, as well.

Moreover, while the development processes were interrupted for the AAA games during a year passed with remote and hybrid working systems, the production capacity of the mobile game sector contrarily increased with the newly established small and middle scaled game studios.

We saw the interest in acquiring the mobile game publishers and investing in the mobile game studios to increase even more in 2021.

This change in the sector has brought positive results in Turkey, too. Last year, our country was started to be reflected in the foreign media as one of the biggest centers for development especially hyper-casual and casual games.

As CrazyLabs, we see this potential and cooperate on the games aiming to achieve global success by offering 25 game studios in a year through CrazyHub İstanbul game development center that we established in İstanbul.

I anticipate that the growth momentum of the hyper and hybrid casual, which increased by 15% last year, will also continue in 2022. Additionally, I think that it is yet early for mainstream gamers to embrace blockchain-based games, and the masses will continue to stay in mobile.

TURKISH GAMING SECTOR EXPERT OPINIONS

TURKEY GAME MARKET REPORT 2021



TUNÇ AFŞAR
PLAYERBROS
KURUCU ORTAĞI

I can say that the stagnation in the gaming industry and esports, which started with the pandemic in 2020, is going in a positive direction with the easing of the pandemic in 2021. I think that with the increase in offline tournaments in 2020, the momentum gained before the pandemic will be regained.

We can see that our country, which has the youngest population in Europe, will make a name for itself globally with the end of the pandemic. The success of Turkish teams will follow our esports players who successfully represent us in foreign teams.

The way of gaming and esports world is open.



ÖYKE CAN ASAAD
ESPORTS
MARKETING
EXECUTIVE
BENQ

I think the introduction of the Metaverse was one of the most exciting topics in 2021. As it conceptually includes what classical digital games and social media platforms offer to their users to entertain and socialize, it also offers more engagement, freedom, and creativity.

The popularity and the concept of the platforms are currently limited by the internet connection, hardware, and peripheral capacity but as the general interest in artificial or augmented reality keeps growing, I'm quite sure that the tech manufacturers will respond to those needs as soon as possible.

TURKISH GAMING SECTOR EXPERT OPINIONS

TURKEY GAME MARKET REPORT 2021



BOĞAÇHAN AYDIN
GARENA
ESPORTS PROJECT
MANAGER

The Turkish gaming sector took a step further with the investments made in Turkey by many game companies also in 2021. I can say that the effects of the pandemic crisis experiences in 2020 became more minimized, and the game companies came back to the ecosystem in 2021 with their campaigns and events. After spending a year confined solely to digital in 2020, the fact that the sector continued its activities as in the past, but at a larger scale, created a pretty positive framework for both the employees and the companies in the sector. Similarly, with the increase in the Turkish gaming sector, the masses influenced by the events held in 2021 in the e-sport field increased, and such influence is reflected in the reward pools.

In 2021, Facebook's transformation into "Meta" increased the interest shown in the VR field by the game companies and branding works. Creation of the Alpine map, in which VR glasses could be used for wandering, in the battle royale mobile game Garena Free Fire indicated that even the games not being a part of the VR ecosystem did not ignore the interest shown in the VR. I think that we observe the reflections of the VR market, whose preparations have continued since 2016, in an even higher volume in the Turkish gaming sector in 2022. While talking about VR, I cannot stop addressing the most popular topic of the present time, i.e. the "Metaverse". "Metaverse" has become a generic name in the gaming sector from Crypto P2E (Play 2 Earn) games to VR games. Obviously, the teams that are still advancing their workforce according to the differences among those terms in the sector spent the year 2021 making preparations for 2022. Although the mobile games still maintained their enormous position in 2021, the P2E and VR games spent the entire year preparing their workforce for 2022. 2021 was a good year in terms of both the preparation of the sector and the revival of the campaigns. However, the most important thing I can say considering 2021 is that 2022 will be more challenging and rapid drawing a way for the sectoral growth to progress much more in Turkey.

