



TÜRKİYE GAME MARKET 2022 REPORT

We are deeply saddened by the Kahramanmaraş earthquakes on February 6, 2023, that caused terrible destruction in 11 provinces of our country. We wish God's mercy on those who lost their lives in these terrible earthquakes and we convey our condolences to their families and relatives. We hope that these wounds we have received as a country will be healed as soon as possible.

GET WELL TÜRKİYE

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Thank You

We acknowledge our sponsors, accompanying and supporting us, in the 2022 version of the Turkish Gaming Sector Reports that we prepare rigorously and interpret data from many published resources for 7 years.

(The logos of our sponsor brands are listed alphabetically and by sponsorship category.)



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Türkiye's Biggest Gamer
Friendly Shopping Site



Coca-Cola

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Türkiye's Gamer-Oriented
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Gaming Platform



Genshin Impact

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Virtual World



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Professional Gaming
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Thank You

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



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Current Status of the Gaming Sector

OZAN AYDEMİR

PRESIDENT / CEO

At the beginning of the last year, 2021, the gaming sector slowed but recovered by gaining momentum later. As we always mentioned, the gaming sector experienced a growth period during the first years of the pandemic leading to record profits and sales. We went through quite an exceptional interim period.

Calculated to be 152 billion USD in 2019, the gaming sector jumped to 177 billion USD in 2020 with the positive effect of the pandemic, and the total income was 176 billion USD in 2021. In 2022, our industry is returning to its routine growth momentum and the figures we predict, regardless of external factors affecting the industry. This is actually a situation that we all expect and create our strategies accordingly.

However, there is also another side of the coin.



Current Status of the Gaming Sector

OZAN AYDEMİR

PRESIDENT / CEO

U.S.-China trade crisis, expected recession, and Russo-Ukrainian War!

In 2022, we witnessed the reflections of the global fluctuations in international politics on the economy. In addition to the impacts of the pandemic which has slowed down but continues, there were global trade problems, the U.S.-China trade crisis, possible recession in Europe, inflation rates, and the Russo-Ukrainian war. It was a difficult year for the world. All of these conditions have also affected the gaming world.

Similar to pandemic, war is a negative condition desired by nobody. And due to that war, esports and gaming companies also imposed some sanctions. While many esports companies decided to withdraw from Russia, giants such as Activision Blizzard and Epic Games announced that they stopped selling games in Russia within the year. Russia is a very big marketplace for the gaming world, and in general, the said circumstances had an important role in income reduction from the sectoral aspect.



Current Status of the Gaming Sector

OZAN AYDEMİR

PRESIDENT / CEO

When we evaluated the year 2022 based on figures, the market size is anticipated to be around 185 billion USD according to Newzoo's report. The main factor guiding the gaming sector was "mobile" again. In 2022, **more than 92 billion USD of the total global income came from mobile. While the total turnover of PC games was above 40 billion USD, console games had a volume of 52 billion USD.** Investments into the sector continued in both our country and globally in 2022. However, finding investments and funds became harder than the previous years all around the world. Along with the gaming sector, the most prominent investment areas were AI (Artificial Intelligence) and Fintech.

We will share all relevant details later in our report. I hope that our report will continue to be a guide that everyone can benefit from, regardless of the sector, as it is every year. I wish everyone a good reading in advance.

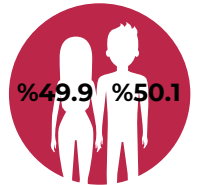
2022 Türkiye Overview

In 2022, the population of Türkiye increased compared to the previous year. As of 31 December 2022, the population residing in Türkiye increased by 599 thousand 280 people compared to the previous year and reached 85 million 279 thousand 553 people.

While the annual population growth rate was 12.7 per thousand in 2021, it became 7.1 per thousand in 2022.

While the male population is 42 million 704 thousand 112, the female population is 42 million 575 thousand 441. In other words, 50.1% of the total population is men and 49.9% women.

The population of Istanbul increased by 67 thousand 51 people compared to the previous year and became 15 million 907 thousand 951 people. Istanbul, where 18,65% of Türkiye's population resides, is followed by Ankara with 5 million 782 thousand 285 people, İzmir with 4 million 462 thousand 56 people, Bursa with 3 million 194 thousand 720 people, and Antalya with 2 million 688 thousand 4 people.



2022 Türkiye



**TOTAL
POPULATION**
85.279.553



**FEMALE
POPULATION**
42.575.441



**MALE
POPULATION**
42.704.112



**INTERNET
USERS**
72.000.000+



**SOCIAL MEDIA
USERS**
69.000.000+

POPULATION RATE AGE 16 - 74
85%







BY GENDER
MALE 89.1%
FEMALE 80.9%

54.000.000 FACEBOOK
64.000.000 INSTAGRAM



Estimated Media and Advertising Investments in Türkiye

According to the figures in the report Estimated Media and Advertising Investments in Türkiye for the First Half of 2022 issued by the **Association of Advertising Agencies**, the result of the digital transformation has also reflected in advertising investments increasing the total share of the digital channels to 67.2%.

	Channel	Market Share 2022	Market Share 2021
	Television	26%	28%
	Press	1,2%	1,7%
	Outdoor	3,9%	3,4%
	Radio	1,5%	1,4%
	Cinema	0,4%	-
	Digital	67,2%	65%



Estimated Media and Advertising Investments in Türkiye

Considering the platform-based distribution of the media investments in digital advertising channels, we observed that 76% was made on mobile devices and 24% was made on PC.



Digital Breakdown

Percent

Impressions / Clicks

37.7%

Video

34.3%

Search Engine

21.3%

Other

6.7%



Estimated Media and Advertising Investments in Türkiye

Considering the media investments in digital advertising channels in Türkiye, one of the most significant developments is that our sector has taken an undeniable part under the category "Other". Gaming, which became an indispensable medium for Internet users in 2021, apparently continues to be effective to the same degree in 2022.

Digital Breakdown

Percent

Other (Sub-breakdowns)

6,7%

Influencer

Digital Audio

E-mail

Connected TV

In-game Sponsorship



Most Used Social Media Platforms in Türkiye

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

How Many People Use Social Media Platforms in Türkiye?

- Nearly 78% of the Turkish population uses social media.

Important Considerations About the Social Media

- Average time spent on social media by Internet users is 2 hours and 47 minutes.
- In our country, each Internet user uses an average of 7,8 social media platforms.
- 59.4% of the social media users in our country follow the social media channels and contents of the brands.
- 11.9% of those who use social media in our country say that their main purpose of use is to follow their favorite influencer(s) or content producer(s).



While Türkiye is the 9th country in the world that uses social media platforms the most; India, Brazil, United Arab Emirates, Indonesia, Philippines, Saudi Arabia, Mexico and Malaysia are in the top 8 countries.



As a country, we spend a lot of time on social media platforms. The time we spend on social media channels on a daily basis is 2 hours and 47 minutes on average.



Important Considerations About the Internet Use in Türkiye

- In Türkiye, 61.4% of Internet users watch videos to get information and learn something.
- In Türkiye, 96.2% of Internet users watch digital TVs.
- In Türkiye, 16.5% of Internet users listen to Podcasts.
- In Türkiye, 66.9% of Internet users shop online, and Türkiye has the highest percentage in this regard around the world.
- In Türkiye, 44.5% of Internet users do grocery shopping online, and it has the highest percentage in this regard around the world.



**INTERNET
USERS
72.000.000+**



Türk Telekom GAMEON Shows Its Power In Every Part Of The Game!

GAMEON became the first brand in the telecommunications industry to focus 360 degrees on the game and the gamer in 2022. GAMEON has shown that it stands by its customers with the opportunities and campaigns it offers for existing and new Türk Telekom customers, both within the gaming ecosystem and in different areas of life.

During 2022, GAMEON offered many services, which were realized for the first time in Türkiye, between both the gaming ecosystem and telecommunication brands. Throughout 2022, GAMEON offered many services that were realized for the first time in Türkiye among both the game ecosystem and telecommunication brands. Focusing on increasing the performance of gamers with the motto of "Show Your Power", the brand launched a Premium Gamer Modem that supports gaming performance, in addition to fiber speed options with high upload and download speeds, and internet campaigns with special benefits for the gamers. With its innovative vision, it made the Discord platform, which is frequently used by gamers, a part of its communications, and thus became the first Telecommunication brand to use the Discord channel. In addition, GAMEON has expanded the boundaries of its 24/7 Internet Support line to Discord, breaking new ground in this field as well. GAMEON has provided many benefits in areas such as in-game benefits, gaming chairs, and food and beverage with its partnerships with popular brands of the gaming world. In addition, Türk Telekom's digital game shopping brand Playstore offered various opportunities to gamers with the campaigns carried out. Launching the first long-running e-sports tournament series in the telecommunication sector, GAMEON took its place in the e-sports ecosystem with an intense 6-month calendar with the GAMEON 2022 E-sports Tournaments, which include CS: GO and PUBG: BATTLEGROUNDS games. Thousands of amateur and semi-professional players from all over Türkiye competed in the tournaments held online.

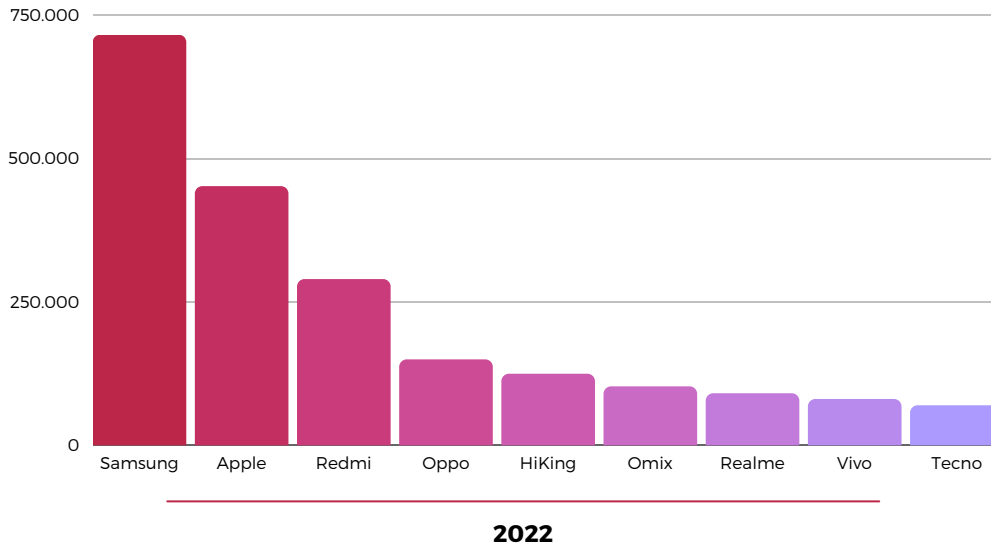


GAMEON, which will continue its progress in 2023 by taking the speed and power of Türk Telekom behind it, will continue its way by enriching the opportunities it offers to gamers.



Preferred Brands in Türkiye

Türkiye has a pretty high smartphone and regular phone usage rate. Having analyzed the third quarter of 2022, it is found that more than 3.1 million mobile devices had IMEI registration, and when evaluated on the brand basis, nearly %63 of those devices consist of the products developed by Samsung, Apple, and Redmi brands.



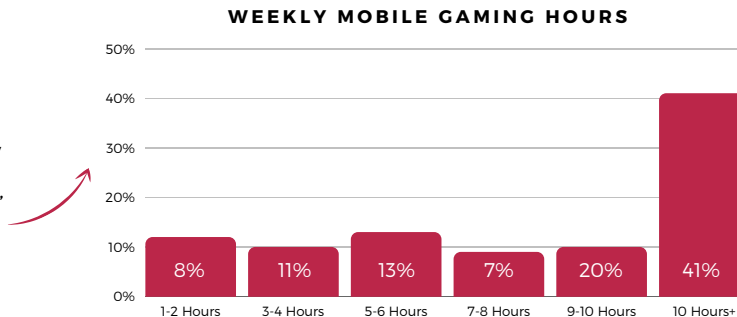
Turkish Mobile Player Habits

According to MMA & DT Inventory Survey Q3 2022 data, people of all ages play mobile games in 2022 as they did in 2021. The demographics and behavioral habits of mobile players in Türkiye are as follows:

- 81% of the adults in Türkiye play a mobile game.
- Of the mobile players in Türkiye, 51% are male and 49% are female.
- Percentage breakdown of the age ranges of the mobile players in Türkiye:
 - Age: 14-29 – 37%
 - Age: 30-49 – 44%
 - Age: 50-65 – 19%



Among those surveyed, 72% says they daily play mobile games, and 22% plays mobile games few times a week.



Turkish Mobile Player Habits

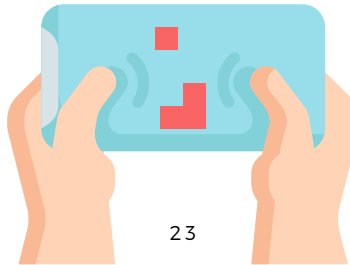
As in the last year, Puzzle/Trivia/Word games rank first (54%) among the favorite game genres for the mobile players in Türkiye while Card games rank second (52%) and Action/Adventure games rank third (46%).

Preferred Game Genres

Puzzle/Trivia/Word 54%
Card Games 52%
Action/Adventure 46%
Strategy 38%
Sports/Race 31%
Shooter Games 24%
Social 19%
Role Playing Games 13%
Party Games 10%

Why Do They Play Mobile Games?

To Enjoy 65%
To Relax/Relieve Stress 59%
To Feel Free 43%
To Progress/Develop/Create 36%
For Friendship 33%

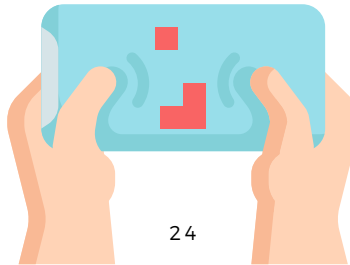


Turkish Mobile Player Habits

Beyond the fact that mobile gamers select the game genre(s) because they like them, there is another important aspect: which games do they play and for which in-game factors? This actually doesn't change from year to year. Only age-dependent variations are in question.

Which In-game Motivations Do Trigger Players' Choices?

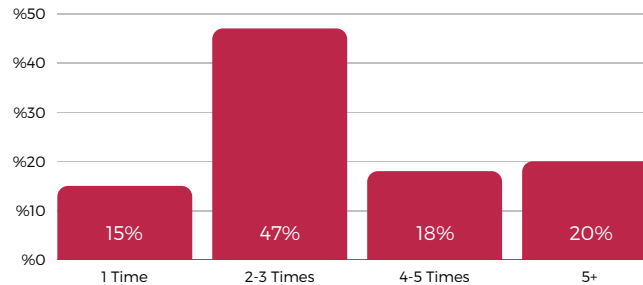
- Being Free to Download
- Having No Disturbing In-game Ads
- Having Multiplayer Mode Enabling to Play with Friends Online
- Having Single Player Mode Enabled to Playing Offline
- Ability to Make Friends / Chat
- Knowing and Trusting the Producing Company
- Making Continuous Innovations
- Having a Competitive Environment and Showing It Well



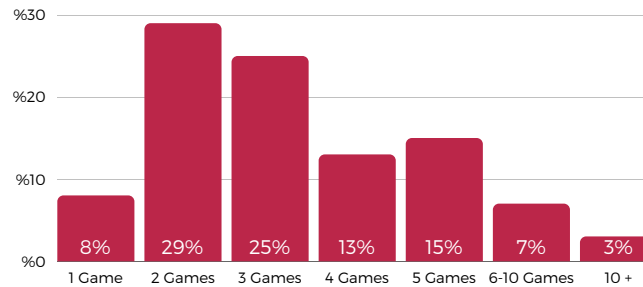
Turkish Mobile Player Habits



NUMBER OF DAILY MOBILE GAMING SESSIONS



NUMBER OF THE MOBILE GAMES PLAYED



Note: 2021 data; the percentages will be updated if current information on 2022 data is obtained.

Source: Turkish Mobile Gaming Research 2021 - AdColony - Nielsen



Turkish Mobile Player Habits

When we look at the personal interests of mobile players, it is seen that the interests of the users are the same, but there is a percentage variation depending on the duration of use. Music, Social Media Use, and TV now represent the second screen. The most common simultaneous activity of the players is listening to music as it was in the last year.

Mobile Gamers Personal Interests and Simultaneous Activities

Listening to Music 72%
 Watching TV 67%
 Social Media 43%
 Movie/Series 38%
 Watching Online Videos %24

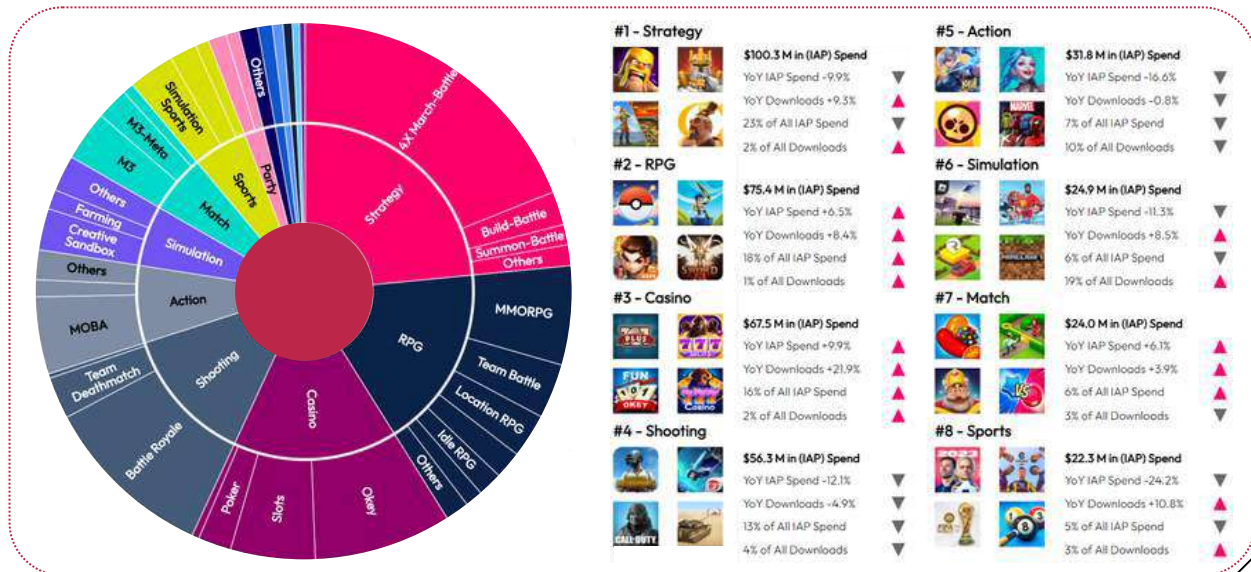
How Do They Feel While Playing?



Turkish Mobile Player Habits

Mobile Game Genres by Consumer Spending

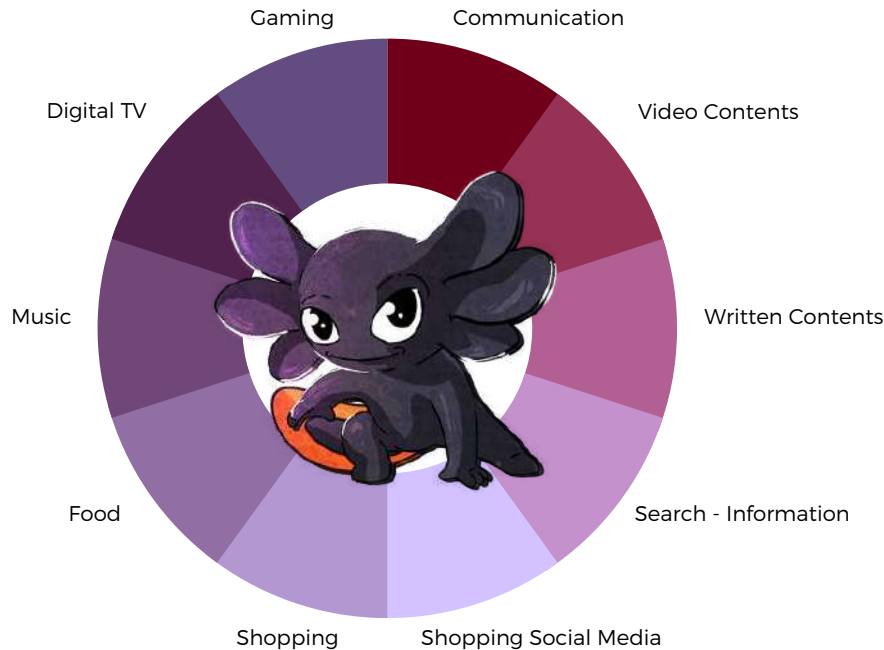
When we look at the spending habits of the players, as we always say, it is seen that the strategy games generate the highest spending.



A sunburst chart illustrating the distribution of game genres. The chart is divided into two main rings: an inner ring representing the primary genre and an outer ring representing sub-genres. The largest category is 'Hypercasual' (pink), which includes sub-genres like 'Action', 'Simulation', 'Puzzle', 'Jo', 'Music', 'Shooting', 'Racing', and 'Others'. Other major categories include 'Simulation' (dark blue), 'Action' (purple), 'Puzzle' (grey), 'Kids' (dark grey), 'Educational' (light grey), 'Creative World' (light blue), 'Open World' (light green), 'Racing' (yellow), 'Sports' (orange), 'Math' (red), 'Strategy' (dark red), 'Shooting' (dark blue), 'PvE Shooting' (dark purple), 'Arcade Racing' (dark green), 'Word' (dark blue), 'Pets & Caring' (dark purple), and 'Others' (various colors).

Turkish Mobile Player Habits

General Mobile Application Preferences of Turkish Players (Based on Active Users)



World of Android Games in Türkiye

There are **over 2,943 Turkish publishers** among 192,025 game publishers on Google Play. *(In 2021, there were over 2,636 Turkish publishers among 158,096 game publishers.)*

Turkish publishers offer **over 10,893 games** among 531,946 games on Google Play. *(In 2021, it was 8,890.)*

The average score of over 10,893 games offered by Turkish publishers on Google Play is 3.99 out of 5. *(In 2021, it was 3.97.)* This score is better than the overall average score (3.93) of all the mobile games.