TURKISH GAMING SECTOR EXPERT OPINIONS

TURKEY GAME MARKET REPORT 2021



**BÜŞRA SU
TÜREYYEN**

MARKETING AND
BRAND MANAGER
GAMING IN TURKEY

As a year of the game, I think 2021 has been a good year that feeds the ecosystem and highlights the beautiful works that we will never think of in this system.

We have seen that the developing esports and gaming culture with the release of new games by many game companies, creates an area where we can turn crises into opportunities 100% in the pandemic. The efficient closure of the year with the momentum gained by brands that can make these conditions useful with the most accurate and efficient strategy has greatly accelerated the introduction of multiple brands into the investment processes in the gaming sector. This, of course, contributed greatly to increasing the value of the ecosystem of which both brands and influencers are a part.

The fact that award-winning works, appreciation, and encouraging works are placed under this category has been quite a trigger for everyone who works in this sector. As of 2021, we have reached a point where many of our friends in the esports category have proven that they can do this professionally. I am sure that my colleagues who have been working for this ecosystem for a long time and who see and think that the pandemic has accelerated our work to a point where we think that it is not given its right, share the same happiness as me. At the point we have reached, we now see a lifestyle in which we carry professional support to different points beyond just marketing, strategy, or raising awareness. Now, where gaming is not just a hobby and game publishing is not just entertainment, I am sure that all the work to be done in 2022 will reach a point where it receives much more investment and value globally and in Turkey. I wish that 2022 will be a year in which the entire game ecosystem and gamers can play and access all the games they want.

TURKISH GAMING SECTOR EXPERT OPINIONS

TURKEY GAME MARKET REPORT 2021



EMRE YAKARIŞIK
OPERATION
MANAGER
GAMING IN TURKEY

Although the effects of the pandemic have decreased in 2021 compared to 2020, the video gaming and digital consumption rates of the people continue to grow increasingly day by day. Considering that the biggest share in the gaming sector is held by the mobile gaming industry, Turkey has become a remarkable star in this market as always. The fact that the first unicorn of our country in the gaming sector, Peak Games, is being followed by Dream Games with the investments it received this year and Dream Games has its name written among the giant unicorns has shown again how important the gaming sector is for Turkey. Obviously, seeing different unicorns coming out of our sector in 2022 should not be a surprise.

The development of the products integrated into the blockchain, which we observed to be among the rising stars and trends of 2020 to 2021, seems to continue in 2022 without slowing down. We are going to witness the intense effects of such concepts as Play to Earn, NFT Games, and Metaverse on the gaming sector. The current position of blockchain-based games reminds of the debut of mobile games. The persons and companies seeing the potential lying there will always be one step ahead of the sector in 2022 and later.

Microsoft's acquisition of Activision Blizzard was one of the most important news of the near past. Made the gamers happy with Xbox Game Pass in 2021, Microsoft has gained a significant income in this way. In the upcoming period, we might see the subscribe model to be used much more actively in the games and different platforms.



ZÜLFÜ TOPÇU
TURKEY MARKETING
MANAGER
HYPERX EMEA

2021 was a relatively active year for games around the world. But we know that many stars are also hiding for 2022. I want to look at 2021 from two perspectives: the change of gaming and the player equipment. Turkey has followed the changes in the world of mobile gaming very quickly. In terms of consumption, we already know that gamer in our country in general follow the world instantly. However, this year was a very productive year not only in terms of consumption but also in terms of production. Apart from the unicorns coming out of our country, perhaps hundreds of new mobile gaming companies have been established and received large investments. There is no doubt that this boom will return as major import inputs in our country in the coming years. Naturally, software students at universities are still getting picked up from the schools while they are still students. On the hardware side, PC accessories tended towards wireless, while mobile gaming showed a large increase in variety and quantity, especially in gaming equipment used in phones and handheld consoles. I have no doubt that more games and products will be released in both areas in the coming years, and we are already ready for these changes as HyperX.

TURKISH GAMING SECTOR EXPERT OPINIONS

TURKEY GAME MARKET REPORT 2021



UTKU DÖRDÜNCÜ
PARIBU VENTURES
MANAGER

2021 was a year of intense interest in blockchain-based games, and this trend is expected to continue in 2022. The main reasons for the development of this category can be summarized as follows:

- P2E (play-to-earn) model pioneered by Axie Infinity
- Contribution of NFT technology to the in-game economy
- Establishment of guilds supporting the P2E model
- Development of high-quality games
- Rapid development of technologies to scale blockchain infrastructure

First, these new types of games give players a different gaming experience. While traditional games are based on generating financial income from the player, in this new model players can earn money while playing. Of course, the sector is still at the beginning; existing trials have a lot to improve on in-game economics, game mechanics and design. However, when this new model discovers the right fiction, it will be inevitable that the game world will turn to blockchain.

In-game NFT's give players an opportunity they've never experienced. In addition to the characters they play in the game, it is now possible for them to own equipment and clothing with NFT's. In this way, both game creators and players get the chance to generate high revenues from this technology.

One of the important elements in the development of blockchain games is the establishment of guild structures. As a cornerstone of the in-game economy, these guilds make it easier for players to enter games (by buying NFT or game token) with a variety of financial models (leasing). In addition, they ensure that the in-game experience is developed with the spirit of the community, and with the high budgets in their treasury, they are the most important investors in this world and bring financial and human funds to the blockchain gaming industry.

In 2021, Axie Infinity reached 8 million players and the weekly active user of blockchain games reached 10 million. Blockchain games became the fastest growing category in the gaming industry. As Paribu Ventures, we anticipate that this category will experience similar growth rates in 2022, with the production of high-quality games and the scaling of the blockchain infrastructure (fast and low-fee transactions), and we are considering adding investments in this area to our portfolio.

TURKISH GAMING SECTOR EXPERT OPINIONS

TURKEY GAME MARKET REPORT 2021



**MİRAÇ CEREN
ÖZERCAN**

SENIOR BRAND
MANAGER
ARİSTO İLETİŞİM

With the pandemic entering our lives, the hybrid business model quickly took its place in our lives. Contrary to popular belief, we have adapted to this business model more quickly. We started spending more time on entertainment, games, and shopping through online apps. While games continue to hold their place in their kingdom, mobile games have permanently changed our lives during this transition. We're starting to spend more time in the game world. Big brands that realize this; started to increase their investments by taking the game industry into their frame. Brands that want to make a name for themselves in the gaming industry; turned to projects that would raise awareness and attract attention. They did not hesitate to step into the world of Metaverse, which has recently risen at the speed of light. While developing technology makes games attractive, new trends have emerged that show how to move forward and what to do.

Everyone would add their imagination to the games they played when they were little and make it more fun. Now, these dreams have moved into the digital world. People, brands, and companies create their own characters and say "I'm in this magical world.". The game industry, which renews and develops itself day by day, changes and develops the existing games. At this point, different games, and different worlds are knocking on our door. In the Metaverse universe, land can be bought, a party can be held, or a sale can be made. I think it's important to steer and use these improvements correctly. As in all areas, there is a lot of misinformation in the gaming industry. It is necessary to learn the details well and follow the sector in detail.

The rapid growth of the industry and the digital transformation predict that different innovations will welcome us in the future. Inevitably, the rapid development of the gaming industry will soon enter a vicious cycle. Therefore, it is important that individual or corporate companies that want to take part in this world take care not to be monolithic in their production and thoughts and be creative. Competition is good but shouldn't be at the forefront of goals. Catchy, innovative, and entertaining works should be created. It is seen that the same games are no longer looked at and users are waiting for creative works. I believe that 2022 will have a pleasant and creative process in the gaming sector. The days that we will follow with curiosity by not taking our eyes off the innovations are waiting for us.



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

11 years
with
increasing investment

Coca-Cola
Real Magic™



Real Magic™

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 produced in 11 factories.

Coca-Cola is 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's operation stands out as the largest operation in the region in terms of the number of employees and market size.