2% of the games published by Turkish publishers are in the paid category while 76% contain ads. *(In 2021, it was 81%.)* 23% of the games utilize in-app payments. *(In 2021, it was 26%.)*

Only 19% of the games published by Turkish publishers are available both on Google Play and App Store. *(In 2021, it was 21%.)*



World of Android Applications in Türkiye

There are **over 5,872 Turkish publishers** among 998,300 publishers on Google Play. *(In 2021, there were over 5,529 Turkish publishers among 869,320 game publishers.)*

Turkish publishers offer **over 22,045 applications** among 3,263,079 applications on Google Play. *(In 2021, there were over 20,000 applications among 2,757,563 applications.)*

The average score of over 22,045 applications offered by Turkish publishers on Google Play is 3.86 out of 5. (In 2021, it was 3.85.) This score is better than the overall average score (3.71) of all the mobile applications.

5% of the applications published by Turkish publishers are in the paid category and 43% contain ads. *(In 2021, it was 46%.)* 13% of the applications utilize in-app payments. *(In 2021, it was 14%.)*

Considering the application distribution of the Turkish publishers, we see that it is made up of different category applications by 67% and games by 33%. *(In 2021, it was 69% and 31%, respectively.)*



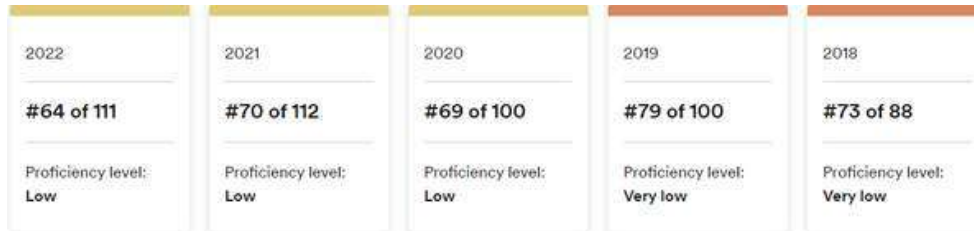
Why is Localization Essential for Turkish Players?

According to the 2022 English Proficiency Index conducted by Education First English Language School with the participation of 111 countries from all over the world, Türkiye is on the rise compared to the previous year.

According to the table, Netherlands still ranks first in terms of English speakers as it has been in the previous years. Türkiye has made a 6-level progress, rising from 70th to 64th place in the list that includes 111 countries.



Proficiency Trends



Why is Localization Essential for Turkish Players?

Türkiye dropped by 11 levels and ranked 73rd in 2018. In 2019, we ranked 79th. Declining year by year since 2012 when we ranked 32nd, our country climbed up 10 levels at once in 2020. Although it ranked 64th in 2022 again with a rising momentum, in general, it is still in the low proficiency category.

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



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

We can say that many details such as translation by a specialized team per game content, not having spelling mistakes, using the fonts that comply with our special letters (i.e. Öö, Çç, Şş, ı, İ, Çç, Üü, Ğğ), 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 2022 SUMMARY

TOP SONGS PLAYED VIA GAME CONSOLES IN TÜRKİYE

Top Singers Played via Gaming Consoles in Türkiye in 2022

- UZI
- cakal
- Lvbel C5
- Ezhel
- Batuflex
- Reckol
- Motive
- XXXTENTACION
- Sefo
- Eminem



Top Songs Played via Game Consoles in Türkiye in 2022

- cakal - İmdat
- UZI - PAPARAZZI
- UZI - ARASAN DA
- Lvbel C5 - 10 NUMARA
- Lvbel C5 - GELMEZSEN GELME
- cakal - Lütfen
- Güneş - Suçlarımın Biri
- Arcane, Imagine Dragons, JID, League of Legends - Enemy (with JID)
- Tom Odell - Another Love
- UZI - CINDY



Music is an Indispensable Part of Gaming

SPOTIFY 2022 SUMMARY

TOP SONGS PLAYED VIA GAME CONSOLES IN TÜRKİYE

Top Podcasts Played via Game Consoles in Türkiye in 2022

- Meksika Açmazı
- O Tarz Mı?
- Ortamlarda Satılacak Bilgi
- Mesut Süre ile Rabarba
- Barış Özcan ile 111 Hz
- Biraz Konuşabilir miyiz?
- Podcastia Maceraları – Bir RPG Yayını!
- Reddit Zone
- N'aaptın
- KALT'ın Podcast'i



Top Albums Played via Game Consoles in Türkiye in 2022

- UZI – Kan
- cakal – Paradoks
- UZI – EL CHAVO
- Lvbel C5 – C5MODE
- Reckol – Özlüce Trap Boys
- Motive – 22
- Güneş – Atlantis
- Lil Nas X – MONTERO
- XXXTANTACION – 17
- No.1 – Kron1k



Music is an Indispensable Part of Gaming

SPOTIFY 2022 SUMMARY

TOP SONGS PLAYED VIA GAME CONSOLES IN TÜRKİYE

Top Spotify Playlists Played in the Gaming Tab

- Phonk
- Top Gaming Tracks
- Ultra Gaming
- Down Low
- Indie Gaming
- Ultimate Fifa Soundtrack
- Fifa 23 Official Soundtrack
- Trophy Room
- Video Game Soundtracks
- League Of Legends Lil Nas X Takeover
- Retrowave // Outrun
- Nitroboost
- Bass Arcade
- EA Sports Fifa Mix
- Top Gaming Tracks of 2022
- PUBG: Battlegrounds, Thank You Survivors



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

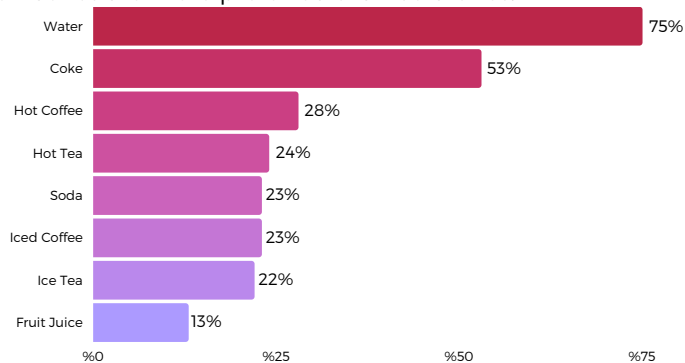
- Excitement
- Stress
- Victory
- Pleasure
- Anger
- Sadness
- Wonder
- Happiness
- Impatience
- Greed
- Struggle
- Collapse
- Responsibility
- Habit



Beverages Consumed by the Turkish Players During Game

When we look at the beverage consumption rates of the players during the game, it is seen that the beverage consumption is much lower especially in mobile players compared to PC players. Gaming on the computer among the players is considered a more special and comprehensive activity than playing games on the mobile platform. Accordingly, the long hours spent at the desk have a great impact on eating and drinking behaviors.

It is seen that the most preferred beverage of the players is water, while the second beverage is cola. Coffee and tea are also among the leading choices. For coffee and tea consumption, hot alternatives are more preferred than cold ones.

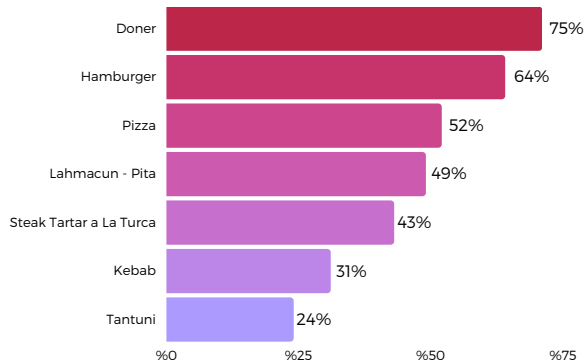


Eating Habits of the Turkish Players

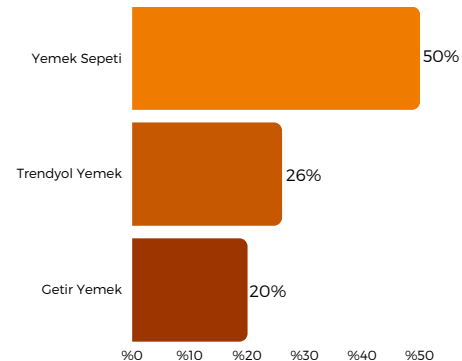
Contrary to the social misconception created that players eat "quite unhealthy", global research shows that gamers' eating habits are not that different from their peers. While chips are the most preferred product, nuts and fruits are among the other preferred snacks.



Food Preferences of Players



Order Application Preferences



What's the Status of Turkish Gaming Market?

In 2022, we are experiencing the economic repercussions of the fluctuations in international politics all over the world, in Türkiye as well. Especially the loss of the strength of the TL against the Dollar has greatly affected the Turkish gaming industry and continues to do so. Although we are in a very good position regarding the number of players, the economic conditions force the players' purchasing power.

THE PURCHASING POWER OF THE PLAYERS CANNOT MATCH THE SPEED OF THE GAMES!



Gaming Market in Türkiye

In 2022, we are experiencing the economic repercussions of the fluctuations in international politics all over the world, in Türkiye as well. Especially the loss of the strength of the TL against the Dollar has greatly affected the Turkish gaming industry and continues to do so. Although we are in a very good position regarding the number of players, the economic conditions force the players' purchasing power. The average dollar rate, which was 8.9 TL in 2021, jumped to 16.58 TL in 2022. This has affected the industry. Although the players whose purchasing power does not increase, still spend money on games, which are their biggest hobbies, the value of the money they spend on the game decreases. Even though some game companies regulate their in-game economies or game sales prices according to Turkish conditions, the majority continue their global strategy. Especially, the fact that the new big games on PC and console platforms have price tags such as 800 – 1500 TL makes it very difficult for the players. In other words, to be able to play a game with a global sales price of \$80 (which is not a very expensive figure for a new game), Turkish players have started to follow discounts and seasonal campaigns.



While some players tried to solve this problem to some extent by switching to a monthly subscription system such as PlayStation Plus, or Xbox Game Pass, some players started to shift to mobile and PC games in the free-to-play category. Hyper-casual games have gradually ceased to be a trend and have been replaced by casual and mid-core-casual games. Battle Royale, FPS, Racing, Sports Strategy, and MOBA game genres remain the most popular genres. Türkiye on mobile in 2022; While we prefer Subway Surfer, PUBG Mobile, Roblox, 101 Okey Plus, Words Of Wonders, Free Fire, Mobile Legends, Genshin Impact, Head Ball 2, and similar games, when we look at PC and consoles; Featured games of God Of War Ragnarok, Genshin Impact, PUBG, Lost Ark, VALORANT, LOL, CS: GO, Minecraft, Roblox, Call Of Duty.



Gaming Market in Türkiye

The Most Remarkable Developments in 2022

Dream Games Received 255 million USD Investment

Just at the beginning of 2022, the valuation of Dream Games was announced to be 2.75 billion USD together with the new investment of 255 million USD. Series C, the third investment round conducted in the last year by the company, was led by Index Ventures. Important funds such as Makers Fund, BlackRock, IVP, Kora, and Balderton Capital also participated in the investment round. "Royal Match", the first game of the company, was among the most revenue-generating mobile games in 2021, and it ranked among the top 10 mobile games in the USA, UK, and other important markets.



SONER AYDEMİR



Gaming Market in Türkiye

The Most Remarkable Developments in 2022

S2G Becomes PUBG MOBILE World Champion

"PUBG Mobile Global Championship 2022", the 2022 world championship of the Battle Royale game PUBG MOBILE, which is among the most popular mobile games in our country and in the world, was jointly held in Malaysia and the grand finale in Indonesia. A total of 50 teams from all over the world participated in the tournament, which started on November 10, 2022, and continued until January 8, 2023. The champion in the tournament with a total prize pool of 4 million dollars was the S2G team from Türkiye. While S2G brought the joy of this world championship, which is described as the greatest success in Turkish esports history, to our whole country, S2G fans, the Turkish Esports Federation, various news organizations, and game lovers showed great interest in this success.



Gaming Market in Türkiye

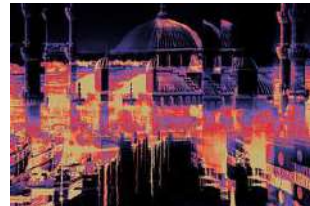
The Most Remarkable Developments in 2022

VCT 2022 Held in Türkiye

VCT, which was held in Berlin in 2021 for the first time with the title of the world's largest official VALORANT Esports Tournament, was held in Istanbul in 2022. In our country, which is one of the pioneers of gaming and esports, VALORANT is among the most popular PC games. In VALORANT Champions 2022, where a total of 16 teams from all over the world took part, Brazilian representative LOUD was awarded the title of 2022 VALORANT World Champion. In addition to Turkish influencers and important names of the Turkish esports community, world-famous influencers, important names from the global esports community and international artists showed great interest in the Champions 2022 event, where excitement and competition are always at a high level. The event, which was watched with great enthusiasm by esports lovers from all over the world and where the excitement of the world final was at its peak, took place at Volkswagen Arena. The total prize pool of the event was recorded as US\$ 1 million.

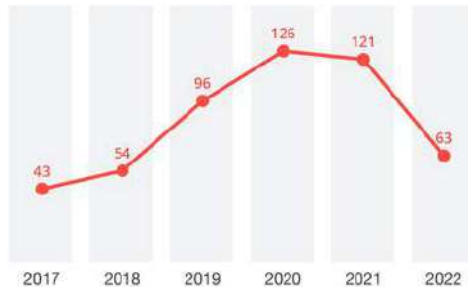


VALORANT



Investments in the Gaming Industry

Start-ups in Türkiye by Years

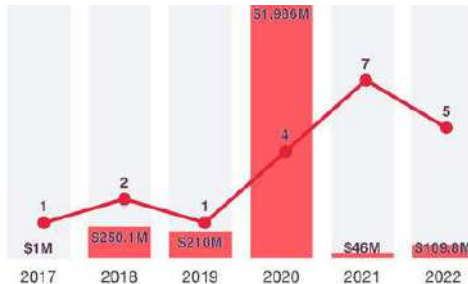


- 2017 - 43 Gaming Start-ups
- 2018 - 54 Gaming Start-ups
- 2019 - 96 Gaming Start-ups
- 2020 - 126 Gaming Start-ups
- 2021 - 121 Gaming Start-ups
- 2022 - 63 Gaming Start-ups

Among 737 gaming startups built in total, 18% was closed but 606 of them are still operating!



Number of the Companies Exited the Domestic Gaming Sector in the Last 6 Years



- 1 in 2017, 1 Million \$ in total
- 2 in 2018, 1,8 Million \$ in total
- 1 in 2019, 8,4 Million \$ in total
- 4 in 2020, 1,986 Billion \$ in total
- 7 in 2021, 46 Million \$ in total
- 5 in 2022, 109,8 Million \$ in total



Investments in the Gaming Industry

Most Funded Start-ups Between 2017 and 2022 and Top Investors

MOST FUNDED STARTUPS (2017-2022)

	\$467.5M
	\$55M
	\$30M
	\$10M
	\$7.3M

TOP INVESTORS (2020-2022)**:

	14
	11
	8
	6
	3

- Dream Games - 467,5 Million \$
- Spyke Games - 55 Million \$
- Libra Softworks - 30 Million \$
- Metaverse Game Studios, Inc. - 10 Million \$
- Agave Games - 7,3 Million \$

- WePlay Ventures - 14
- Ludus Ventures - 11
- Games United - 8
- Boğaziçi Ventures - 6
- Actera Group - 3



Top 5 Exits in the Turkish Gaming Sector

TOP EXITS

	\$1.8B
	\$250M+
	~\$200M
	\$180M
	\$100M

TOP ACQUIRERS

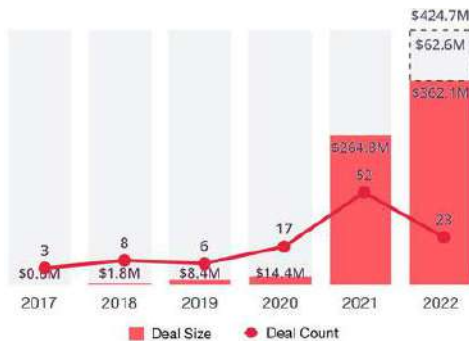
	7
	1
	1

- Peak 1,8 Billion \$
- Gram Games 250 Million \$
- Masomo 200 Million \$
- Rollic 180 Million \$
- Alictus 100 Million \$



Investments in the Gaming Industry

How much money was invested in the Turkish gaming sector in 2022?



- 3 in 2017, 0,6 Million \$ in total
- 8 in 2018, 1,8 Million \$ in total
- 6 in 2019, 8,4 Million \$ in total
- 17 in 2020, 14,4 Million \$ in total
- 52 in 2021, 264,8 Million \$ in total
- **23 in 2022, 424,7 Million \$ in total**

Note: Figures were calculated based on the companies resident in Türkiye.



- In 2022, 1,593,000 USD was invested in 300 agreements in total from different sectors in seed, early, and later risk capital phases. When the crypto investments are also taken into account, the total volume amounts to 1,656,000 USD.
- Excluding Getir agreements, the all-time record (825 billion USD) was broken.
- Excluding the Getir agreement, 54% of the investments were made in Gaming and Fintech (Finance and Technology) sectors. Gaming and Fintech sectors broke the all-time record of their own sectors in terms of investment amounts.
- In terms of the number of agreements, Fintech, Saas, Gaming, AI, and marketplace were the most important topics in 2022.
- In 2022, Istanbul became the city with the most number of game deals concluded in Europe after London. It was ranked fifth worldwide.



Investments in the Gaming Industry 2022

Company	Investor	Amount
Abrakadabra Games	Zihni Holding	15 Million USD Valuation
Ace Games	Playtika	25 Million USD
Ace Games	Re-Pie	8 Million USD
Agave Games	Felix Capital ve 500 Istanbul	7 Million USD
Alictus	SciPlay	100 Million USD (Share Buy)
Artlabs	ECİAD Melekleri ve Kültepe Yatırım	700 Thousand USD
Atlas Space	Startupfon, Techone VC, AFM	
Cypher Games	500 Global, Joakim Achrén, Akın Babayigit	3.2 Million USD
Dream Games	Index Ventures, Makers Fund, BlackRock, IVP, Kora, Balderton Capital	255 Million USD
Drybrush	Joygame	
Elyzio	Paribu Ventures, Shima Capital ve Solana Ventures, Abdelmounaim Derraz	2 Million USD
Flank Esports	FUT Ventures	
Fomo Games	Libertus Capital	67.5 Million TRY Valuation
Gleam Games	Fatih İşbecer ve Firat İşbecer	1 Million USD
Heaventures	x	26 Million TRY
Hyperlab	Avni Yerli, Ali Can Temel	7.5 Million USD Valuation
Kodris	Onur Canlitepe ve Barış Sivri, Cantekin Dinçerler, Duran Cesur, Çağatay Bircan, Mehmet Çelikel, Kamil Özdağ, Ahmet Kocamaz, Nicolaos Anagnostopoulos, Cezmi Aydoğdu	420 Thousand USD



Investments in the Gaming Industry 2022

Company	Investor	Amount
L8 Studios	Lima Ventures	
Magic Games	Makers Fund, Hummingbird Ventures	5 Million USD
Manc	Mancium için GEM Digital Limited	50 Million USD
Metacorn Games		8 Million TRY
Mixer Games	WePlay Ventures ve Diffusion Capital Partners	1.6 Million USD Valuation
NDG Studio	Boğaziçi Ventures ve Mert Firat	3.1 Million TRY
Joygame		
njoyKidz	DOMiNO Ventures, Anibera, Angel Effect, Aegean Ventures ve Mustafa Serdar Arıkan	525 Thousand USD
Odeo	Eric Seufert, Anton Gauffin, Christian Calderon ve Lior Shiff	9 Million USD
Pax Animi Games	Alesta Yatırım	8 Million 750K TRY Valuation
Pink Games	Geometry Venture Development, Alesta Yatırım ve bir bireysel yatırımcı	1.2 Million USD Valuation
Plummy Games	X-Flow Games	6 Million USD
Portuma	AdsYield	20 Million USD Valuation
POW Games	Matchingham Games	10 Million GBP



Investments in the Gaming Industry 2022

Company	Investor	Amount
Revel Games	Sebastien Borget ve Arthur Madrid, Akın Babayigit, Ümit Boncukçu, Tolga Şen, Melih Ödemiş, Bora Uygun, Fırat Kalsın, Kenan Yılmaz, Eriñ Özada, Tom Hammond, Uğur Şeker, Tolga Esin, Murat Coşkun, Ahmet Dik, Scott Wood, Barış Alınacıık ve Kenny Carvalho	4.5 Million USD
Scoutli	Alesta	7.42 Million TRY
Space Runners	Polychain Capital, Pantera, Accel Ventures, Jump Capital ve Core Ventures	10 Million USD
Spinblade		250 Thousand USD
Sportimec	TT Ventures	
Spyke Games	Griffin Gaming Partners	55 Million USD
The Unfettered	Vendetta Capital, Icetea Labs, Animoca Brands, Morningstar Ventures, Bridge Mutual, Momentum6, FomoCraft, GAINS Associates, ZBS Capital, L.A.B.S. Group'tan Yuen Wong, Illuvium CEO'su Kieran, Good Games Labs, BreederDAO, PolkaCity, RBL Labs, Paribu Ventures, Cryowar, Parachain Ventures, Gate.io Labs, Sam Ong, Tehmoonwalker	2.5 Million USD
Tripledote	Access Industries, Lightspeed Venture Partners ve Eldridge	116 Million USD
UGC90	The Sandbox	
Umuro Game	Keiretsu Forum Türkiye melek yatırımcıları	32 Million TRY Valuation
Yin Yang Games	Gelişim Group	1 Million USD



Investments in the Gaming Industry 2022

Advancing mobile technologies enabled the digital gaming sector to be noticed by corporate and qualified investors. The digital gaming sector has turned into an arena that hosts companies from the global giants' league which have left their mark in the last thirty years.

2022 was marked by giant company acquisitions in the sector. World software giant Microsoft announced to the acquisition of Activision Blizzard, the biggest company in the gaming world, for 68.7 billion USD while Zynga, another giant gaming company, was acquired for 12.7 billion USD by Take-Two.

The glimmer of the premiere league creates the motivation that the new start-ups will also generate returns for their investors at such a rate that is well above the market. However, high return expectation comes with a high risk. Thus, the venture capital funds investing in such companies in the starting phase are intended for qualified investors, and inaccessible to small investors.

Venture capital funds focus on minimizing the risk by investing in many companies with the portfolio logic. Companies receiving investment include the newly started ones which often have limited capital, haven't been able to create cash yet, and have high R&D and marketing expenses. They are at a bigger risk than the companies that are in the further phases of the business cycle because any problem to be encountered in their workflow might cause great losses for those companies. On the other hand, their financials aren't traceable, only available to an audience limited to the partners because they aren't publicly traded.