Brands in Coca-Cola's product portfolio in Turkey

Coca-Cola's soft drink portfolio in Turkey includes Coca-Cola, Fanta, Sprite, Schweppes, Cappy, Doğadan, Fusetea, Powerade, Damla Minerale, Damla Su brands and their different variants.

The responsibility of the production, sale and distribution of Coca-Cola's 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.](#)



Coca-cola.com.tr



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Being the first digital wallet application of Turkey, **fastPay** was established in 2012 by DenizBank A.Ş. and reached 2.6 million users as of the end of 2021. fastPay operations are carried out under the tradename of **fastPay Elektronik Para ve Ödeme Hizmetleri A.Ş.** which is licensed by the Central Bank of Republic of Turkey and a 100% DenizBank subsidiary as of 2022.

fastPay users can:

- Transfer money from mobile to mobile or to IBAN 24/7 free of charge to whomever they wish, even if they are not a customer of the bank.
- Top up their travel card wherever they wish through their account or through their credit card defined in the electronic wallet, even if they do not have any cash with them.
- Make contactless payment and benefit from other various privileges at giant retail chains such as A101, Migros, Carrefour, Burger King, Popeyes, Sbarro, Usta Dönerci, Kahve Dünyası through paying with QR Code by just turning their phones sideways and without being have to be a member of any bank.
- Pay their bills without being have to wait in the line and paying any fees.
- Easily purchase game codes and make change game payments without paying any fees.
- Make fast and safe payments in online shopping without being have to enter their card information, and
- Pay the debt for any credit card using fastPay.

fastPay users can benefit from all these privileges by adding their choice of credit cards or debit cards from any bank to their fastPay waller. They can transfer money to their fastPay account from any bank account or from a DenizBank ATM.

fastPay will continue to grow further with the following new products and services to be launched through new investments to be made within 2022:

- **fastPay 2.0** with pre-paid card, IBAN, FAST and new generation fin-tech integrations,
- **Pre-paid Card** enabling making fast and safe payments in any location with new generation membership schemes,
- **SME HUB** with Payment Facilitator (PF), Alternative Payment Methods, MerchantApp and Wallet as a Service (WaaS) features,
- **PAYMENT HUB** offers a single portal for all the collections such as Institution/Bill payments, loan repayment, new loan underwriting and credit card debt repayment,
- Card storage and wallet payment infrastructure solution FASTPASS,
- **CREDIT HUB** with smart features to make credit lending simpler, offering the opportunity to cooperate with Remote Customer Acquisition and contracted points (fastNokta), apart from the physical locations of member banks



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As a technology brand operating in the field of high-performance laptops and gaming equipment, **Monster Notebook** is one of the most popular brands in the gaming and eSports ecosystem with the innovative solutions it offers to the world of gaming and the products it specially develops for the needs of gamers of all levels.

It reaches end users all around Turkey with its online sales and technical support channels, as well as its stores and technical service centers in Istanbul, Ankara, and Izmir.

The company, which started its operations in Istanbul in 2000 with the goal of becoming a global brand from Turkey, continues to make international investments in line with this goal.

Monster Notebook operates in the Turkish Republic of Northern Cyprus with its store in Nicosia and reaches Gulf countries with its operations in Dubai.

It manages its operations in Europe from its gaming and experience store on Alexanderplatz Square, which is located in one of the central districts in Berlin and is Europe's largest gaming and experience store with a total area of 1,000 sq. meters. Monster Notebook's next destination will be London, UK.



Monsternotebook.com.tr



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SHOW YOUR POWER

Turkey's fiber power **Türk Telekom** presents its games and gamers exclusive new brand **GAMEON!**
Now it's your turn, show your power with GAMEON,
the common point of all of us!



GAME ON

Türk Telekom



Türk Telekom
Değerli Hissettirir



Türk Telekom, which has a long history of more than 180 years, is Turkey's first integrated telecommunications operator. "Turkey's Multiplayer" **Türk Telekom**, as of 31 December 2021; serves a total of 51.8 million subscribers, including fixed access lines, broadband, TV, and mobile users. Türk Telekom, whose primary and most important goal is to introduce the internet to as many people from all parts of the country as possible and to raise every part of Turkey to a level where everyone uses the internet at the same level as the developed countries, provides services in 81 cities with its nearly 35 thousand employees. Türk Telekom, the pioneer of digital transformation in Turkey, continues its activities with the mission of 'making people feel valued' in every field that focuses on 'human', while maintaining its understanding of infrastructure improvements and quality service.