**HÜSEYİN ÖMÜR
KARAKUŞ**
BOĞAZIÇI VENTURES
CFA - BV PORTFÖY
DEPUTY GENERAL
MANAGER



Investments in the Gaming Industry 2022

However, publicly traded companies are obliged to announce their financials as per the rules of the exchange markets where they are being traded and to maintain a certain level of transparency. Thus, the balance sheets, incomes, and cash flow statements of the previous years can be easily analyzed while making investment decisions. Similarly, the main elements of those companies such as their business models, games, services, income items, copyrights, etc. are significantly public and can be verified easily from several sources.

The thematic investment funds, one of the emerging trends of recent years, appear as such investment instruments that enable to make investments in publicly traded companies in certain sectors according to portfolio management and risk control principles. The balance sheets of the companies to be invested are analyzed, and the fund portfolio is created by examining the growth opportunity to be provided by the business models of the companies based on the sectoral dynamics. Any investor, either small or big, can easily invest in thematic funds. The investment portfolio of those funds is regularly published every month; thus, a reliable investment environment is promoted with transparency and traceability. The market value of the publicly held gaming companies being traded in global exchange markets is above 3 trillion USD. With such funds, investors can invest in those companies having growth potential.

At this point, thematic funds for the digital gaming sector attract more and more investors with the sustained growth trend of the sector. Thematic funds stand out among other funds as they reflect the financial analysis of their portfolios based on the sectoral dynamics to invest in the digital gaming sector with a reliable and manageable risk scale. Thus, the global giants' league turns into an accessible investment instrument for all investors irrespective of the number of funds.



**HÜSEYİN ÖMÜR
KARAKUŞ**
BOĞAZIÇI VENTURES
CFA - BV PORTFÖY
DEPUTY GENERAL
MANAGER



Turkish Esports Federation

TESFED

Interview

Brief Evaluation Notes for 2022 by the Chairman of Our Federation

We can say that 2022 was a good year for us and our community. As an output of the new sports law, our federation was granted the same status as the other sports federations in our country with the communique published on the official gazette dated November 18, 2022.

With our new status, we are now able to act in a much stronger and more effective manner.

In 2022, our 4th TEFED Turkey Cup was held with the participation of thousands of esports players under 11 branches. Passing the national elections, our champions participated in international tournaments and we achieved pretty good results.

In the tournament held in Azerbaijan by the European Esports Federation, we ranked 4th among European countries in the Rocket League and were awarded the silver medal taking second place in the e-football branch of the Montenegro leg.



ALPER AFŞİN ÖZDEMİR
FOUNDING CHAIRMAN,
TESFED / EUROPE
FOUNDING BOARD
MEMBER,
ESPORTS FEDERATION



Turkish Esports Federation

TESFED

Interview

Brief Evaluation Notes for 2022 by the Chairman of Our Federation

We took justified pride in hosting the Global Esports Championship in our country this year which was organized for the second time by the Global Esports Federation. We hosted about 300 esports players from nearly 70 countries in İstanbul. Taken place in İstanbul, this event had broad repercussions around the world and achieved nearly 1 billion social media engagements. Emphasizing female representation in esports, we built the first Dota2 women's team and our men's team also brought the silver medal to our country in esports on the national arena. Moreover, we participated in the Bali Championship held by the International Esports Federation in 2 branches and brought the bronze medal to our country in e-football.

There are currently 175 sports clubs, 61 private physical education facilities, 88 trainers and 15,375 licensed esports players registered with our federation. With the new arrangement, individual esports players are now able to make license applications on E-Devlet, and accordingly, we expect a significant increase in the number of our licensed esports players.



ALPER AFŞİN ÖZDEMİR
FOUNDING CHAIRMAN,
TESFED / EUROPE
FOUNDING BOARD
MEMBER,
ESPORTS FEDERATION



Turkish Esports Federation TESFED

Interview

What will be the strategy of TEFED for 2023?

We expect really good developments in 2023. We have 10-year long-term plans in the MoU we signed with the Global Esports Federation in 2022. We will also carry out many global and regional activities in the esports field within the scope of the collaboration agreements signed with the esports federations of Singapore and Saudi Arabia. We also plan to continue the global events we introduced to our country.

I believe that our esports ecosystem is among the most successful countries in the world and our country has a rather high and long-lasting potential. As an indication of this, the esports clubs of our country rank high in the championships held by gaming companies and all the world memorizes the names of our successful clubs. I would like to take this occasion to congratulate all of our clubs and esports players that fill us with pride inside and outside our country. We deeply believe that 2023 will be a more thriving year than 2022 for both TEFED and the Turkish esports ecosystem and bring our country much more success in esports, and we continue all our efforts in this direction.



ALPER AFŞİN ÖZDEMİR
FOUNDING CHAIRMAN,
TESFED / EUROPE
FOUNDING BOARD
MEMBER,
ESPORTS FEDERATION



RIOT GAMES 2022

Interview

A Brief Evaluation of 2022 by RIOT Games

We, Riot Games, celebrated our 10th anniversary in our country in 2022 and offered special experiences to raise a big excitement for our entire community remaining with us for 10 years. One of our biggest sources of pride in 2022 was that League of Legends, the first game of the company, remained the most liked and played PC game in our country exactly for 10 years. LoL is still the most-played PC game in Türkiye with more than 22 million accounts. I attach this success to our player-focused approach and constantly updating ourselves according to player expectations. Since our establishment in 2012, we, Riot Games Türkiye, haven't only shaped the game but also changed and developed ourselves along with the players. Altogether, we have celebrated this journey made up of many different memories through our community contents, contests, university events, and some innovations in our games. Looking at the past, we see that we have continued to grow our community with our strong content and player-focused investments for 10 years. Our adventure started with League of Legends and continued with 5 games of different genres and platforms including Teamfight Tactics, VALORANT, Wild Rift, and Legends of Runeterra. We continued to reach our players by different means such as our media projects, virtual music bands, story books, comic books, etc. Especially with the introduction of a Turkish agent into VALORANT and the organization of the VALORANT Champions Tour in İstanbul, all eyes turned to our country globally. And this made us happy as we both realized some of our dreams planned for years and made a contribution to our country's reputation.



ERDİÑÇ İYİKÜL
TÜRKİYE COUNTRY
MANAGER,
RIOT GAMES

**RIOT
GAMES**



RIOT GAMES 2023

Interview

What Are Your 2023 Goals As Riot Games?

Currently, the top two games played most in Türkiye belong to Riot Games. We aim for VALORANT and League of Legends to maintain their strength in the PC market also in 2023, even to reach more new players and watchers.

We are aware that Riot Games has a long path ahead to turn into a game-centric and player-focused entertainment company. We primarily aim to maintain and diversify the services we have been offering to our players in Türkiye for 10 years. We will continue to make efforts to take a part in our players' lives as a cultural value beyond the time they spend playing games and to be present at all places wherever they are.



ERDİÑÇ İYİKÜL
TÜRKİYE COUNTRY
MANAGER.
RIOT GAMES

RIOT
GAMES



THE PLACE OF GAMIFICATION IN LIFE

Interview

GAMFED

Evaluation of 2022 by Ercan Altuğ Yılmaz, Türkiye Representative

In Türkiye, 2022 was a period of recovery from the impact of the pandemic which hit the global economy hard in many fields. On the other hand, we can talk about the positive impact of the pandemic on remote work, education, and many other fields. The ever-growing digital gaming and gamification sector is one of them.

Gamification was used in important projects, especially in education, healthcare, and marketing fields during 2022.

At the beginning of the year, while the impact of the pandemic was still present, many instructors started to use a lot of game-based and gamified programs to hold interactive and efficient courses for primary and secondary schools applying distance education. In addition to child education, online meeting and conference sessions were also gamified with more interactive and score-based gaming elements such as quizzes and wheels.



ERCAN ALTUĞ YILMAZ
TÜRKİYE
REPRESENTATIVE
GAMFED



THE PLACE OF GAMIFICATION IN LIFE

Interview

GAMFED

Evaluation of 2022 by Ercan Altuğ Yılmaz, Türkiye Representative

E-commerce applications, which inevitably gained a significant acceleration during pandemic, were focused on the logistics and customer processes of that demand which increased again, particularly in the past half of the year; however, many e-commerce applications embraced gamification as of the second half as they couldn't differ from their competitors only by buying and selling and a significant audience using those platforms reluctantly didn't find using them meaningful and enjoyable.

Getir launched a feature "Tasks of the Week" to reward the users for a series of logins just like in the games by creating a meaningful relationship even if they didn't do shopping. Hepsiburada was one of those who took gaming and gamification very seriously. During New Year, it launched a section "Play to Win" with the motto "Gaming Is Here Too" containing a lot of experiences from bingo to product quizzes after shopping which attracted considerable attention. Yemeksepeti continued to improve the Joker feature introducing it into all segments. In addition to VIP Elite advantages, Trendyol launched the "Shop Together" approach is very popular in the Far East. You gain discounts as you shop together with more than one friend. A101 launched an enjoyable screen with its feature "Tell us about yourself" rewarding the users after asking survey questions.



ERCAN ALTUĞ YILMAZ
TÜRKİYE
REPRESENTATIVE
GAMFED



THE PLACE OF GAMIFICATION IN LIFE

Interview

GAMFED

Evaluation of 2022 by Ercan Altuğ Yılmaz, Türkiye Representative

Furthermore, many e-commerce applications started to hide passwords in their weekly bulletins and reward the first ones to collect and find them in order to encourage to open and read those bulletins. Our mobile phones which we were glued to during the pandemic might also have fulfilled many of our social needs. In this field, telecommunication companies also gamified their rewarding methods over data consumption (i.e. Shake and Win by Turkcell, Wipe and Collect by Türk Telekom, Reward Wheel by Vodafone).

During the pandemic, "efficiency" stood out in employee experience while companies increased their efficiency in terms of office expenses, transportation, food, social areas, etc., and "Wellness" field gained a significant importance as employees' socialization, especially their physical activities reduced. As the employees started to increasingly suffer from disorders resulting from sitting at the computer all the day, organizations had to launch several healthcare applications. Also at this point, gamification was the most used method to encourage voluntary participation because it was both enjoyable and rewarding. Several experts and applications broke a new ground in the Wellness field with gamification by going global. Public institutions and municipalities also developed applications to encourage people to walk, and they tried to increase our activity duration, which had reduced due to "staying at home" for one and a half year, through gamification.



ERCAN ALTUĞ YILMAZ
TÜRKİYE
REPRESENTATIVE
GAMFED



THE PLACE OF GAMIFICATION IN LIFE

Interview

GAMFED

Evaluation of 2022 by Ercan Altuğ Yılmaz, Türkiye Representative

Gamification was also used as a really good marketing method by those brands which intended to use community management and internal motivation on metaverse platforms.

NFTs created in limited numbers or models for sharing or donating the income coming from sales made a serious difference with gamification. People started to think that gamification would reveal the real strength of the metaverse platforms in the long term.

Also in 2023, gamification will continue to enable organizations, which try to differ the experience on many different platforms, to reach their business goals through games by growing in the gaming sector.



ERCAN ALTUĞ YILMAZ
TÜRKİYE
REPRESENTATIVE
GAMFED



CURRENT STATUS OF THE GAMING MEDIA

Interview

Evaluation of 2022 by Murat Oktay

Gaming media is passing through a different process. About ten years ago, the functioning of the media was quite different from today. Managed by much more conscious people, the sector went back to its even older condition due to the problems that emerged in the economy. In previous years, distribution companies used to collaborate with media institutions to promote and announce productions. However, their withdrawal from the Turkish market caused the promotion activities to be transferred to PR companies that didn't have enough knowledge about games. As the PR companies lacked employees specialized in that sector, the chaos started. When this situation restrained the desire of the media institutions like us for reaching high-quality and new content, we had to produce different solutions to get rid of that problem. We had to proceed by reaching out to the Europe representatives of the distributors or directly to the producing companies. This meant an extra burden for us in our workflow which had already been busy. It unavoidably affected our quality while increasing our costs.

Moreover, some companies think that "If they don't see our bulletin, they can't reach our product as well", and this represents one of the biggest problems on the media side. We always consider our responsibility to our readers as our priority. The bulletins being sent usually contain information that has already been published days ago, and that lack of communication both damages the sector and prevent people from reaching information.



MURAT OKTAY
FOUNDER
MERLINİN KAZANI
PLAY4UK

MEDYA



CURRENT STATUS OF THE GAMING MEDIA

Interview

Evaluation of 2022 by Murat Oktay

On the other hand, there is a publisher reality. With the technology changing its face, public journalism started to stand out. However, this manner of work dreamed by many people who don't have any media training resulted in an incredible amount of misinformation and chaos. The media side benefits from a lot of sources to verify or improve the news while creating a content; however, we witness some people praising low-quality productions in return for a game to be received from the company, or criticizing the good ones if they can't receive those games. Of course, it will be a mistake to evaluate all publishers in this framework. I enjoy and follow some of them, too. However, I see a serious corruption looking the general situation.

At the current point, it is sad to see that our fellow journalists having served in the sector for years have been affected by that craze and started to move alone. There is an important saying: "United We Stand, Divided We Fall." Unfortunately, the sector is far from that. My knowledgeable, highly esteemed fellow journalists have turned towards a different path saying around "Dear Friends! Don't forget to subscribe to my channel." Although their works are obviously of good quality, we all know media isn't something like that.



MURAT OKTAY
FOUNDER
MERLİNİN KAZANI
PLAY4UK

MEDYA



CURRENT STATUS OF THE GAMING MEDIA

Interview

Evaluation of 2022 by Murat Oktay

As a result of the facts that I mentioned, media institutions have been significantly affected by this process. While many of them are trying to create income models in different sectors to live on, the easily deceivable SEO structure of the search engines also prevent our independent content creation process.

Considering many sites we browse today; this is the biggest reason for them to have the same content creation structure. As the reader loyalty has lost ground to searching that is easier, we are dependent on the information provided by the search engines and the most of the contents created are of poor quality, copies of each other and often full of wrong or old information. The search technologies which are supposed to save our time actually waste our time.

Although I painted a hopeless picture, I feel really hopeful about the future. Because companies which only operate in the gaming field by building specialized teams have started to emerge on the PR side, one of the most important legs of the business. Their burden is really heavy but I believe that the media sector will soon start to regain its meaning as these companies grow.



MURAT OKTAY
FOUNDER
MERLINİN KAZANI
PLAY4UK

MEDYA



CURRENT STATUS OF THE GAMING MEDIA

Interview

Evaluation of 2022 by Burak Akmenek

In general, 2022 wasn't brilliant in terms of gaming media. The fact that hit games were launched at the end of the year with delay and found mostly disappointing had affected this situation. The rising influencer impact and entertainment taking precedence over filtered information also indicated the ongoing change.

While that change was enjoyable, it led people to follow the publishers which they found similar to themselves for self-verification. This has inevitably resulted in an audience watching the same publishers that have common tastes and share a similar lifestyle just as on the TV channels.

I think the biggest problem is being dependent on the knowledge of just one person. Today, we encounter a problem that is similar to the fact that the social media isn't a news source. Followers "should always suspect" and investigate. Luckily there are skilled influencers as well as fellows who became influencers.



BURAK AKMENEK
FOUNDER
FRAGTIST

MEDYA



CURRENT STATUS OF THE GAMING MEDIA

Interview

Evaluation of 2022 by Burak Akmenek

2023 will be more satisfying for the gaming media in terms of contents. However, considering the media channels as a selling space will continue to exist as a problem conflicting with our impartial content responsibility against the readers. Due to the reduction in sales which occurred in parallel with the declined purchasing power in our country, not only the gaming but also the hardware companies shut down their contact offices or PR efforts, and this naturally decreased and will continue to decrease media's power to access both information and budgets.

Honestly, I don't think gaming media will have a bright future. I think the media should continue with "conscious influencers". This transformation will be completed in a couple of years. Here, publishers with a strong community will survive but they will inevitably continue to change their content creation, too. As you all know, "There is nothing permanent except change."



BURAK AKMENEK
FOUNDER
FRAGTIST

MEDYA



WHAT'S THE STATUS OF SERIOUS GAMES IN TÜRKİYE ?

Interview

Serious games include those games whose primary purpose is different than entertainment. Basically aimed at providing information and ensuring permanent learning, serious games are used in various sectors such as education, defense, healthcare, emergency management, urban planning, etc.

According to the Serious Games Global Market Report 2022, this genre is expected to grow from \$6.73 billion in 2021 to \$8.23 billion in 2022 at a compound annual growth rate of 22.3%.

The serious games market is divided into segments based on gaming platform, application, industrial sector and region. While the smartphone and console together rank first in the gaming platform market in 2020s, the smartphones are expected to have an increased growth in the market in 2030s. (Smartphone, console, PC, etc...)

Serious Game Categories

- Aviation and Defense
- Automotive
- Education
- Energy
- Healthcare
- Government
- Media and Advertisement

Market Growth Ranking by Application

- Simulation and Education,
- Research and Planning
- Advertisement and Marketing
- Human Resources
- Others



AFRA ÇALIK
ASSOCIATION
OF TECHNOLOGY
GAMIFICATION AND
EDUCATION
DEPUTY CHAIRPERSON

**SERIOUS
GAMES**



WHAT'S THE STATUS OF SERIOUS GAMES IN TÜRKİYE?

Interview

In our country, the serious games sector focuses on aviation and aerospace, education and military, etc. Simsoft is one of the leading serious game companies in our country. In 2022, the company is developing serious games in different fields including FAYSİM Earthquake Education Simulation, EMERSİM/MINE VR Mining Simulation, FIREVR Fire Fighting Education and TAOSİM: Border Security Battle Game Simulation.

Established for meeting the software needs of the Turkish Armed Forces, HAVELSAN is also getting prepared to enter the serious games sector. HAVELSAN plans to enter the sector with its title Malazgirt in 2023 during the International Defense Industry Fair (IDEF) which is annually held in Türkiye.

Besides the academic studies conducted on serious games in universities, there is also an increasing interest in the MSc and PhD thesis studies focused on this subject. Such thesis studies are primarily focused on the serious games developed in the fields of healthcare, engineering and educational sciences. Among the thesis studies published in 2022, there are ground breaking academic activities including the MetaHospital developed in the nursing field and the SDM Prototype (Shared Decision-Making App) developed in the physical therapy and rehabilitation field.

The Crystal Pixel Video Game Awards, which has been organized since 2012 in order to identify and reward the games with original intellectual properties developed in Türkiye, make a considerable contribution to the Turkish gaming sector. Within this scope, the Crystal Pixel Video Game Awards 2021 granted awards in the following categories in March 2022: Game of the Year, the Best Game Design, the Best Visual Artwork, the Best Audio Artwork, the Best Narrative, the Best VR Game, the Best Console Game, the Best Mobile Game, the Best Serious Game and the Special Jury Award. The winner of the serious game category was the White Dodecahedron/Sanal Laboratuvar.



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EDUCATION
DEPUTY CHAIRPERSON

**SERIOUS
GAMES**



ARE PC GAMES ON RISE?

Interview

A Brief Evaluation of 2022 by Singingiant

2022 was a really interesting year for the Turkish gaming sector. Gaming sector gained acceleration thanks to the investments continued increasingly, opening more development centers and expanding the existing Technoparks, ongoing government incentives without interruption, etc. However, investments started to decrease with the recession observed all around the world. On the other hand, we witnessed the maturity of the gold rush period as the mobile game production settles. Unfortunately, some companies shut down, too. However, companies being on the safer side and increased production in the PC field signaled that the things would change. As a foreign exchange bringing sector, it could show a stronger resistance against the inflationary economic structure in our country. On the other hand, we should also remember that many expenses are in foreign exchange basis. Finally, the HR deficit still continues. This necessarily causes the companies to turn towards international resources.

2022 was obviously very important for us as Singingiant would celebrate its first anniversary by the new year 2022-2023. As an editor living on the gaming sector for 33 years, I hit the road together with my partners Oğuz Taştan and Sonat Samir to realize our dreams. We wrote the background of the first songs of our Singing Giant, and prepared them for 2023. As a team having examined hundreds of games and designed magazines, coming from the back of house brought us to a unique place. Combined with our business administration experience, this new opportunity will enable Singingiant to go from strength to strength in coming years. Here, having a great team growing steadily plays an important role.



BURAK AKMENEK
CO-FOUNDER
SINGINGIANT

SINGINGIANT



ARE PC GAMES ON RISE?

Interview

A Brief Evaluation of 2022 by Singingiant

In 2023, a lot of PC games will be released in Türkiye. Maybe it will be the most productive year of the country so far in terms of PC games, and we expect that some of them will make a splash globally. Of course, we struggle to be one of those successful companies. In addition to our horror-themed tactical FPS game Contain, we are planning to offer a surprise game to the players. We will continue to progress based on our long-term plans.

Apart from VR, we will see a boom on the AR side in 2023. We can follow this from the hardware developments. The virtual reality world is a really interesting field where the hardware impacts the user experience significantly. We curiously follow to see how the return will be after the things happened in previous years.

Honestly, I was waiting for 2023 with excitement as it would be a year during which the market would see more cryptocurrency-based games developed with blockchain infrastructure. We will all analyze the short and long-term effects of those games on the gaming world. For metaverse, uncertainties are still present.

The new year won't be financially easy for our country and the world. Also, we will all live and learn the changes to happen in our lives with the elections awaited in our country. We only wish health, peace, happiness and success.



BURAK AKMENEK
CO-FOUNDER
SINGINGIANT

SINGINGIANT



2021



2022

**Türkiye Game
Market 2021**

&

**Türkiye Game
Market 2022
Comparison!**





POPULATION

TÜRKİYE GAME MARKET REPORT 2022

- 2021 Population: **84.680.273**

- **22,4%** Age 0 - 14

- **67,9%** Age 15 - 64

- **9,7%** Age 64+



- 2022 Population: **85.279.553**

- **22%** Age 0 - 14

- **68.1%** Age 15 - 64

- **9.9%** Age 64+

2021

2022



INTERNET USERS

TÜRKİYE GAME MARKET REPORT 2022

- Internet Users:

66.055.000+

- 82,6% of the population is online

* People in age group 16-74

* Internet access at home 92%

* Internet usage rate by gender
Males 87.7% - Females 77.5%

2021



- Internet Users:

72.000.000+

- 85% of the population is online

* People in age group 16-74

* Internet access at home 94.1%

* Internet usage rate by gender
Males 89.1% - Females 80.9%

2022



SOCIAL MEDIA USERS

TÜRKİYE GAME MARKET REPORT 2022

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



- Average time spent on the social media every day by the internet users aged 16-64: **2 Hours and 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 (+/-)
- TwitchTV: Monthly 5.7 Million Unique Viewers

2021

- Active Social Media Users: **69.000.000+**

- Average time spent on the social media every day by the internet users aged 16-64: **2 Hours and 47 Minutes**
- Facebook: 54 Million Users (+/-)
- Youtube: 60 Million Users (+/-)
- Instagram: 64 Million Users (+/-)
- Tiktok: 34 Million Users (+/-)
- Twitter: 48.3 Million Users (+/-)
- Snapchat: 25.5 Million Users (+/-)
- Twitch TV: Monthly 5.7 Million UV (+/-)
- Discord: 14 Million Unique Users (+/-)

2022



MOBILE USERS

TÜRKİYE GAME MARKET REPORT 2022

- Mobile Users: **87.000.000+**

- **104%** Mobile / Population

- **75 -80%** Smartphone / Mobile

- Smartphone Users:

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

59.500.000 (+ / -)

- 4.5G subscribers: 80.8 Million
- 3G subscribers: 4.1 Million
- Other: 2G and M2M

2021



- Mobile Users: **90.778.328+**

- **107,2%** Mobile / Population

- **75 -80%** Smartphone / Mobile

- Smartphone Users:

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

64.300.420 (+ / -)

- 4.5G subscribers: 84 Million
- 3G subscribers: 4.4 Million
- Other: 2G and M2M

2022



PLAYERS

TÜRKİYE GAME MARKET REPORT 2022

- 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: **44.000.000+**

- Total Game Revenue:

625.000.000 USD (+ / -)

- Mobile: 275.000.000 USD (+ / -)

- PC: 175.000.000 USD (+ / -)

- Console: 175.000.000 USD (+ / -)

1 Dollar = 16,58 TL

2022



PLAYERS

TÜRKİYE GAME MARKET REPORT 2022

Players Breakdown (**Estimated**)

- **MOBILE:** 40 Million Players



- **MOBILE:** 42 Million Players

- **PC:** 24 Million Players



- **PC:** 24 - 25 Million Players

- **CONSOLE:** 20 Million Players



- **CONSOLE:** 15 Million Players (+ / -)

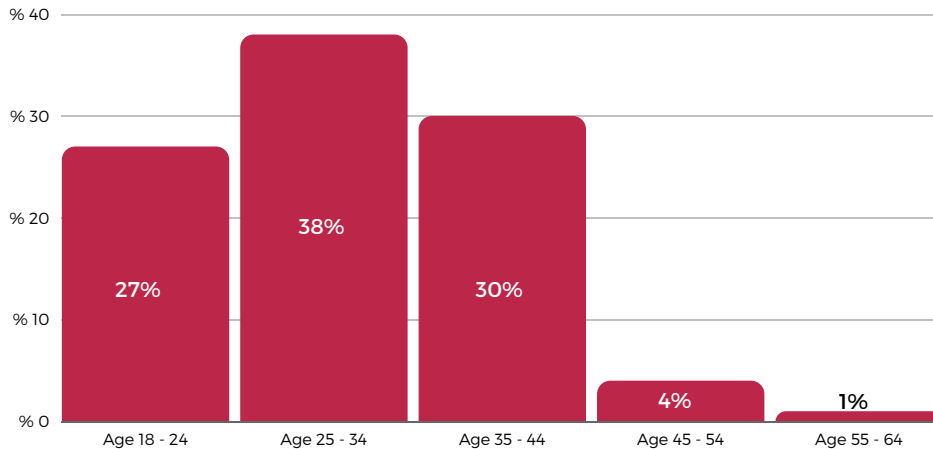
2021

2022



PLAYERS BY AGE

TÜRKİYE GAME MARKET REPORT 2022



Players by Age 2021

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

Players by Age 2022

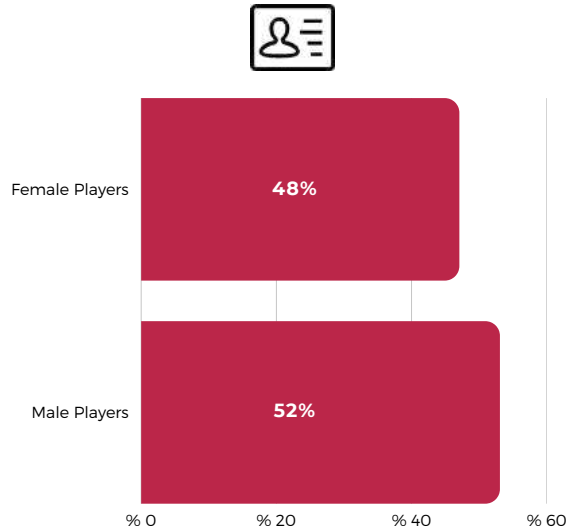
Age 18 - 24	27%
Age 25 - 34	38%
Age 35 - 44	30%
Age 45 - 54	4%
Age 55 - 64	1%

2022



PLAYERS BY GENDER

TÜRKİYE GAME MARKET REPORT 2022

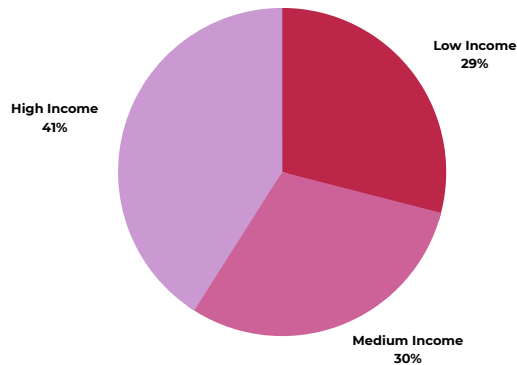


2022

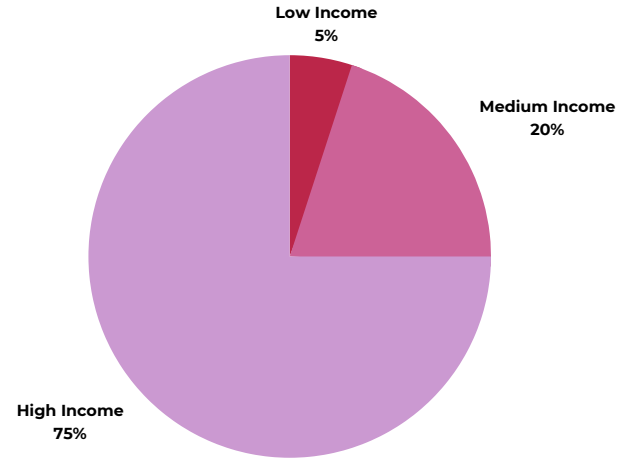


PLAYERS BY INCOME

TÜRKİYE GAME MARKET REPORT 2022



2021



2022



TOP 15 MOBILE GAMES - FREE GAMES DOWNLOAD

TÜRKİYE GAME MARKET REPORT 2022



1	Subway Surfers	Miniclip	9.500.000 + / -
2	101 Yüzbir Okey Plus	Take-Two Interactive	8.000.000 + / -
3	PUBG Mobile	Tencent	7.000.000 + / -
4	Roblox	Roblox Corporation	6.000.000 + / -
5	Words of Wonders: Crossword	Fugo	5.000.000 + / -
6	Race Master 3D - Car Racing	SayGames	5.000.000 + / -
7	Candy Crush Saga	Activision Blizzard	5.000.000 + / -
8	Going Balls	SUPERSONIC STUDIOS	5.000.000 + / -
9	FIFA Soccer	Electronic Arts	4.500.000 + / -
10	Snake.io - Fun Snake .io Games	Kooapps	4.500.000 + / -
11	Stumble Guys	Kitka Games	4.500.000 + / -
12	Bridge Race	SUPERSONIC STUDIOS	4.000.000 + / -
13	Soccer Super Star	Real Freestyle Soccer	4.000.000 + / -
14	Magic Tiles 3	Amanotes	4.000.000 + / -
15	Brawl Stars	Supercell	4.000.000 + / -



TOP 15 MOBILE GAMES - REVENUE

TÜRKİYE GAME MARKET REPORT 2022



1	PUBG Mobile	Tencent	13.000.000 USD + / -
2	101 Yüzbir Okey Plus	Take-Two Interactive	10.500.000 USD + / -
3	Garena Free Fire	Garena Games Online	5.000.000 USD + / -
4	Mobile Legends: Bang Bang	Moonton	5.000.000 USD + / -
5	Candy Crush Saga	Activision Blizzard	5.000.000 USD + / -
6	Roblox	Roblox Corporation	4.500.000 USD + / -
7	Clash of Clans	Supercell	4.000.000 USD + / -
8	Lords Mobile: Kingdom Wars	IGG	3.500.000 USD + / -
9	Evony: The King's Return	TOP GAMES	3.500.000 USD + / -
10	Pokémon GO	Niantic	3.000.000 USD + / -
11	Jackpot Magic Slots™ & Casino	Pixel United	3.000.000 USD + / -
12	Rise of Kingdoms	Lilith	3.000.000 USD + / -
13	Fun 101 Okey®	Fast Game	2.750.000 USD + / -
14	State of Survival: Zombie War	FunPlus	2.750.000 USD + / -
15	Zynga Poker™ - Texas Hold'em	Take-Two Interactive	2.750.000 USD + / -



TOP 15 MOBILE GAMES - PAID GAMES DOWNLOAD

TÜRKİYE GAME MARKET REPORT 2022



1	Minecraft	Microsoft Corporation	60.000 +
2	Earn to Die Lite	Not Doppler	35.000 +
3	Grand Theft Auto: Vice City	Take-Two Interactive	20.000 +
4	RFS - Real Flight Simulator	RORTOS SRL	20.000 +
5	Hitman Sniper	SQUARE ENIX	20.000 +
6	Grand Theft Auto: San Andreas	Take-Two Interactive	20.000 +
7	Construction Simulator 2014	astragon Software	15.000 +
8	Earn to Die 2	Not Doppler	10.000 +
9	Plague Inc.	Ndemic Creations	10.000 +
10	Real Drift Car Racing Lite	Real Games srls	10.000 +
11	Shadow Knights: Ninja Game RPG	Fansipan	10.000 +
12	Geometry Dash Lite	RobTop Games AB	10.000 +
13	Vector: Parkour Run	Nekki Games	10.000 +
14	Age of History II	Łukasz Jakowski	7.500 +
15	Football Manager 2022 Mobile	SEGA CORPORATION	7.500 +



TOP 15 MOBILE GAMES - PAID GAMES REVENUE

TÜRKİYE GAME MARKET REPORT 2022



1	Minecraft	Microsoft Corporation	550.000 USD +
2	Football Manager 2022 Mobile	SEGA CORPORATION	100.000 USD +
3	Football Manager 2023 Mobile	SEGA CORPORATION	75.000 USD +
4	Grand Theft Auto: San Andreas	Take-Two Interactive	60.000 USD +
5	Grand Theft Auto: Vice City	Take-Two Interactive	50.000 USD +
6	Farming Simulator 20	GIANTS Software	50.000 USD +
7	Space Shooter: Galaxy Attack	ONESOFT GLOBAL	45.000 USD +
8	RFS - Real Flight Simulator	RORTOS SRL	30.000 USD +
9	Construction Simulator 3 Lite	astragon Software	20.000 USD +
10	Poppy Playtime Chapter 1	MOB Games Studio	20.000 USD +
11	Shadow of Death: Dark Knight	Bravestars Games	16.000 USD +
12	Farming Simulator 18	GIANTS Software	16.000 USD +
13	Human: Fall Flat	505 Games	16.000 USD +
14	Stardew Valley	ConcernedApe	16.000 USD +
15	Dead Cells	Neko Entertainment	15.000 USD +



THE MOST POPULAR TURKISH MOBILE GAMES IN 2022

TÜRKİYE GAME MARKET REPORT 2022

The Turkish games before investment/acquisition are also included in the list. / By Active Users

- 101 Okey Plus - Peak Games / Zynga
- Words Of Wonders - Fugo
- Kafa Topu 2 - Masomo / Miniclip
- Bus Simulator - Zuuks Games
- Çanak Okey - Zynga / Take Two Interactive
- Okey by Peak Games - Zynga / Take Two Interactive
- Okey - Ahoy Games
- MentalUP - MentalUP
- Truck Simulator : Ultimate - Zuuks Games
- Royal Match - Dream Games
- Kelimelik - He2 Apps
- Traffic Rider - Soner Kara
- Paper Fold - Good Job Games
- TRT Bil Bakalım - Turkish Radio and Television Corporation
- Hair Challenge - Rollic / Take Two Interactive
- Words of Wonders: Guru - Fugo



THE MOST DOWNLOADED MOBILE APPS IN TÜRKİYE

TÜRKİYE GAME MARKET REPORT 2022



1	Instagram	Meta Platforms	16.000.000 + / -
2	Trendyol	trendyol.com	15.000.000 + / -
3	WhatsApp Messenger	Meta Platforms	15.000.000 + / -
4	TikTok	Bytedance	15.000.000 + / -
5	Kwai	Kwai	14.000.000 + / -
6	e-Devlet Kapısı	T.C. Ulaştırma Bakanlığı	14.000.000 + / -
7	Hepsiburada	D-MARKET	11.000.000 + / -
8	CapCut - Video Editor	Bytedance	11.000.000 + / -
9	Snapchat	Snap	10.000.000 + / -
10	getir	Getir	10.000.000 + / -
11	Telegram	Telegram	9.000.000 + / -
12	Ziraat Mobil	Fintek AS	8.500.000 + / -
13	Yemeksepeti	Delivery Hero Holding	8.500.000 + / -
14	Facebook	Meta Platforms	8.500.000 + / -
15	LC Waikiki	LC Waikiki	8.000.000 + / -



TOP MOBILE APPS IN TERMS OF MONEY SPENT IN TÜRKİYE

TÜRKİYE GAME MARKET REPORT 2022



1	TikTok	Bytedance	15.000.000 USD +
2	Azar	Hyperconnect	10.000.000 USD +
3	tango	TangoMe	7.000.000 USD +
4	LivU	CLASH ARTS HK	6.000.000 USD +
5	Tinder	Match Group	6.000.000 USD +
6	YouTube	Google	5.000.000 USD +
7	Connected2.me	C2M	4.000.000 USD +
8	Bigo Live	YY Inc.	4.000.000 USD +
9	Disney+	Disney	3.500.000 USD +
10	FaceApp	FaceApp Technology	3.000.000 USD +
11	Tumile	Tumile Team	3.000.000 USD +
12	17LIVE	17 MEDIA (H.K.)	2.000.000 USD +
13	Google One	Google	2.000.000 USD +
14	beIN CONNECT	DIGITURK	2.000.000 USD +
15	Bumble	Bumble Holding	1.500.000 USD +



THE MOST PREFERRED PC GAMES IN 2022

TÜRKİYE GAME MARKET REPORT 2022

- Among Us
- ARK: Surviva Evolved
- Apex Legends
- Black Desert Online
- Bloons TD 6
- Brawlhalla
- Call of Duty: Black Ops 4
- CP2077
- CS:GO
- Dark Souls III
- DayZ
- Dead by Daylight
- Don't Starve Together
- Dota 2
- Dying Light
- Elden Ring
- Euro Truck Simulator 2
- Fifa 2022
- Fortnite
- Football Manager 2022
- Garry's Mod
- Geometry Dash
- GTA V
- Hades
- Hollow Knight
- League of Legends
- Left 4 Dead 2
- Lost Ark
- Metin2
- Minecraft
- Monster Hunter: World
- Mount & Blade II: Bannerlord
- Mount & Blade: Warband
- New World
- PAYDAY 2
- Phasmophobia
- Portal 2
- PUBG: BATTLEGROUNDS
- Raft
- Rainbow Six Siege
- Red Dead Redemption 2
- Roblox
- Rocket League
- Rust
- Sea of Thieves
- Stardew Valley
- Team Fortress 2
- Terraria
- The Binding of Isaac: Rebirth
- The Forest
- The Witcher 3: Wild Hunt
- Tom Clancy's Rainbow Six Siege
- Valheim
- VALORANT
- World Of Warcraft



Source: Playstore, Razer Gold, Steam, Oyunfor, Epic Store
Listed in alphabetical order.



THE MOST PREFERRED PC GAME TYPES IN 2022

TÜRKİYE GAME MARKET REPORT 2022



Shooter - FPS



Strategy



Adventure



Sandbox



Battle Royale



Racing



Role-Playing



Platform



Sports



Arcade





THE MOST PREFERRED CONSOLE GAMES IN 2022

TÜRKİYE GAME MARKET REPORT 2022

- A Plague Tale: Requiem
- Animal Crossing: New Horizons
- Apex Legends
- Babylon's Fall
- Battlefield 2042
- Call of Duty Modern Warfare II
- Call of Duty: Black Ops Cold War
- Call of Duty: Vanguard
- Dying Light 2 Stay Human
- eFootball 2022
- Elden Ring
- FI® 2021
- FI® 2022
- Fall Guys
- FIFA 22
- FIFA 23
- Fortnite
- Forza Horizon 5
- Genshin Impact
- Ghostwire: Tokyo
- Goat Simulator 3
- God of War Ragnarök
- Gotham Knights
- Gran Turismo Sport
- Grand Theft Auto V
- Horizon Forbidden West
- Just Dance 2023
- Little Devil Inside
- Minecraft
- Mortal Kombat 11
- NBA 2K22
- NBA 2K23
- Need for Speed™ Heat
- OlliOlli World
- Pokemon Sword & Shield
- PUBG: BATTLEGROUNDS
- Roblox
- Rocket League
- Salt and Sacrifice
- Sea of Thieves
- Sifu
- Stranger of Paradise Final Fantasy Origin
- Stray
- Suicide Squad: Kill the Justice League
- Tiny Tina's Wonderlands
- Tom Clancy's Rainbow Six Extraction
- Tom Clancy's Rainbow Six Siege
- UNCHARTED: Legacy of Thieves Koleksiyonu





TÜRKİYE'S REVENUE RANKING IN THE WORLD

TÜRKİYE GAME MARKET REPORT 2022

- World Ranking - Total

18

- World Ranking - Mobile

18

2021



- World Ranking - Total

30 +/-

- World Ranking - Mobile

30 +/-

2022



POPULAR GAMING COMPANIES IN TÜRKİYE

TÜRKİYE GAME MARKET REPORT 2022

- 11 Bit Studios
- 2K Games
- Ahoy Games
- Amanotes
- AppQuantum
- AppQuiz
- ArenaNet
- Arkane Studios
- AxesInMotion
- Ayasis
- Azur Interactive Games
- Bandai Namco
- Beach Bum
- Bethesda
- Bigpoint Games
- Bioware
- Blizzard/Activision
- Boke
- Candivore
- Capcom
- CD Projekt Red
- Chess.com
- ConcernedApe
- Crazy Labs
- Critical Force
- Crytek
- Daily Innovation
- Deep Silver
- Devolver Digital
- DICE
- Dream Games
- EA Games
- Easybrain
- Epic Games
- Epic Story Interactive
- Etermax
- Facepunch Studios
- Fingersoft
- Firaxis Games
- First Touch
- Fishlabs
- ForgeGames
- FromSoftware
- Fugo
- FunPlus
- Gamebasics Studio
- Gameforge
- Gameloft
- Garena
- Gartic
- Good Job Games
- Gram Games
- Grinding Gear Games
- Guerila Games
- Habby
- Halfbrick
- He2 Apps
- Hinterland Games
- Homa
- IGG
- Ilyon Dynamics
- Imangi
- Innersloth
- InnoGames
- Ketchapp
- King
- Kingsgroup Games - FunPlus
- Klei Entertainment
- Kojima Productions
- Kolibri Games
- Konima
- KRAFTON
- Larian Studios
- Lilith Games
- Lion Studios
- Lokum Games
- Loop Games
- Lowtech Studios
- Lunime
- Marul Games
- Masomo
- Matchingham Games
- Mattel 163
- Mechanist
- Mediatonic
- Mediocre
- miHoYo
- Miniclip
- MNO GO APPS
- Mojang Studios
- Moon Studios
- Moonton
- Mynet
- Naughty Dog
- Ndemc Creations
- Nekki
- Netease
- Netmarble
- NEXON
- Nfinity Games



POPULAR GAMING COMPANIES IN TÜRKİYE

TÜRKİYE GAME MARKET REPORT 2022

- Niantic
- Nintendo
- Nordeus
- Not Doppler
- Olzhass
- Onemt
- OneSoft
- Outfit7
- Panoramik Games
- Paradox Interactive
- Peak Games
- Pearl Abyss
- Playgendary
- PopCap
- Psyonix
- Riot Games
- Roblox Cooperation
- Rockstar
- Rollic Games
- Rovio Entertainment
- SCS Software
- SEGA
- SkGames
- Smilegate
- smSoft

- SNG ICT
- Social Point
- Sony Interactive
- Sports Interactive
- Spyke Games
- Square Enix
- StarUnion
- Studio Wildcard
- Supercell
- Supergiant Games
- Supersonic
- Sybo
- TaleWorlds Entertainment
- TapBlaze
- TapNation
- Techland
- Tencent
- tinyBuild
- Tiramisu Studios
- Topwar Studio
- Ubisoft
- Unico Studio
- Valve
- Vertigo Games
- Voodoo

- Wargaming
- Warner Bros. Interactive
- Wildlife Studios
- Xbox Game Studios
- Yalla Game
- Zakeh
- Zego Studio
- Zenlife Games
- Zuuks Games
- Zynga





LOCAL GAMING COMPANIES IN TÜRKİYE

TÜRKİYE GAME MARKET REPORT 2022



There is no doubt that the number of gaming studios started to increase rapidly in Türkiye after Peak Games was acquired for 1,8 billion USD in 2020 by Zynga. According to a report published by Startup Centrum, 80 former employees of Peak (including trainees) built their start-ups. Among 65 start-ups built, 28 of them consist of gaming ventures. In this regard, considering Peak Games as a school won't be wrong. This surge started in 2020 also continued in 2021 and 2022.

There are more than 250 companies on the list of "Local Gaming Companies 2022". While the majority of those studios are focused on the mobile gaming sector, there is a considerable number of companies developing games for different platforms such as PC, console, VR, etc. Furthermore, the interest shown in these fields is increasing day by day.

Some of the listed gaming companies consist of studios receiving investment. These include unicorns such as Peak Games and Dream Games as well as different companies receiving million-dollar investments such as Madcraft Studios, Gnarly Game Studio, Loop Games, etc.

LOCAL GAMING COMPANIES IN THE EYES OF AN EXPERT



SENEM AKSAKAL
GAME DESIGNER
VIDEO GAME QA TEST SPECIALIST
COMMUNITY MANAGER



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The gaming sector leading the most invested sectors in the last two years has become a center of interest for both young people and investors. According to the report "Gaming Snapshot for Türkiye v1.5" published by Startup Watch, 126 gaming start-ups were built in 2020. This is followed by 121 and 63 gaming start-ups built in 2021 and 2022, respectively. Among 737 gaming start-ups built in total, 131 of them, unfortunately, shut down.