Türk Telekom, which is a pioneer in its sector, launched the **GAMEON** brand for gamers and game lovers by investing in the game focus, which is one of the activities where Türk Telekom customers spend most of their time on the Internet. Combining its experience and innovative perspective, Türk Telekom is the side of games and gamers with GAMEON.

Türk Telekom, which has created a sub-brand concept that will always serve gamers by thinking like a gamer while creating the **GAMEON** brand, will continue its way by adapting its quality service strategy, speed and power to the game with all its marketing activities online and offline. GAMEON, which will offer 360-degree solutions to the needs of gamers and game lovers, will bring solutions to both new and existing customers of Türk Telekom with game-oriented offers, brand partnerships, devices, tournaments and many more other similar actions. Apart from all the marketing and communication activities to be carried out in 2022, Türk Telekom, which is one of its biggest strengths is GAMEON, while continuing to strengthen its work with strategic partnerships with game companies, it will always keep its quality at the highest level as a brand that has made a name for itself in the game ecosystem.



Gameon.com.tr/



[Instagram.com/turktelekomgameon/](https://www.instagram.com/turktelekomgameon/)



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**EXPERIENCE
COMPETITIVE
GAMING
EXCITEMENT
ALL OVER IN YOUR LIFE
EARN
PRIZES!**



GAMER ARENA

GAMER ARENA

Gamer Arena is a Competitive Gaming Platform that provides players with the opportunity to earn money and prove themselves by bringing players against each other in an online arena in new generation digital games. The platform has been activated in March 2020 and allows 1vs1 duels, and tournaments with single/multiple participation options in more than 20 games played on mobile, PC, and consoles. With these duels, players have the chance to participate in battles whenever and wherever they want and win.

More than 200,000 duels have been played and 260 tournaments have been held on the platform, where more than 330,000 players are registered. The platform, which will start its global expansion in 2022, has already started its preparations and studies for the Web3. In November 2021, Gamer Arena held the public offering of its own cryptocurrency Gamer Arena Utility Token (GAU) in Turkey, and the GAU Token started to be used as the only valid currency in the platform.

Gamer Arena aims to provide players with a much better experience by developing their own games in 2022 and with integrations with popular games. We can say that the platform, which is one of the pioneers of the Play to Earn concept, has innovative and big surprises to be announced to its users in the near future.

Gamer Arena is built with the mission of being one of the largest talent-based competitive gaming platforms in the world and continues to work with the vision of entertaining, satisfying, and inspiring every gamer they touch.



TBV
TURKISH
INFORMATICS
FOUNDATION

To Shape the Future with
Education and Transform
Turkey into an Information
Society
We Support **Games in the
Field of Education.**



tbv.org.tr





The Turkish Informatics Foundation (“TBV”) is a non-governmental organization with its headquarter located in Istanbul. Our aim is “to transform Turkey into an information society”.

TBV was founded in April 1995 by 178 founding members from 114 different institutions and today the organization has more than 400 members. The main objective of our organization is to provide a necessary foundation in enabling the Turkish society to become an information society, and in doing so, to organize and develop scientific research and activities and specifically to research the effects of new technologies on the social and economical lifestyles of the society, to create and provide projects and policies and to provide reliable sources and qualified information.

In this direction, the **KOD Educational Games Competition**, which has been held regularly every year since 2018 by the Turkish Informatics Foundation and which is a first in Turkey and rewards digital game or digital game ideas in the fields of mathematics and science, is changing and evolving.

The KOD Awards Education Games Competition, which we have been holding for 4 years with the mission of supporting games in the field of education, will be here with the same mission in its 5th year with its new name and new format.



Tbv.org.tr/



[Instagram.com/tbv1995](https://www.instagram.com/tbv1995)

EXPLORE & CONSTRUCT & EXPAND & SOCIALIZE



PLAY TO DISCOVER,
MORE TO IMPROVE!



 **POLITY**



Polity started its journey in 2018 as the dream of a small development team. Nowadays, **Jib Oyun Yazilim ve Pazarlama A.Ş. (JIB Games)** supports this dream and turns it into a huge gaming platform. The game, which is also open to the user-generated content by the players, completed the Closed and Open Beta Tests and was opened to early access on Steam in the last half of 2021. In the second half of this year, the Open Beta will be launched on IOS.

Polity offers its players a social platform where they can establish and rule their own country on a planet covered with waters resembling the Earth, and other players can become citizens in their country. As players specialize in professions, each of which is a "casual game", they also contribute to the development of their country. Countries, on the other hand, are trying to dominate the planet with their relations and trade wars.

Polity, which is in the category of MMORPG, is more than a game with its aim focused on the future and education, and it offers a world with the motto of 'Upload your Brain'. This world becomes a home for the players' ideas and dreams. To have inclusiveness within the game makes basic needs such as equal education, which many people are not able to have, and other issues that the majority of people find difficult, boring and monotonous in real life accessible and enjoyable.

The development team, who are currently working new professions by paying attention to the feedback of Polity players, who are majorly from Europe and Americas, continue to improve the game and add new features, and at the same time, they work with academicians to examine and integrate education models, other than the contemporary education model, into the game. In addition, it is planned to establish a system that players can train and develop their own artificial intelligence in the game and continue the game with their trained AI-self when they are offline.

To learn more about **Polity**, you can visit the following social media accounts.



[Steam.com/Polity](https://steam.com/Polity)



[Discord.gg/polity](https://discord.gg/polity)



[Instagram.com/polityonline/](https://instagram.com/polityonline/)

GAMEFI & NFT & METaverse PLAY & EARN & THRIVE

CHANGE THE RULES...IF YOU CAN'T...CHANGE THE GAME



**UGC
90** **ULTIMATE** **GAMECHANGER**



Blockchain technologies influenced many industries to date and started to show their effect in the gaming industry as well. The rules of the game industry are changing every day, especially with the involvement of NFTs, which skyrocketed in use last year, and also with the introduction of Metaverses, which everyone is now curious about. The journey started the development of "play to earn" (P2E) games which later transformed into "play and earn" (P&E) game model instead, accompanied by a change in ownership, digital assets in the games were given to the players as NFTs. WEB3.0's Interoperability in games, blockchains, and Metaverses will become disruptive innovations in the gaming industry. To support the development of this rapidly evolving ecosystem, and to empower game studios and other initiatives in the world of GameFi and Metaverse, UGC90 was launched. A new generation initiative, designed by the leaders of the game, technology, and marketing industry.

Ultimate Gamechanger (UGC) joined the portfolio of BV Growth, a fund of Boğaziçi Ventures, one of the largest investment companies in Turkey, and added Turkey's country code 90, to its name. While "the game itself" changes before the rules in the new ecosystem, UGC90 aims to bring all passionate game entrepreneurs, cutting-edge blockchain & NFT tech. developers, creative marketing professionals, razor-sharp analysts, and expert community builders together with the next generation investment world. To learn more about UGC90 new generation initiative and its services that focus on combining Blockchain technology with games and Metaverse projects, you can visit our website and follow our social media channels to learn more about our projects.



Ugc90.com/



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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: 1.2 Billion USD
- Saudi Arabia: 1 Billion USD +
- Iran: 600 Million USD + / -
- Israel: 500 Million USD + / -
- Egypt: 400 Million USD + / -
- United Arab Emirates: 400 Million USD + / -
- TOTAL: 6 Billion USD 2021 Revenue+



- Population: 1.8 Billion + / -
- Online Population: 750 Million +
- Number of Players: 420 Million +

Source: Newzoo - 2021 Free Global Game Market Report

2021

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- SimilarWeb Data

Information Note

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.

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