The acceleration that happened in the gaming sector with the pandemic has now started to slow down. We see a decline in the reports for the first time. The number of gaming start-ups built in Türkiye reduced by 48% last year compared to 2021. We see similar results looking at the global gaming sector data. Therefore, entrepreneurs intending to build a game studio had better be cautious. They should avoid thinking that "This sector is too profitable so we can receive investment by creating a few prototypes." Innovative ideas are necessary to have a long-lived, sustainable game studio. Starting with a talented and coherent team is also very important.

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As seen on the list "Local Gaming Companies 2022", the majority of mobile game developers develop Hyper-casual or Hybrid-casual games in our country. As the trends are changing fast in the gaming sector being highly dynamic, we witness teams turning towards different fields such as Casual and Blockchain Games. Different gaming areas such as Blockchain Games and XR will also continue to be trending in the forthcoming years. It will be helpful for the new studios to follow up on the trends.

For Türkiye which proved its success in the mobile gaming sector in previous years, it is time to stand out in other gaming areas, especially in the indie games field. Many Entrepreneurship Programs have been started for those entrepreneurs who want to build their game studio and create the game of their dreams. These are available across the country in different models such as Acceleration Centers, Incubation Centers, Pre-incubation Centers, etc. These centers are quite helpful for learning entrepreneurship and entering into the sector. They also contribute to training qualified employees for the sector because people's increased interest in this field gives rise to more bachelor's and master's degree programs.

Consequently, we will all witness in 2023 that the number of game studios will rise, high-quality games will be released and new unicorns will be created by the Turkish gaming sector.

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LOCAL GAMING COMPANIES IN TÜRKİYE

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COMPANY	WEBSITE	CONTACT
208 Studios	http://208studios.org/	208studios@gmail.com
2Medya Game Studio	http://2medya.com/	info@2medya.com
AbraKadabra Games	https://abrakadabra.com.tr/	info@abrakadabra.com.tr
Ace Games	https://ace.games/	info@ace.games
Aden Games	https://www.adengames.com/	info@adengames.com
Agave Games	http://www.agave.games/	contact@agave.games
Alfish Games	http://www.alfgames.com/	studio@alfgames.com
Alictus	www.alictus.com	hello@alictus.com
AlkameGames	http://www.alkamegames.com/	hialkame@alkamegames.com
Alper Games	www.alpergames.com	info@alpergames.com
Alsa Games	http://www.alsa.games/	-
Anemo Games	https://anemogames.com/	info@anemogames.com
Anisoft Games	https://www.anisoftgames.com/	contact@anisoftgames.com
Any Games	https://www.anygames.io/	hello@anygames.io
Appgamedo	http://www.appgamedo.com/	info@appgamedo.com
Apphic Games	www.apphicgames.com	info@apphicgames.com
ArcadeMonk	www.arcadem Monk.com	businessdevelopment@arcadem Monk.com
Arctec Games	https://arctec.games/	info@arctec.games
Arkhe Games	https://arkhegames.com/	contact@arkhegames.com
Arsh Game Studio	www.arshgames.com	info@arshgames.com
Artuex Games	https://www.artuexgames.com/	
Arvis Games	https://arvisgames.com/v2/	info@arvisgames.com



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COMPANY	WEBSITE	CONTACT
Aryas Games	www.aryasgames.com	soneraltincit@aryasgames.com
Aslan Game Studio	https://aslangamestudio.com/	ahmet@aslangamestudio.com
Atolye Games	http://www.atolye.games/	-
Atom Games	https://www.atom.gs/	info@atomgames.net
Awkay Technologies	https://www.awkaytech.io/	admin@awkaytech.io
Axell Studio	www.axellstudio.com	info@axellstudio.com
Aylak Games	https://aylak.com/	contact@aylak.com
Babil Studios	www.babilstudios.com	info@babilstudios.com
Backpack Games	https://www.backpack.games/	info@backpack.games
BadLabGames	https://www.badlabgames.com/	ulgergokturk@gmail.com
Bakodun Game Studios	https://www.bakodungamestudios.com/	what@bakodungamestudios.com
Banba Games	https://banba.games/	info@banba.games
Batpad	https://www.batpad.co/	-
Bermuda Games	https://bermuda.gs/	info@bermuda.gs
Berzah Games A.Ş.	www.berzahgames.com	info@berzahgames.com
Big Mobile Games	https://www.bigmobilegames.com/	contact@bigmobilegames.com
Bigger Games	https://biggergames.com/	info@biggergames.com
BigPogo Games	https://www.bigpogogames.com/	info@bigpogogames.com
Black Coco	www.blackcoco.net	contact@blackcoco.net
Blackburne Games Yazılım A.Ş.	https://exnaturathegame.com/	contact@blackburne.games
Blay Games	https://www.blaygames.com/	info@blaygames.com
Blended Games	https://blendedgames.com/	ilke@blendedgames.com



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COMPANY	WEBSITE	CONTACT
Boom Games	https://boomgamestudio.com/	hello@boomgamestudio.com
BoomHits	https://boomhits.com/	support@boomhits.com
Brew Games	https://www.brew-games.com/	info@brew-games.com
Bucked Games	https://buckedgames.com/	playground@buckedgames.com
BugFix Games	https://www.bugfix.games/	https://www.bugfix.games/#contact
Burger Games	https://www.burgergames.net/	hello@burgergames.net
Bycodec Games	https://www.bycodecgames.com/	contact@bycodecgames.com
ByRock Games & Studio	https://byrockgames.com/	info@byrockgames.com
Bytetyper	http://bytetyper.com/	https://bytetyper.com/
Cata Game Studios	https://www.catagamestudios.com/	catagamestudios@gmail.com
Catchy Games	https://catchy.games/	info@catchy.games
Catpath Studios	www.cataeon.com	hello@cataeon.com
Cat Soul Studios	https://www.catsoulstudios.com	info@catsoulstudios.com
Champy Games	https://champygames.com/	info@champygames.com
Chipmunk Games	https://chipmunk.games/	k.furkancaybasi@gmail.com
Ciconia Games	http://www.ciconiagames.com/	info@ciconiagames.com
Clap Games	https://clapgames.app/	info@clapgames.app
Click Game Studio	https://clickgamestudio.com/	info@clickgamestudio.com
Clock Wizard Games	https://www.clockwizardgames.com/	-
Clown Games	www.clown.gs	hello@alictus.com
Coconut Game	http://www.coconutgame.com/	coconut@coconutgame.com
Codeway Studios	https://www.codeway.co/	hello@codeway.co



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COMPANY	WEBSITE	CONTACT
Consala Games	http://www.consala.com/	info@consala.com
Cool Pigz	https://coolpigz.io/	https://coolpigz.io/
CORE Studios	https://www.core-attacks.com/	attack@core-attacks.com
Crania Games	www.cranlagames.com	support@cranlagames.com
Cratoonz	https://cratoonz.com/	info@cratoonz.com
Crealode Games	www.crealodegames.com	contact@crealodegames.com
Creasaur Entertainment	www.creasaur.net	info@creasaur.net
Crescive Games	www.crescivegames.com	hello@crescivegames.com
Crew Game Studio	http://www.crewgamestudio.com/	info@crewgamestudio.com
Crystal Shark Games	https://crystalsharkgames.com/	info@crystalsharkgames.com
Cultic Games	http://cultic.games/	culticgames@gmail.com
Curse Game Studio	http://cursestudios.com/	cursegamestudios@gmail.com
Cypher Games	https://www.cyphergames.com/	info@cyphergames.com
DaBomb Games	https://www.dabomb.games/	info@dabomb.games
Dalak Games	http://dalakgames.com/	egemen@dalakgames.com
Dark Zone Game Studio	https://darkzone.com.tr/	https://darkzone.com.tr/
Daxe Games	https://www.daxe.games/	start@daxe.games
Digimind Market	https://digimindmarket.com/	info@digimindmarket.com
Digitoy Games	https://digitoy.games/	support@digitoygames.com
DoDo Game	https://dodogame.co/	info@dodogame.co
Dorudon Games	https://www.dorudongames.com/	dorudongames@gmail.com
Dream Games	www.dreamgames.com	info@dreamgames.com



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COMPANY	WEBSITE	CONTACT
Dream Harvesters	https://dreamharvesters.com/	contact@dreamharvesters.com
Droll Studio	http://www.drollstudio.com/	
Duuby Games	https://www.duubygames.com/	duubygames@gmail.com
Easy Clap Games	https://easyclapgames.com/	info@easyclapgames.com
EFNSOFT	https://www.efnsoft.com/	info@efnsoft.com
EKSOT Studios	https://www.eksotstudios.com/tr/	https://www.eksotstudios.com/tr/iletisim
Ela Game Studio	http://www.elagamestudio.com	info@elagamestudio.com
Elite Game Studio	www.ingamegroup.com	contact@ingamegroup.com
Endless Games	http://endlessgamesstudio.com/	info@endlessgames.com
enny Games	https://lennygames.com/	https://lennygames.com/contact
Enrich Games	www.enrichgames.com	hi@enrichgames.com
Erik Games	www.erikgames.com	info@erikgames.com
F13 Entertainment	https://f13entertainment.com/about/	info@f13entertainment.com
Fabrika Games	www.fabrikagames.com	contact@fabrikagames.com
FE Games	http://www.fegames.co/	info@fegames.co
Fernville	https://www.fernville.com/	info@fernville.com
Fiber Games	www.fibergames.com.tr	info@fibergames.com.tr
Firebyte Games	https://firebyte.ro/home/	support@firebyte-games.com
Flaky Games	https://flakygames.com/	flakygamesofficial@gmail.com
Flamingo Game Studio	https://flamingo.gs/	info@flamingo.gs
Fluffy Games	https://thefluffygames.com/	fluffygamestr@gmail.com
FMC Game Studio	http://www.fmcgamestudio.com/	info@fmcgamestudio.com



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COMPANY	WEBSITE	CONTACT
Fomo Games	https://fomo.gs/	hello@fomo.gs
Forge Games	https://forgegames.co	info@forgegames.co
Fortune Mine Games	https://fortunemine.com/	contact@fortunemine.com
FoxPider Games	https://www.foxpidergames.com/	foxpidergames@gmail.com
Frostline Games	https://frostline.games/	info@frostlinegames.com
Frothy Games	https://frothygames.com/	info@frothygames.com
Frutgames	https://frut.games/	-
Fubu Games	http://fubugames.com/	tahatepedelen@fubugames.com
Fugo Games	www.fugo.com.tr	info@fugo.com.tr
Funika Games	www.funikagames.com	info@funikagames.com
Funmoth Games	www.funmoth.com	info@funmoth.com
Funpac (Mynet)	www.funpac.com	hr@funpac.com
Funrika	https://www.funrika.com/	info@funrika.com
Funverse Games	https://www.funversegames.com/	hr@funversegames.com
Furtile Game	http://furtilegame.com/	http://furtilegame.com/#contact
Gabble Studios	http://www.gabblestudios.com/	info@gabblestudios.com
Gambol Games	https://www.gambolgames.com/	https://www.gambolgames.com/contact
Gamebit Studio	www.studiogamebit.com	contact@studiogamebit.com
Gamegos	https://www.gamegos.com/	info@gamegos.com
GameGuru	www.gameguru.net	hello@gameguru.net
GameHub	www.gamehub.gs	info@gamehub.gs
GamesMrkt	https://www.gamesmrkt.com/	sfi@gamesmrkt.com



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COMPANY	WEBSITE	CONTACT
Gamester	www.gamester.com.tr	info@gamester.com.tr
Gametator	https://www.gametator.com/	letgamebegin@gametator.com
Gamikro	www.gamikro.com	info@gamikro.com
Gamina Technology	https://gaminatetechnology.com/	info@gaminatetechnology.com
Gaminics	https://www.gaminics.com/	https://www.gaminics.com/contact/
Ganover Teknoloji ve Bilişim	https://www.ganover.com/	hello@ganover.com
Gany Games	https://ganygames.com/	social@ganygames.com
Garawell Games	https://www.garawell.com/	info@garawell.com
Gigantic Games	https://gigantic.gs/	https://gigantic.gs/
Ging Games	https://ging.games/	info@ging.games
Gleam Games	https://www.gleamgames.com/	info@gleamgames.com
Gnarly Game Studio	www.gnarlygamestudio.com	info@gnarlygamestudio.com
Good Job Games	www.goodjobgames.com	contact@goodjobgames.com
Gorgonize Games	https://www.gorgonizegames.com/	gorgonizegames@gmail.com
Gorilla Softworks	http://gorillasoftworks.com/	info@gorillasoftworks.com
Gram Games	www.gram.gs	other@gram.gs
Gramofon Games	https://www.gramofon.games/	hello@gramofon.games
Gulliver's Games	https://gullivers.games/	gullivers.games/
Günay Studio	www.gunaystudio.com/tr/	info@gunaystudio.com
Gybe Games	https://gybegames.com/	info@gybegames.com
Gyroscoping Games	https://gyroscopinggames.com/	info@gyroscopinggames.com
Hadi Games	https://www.hadi.gs/	info@hadi.gs



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COMPANY	WEBSITE	CONTACT
Hamlet Games	https://hamletgamestudio.com/	info@hamletgamestudio.com
Hammurabi Games	www.hammurabigames.com	hammurabi.games@gmail.com
Happy Game Company	https://www.happygamecompany.com/	hi@happygamecompany.com
Harmonia Games	https://www.harmoniagames.com/	hello@harmoniagames.com
He2 Apps	www.he2apps.com	iletisim@he2apps.com
Heisen Games	www.heisengames.net	heisengames@gmail.com
Hero Concept	https://heroconcept.com/	https://heroconcept.com/contact/
Hero Games	https://www.herogamestudio.com/	hello@herogamestudio.com
HES Games	www.hesgames.com	info@hesgames.com
Hey Games	www.hey.gs/tr/	info@hey.gs
Hifive Games	http://hifive.games/	http://hifive.games/
HOGO Games	http://www.hogogames.com/	-
Hoody Studios	https://www.hoodystudios.com	contact@hoodystudios.com
Horda Games	https://www.horda.games/	info@horda.games
Houch Game Studios	-	-
HOUF Games	https://houf.games/	info@houf.games
Humbara Game Studio	https://www.humbaragames.com/	humbaragames@gmail.com
Hungri Games	https://www.hungrigames.co.uk/	info@hungrigames.com
Hypebive Games	https://www.hypebive.com/	jobs@hypebive.com
HyperFlow Games	www.hyperflowgames.com	info@hyperflowgames.com
Hyperlab	https://www.hyperlab.games/	hello@hyperlab.games
HyperMonk	https://www.hypermonkgames.com/	info@hypermonkgames.com



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COMPANY	WEBSITE	CONTACT
Hypernova Technology & Gaming	https://www.hypernova-tech.com/	info@hypernova-tech.com
Imaginite Studios	www.imaginitesoft.com	info@imaginitesoft.com
Indie-dir Games	www.indiedir.com	info@indiedir.com
IRONHEAD Games	https://ironheadvr.com/	art@ironheadgamestudios.com
Joinco Games	https://www.joincogames.com/	-
Joker Game	http://jokergame.net/	http://jokergame.net/support-center
Jollify Games	https://jollifygames.com/	info@jollifygames.com
Joygame Oyun ve Teknoloji A.Ş.	http://www.joygame.com/	hr@joygame.com
KA Games	https://kagames.net/	info@kagames.net
Karga Games	https://www.kargagames.com	info@kargagames.com
KasApp Games	https://kasappgames.com/	kasappgames@outlook.com
Kiki Games	https://www.kikigames.fun/	nkirkoglu@hotmail.com
Kirpi Games	https://www.kirpigames.com/	info@kirpigames.com
Kleinsteins Games	https://kleinstein.games/	info@kleinstein.games
Koala Game Studio	https://www.koalagamestudio.com/	info@koalagamestudio.com
Kodobur	www.kodobur.com/tr	info@kodobur.com
Konrul Game	http://www.konrul.com/	info@konrul.com
Kontra Games	https://www.kontra.games/	hey@kontra.games
Kraker Studio	www.krakerstudio.com	hello@krakerstudio.com
L8 Studios	https://l8studios.com/	info@l8studios.com
Labor Bilisim	https://laborbilisim.com/	info@laborbilisim.com
Lacivert Digital Services	www.lacivert.org	sari@lacivert.org



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COMPANY	WEBSITE	CONTACT
Lagot Games	https://www.lagotgames.com/	contact@lagotgames.com
Laps Games		
Leartes Studios	https://leartesstudios.com/	info@leartesstudios.com
Lebleby Games	https://www.lebleby.com/	https://www.lebleby.com/contact/
Lerp Games	https://lerpgames.com/	contact@lerpgames.com
Lethe Studios	https://lethestudios.net/	info@lethestudios.net
Leyla	https://leyla.gs/	info@leyla.gs
Libra Softworks	www.librasoftworks.com	librasoftworks@gmail.com
Lokum Games	www.lokumgames.com	contact@lokumgames.com
Longhorn Games	https://longhorn.games/	hello@longhorn.games
Loop Games	https://loopgames.net/	support@loopgames.net
Looser Games	http://loosergames.club/	loosergamestudios@gmail.com
Lost Panda Games	https://lostpandagames.com/	info@lostpandagames.com
Lumier Games	https://www.lumiergames.com/	https://www.lumiergames.com/
Lumos Games	https://lumos.games/	hi@lumos.games
M8 Games	https://m8games.co/	info@m8games.co
Machina Games	http://machinagames.xyz/	info@machinagames.xyz
MadByte Games	www.madbytegames.com	contact@madbytegames.com
Madcraft Studios	www.madcraftstudios.com	madcraftstudios.com/
Maestro Game Studio	https://maestro.gs/	https://maestro.gs/
Mafia Games	https://mafia-games.com/	info@mafia-games.com
MagicLab Game Technologies	www.maglab.com.tr	hello@maglab.com.tr



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COMPANY	WEBSITE	CONTACT
Mai Games	https://www.mai.games/	hr@mai.games
Makemake	https://www.makemake.com.tr/	game@makemake.com.tr
Mangorama Studio	www.mangoramastudio.com	contact@mangoramastudio.com
Masomo	www.masomo.com	support@masomo.com
Matchingham Games	https://matchingham.gs/	info@matchingham.gs
Mate Studios	http://matestudio.cc/	info@matestudio.cc
Mavis Games	www.mavisgames.com	saygin@mavisgames.com
Mayadem Teknoloji	www.mayadem.com	iletisim@mayadem.com
Mayaworks	https://maya.works/	iletisim@multiplayer.com.tr
Metaverse Bilgi Teknolojileri A.Ş.	https://metaversebilgi.com.tr/	info@metaversebilgi.com.tr
Metaverse Game Studios	https://angelicthegame.com/	angelicsupport@metaverse.gs
Metavision Studio	https://metavision.com.tr/	info@metavision.com.tr
Midpoly Games	https://www.midpolygames.com/	info@midpolygames.com
Mil Game Studio	https://milgamestudio.com/	info@milgamestudio.com
MildMania	www.mildmania.com	weare@mildmania.com
Mindlabor	https://mindlabor.dev/	chisenoa@mindlabor.dev
Miracle Works Game Studio	https://miracleworks.com.tr/	info@miracleworks.com.tr
Mixer Games	https://www.mixer.games/	hello@mixer.games
Mobge	www.mobge.net	https://mobge.net/contact
Mobilecraft	www.mobilecraft.net	support@mobilecraft.net
Mocca Games	http://www.moccagames.com/	
Momentum Digital Media Technologies	www.momentum-dmt.com/tr/	info@momentum-dmt.com



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COMPANY	WEBSITE	CONTACT
Momosh Studios	https://www.momoshstudios.com/	momoshstudios@gmail.com
Mood Games	https://mood.games/	support@mood.games
Moomoo Games	https://www.moomoo.games/	-
Moon Star Games	https://www.moonstargames.net/	burakcakkak@moonstargames.net
Moon Star Games	https://www.moonstargames.co/	info@moonstargames.co
MoonStar Games	http://www.moonstargames.com/	info@moonstargames.com
Mooxer Games	https://www.mooxergames.com/	-
Moralabs	www.moralabs.com	info@moralabs.com
Morii Games	https://moriigames.com/	info@morii.games
Morina Games	http://morinagames.com/?i=2	evliyabalik@gmail.com
Morne Games	https://mornegames.com/	hello@mornegames.com
Mortys Games	https://mortys.games/	https://mortys.games/
Mosu Games	https://www.mosugames.com/	info@mosugames.com
Motion Blur	https://www.motionblur.com/	info@motionblur.com
Mubu Games	-	-
Mythra Tech	www.mythratech.com	info@mythratech.com
Narcade	www.narcade.com	zip@nar.club
Naturepixel Studios	https://www.naturepixelstudios.com/	-
NDC Studio	http://ndgstudio.com.tr/	http://ndgstudio.com.tr/#contact
Needle Games	https://www.needlegames.com/	info@needlegames.com
Negentra	www.negentra.com.tr	info@negentra.com.tr
Neuron Entertainment	-	financial.anayurt@gmail.com



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COMPANY	WEBSITE	CONTACT
NGD Studio	https://test.ndgstudio.com.tr/	-
NiceTry Games	http://nicetrygames.com/	info@nicetrygames.com
Nirah Games	https://nirahgames.com/	hello@nirahgames.com
Nitrid Game	www.nitrid.com	info@nitrid.com
Nitrogen Games	-	-
no-pact	www.nopact.com	info@nopact.com
NoExit Games	https://www.noexitgames.com/	info@noexitgames.com
Noho Games	https://www.noho.games/	hello@noho.games
Nonsum Games	https://nonsumgames.com/	info@nonsumgames.com
NoSurrender Game Studio	https://www.nosurrender.studio/	community@nosurrender.studio
Nowhere Studios	www.nowherestudios.com	info@nowherestudios.com
Nyctophile Studios	https://www.nyctophilestudios.com/	info@nyctophilestudios.com
Od Game Studio	https://www.odgamestudio.com/	info@odgamestudio.com
OGO Play	https://ogoplay.com/	-
Ohengo Studio	https://ohengostudio.com/	ohengocom@gmail.com
Omnio Games	https://omniogames.com/	hi@omnio.gs
On Off Games	https://onoff.games/	info@onoff.games
Opnomo Studios	https://opnomo.com	opnomostudio@gmail.com
Optimus Game Studio	https://optimusgamestudio.com/	-
OTTO Games	https://www.ottogames.studio/	hi@ottogames.studio
Ottoman Games	https://www.ottomangames.com/	info@ottomangames.com
Ottomotto Labs	https://www.ottomottolabs.com/	info@ottomottolabs.com



LOCAL GAMING COMPANIES IN TÜRKİYE

TÜRKİYE GAME MARKET REPORT 2022

COMPANY	WEBSITE	CONTACT
Overdose Caffeine	www.odcaf.com	medic@odcaf.com
OverKraft	https://overkraft.com/	
OXO Games	https://www.oxogames.net/	oxogamestudio@gmail.com
Oxyun	https://www.oxyun.com/	info@oxyun.com
Oyun Stüdyosu	www.oyunstudyosu.com	info@oyunstudyosu.com
Pan Games	http://pan.games/	support@pan.games
Panda Bear	https://www.pandabeargames.com/	bear@panda.istanbul
Pango Games	http://www.pangogames.com/	info@pangogames.com
Panteon	https://www.panteon.games/	info@panteon.games
Parma Games	https://www.parmagames.com/	https://www.parmagames.com/contact/
Pasatempos Games	https://pasatemposgames.business.site/	https://pasatemposgames.business.site/
Passion Punch Studio	https://passionpunch.studio/	contact@passionpunch.studio
Path Games	https://www.pathgames.com/	
Pax Animi Games	http://www.paxanimigames.com/	info@paxanimigames.com
Paxie Games	https://www.paxiegames.com/	hey@paxiegames.com
Peak Games	www.peak.com	contact@peak.com
Pera Games	https://peragames.co/	https://peragames.co/contact-us
Pink Games	https://pinkgames.net/	contact@pinkgames.net
Pinq Games	https://pinq.games/tr/	info@pinq.games
Pipoza Games	https://pipoza-studio.business.site/	https://pipoza-studio.business.site/
Pirzola Games	http://www.pirzola.studio/	info@pirzola.studio
Pixega Studio	www.pixegastudio.com	info@pixegastudio.com



LOCAL GAMING COMPANIES IN TÜRKİYE

TÜRKİYE GAME MARKET REPORT 2022

COMPANY	WEBSITE	CONTACT
Pixofun	www.pixofun.com	info@pixofun.com
Playable Factory	www.playablefactory.com	hello@playablefactory.com
Poison Software Studio	www.poisonsoftwarestudio.com	develop@poisonsoftwarestudio.com
Pollux Studios	https://polluxstudios.com/	mak@polluxstudios.com
Pokuch	https://pokuch.com/contact/	contact@pokuch.com
POW Games	https://pow.games/	hey@pow.games
Presto Games	https://www.prestogames.com/	-
Proud Dinosaurs	https://prouddinosaurs.com/	https://prouddinosaurs.com/contact
Pximal Games	https://pximal.com/	contact@pximal.com
Pyro Games	http://www.pyrogames.io/	hello@pyrogames.io
Quok Games	https://quok.games/	https://quok.games/
Radiant Cat Studio	https://www.radiantcat.studio/	info@radiantcat.studio
Rapture Games	http://rapture.com.tr/	ugurarsen@gmail.com
Ratic	https://ratic.io/	support@ratic.com
RealityArts Studio	www.realityartsstudio.com	info@realityartsstudio.com
Recontact Games	www.recontactgame.com	info@recontactgame.com
Red Chameleon Game Studios	https://www.rclstudio.io/	hi@rclstudio.io
Remoob	https://remoobgames.com/	remoob.dev@gmail.com
Return Game Studio	http://returngamestudio.com/	contact@returngamestudio.com
Revel Games	http://www.revel.gs/	info@revel.gs
Reves Games	https://revesgames.com/	hello@revesgames.com
Ridgge	https://www.ridgge.com/	info@ridgge.com



LOCAL GAMING COMPANIES IN TÜRKİYE

TÜRKİYE GAME MARKET REPORT 2022

COMPANY	WEBSITE	CONTACT
Roar Games Studio	http://roar.gs/	info@roar.gs
Rocinante Games	http://www.rocinantegames.com/	info@rocinantegames.com
Rockwise Entertainment	www.rockwise.com	info@rockwise.com
Rog Studios	www.rogstudios.com	contact@rogstudios.com
Roko Game Studios	https://www.rokosoftware.com/	info@rokosoftware.com
Rollic Games	www.rollicgames.com	info@rollicgames.com
Rooster Games	http://roostergames.net/	info@roostergames.net
Root Games	http://root-games.com/	http://root-games.com/#contact
Rotatelab	https://rotatelab.com/	info@rotatelab.com
Ruby Game Studio	www.rubygamestudio.com	info@rubygamestudio.com
Ruckcat Games	https://ruckcat.com/	hello@ruckcat.com
Ruff Games	https://www.ruffgamestudio.com/	roofgames@lionstudios.cc
Rustle Games	https://rustlegames.com/	info@rustlegames.com
S2SGAME	https://s2sgame.com/	info@s2sgame.com
Sek Games	https://sekgames.com/	info@sekgames.com
Seksek Games		seksekgames@gmail.com
Semruk Games	https://semrukgames.com/	https://semrukgames.com/contact-us/
Settings Games	https://settings.games/	info@settings.games
Shawty Games	https://www.shawtygames.com/	info@shawtygames.com
Sheriff Games	https://www.sheriffgames.com/	info@sheriffgames.com
Siis Games	https://siis.com.tr/	games@siis.com.tr
Simsoft	www.simsoft.com.tr	info@simsoft.com.tr



LOCAL GAMING COMPANIES IN TÜRKİYE

TÜRKİYE GAME MARKET REPORT 2022

COMPANY	WEBSITE	CONTACT
Sincapp Games	https://www.sincappgames.com/	sincappstudio@gmail.com
SinginGiant	http://www.singingiant.com/	info@singingiant.com
Sir Studios	www.sirstudios.com	support@sirstudios.com
Sisifos Games	https://www.sisifosgames.com/	sisifosgame@gmail.com
Skyloft	https://www.skyloftstudios.com/	https://www.skyloftstudios.com/contact/
SNG Studios	https://www.sngict.com/	info@sngict.com
Software Kingdom	https://www.thesoftwarekingdom.com/	softwarekingdomtr@gmail.com
Soi Games	https://soigames.com/	contact@soigames.com
Sonicmob Entertainment	https://sonicmob.co/	info@sonicmob.co
Spektra Games	https://spektra.games/	business@spektra.games
Spyke Games	https://spykegames.com/	support@spykegames.com
Stardust Games	https://stardust.gs/	info@stardust.gs
Stormling Studios	https://stormlingstudios.com/	info@stormlingstudios.com
Studio Billion	www.studiobillion.com/tr	info@studiobillion.com
Studio Gamebit	www.studiogamebit.com	contact@studiogamebit.com
Suji Games	https://suji.games/	info@suji.games
SuperMesh Games	https://supermesh.games/	info@supermesh.games
Taba Games	https://tabagames.com/	contact@tabagames.com
TaleWorlds Entertainment	www.taleworlds.com	info@taleworlds.com
Talus Studio	http://www.talusstudio.com/	info@talusstudio.com
Tayfa Games	http://tayfagames.com/	info@tayfagames.com
Teleporter	https://teleporter.gg/	partnership@teleporter.gg



LOCAL GAMING COMPANIES IN TÜRKİYE

TÜRKİYE GAME MARKET REPORT 2022

COMPANY	WEBSITE	CONTACT
Teos Games	https://www.teosgamestudio.com/	info@teosgamestudio.com
Tenet Games	https://www.tenetgames.com/	murat@tenetgames.com
Teta Games	www.tetagames.com	support@tetagames.com
THE BGR Games	https://thebgr.com/games/	info@thebgr.com
The SA Game Studio	https://thesagamestudio.com/	thesagamestudio@gmail.com
The Pack Studios		
Thorsu Games	https://www.thorsugames.com/	hello@thorsugames.com
Tiplay Studio	www.tiplaystudio.com	info@tiplaystudio.com
Tiramisu Studios	https://www.tiramisu.game/	info@tiramisu.game
Tool Games	http://www.toolgamestudio.com/	
Tosby Games	https://tosbygames.com/	info@tosbygames.com
Traxis Games	https://traxisgames.wordpress.com/	traxisgames@gmail.com
Tricksy Games	https://www.tricksygames.com/	info@tricksygames.com
Trifles Games	www.triflesgames.com	info@triflesgames.com
Tunga Games	https://tungasoft.com/	info@tungasoft.com
Twenty Games	https://twenty.games/	info@twenty.games
Two Page Games	https://twopagegames.com/	
Udo Games	www.udogames.com	info@udogames.com
Umuro Games	https://umuro.net/	me@umuro.net
Uncosoft Yazılım	www.uncosoft.com	hello@uncosoft.com
Unpredictable Games	https://www.unpredictablegames.com/	contact@unpredictablegames.com
Upperpik Games	http://upperpik.com/	info@upperpik.com



LOCAL GAMING COMPANIES IN TÜRKİYE

TÜRKİYE GAME MARKET REPORT 2022

COMPANY	WEBSITE	CONTACT
Vacuum Games	http://www.vacuumgames.com/	info@vacuumgames.com
VantaPlay Games	https://vanta.games/	hello@vanta.games
Vavraek Technology Inc	https://vavraek.com/	iletisim@vavraek.com
Velo Game Studios		
Veloxia	https://veloxia.co	hey@veloxia.co
Vercial Games	https://www.vercialgames.com/	info@vercialgames.com
Vertigo Games	www.vertigogames.co	info@vertigogames.co
Volly Game	http://www.vollygame.com/	info@vollygame.com
Volx Games	http://www.volxgames.com/	hi@volxgames.com
Voxel Studio	https://www.voxelstudio.co/	info@voxelstudio.co
Voyant Games	https://voyantgames/	info@voyantsmart.com
Waker Games	https://wakergames.com/	contact@wakergames.com
Warlock Arts	https://warlockarts.com/	info@warlockarts.com
Weez Beez	www.weezbeez.com	weezbeezgames@gmail.com
Wendigo Games	https://wendigo.games/	hello@wendigo.games
Whoops Games	https://whoopsgames.com/	info@whoopsgames.com
Wily Pumpkin	https://wilypumpkin.com/	info@wilypumpkin.com
WORA Games		
Xenolia	https://www.xenolia.com/	info@xenolia.com
Yamy Studio	https://yamystudio.com/	info@yamystudio.com
YAMY Studio	https://yamystudio.com/	info@yamystudio.com
Yeapp Game	https://yeapp.gs/	info@yeapp.gs



LOCAL GAMING COMPANIES IN TÜRKİYE

TÜRKİYE GAME MARKET REPORT 2022

COMPANY	WEBSITE	CONTACT
YILKO Games	https://www.yilkogames.com/	info@yilkogames.com
Yin Yang Games	https://yinyang.games/	hello@yinyang.games
Yolo Game Studio	https://www.yologamestudio.com/	contact@yologamestudio.com
Yurt Games	http://www.yurtgames.com/	-
Zerosum	https://zerosum.co/	info@zerosum.co
Zest Games	http://zestgames.co/	info@zestgames.co
Zinky Games	https://www.zinkygames.com/	info@zinkygames.com
Zonex Entertainment Studios	https://zonexstudios.com/	-
Zoomzo Games	https://zoomzo.games/	info@zoomzo.games
Zuuks Games	www.zuuks.com	help@zuuks.com

We would like to thank **Senem Aksakal** who assisted us in preparing the list from beginning to end.





POPULAR STREAMERS IN TÜRKİYE / TWITCH TV

TÜRKİYE GAME MARKET REPORT 2022

TWITCH

TOP 20 POPULAR TWITCH STREAMERS IN TURKEY

	FOLLOWERS	NEW FOLLOWERS	AVERAGE VIEWS	MAXIMUM VIEWS	STREAMING HOURS	HOURS VIEWED
#1 Elraenn	3.7M	1M	26.819	163.915	1014	27.2M
#2 wtcN	2.8M	223K	11.555	114.111	853	9.8M
#3 KendineMuzisyen	2.4M	260K	10.535	30.117	813	8.6M
#4 pqueen	2.1M	348K	5.261	30.934	933	4.9M
#5 Jahrein	1.7M	44K	10.275	29.372	374	3.8M
#6 Mithrain	1.6M	124K	3.872	42.563	1404	5.4M
#7 Elwind	979K	34K	6.153	16.419	328	2M
#8 Levo	768K	133K	4.088	18.678	1553	6.3M
#9 Eray	757K	318K	6.514	30.042	1185	7.7M
#10 RRAENEE	670K	336K	7.843	19.6	611	4.8M



POPULAR STREAMERS IN TÜRKİYE / TWITCH TV

TÜRKİYE GAME MARKET REPORT 2022

TWITCH

TOP 20 POPULAR TWITCH STREAMERS IN TURKEY

	FOLLOWERS	NEW FOLLOWERS	AVERAGE VIEWS	MAXIMUM VIEWS	STREAMING HOURS	HOURS VIEWED
#11 JRKZ	650K	70K	3.752	19.115	1267	4.7M
#12 Hype	597K	124K	9.999	24.905	1048	10.5M
#13 Videoyun	513K	20K	1.234	13.93	1792	2.2M
#14 Ebonivon	338K	237K	2.293	11.506	895	2M
#15 TenekeKafalar_TK	322K	36K	1.269	3.918	1711	2.2M
#16 sizophren	316K	132K	3.486	56.482	805	2.8M
#17 Crystal_LoL	313K	34K	2.07	10.528	2157	4.5M
#18 holyphoenix	292K	58K	2.11	7.429	1821	3.8M
#19 Nympea	211K	113K	1.715	6.501	1228	2.1M
#20 rootthegamer	92K	81K	3.012	25.445	631	1.9M



POPULAR YOUTUBE CHANNELS IN TÜRKİYE

TÜRKİYE GAME MARKET REPORT 2022

YOUTUBE

TOP 20 POPULAR YOUTUBE CHANNELS IN TURKEY

	SUBSCRIBERS	AVERAGE VIEWS	TOTAL VIEWS	TOTAL VIDEOS	MOST POPULAR VIDEO VIEWS (2022)
#1 netd müzik	23.5M	13.61K	53.19B	21819	233M
#2 BETER BÖCÜK	19.8M	1.01M	10.96B	1702	4.21M
#3 Enes Batur	15.8M	3.9M	9.60B	1986	76.20M
#4 OYUNCAK AVI	15.2M	347.39K	8.23B	618	24.05M
#5 OYUNCAKOYNUYORUM	11.2M	308.13K	10.47B	821	15.38M
#6 atv	10.8M	68.7K	7.21B	23246	16.68M
#7 skgames	10.3M	39.6M	346.56M	7	-
#8 Orkun Işıtmak	10.2M	2.11M	3.21B	1555	11.21M
#9 Deli Mi Ne?	8.34M	2.15M	2.05B	341	8.89M
#10 Czn Burak	8.2M	527.98K	2.74B	284	21.83M



POPULAR YOUTUBE CHANNELS IN TÜRKİYE

TÜRKİYE GAME MARKET REPORT 2022

YOUTUBE

TOP 20 POPULAR YOUTUBE CHANNELS IN TURKEY

	SUBSCRIBERS	AVERAGE VIEWS	TOTAL VIEWS	TOTAL VIDEOS	MOST POPULAR VIDEO VIEWS (2022)
#11 KanalD	7.94M	10.2K	8.90B	25522	4.97M
#12 Sevimli Dostlar	7.84M	646.81K	7.99B	642	58.81M
#13 Kafalar	7.62M	1.41M	1.97B	473	3.44M
#14 KIDIBLI Türkçe olarak	7.61M	62.85K	4.18B	467	82.38M
#15 Maşa ile Koca Ayı	6.84M	666.97K	4.04B	810	34.62M
#16 Kuruluş Osman	6.74M	244.49K	3.18B	4560	20.62M
#17 Ruhi Çenet Medya	6.62M	5.84M	821.12M	295	21.64M
#18 Çukur	6.57M	88.3K	6.84B	3857	11.48M
#19 Reynmen	6.31M	33.37M	1.62B	46	40.87M
#20 AfacanTV	6.13M	791.9K	4.19B	288	23.93M



POPULAR INSTAGRAM INFLUENCERS IN TÜRKİYE

TÜRKİYE GAME MARKET REPORT 2022

INSTAGRAM

FOLLOWERS

#1 Tuğkan "Elraenn" Gönültaş	1.99M
#2 Barışcan	1.10M
#3 elanur	1.05M
#4 Pqueen	893K
#5 wtcn	868K
#6 Mezarıcı	809K
#7 Kendine Müzisyen	797K
#8 Tugay Gök	701K
#9 Mervan	672K
#10 Hz Yasuo	663K



POPULAR INSTAGRAM INFLUENCERS IN TÜRKİYE

TÜRKİYE GAME MARKET REPORT 2022

INSTAGRAM

FOLLOWERS

#11 Duygu Köseoğlu	631K
#12 Doch	608K
#13 Unlost	597K
#14 Sese gel	572K
#15 Baturay Anar	560K
#16 Miafitz	547K
#17 Emrehan Önal	542K
#18 Ersin Yekin	490K
#19 Egoist Pati	455K
#20 Barış Bra	413K



ACTIVE PAYMENT INSTITUTIONS

TÜRKİYE GAME MARKET REPORT 2022



- Aypara Ödeme Kuruluşu A.Ş. (880)
- BRQ Link Ödeme Hizmetleri A.Ş. (898)
- Ceo Ödeme Kuruluşu A.Ş. (878)
- 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 ve Elektronik Para A.Ş. (883)
- Klon Ödeme Kuruluşu A.Ş. (881)
- Lidio Ödeme Hizmetleri A.Ş. (895)
- MoneyGram Turkey Ödeme Hizmetleri A.Ş. (871)
- Octet Express Ödeme Kuruluşu A.Ş. (874)
- Ödeal Ödeme Kuruluşu A.Ş. (868)

- Ödeal Ödeme Kuruluşu A.Ş. (868)
- Paragram Ödeme Kuruluşu A.Ş. (888)
- Paratika Ödeme Hizmetleri A.Ş. (865)
- Pay Fix Elektronik Para ve Ödeme Hizmetleri A.Ş. (882)
- Paybull Ödeme Hizmetleri ve Elektronik Para 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)
- Sundus Ödeme Kuruluşu A.Ş. (844)
- Trend Ödeme Kuruluşu A.Ş. (862)
- Tronapay Ödeme Hizmetleri A.Ş. (887)
- Vezne24 Tahsilat Sistemleri ve Ödeme Hizmetleri A.Ş. (885)
- Western Union Turkey Ödeme Hizmetleri A.Ş. (886)



ACTIVE ELECTRONIC MONEY INSTITUTIONS

TÜRKİYE GAME MARKET REPORT 2022



- A Ödeme ve Elektronik Para Hizmetleri A.Ş. (913)
- Ahlatıcı Ödeme ve Elektronik Para Hizmetleri A.Ş. (894)
- As Ödeme Hizmetleri ve Elektronik Para A.Ş. (911)
- Aköde Elektronik Para ve Ödeme Hizmetleri A.Ş. (836)
- Belbim 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)
- Dgpara Ödeme ve Elektronik Para Kuruluşu A.Ş. (893)
- DSM Ödeme ve Elektronik Para Hizmetleri A.Ş. (848)
- 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)
- Fzypay Elektronik Para ve Ödeme Hizmetleri A.Ş. (896)
- 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)
- Moka Ödeme ve Elektronik Para Kuruluşu A.Ş. (857)
- Moneypay Ödeme ve Elektronik Para Hizmetleri A.Ş. (842)
- N Kolay Ödeme ve Elektronik Para Kuruluşu A.Ş. (852)
- Nomu Pay Ödeme ve Elektronik Para Hizmetleri A.Ş. (831)



ACTIVE ELECTRONIC MONEY INSTITUTIONS

TÜRKİYE GAME MARKET REPORT 2022



- Ozan Elektronik Para A.Ş. (839)
- Paladyum Elektronik Para ve Ödeme Hizmetleri A.Ş. (834)
- Papara Elektronik Para A.Ş. (829)
- Papel Elektronik Para ve Ödeme Hizmetleri A.Ş. (914)
- ParaQR Elektronik Para ve Ödeme Hizmetleri A.Ş. (897)
- Parolapara Elektronik Para ve Ödeme Hizmetleri A.Ş. (846)
- Payco Elektronik Para ve Ödeme Hizmetleri A.Ş. (849)
- Paytr Ödeme ve Elektronik Para Kuruluşu A.Ş. (863)
- Rubik Elektronik Para ve Ödeme Hizmetleri A.Ş. (899)
- SecurIT Ödeme ve Elektronik Para Hizmetleri A.Ş. (847)
- Sipay Elektronik Para ve Ödeme Hizmetleri A.Ş. (838)
- Token Ödeme Hizmetleri ve Elektronik Para A.Ş. (840)
- Tom Pay Elektronik Para ve Ödeme Hizmetleri A.Ş. (912)
- TT Ödeme ve Elektronik Para Hizmetleri A.Ş. (870)
- TTM Elektronik Para ve Ödeme Hizmetleri A.Ş. (843)
- Turk Elektronik Para A.Ş. (827)
- Turkcell Ödeme ve Elektronik Para Hizmetleri A.Ş. (869)
- UPT Ödeme Hizmetleri ve Elektronik Para A.Ş. (853)
- Vepara Elektronik Para ve Ödeme Hizmetleri A.Ş. (845)
- Vizyon Elektronik Para ve Ödeme Hizmetleri A.Ş. (854)
- Vodafone Elektronik Para ve Ödeme Hizmetleri A.Ş. (835)



ASSOCIATIONS

TÜRKİYE GAME MARKET REPORT 2022

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



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

2021

2022



GAME EXHIBITIONS

TÜRKİYE GAME MARKET REPORT 2022

*The Game Exhibitions were postponed in 2021 due to **Covid-19**.*



- GameX
- GIST (Gaming İstanbul)



2021



2022

GAMEX 2023

Interview

What awaits the players to visit GAMEX in 2023?

What are GAMEX's contributions to the gaming ecosystem and future plans?

Held with the contribution from strong sponsors, each of which is leading in its sector, and the great support from Printed, Visual and Digital Media, GameX 2022 hosted Cosplay Contests, Esports Tournaments, Geek Bazaar Space, Drone Races, Indie Space, Board Games, Anime, Manga (Sub-culture) Space, Influencer Meetings, Esports Team Activities, Simulator and VR Spaces, where visitors had fun to repletion at B2C Halls.

Both national and international gaming and gaming technology companies broadly participated in GameX organized for the 16th time. GameX International Digital Gaming and Entertainment Fair, which annually hosts more than 100,000 young people of all ages, was held at İstanbul TÜYAP Fair and Congress Center at an area of 20,000 m2 in total.

In addition to the spaces where esports clubs and the most loved influencers in Türkiye met and chatted with their fans, and had photographs taken, breathtaking show matches were played in GameX 2022. Visitors participated in tens of prize tournaments held over 4 days to both win and have fun, and they also watched live concerts. Cosplayers from all around Türkiye and abroad participated in the Cosplay Contest representing anime characters and competing for the big prize before the spectators and the jury.

[Gamex.com.tr](https://www.Gamex.com.tr)



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



GAMEX 2023

Interview

What awaits the players to visit GAMEX in 2023?

What are GAMEX's contributions to the gaming ecosystem and future plans?

GameX B2B; Stakeholders of the gaming sector met in the GameX 2022 B2B halls organized in partnership with Game Factory. Sector professionals were provided with various possibilities such as special networking areas, meeting halls, conferences, presentations, and panels attended by domestic and international speakers as well as afterparty in the GameX B2B section including two halls with controlled entry points.

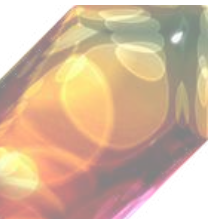
GameX 2023, is getting prepared to meet the sector and its visitors for the 17th time with big surprises in the last quarter of the year due to the election calendar and considering the growth in the market. A visitor profile qualified by young, well-trained, tech-savvy people who want to buy the right 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 45 million people and a rapidly growing digital entertainment market.

Established 1 year ago, Rönesans Fuarcılık is one of the first fair organization companies in Türkiye. CompeX, the most important Computer Technologies Fair of Türkiye organized from 1982 to 2006, has given its place to GameX International Digital Gaming and Entertainment Fair for the last 17 years.

[Gamex.com.tr](https://www.Gamex.com.tr)



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



GIST 2023

Interview

What awaits the players to visit GIST in 2023?

Within the first six years of its foundation, Gaming Istanbul has become one of the top ten gaming and esports activities of the world and maintained that position. For GIST 2023, we aim to make Gaming Istanbul one of the top three gaming and esports activities of the world by increasing the number of the visitors and professionals.

We think that we will achieve this goal in collaboration with Istanbul Metropolitan Municipality, partner universities, associations and attending brands. Istanbul has a population of approximately twenty million residents which is comprised mainly of young people, and young people love gaming. We organize such an event that that audience desires to attend through Gaming Istanbul, Indieway, Vardiya, Upgrade Entertainment and our publishers.

We will have more games and esports in GIST 2023. We are planning to increase the capacity of GIST Lan Party, the first public tournament field of Türkiye which we started under Istanbul Municipality's sponsorship. Moreover, a special area for publishers and players will be introduced in GIST 2023 as the Internet publishers are an important part of the gaming sector.

There is a significant rise in the Turkish game development sector and that rise will continue. In GIST 2023, we will again provide the indie teams coming from all over the world with free areas and enable them to introduce themselves with the visibility power of GIST.



CEVHER ERYÖREK
GAMING ISTANBUL
INDIEWAY
UPGRADE
ENTERTAINMENT B.V.
VARDİYA
CO-FOUNDER
PROJECT DIRECTOR



GIST 2023

Interview

What are GIST's contributions to the game ecosystem and future plans?

We have seen Gaming Istanbul as a school since its first year. We, our managers, our teams, and the industry have learned a lot from Gaming Istanbul. In my opinion, our first and most important contribution to the industry was to provide this know-how and to prove that a professional game event on a global scale can be organized in Türkiye and that this event can be permanent. Almost everyone in the gaming and esports industry, based on many years of experience, thought that it would be very difficult to hold a large gaming and esports event in the region. We changed that belief with the support of visionary names and brands of the gaming sector. It was not easy, but together we managed to change the global and local sector's views of Türkiye. Today, if game studios are putting Türkiye on their radar and launching some of their games at Gaming Istanbul, this is the success of everyone who started in this sector before us as well as ours.

What are we planning for the future? The pandemic and the period afterward proved two things: People won't stop socializing and they're tired of stereotypical/cliche activities. In the future, we will enrich and grow Gaming Istanbul with changes appropriate to the trends and young audience of the day. It is not our job to convince the gaming and esports audience of the old-fashioned concept of 'fair', and I think it is not possible. We will learn what they want from game industry professionals, esportsmen, internet publishers, and consumers and continue to do the gaming and esports event they want to come to. So we have plans for the future, but those plans will be shaped by our audience. Remaining as an event that can keep up with the pace of the world, in my opinion, would be the most correct perspective for an event.



CEVHER ERYÖREK
GAMING ISTANBUL
INDIEWAY
UPGRADE
ENTERTAINMENT B.V.
VARDİYA
CO-FOUNDER
PROJECT DIRECTOR





SUSTAINABLE SYSTEMS ARE A MUST IN EDUCATION

TÜRKİYE GAME MARKET REPORT 2022



As always, there are both good and bad news. There are promising developments but some policies must be reviewed right now, otherwise we won't be able to build sustainable systems.

There is a considerable interest in both the gaming sector and game design/development education. Excluding our valuable state university Muğla Sıtkı Koçman, private universities have their 70 to 80-person quotas filled up (in fact, so does Muğla Sıtkı Koçman). Namely, the American dream continues at full speed. But who will teach so many students, how, with what vision and network, is still a problem full of question marks and exclamations. Although the intentions are good, I hope we can pass this period without getting seriously hurt, especially without falling from students' and prospective student's grace and not strengthening the prejudice that "If this is the education, I can learn it myself and I don't need studying at university," while trying to support the sector, seize opportunities and get a slice of the cake. By the way, this is a creative industry which ambitious people can enter by self-education. Anyway, it isn't a topic of discussion for us. But I think that receiving training on this business in some way is critical for those people to be able to see the big picture, learn the art and craft of the business through master & apprentice system, understand the concepts from an academic perspective, and maybe most importantly, gain experience by doing their initial experiments from production to teamwork at a safe environment.

**EDUCATION
IN THE EYES OF
AN EXPERT**



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



SUSTAINABLE SYSTEMS ARE A MUST IN EDUCATION

TÜRKİYE GAME MARKET REPORT 2022



This is a very fast sector as it must be. So, it can't train every people, who are employed for specific jobs, for 1 year, even for 6 months because it doesn't have such a time. Not to mention that some people suddenly start working for another company for a little bit higher salary upon receiving that training (this is another problem that I don't want to go into detail!). Powerful companies can start some in-house training programs, but only intended for their own production line (naturally). In summary, there is an increasing demand for our Digital Game Design departments but those programs have serious difficulties due to the lack of trained instructors and poor salaries as well as vision-related tight spots.

There is also good news. Luckily, those clubs, communities and incubation centers, which are located at or in touch with the universities, also lay hands on training, and even if they follow their own agendas, they support training from different aspects. Incubation centers such as Game Circle, Digigame Startup, GamesUP, BUG Lab TEKMER and DigiAge design and implement training modules about industry, production and business development through acceleration programs. Some of them (longer ones) are intended for internal incubation or pre-incubation teams while the shorter ones can be held publicly in the form of seminars/workshops.

**EDUCATION
IN THE EYES OF
AN EXPERT**



GÜVEN ÇATAK
FOUNDER DIRECTOR AT
BAHCESEHIR UNIVERSITY
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TÜRKİYE GAME MARKET REPORT 2022



Likewise, the communities and clubs such as ÜNOC, İTÜ OTG, Beikoz and İstinyeDOT also provide various trainings, especially for their members. With game jams, they reinforce these trainings and thus directly or indirectly support digital game design departments and students.

Just at this point, the relevant departments and programs have to see that energy and seize the synergy opportunity. I think that they should build an organic bond with those structures and support them all the way, even design their courses synchronously with those structures and setups as much as possible. Apparently, we have no other chance. It is quite possible to stay up-to-date and active by catching up with both the industry and the communities. We have a clear task: we have to be synchronized going beyond the academic egos and administrative procedures.

The other good news includes a change to the hyper-casual trend which led to a boom in our sector but unintentionally resulted in a talent erosion after a certain point as well as the return to casual games and the rise of PC games. Namely, those who intend to enter and receive education about this field as well as those who are already being educated mainly want to work in big gaming projects, create game worlds, and tell brand new stories and offer experiences through games.

EDUCATION
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GÜVEN ÇATAK
FOUNDER DIRECTOR AT
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SUSTAINABLE SYSTEMS ARE A MUST IN EDUCATION

TÜRKİYE GAME MARKET REPORT 2022



Yes, they are also aware that this is a "job" but they care about not only earning money, but also creating "games". I find this shift pleasing, otherwise we could have got lost among the wheels losing our passion to create games. "Passion" is the basic mechanics of this business, and if we lose it, we can rapidly get disconnected from the industry, let alone launching new brands. We encountered with great games in the Indie Arena held during the previous Gaming İstanbul fair.

If I'm not mistaken, there were 60 projects which we selected out of 120 applications, and it was very hard to select the top 10 games. It means that we will encounter with those projects which can be played for much longer times and give a stronger "game" feeling as well as much more passionate teams from now on. In this regard, digital game design departments will have much more things to do because education is needed not only for acquiring knowledge and experience in many phases from conceptualization to marketing, but also for building start-ups at safe environments.

2023 will be very different from all aspects! Have a good year!

EDUCATION
IN THE EYES OF
AN EXPERT



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



GAME DESIGN BACHELOR'S AND MASTER'S DEGREE

TÜRKİYE GAME MARKET REPORT 2022



University	Type	Bachelor' Master's Degree	Faculty / Institute	Department
Arkin University of Creative Arts and Design	TRNC	Bachelor	Faculty of Communication	Digital Game Design (English) (Paid)
Arkin University of Creative Arts and Design	TRNC	Bachelor	Faculty of Communication	Digital Game Design (English) (Scholarship)
Arkin University of Creative Arts and Design	TRNC	Bachelor	Faculty of Communication	Digital Game Design (English) (50% off)
Bahçeşehir University	Foundation	Bachelor	Faculty of Communication	Digital Game Design (English) (Paid)
Bahçeşehir University	Foundation	Bachelor	Faculty of Communication	Digital Game Design (English) (Scholarship)
Bahçeşehir University	Foundation	Bachelor	Faculty of Communication	Digital Game Design (English) (50% off)
Bahçeşehir University	Foundation	Master	Training Institute	Game Design (English, Thesis)
Bahçeşehir University	Foundation	Master	Training Institute	Game Design (Turkish, Thesis)
Bahçeşehir University	Foundation	Master	Training Institute	Game Development Technologies (Turkish, Non-thesis)
Bahçeşehir University	Foundation	Master	Training Institute	Game Development Technologies (English, Non-thesis)



GAME DESIGN BACHELOR'S AND MASTER'S DEGREE

TÜRKİYE GAME MARKET REPORT 2022



University	Type	Bachelor' Master's Degree	Faculty / Institute	Department
Beykent University	Foundation	Bachelor	Faculty of Communication	Digital Game Design (Scholarship)
Beykent University	Foundation	Bachelor	Faculty of Communication	Digital Game Design (%50 off)
Beykoz University	Foundation	Bachelor	Faculty of Arts and Design	Digital Game Design (Scholarship)
Beykoz University	Foundation	Bachelor	Faculty of Arts and Design	Digital Game Design (%50 off)
Eastern Mediterranean University	TRNC	Bachelor	Faculty of Communication	Digital Game Design (English) (Paid)
Eastern Mediterranean University	TRNC	Bachelor	Faculty of Communication	Digital Game Design (English) (Scholarship)
Eastern Mediterranean University	TRNC	Master	Faculty of Communication	Digital Game Design (English) (50% off)
Doğuş University	Foundation	Master	Faculty of Arts and Design	Digital Game Design (Scholarship)
Doğuş University	Foundation	Master	Faculty of Arts and Design	Digital Game Design (50% off)
Hacettepe University	State	Master	Institute of Informatics	Computer Animation and Gaming Technologies (Thesis)



GAME DESIGN BACHELOR'S AND MASTER'S DEGREE

TÜRKİYE GAME MARKET REPORT 2022



University	Type	Bachelor' Master's Degree	Faculty / Institute	Department
Hacettepe University	State	Master	Institute of Informatics	Computer Animation and Gaming Technologies (Non-thesis)
Işık University	Foundation	Master	Institute of Science	Computer Graphics and Animation (Thesis)
Işık University	Foundation	Master	Institute of Science	Computer Graphics and Animation (Non-thesis)
İstanbul Aydın University	Foundation	Bachelor	Faculty of Fine Arts	Digital Game Design (Scholarship)
İstanbul Aydın University	Foundation	Bachelor	Faculty of Fine Arts	Digital Game Design (50% off)
İstanbul Bilgi University	Foundation	Bachelor	Faculty of Communication	Digital Game Design (English) (Scholarship)
İstanbul Bilgi University	Foundation	Bachelor	Faculty of Communication	Digital Game Design (English) (50% off)
İstanbul Bilgi University	Foundation	Bachelor	Faculty of Communication	Digital Game Design (English) (Paid)
İstanbul Technical University	State	Master	Institute of Training	Gaming and Engagement Technologies (Thesis)
İstanbul Topkapı University	Foundation	Bachelor	Fac. of Fine Arts, Design and Architecture	Digital Game Design (Scholarship)



GAME DESIGN BACHELOR'S AND MASTER'S DEGREE

TÜRKİYE GAME MARKET REPORT 2022



University	Type	Bachelor' Master's Degree	Faculty / Institute	Department
İstanbul Topkapı University	Foundation	Bachelor	Fac. of Fine Arts, Design and Architecture	Digital Game Design (50% off)
İstinye University	Foundation	Bachelor	Fac. of Fine Arts, Design and Architecture	Digital Game Design (English) (Paid)
İstinye University	Foundation	Bachelor	Fac. of Fine Arts, Design and Architecture	Digital Game Design (English) (50% off)
İzmir University of Economics	Foundation	Master	Fac. of Engineering and Computer Sciences	Computer Games and Technology (Thesis)
Muğla Sıtkı Koçman University	State	Bachelor	Bodrum Faculty of Fine Arts	Digital Game Design (TRNC Nationality)
Muğla Sıtkı Koçman University	State	Bachelor	Bodrum Faculty of Fine Arts	Digital Game Design
Muğla Sıtkı Koçman University	State	Master	Institute of Science	Digital Game Design and Technologies (Thesis)
Niğantaşı University	Foundation	Bachelor	Faculty of Arts and Design	Digital Game Design (Paid)
Niğantaşı University	Foundation	Bachelor	Faculty of Arts and Design	Digital Game Design (Scholarship)
Niğantaşı University	Foundation	Bachelor	Faculty of Arts and Design	Digital Game Design (%50 off)
Middle East Technical University	State	Master	Institute of Informatics	Gaming Technologies (Thesis)



GAMING ENTREPRENEURSHIP CENTERS

TÜRKİYE GAME MARKET REPORT 2022



Name	Type	Location	Game Focus
Center of Animation Technologies and Game Development (ATOM)	Pre-incubation Center	Ankara	Yes
Dokuz Eylül University DEPART BAMBÜ	Digital Game Acceleration Programs	İzmir	Yes
Information Commercialization Center (BTM)	Camp, Pre-incubation, Incubation, Post-incubation	İstanbul	
BUG Lab TEKMER	Program Pre-incubation and Incubation Center	İstanbul	Yes
CrazyHubs İstanbul	Acceleration Center	İstanbul	Yes
Digi Game Startup Studio	Acceleration Center	İzmir	Yes
Digital Animation and Game Aggregate Center (DIGIAGE)	Pre-incubation and Incubation Center	Kocaeli	Yes
Game Factory Hub	Incubation Center	Online	Yes
GameDev	Acceleration and Investment Program	İstanbul	Yes
Gameograph	Acceleration Center	Çanakkale	Yes



GAMING ENTREPRENEURSHIP CENTERS

TÜRKİYE GAME MARKET REPORT 2022



Name	Type	Location	Game Focus
GamersHub	Academy, Accelerator and Seed Investment	İstanbul	Yes
GamesUnited	Acceleration and Incubation Center	İstanbul	Yes
Gameventure	Acceleration and Funding Center	Online	Yes
Indie Games Accelerator	Acceleration Program	Online	Yes
İstanbul Gaming Startups Academy: 9999inISpace	Acceleration Center	İstanbul	Yes
İTÜ Seed #GameTech	Pre-incubation Center	İstanbul	Yes
Küçükçekmece Entrepreneurship and Innovation	Pre-incubation and Incubation Center	İstanbul	
Center Next Game Startup	Gaming Startups Contest	Online	Yes
oFON	Acceleration and Incubation Center	Denizli	Yes
OYGEM Game Development Center	Incubation Center	İzmir	Yes



GAMING ENTREPRENEURSHIP CENTERS

TÜRKİYE GAME MARKET REPORT 2022



Name	Type	Location	Game Focus
Game Development Center (OGEM)	Incubation Center	İstanbul	Yes
PikselUp	Acceleration Program	Online	Yes
STARTGATE	Acceleration Center	İstanbul	Yes
The Game Circle (GC)	Acceleration and Incubation Center	Ankara	Yes
Tiplay Apprenticeship	Apprenticeship Program	Denizli	Yes
Udo Garage	Acceleration Center	Ankara	Yes
YTÜ GamesUp	Acceleration and Incubation Center	İstanbul	Yes



CREATE INNOVATIVE AND SUSTAINABLE PROJECTS

TÜRKİYE GAME MARKET REPORT 2022



Last year, we all witnessed the acceleration in the Turkish gaming sector. In that period, countless new start-ups were established, many investors, both domestic and foreign, turned to this sector, two unicorns were born and many things were achieved globally. As a result, efforts were started across the country to open Entrepreneurship Centers, organize game jams and bootcamps and launch Game Design departments in different universities.

Game jams make a considerable contribution to the gaming sector. Organized by different entities such as student communities, entrepreneurship centers and universities, game jams bring the game development enthusiasts together. Game jams, i.e. a kind of game development marathon usually taking 48 hours, are attended by many people regardless of their experience in the sector. These attendants create teams and each of them comes up with a game prototype at the end of the day. After the event, some teams which achieve a good synergy might further develop their games and publish them on the platforms such as Steam, Google Play Store and Apple App Store. And this makes a contribution to the development of indie games. The people who attend those events such as game jams, etc. also improve their networks and strengthen their portfolios. Entrepreneurship Centers offer countless benefits for those people who want to enter the gaming sector or who are currently in the sector but aim to grow their gaming start-up. These areas that we generally call "Entrepreneurship Centers" are divided into different categories including Acceleration Centers, Incubation Centers, Pre-incubation Centers, Post-incubation Centers, etc.



SENEM AKSAKAL
GAME DESIGNER
VIDEO GAME QA TEST
SPECIALIST COMMUNITY
MANAGER



CREATE INNOVATIVE AND SUSTAINABLE PROJECTS

TÜRKİYE GAME MARKET REPORT 2022



Acceleration Centers offer such a program that accepts those people who have recently started their entrepreneurship journey and provides them with several benefits such as mentorship, training, shared offices, investor meetings, etc. These are short-term programs compared to incubation centers.

Pre-incubation Centers and Incubation Centers are the structures which support those entrepreneurs with a mature business idea so that they can incorporate. Entrepreneurs can seize the opportunities of those centers generally for 6 to 12 months. In addition to the benefits offered by the acceleration centers, pre-incubation/incubation centers also ensure university-industry collaborations, legal consultancy, free participation in some fairs and events, etc..

As you can see from the **Gaming Entrepreneurship Centers** list, there are 25 game-focused centers or programs in total in our country. There are also 2 centers which accept other ventures beyond the game-focused ones. While more than half of the list consists of İstanbul-based centers/programs, those sites offering online assistance come in the second place. And this is followed by different cities such as Ankara, İzmir, Denizli, Çanakkale, etc.



SENEM AKSAKAL
GAME DESIGNER
VIDEO GAME QA TEST
SPECIALIST COMMUNITY
MANAGER



CREATE INNOVATIVE AND SUSTAINABLE PROJECTS

TÜRKİYE GAME MARKET REPORT 2022



From the academic perspective, we see different programs including “Digital Game Design”, “Game and Interaction Technologies”, “Computer Animation and Game Technologies” and “Game Development Technologies”. Within this context, there are 12 universities offering bachelor’s degree programs and 7 universities offering master’s degree programs in our country. These include 4 state universities, 11 foundation universities and 2 TRNC universities.

Whether through game jams, Entrepreneurship Centers or academic program, the barrier to entry into the gaming sector is getting lower. Although there are not enough qualified employees yet, they continue to increase in number thanks to all these opportunities. Creating innovative and sustainable projects becomes important in order to survive in such a sector where the competition is very strong.

There is no doubt that we will see new companies in our country which will make a global impact by creating successful gaming projects in the forthcoming years. Some ideas have already started to be suggested about the new unicorn to grow out of the Turkish gaming sector in 2023. We will all see that before the year ends.



SENEM AKSAKAL
GAME DESIGNER
VIDEO GAME QA TEST
SPECIALIST COMMUNITY
MANAGER

PROFESSIONS IN GAMING INDUSTRY

Game Development

- AI • Engine • Gameplay • Graphics
- Localization • Network • Physics
- Rendering • Tools • UI

Art

- 2D • 3D • Character • Concept
- Creative Direction • Direction
- Environment • Lighting • Model • Prop
- Technical • Texture • UI • VFX
- Vehicle • Weapon

Software Engineering

- AI • Backend • Cloud • Data Analysis
- DevOps • Frontend • Full Stack • Mobile
- Project Management

Broadcast

- Camera Operation • Floor Management
- Graphics • In-game Observation
- Lighting • Producing • Replay Operation
- Scriptwriting • Sound Engineering
- Stream Engineering • Studio Management

Content & Media

- Cinematography • Copy Editing
- Game Capture • Graphic Design
- Journalism • Motion Design
- Photography • Scriptwriting • Translation
- Video Editing • Videography

Human Resources

- Compensation & Benefits
- Diversity & Inclusion • Employer Branding
- Health & Safety • Recruitment
- Training & Development • Wellness

Education

- Lecturing • Program Development
- Program Management • Safeguarding
- Teaching

Game Design

- Combat • Economy • Interaction • Level
- Monetization • Multiplayer • Narrative
- Quest • Sound • Systems • Technical
- UI • UX • World

Animation

- 2D • 3D • Cinematics • Gameplay
- Motion Capture • Particle • Programming
- Rigging • Technical

IT

- Cyber Security • Network Engineering
- System Administration • Technical Support

Talent

- Agency • Casting • Content Creation
- Hosting • Interviewing • Management
- Playing • Screen Acting • Streaming
- Voice Acting

Competitive

- Coaching • Fitness • Nutrition
- Performance Analysis • Physiotherapy
- Playing • Psychology • Refereeing
- Scouting • Team Management

Commercial

- Account Management
- Advertising Operations
- Business Development • Customer Service
- Ecommerce • Manufacturing
- Monetization • Partnerships
- Procurement • Product Design
- Product Management • Retail • Sales
- Sponsorships • Ticketing

Administrative

- Executive Assistance • Facilities Support
- Office Management • Personal Assistance
- Reception

Game Production

- Game Direction • Live Operations
- Product Management
- Project Management • Prototyping
- Publishing • Release Management
- Storyboarding • Studio Management

Audio

- Composition • Design • Engineering
- Programming • Sound Direction

Quality Assurance

- Analysis • Automation • Certification
- Compatibility • Compliance • Engineering
- Interruption • Performance • Platform
- SDET • Submission • Testing

Events

- Audio Visual • Catering
- Customer Service • Emergency Services
- Equipment Management
- Facilities Management • Hospitality
- In-game Observing • Logistics • Security
- Technical Engineering

Marketing

- Brand • Community Management
- Copywriting • Digital • Email • Influencer
- Product • Project Management
- Public Relations • Social Media
- User Acquisition

Finance & Legal

- Accounting • Analysis • Auditing
- Compliance • General Counsel • Licensing
- Mergers & Acquisitions • Payroll • Tax

Research

- Academic • Consumer • Data Entry
- Market • UX



INTERNET CAFES

TÜRKİYE GAME MARKET REPORT 2022

• 10.250 internet cafes

Our Internet cafes opened on April 10, 2021. But they closed again pursuant to the circular issued on April 14, 2021 by the provincial administration. They opened again on July 20, 2021 on condition that they would have 1 PC occupied leaving the other 3 PCs empty in 4-seat rows, be closed at 18:00, ask for HES codes at entry, and be subject to continuous surveillance by law enforcement officers. Unfortunately, this difficult period caused many cafes to cease or transfer their business. On October 25, 2021, those severe conditions were annulled, and operations started again by checking HES codes.

2021



• 7.450 internet cafes

Many of our internet cafes had to end their business against the continued impact of the pandemic as well as costs and taxes. In 2022, the number of the active cafes dramatically reduced due to closures and job switches.

2022



INTERNET CAFE PC SYSTEM PROPERTIES

TÜRKİYE GAME MARKET REPORT 2022



• 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



• Processor	i3	i5	i7	i9	
• Percentage	%10	%50	%30	%10	
• Ram	4 GB	8 GB	16 GB	32 GB	64 GB
• Percentage	%2	%40	%40	%10	%8
• Internet Speed	16 MB	24 MB	32 MB	64 MB	100 MB
• Percentage	%0	%0	%20	%20	%60

2022



DAILY INTERNET CAFE STATISTICS

TÜRKİYE GAME MARKET REPORT 2022



- 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

2021

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

15:00 - 23:00

FRIDAY - SUNDAY

9 TL - 25 TL

1.500 - 2.500 TL

50 - 60TL

2022



TOP GAMES PLAYED IN INTERNET CAFES

TÜRKİYE GAME MARKET REPORT 2022

- PUBG Mobile
Emulator

- Free Fire

- Steam Oyunları

- CS: GO

- VALORANT

- League of Legends

- Roblox

- Epic Games Oyunları

- Xbox Game Pass Oyunları



- PUBG: BATTLEGROUNDS

- Steam Games

- League of Legends

- VALORANT

- Free Fire

- CS: GO

- GTA

- Call Of Duty

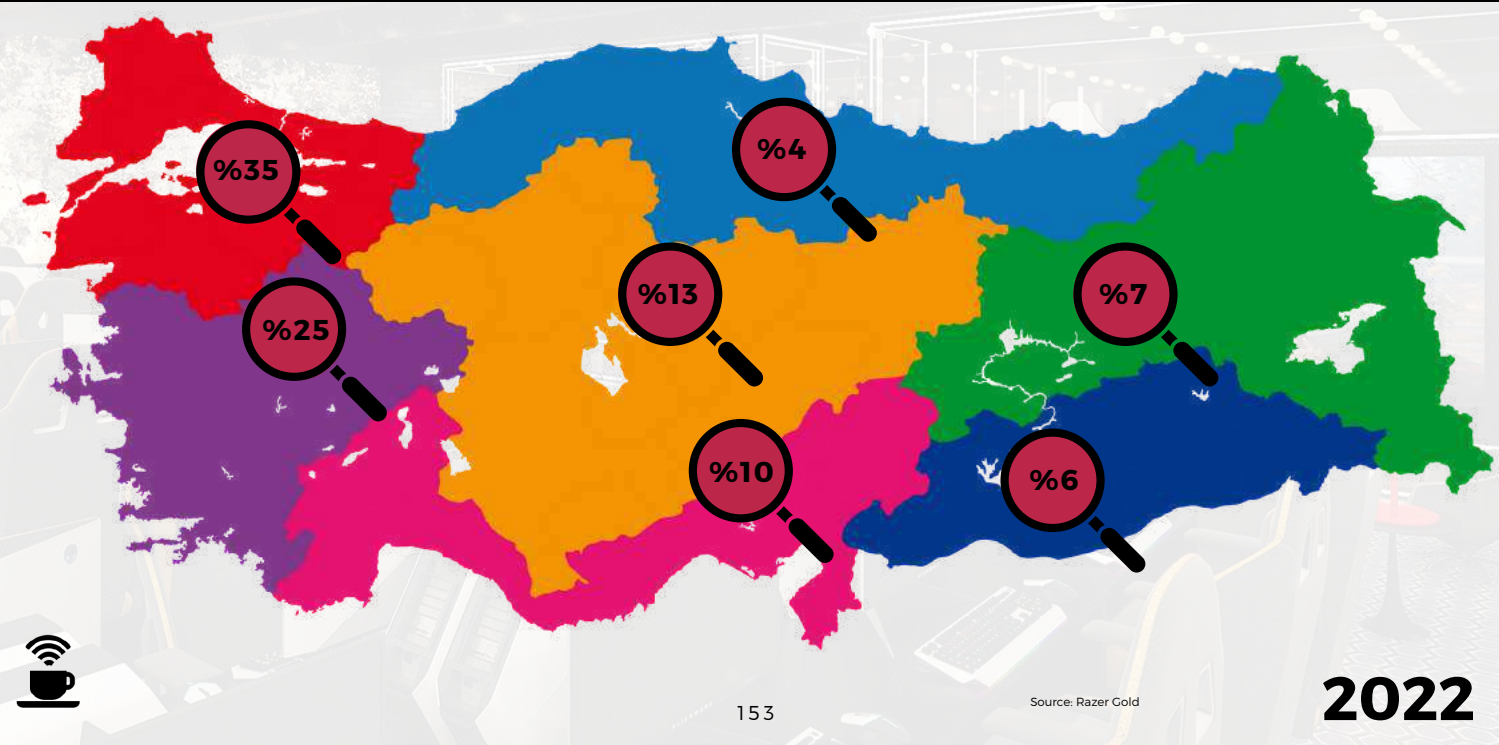
2021

2022



BREAKDOWN OF INTERNET CAFES IN TÜRKİYE

TÜRKİYE GAME MARKET REPORT 2022





KEY ESPORTS TEAMS IN TÜRKİYE

TÜRKİYE GAME MARKET REPORT 2022

Esports Teams

- 1461 Trabzon FK
- 36 Number
- 3Gün Yatar
- 5 Ronin
- 52 Orduspor FK
- ABB Aski Esport
- Adanaspor
- Altay
- Anatolia Esports
- Antalyaspor
- Bahçeşehir Esports - BK Esports
- BAL Esport
- BBL Esports
- Beşiktaş Esports
- Brosskiez
- Bursaspor
- Çaykur Rize Esport

Games Played

- FIFA Pro Club
- VALORANT
- VALORANT
- League of Legends
- FIFA Pro Club
- ZULA
- FIFA Pro Club
- FIFA Pro Club
- VALORANT
- FIFA Pro Club
- FIFA Pro Club - NBA 2K
- ZULA
- VALORANT - PUBG
- FIFA Pro Club - VALORANT - League of Legends - PUBG Mobile - NBA 2K
- CS:GO
- FIFA Pro Club
- FIFA Pro Club





KEY ESPORTS TEAMS IN TÜRKİYE

TÜRKİYE GAME MARKET REPORT 2022

Esports Teams

- Dark Passage
- Denizbank Istanbul Wildcats
- Digital Athletics
- Erzurumspor FK
- Eternal Fire
- Eternal Fire DEXGAME Academy
- EtigeT Esports
- Fatih Karagümrük
- Fenerbahçe Esports
- Fire Flux
- Fut Esports
- Galakticos
- Galatasaray
- Gamers of Future
- Gaziantep FK
- Gençlerbirliği
- Getso Esports

Games Played

- FIFA Pro Club - League of Legends
- FIFA Pro Club - League of Legends - ZULA - PUBG Mobile- PUBG - LoL Wild Rift - NBA 2K
- VALORANT - PUBG
- FIFA Pro Club
- CS:GO
- CS:GO
- PUBG
- FIFA Pro Club - VALORANT
- FIFA Pro Club - VALORANT - League of Legends - PUBG Mobile - NBA 2K
- FIFA Pro Club - VALORANT - PUBG Mobile
- FIFA Pro Club - VALORANT - PUBG Mobile - PUBG - LoL Wild Rift
- FIFA Pro Club - VALORANT - League of Legends - PUBG
- FIFA Pro Club - VALORANT - League of Legends - PUBG Mobile - NBA 2K
- ZULA
- FIFA Pro Club
- FIFA Pro Club
- PUBG Mobile





KEY ESPORTS TEAMS IN TÜRKİYE

TÜRKİYE GAME MARKET REPORT 2022

Esports Teams

- Giresunspor
- Goodguys
- gothboiclique
- Green Dagger
- Gringo Team
- Hak3 Esports
- Hatayspor
- HaZe Clan
- IF Parla Esports
- Info Yatırım Aurora
- Interrail
- İstanbul Başakşehir
- İstanbulspor
- Kafalar esportS
- Kaos Next Rüya
- Kasımpaşa
- Kayserispor

Games Played

- FIFA Pro Club
- PUBG Mobile
- CS:GO
- CS:GO
- VALORANT
- FIFA Pro Club
- FIFA Pro Club
- VALORANT
- VALORANT - LoL Wild Rift
- FIFA Pro Club - VALORANT - League of Legends - NBA 2K
- FIFA Pro Club
- FIFA Pro Club
- FIFA Pro Club
- VALORANT
- FIFA Pro Club - VALORANT - PUBG Mobile
- FIFA Pro Club
- FIFA Pro Club





KEY ESPORTS TEAMS IN TÜRKİYE

TÜRKİYE GAME MARKET REPORT 2022

Esports Teams

- Kocaelispor
- Mersin Espor
- MKE Ankaragücü
- Mod-Z Esports
- Nasr Esports
- New Worlds
- Otherside Esports
- Oxygen Esports
- Ozarox Esports
- Papara Supermassive Blaze
- Real Winner Company
- Regnum Carya
- S2G Esports
- Sakaryaspor
- Samsunspor
- Sangal Esports

Games Played

- FIFA Pro Club
- FIFA Pro Club
- FIFA Pro Club
- VALORANT
- League of Legends - LoL Wild Rift
- PUBG Mobile
- VALORANT
- VALORANT
- PUBG Mobile
- VALORANT - League of Legends - PUBG Mobile - PUBG
- CS:GO
- FIFA Pro Club - VALORANT - PUBG Mobile - PUBG - LoL Wild Rift - NBA 2K
- FIFA Pro Club - PUBG Mobile
- FIFA Pro Club
- FIFA Pro Club
- VALORANT





KEY ESPORTS TEAMS IN TÜRKİYE

TÜRKİYE GAME MARKET REPORT 2022

Esports Teams

- SECURITAS
- Sivasspor Espor
- STEEL TACTICS
- Surreal Esports
- Team Lixa
- The Chosen Few
- Thunderbolts Gaming
- TOA Esports
- Trabzonspor
- vampboiclique
- Weda Esports
- WERSCHIEDEN
- Wofdex Esports
- Yeni Malatyaspor
- Zero Zone

Games Played

- CS:GO
- FIFA Pro Club - VALORANT - ZULA - CS:GO
- ZULA
- VALORANT - PUBG Mobile
- VALORANT
- CS:GO
- VALORANT
- FIFA Pro Club
- FIFA Pro Club - NBA 2K
- CS:GO
- VALORANT
- CS:GO
- VALORANT
- FIFA Pro Club
- VALORANT



2022





KEY ESPORTS TEAMS IN TÜRKİYE

TÜRKİYE GAME MARKET REPORT 2022

University Esports Teams

- AYBU Espor (AGM Espor)
- BAU eSports
- BAUN Esports
- BTU Espor
- DEU Esports
- DOU Espor
- Gazi Espor
- Hacettepe Esports
- HBV Espor
- IAU Espor
- IDU Espor
- IKU Espor
- ITU Espor
- MAU Esports
- Medipol Esports
- METU Esports
- NISH Espor
- Selçuk Esports

Games Played

- CS:GO, VALORANT
- Halo, CS:GO, VALORANT, LoL
- VALORANT
- VALORANT, LoL
- VALORANT, LoL
- VALORANT, LoL
- VALORANT, LoL
- CS:GO, VALORANT, LoL
- VALORANT, LoL
- CS:GO, VALORANT, LoL
- VALORANT, LoL
- LoL
- CS:GO, VALORANT
- VALORANT, LoL
- VALORANT, LoL
- VALORANT, LoL
- VALORANT, LoL
- VALORANT, LoL
- CS:GO, VALORANT, LoL, WildRift





NUMBER OF LICENSED PLAYERS AND TEAMS

TÜRKİYE GAME MARKET REPORT 2022



There are
175+ licensed
e-sports teams
in Turkey.



There are
15,375+
licensed e-
sports players
in Turkey.

** There are 175 sports clubs, 61 private physical education facilities, 88 trainers and 15,440 licensed esports players, including 9,743 men and 5,697 women, registered with our federation. With the new arrangement, individual esports players are now able to make license applications on E-Devlet, and accordingly, we expect a significant increase in the number of our licensed esports players.*

Source: TESFED

2022





ESPORTS TEAMS THAT MAKE BEST USE OF SOCIAL MEDIA

TÜRKİYE GAME MARKET REPORT 2022

INSTAGRAM

	FOLLOWERS	AVG. NUMBER OF CONTENT PER WEEK	AVG. POST LIKES	ENGAGEMENT RATE
BEŞİKTAŞ ESPORTS	214	11	1376	0,66%
GALATASARAY ESPOR	191	6	956	0,50%
BBL ESPORTS	109	2	10116	9,37%
ETERNAL FIRE	93.6	3	4668	5,10%
FUTBOLIST	67.4	12	2181	3,26%
FENERBAHÇE ESPOR	62.4	0	2362	3,78%
PAPARA SUPERMASSIVE BLAZE	45.9	4	195	0,42%
FIRE FLUX ESPORTS	44.6	3	2341	5,31%
DENİZBANK İSTANBUL WILDCATS	35.1	6	749	2,20%
DARK PASSAGE ESPORTS	28.1	6	444	1,59%
SANGAL ESPORTS	16.5	2	197	1,23%
GALAKTICOS	9.158	4	100	1,14%
BAU ESPORTS	5.349	15	37	0,70%

2022





ESPORTS TEAMS THAT MAKE BEST USE OF SOCIAL MEDIA

TÜRKİYE GAME MARKET REPORT 2022

YOUTUBE

	SUBSCRIBERS	TOTAL VIEWS
ETERNAL FIRE	60.7	7.145.510
DARK PASSAGE ESPORTS	56.8	18.137.213
FUTBOLIST	38.9	6.138.424
BBL ESPORTS	36.4	4.124.257
PAPARA SUPERMASSIVE BLAZE	34	5.482.577
SANGAL ESPORTS	21.4	2.541.376
FENERBAHÇE ESPOR	16.6	2.791.765
DENİZBANK İSTANBUL WILDCATS	11.5	3.440.416
FIRE FLUX ESPORTS	8.3	462.968
BEŞİKTAŞ ESPORTS	6.62	465.284
GALAKTICOS	4.28	53.81
BAU ESPORTS	528	32.28

2022





ESPORTS TEAMS THAT MAKE BEST USE OF SOCIAL MEDIA

TÜRKİYE GAME MARKET REPORT 2022

TIKTOK

	FOLLOWERS	TOTAL POST	TOTAL LIKE
BEŞİKTAŞ ESPORTS	33.2	150	351.2
SANGAL ESPORTS	16.2	231	466.3
PAPARA SUPERMASSIVE BLAZE	14.6	261	231.3
FIRE FLUX ESPORTS	10.7	167	196.9
DARK PASSAGE ESPORTS	7.553	176	186.4
DENİZBANK İSTANBUL WILDCATS	5.994	78	39
BBL ESPORTS	5.838	17	48.6
FENERBAHÇE ESPOR	5.754	171	79.7
BAU ESPORTS	750	26	10.8

2022





ESPORTS TEAMS THAT MAKE BEST USE OF SOCIAL MEDIA

TÜRKİYE GAME MARKET REPORT 2022

TWITTER

	FOLLOWERS	AVG. NUMBER OF CONTENT PER WEEK	AVG. POST LIKES	ENGAGEMENT RATE
BBL ESPORTS	143.1	7	2009	1,40%
FENERBAHÇE ESPOR	118.7	10	294	0,24%
GALATASARAY ESPOR	89.3	7	171	0,19%
BEŞİKTAŞ ESPORTS	84.4	10	80	0,09%
PAPARA SUPERMASSIVE BLAZE	69.9	8	20	0,02%
FUTBOLIST	62.3	30	322	0,51%
ETERNAL FIRE	60.4	15	606	1%
DARK PASSAGE ESPORTS	47.4	6	625	1,31%
DENİZBANK İSTANBUL WILDCATS	38.7	9	276	0,71%
SANGAL ESPORTS	29.5	11	88	0,30%
FIRE FLUX ESPORTS	27.7	6	112	0,41%
GALAKTICOS	23.3	4	211	0,90%
BAU ESPORTS	1.583	6	7	0,45%

2022





ON/OFF ESPORTS AND GAME EVENTS ORGANIZED IN TÜRKİYE

TÜRKİYE GAME MARKET REPORT 2022

Event Name

- Anka Hell Summer Cool Events League Of Legends
- Antalya Esports Festival
- ATO Congressium Eternal Fire Esports Festival
- August 30 Deston Victory Cup
- BASE Esports Festival 2022
- Bitexen TESFED Turkish Cup 2022
- BTCTurk Be The Champion League
- BtcTurk x ESA PUBG Revival
- ESA Esports Overwatch2
- ESA Esports Supremes Spring 2022
- ESA Open Fire All Stars 2022
- ESA Open Fire Stand United
- ESA PUBG Dominion
- ESL Turkey Championship
- Istanbul Game Night September
- FIFA 22 (PS4) 1on1 Man City Cup TECNO POVA
- FIFA 22 (PS4) FUT PlayStation Plus WTCN Challenge 2022 Turkey

Event Name

- FIFA 22 (PS4) Galatasaray Challenge 2022 Turkey
- GAMEON 2022 Esports Tournaments CS:GO Tournament
- GAMEON 2022 Esports Tournaments PUBG: BATTLEGROUNDS Tournament
- GameX 2022
- Gaming Istanbul 2022
- Genshin Impact Turkey Live Stream Adventure Carnival
- Global Esports Games 2022
- Global Star Cup
- GUEST GO VI
- INDIEWAY Events (Organized 3 Times Between March - September 2022)
- INTEL ESL TURKEY CS:GO CHAMPIONSHIP
- Intel Monsters Reloaded 2022
- Intel UET LCQ LoL Tournament
- Intel UET League of Legends: Wild Rift Fall Championship
- Intel UET Legends of Runeterra Fall Championship
- Intel UET Rocket League Fall Championship
- Intel UET Summer Fest

2022





ON/OFF ESPORTS AND GAME EVENTS ORGANIZED IN TÜRKİYE

TÜRKİYE GAME MARKET REPORT 2022

Event Name

- Intel UET TFT Championship
- Intel UET VALORANT Division Championship
- Istanbul 2022 Global Esports Games
- Koç Esports Fest 2022
- Kocaeli Esports Festival
- KUCOIN CUP Counter Strike: Global Offensive
- KUCOIN CUP Mobile Legends: Bang Bang
- KUCOIN CUP PUBG: BATTLEGROUNDS
- LoL 5v5 Community Cup Vatan Bilgisayar
- Master Of Gamers Sancaktepe Esports Academy CS:GO Tournament
- Migros Brawl Stars Cup 9
- Migros Clash Royale Cup 11
- Migros Clash Royale Cup 12
- Migros CS:GO 1v1 Cup 3
- Migros Esports Clash Royale Tournament
- Migros FIFA 23 Ultimate Team Cup 1

Event Name

- Back to School Brawl Stars Tournament with Migros
- Back to School Clash Royale Tournament with Migros
- Back to School CS:GO Tournament with Migros
- Back to School Zula Tournament with Migros
- Migros Rocket League Cup 9
- Migros Veet Men FIFA 22 Final Tournament
- Migros Zula Cup 4
- Mobidictum Business Conference
- Mobile Legends Bang Bang Turkey Championship 2022
- OnGame Istanbul
- PASTAVILLA Mac&Cheese PUBG
- Protality Season 4
- Protality Season 5
- PUBG October 29th Cup Invitational
- PUBG Mobile National Championship Turkey 2022
- PUBG Invitational: Vikendi Reborn

2022





ON/OFF ESPORTS AND GAME EVENTS ORGANIZED IN TÜRKİYE

TÜRKİYE GAME MARKET REPORT 2022

Event Name

- Red Bull Campus Clutch Turkey 2022
- Red Bull Flick Turkey 2022
- Red Bull HATTRICK
- Red Bull SoloQ Turkey 2022
- Riot Games Summer Rumble
- Riot Cafe Tournaments 2022
- Rise Online World
- Turkey Esports Fair Selcuklu Congress Center
- TÜSF Esports Turkey Championship
- Valorant 5v5 Community Cup Vatan Bilgisayar
- Valorant Champions Istanbul 2022
- Vodafone Freezone Championship League Winter Season
- Vodafone Freezone Championship League Summer Season
- Yemeksepeti Protality Dropstars

** The events that we followed up throughout the year are included in the list. If you think that any online or offline event is missing, please contact us so that we can include them in the list.*

2022





BRANDS INVESTING IN ESPORTS AND GAMING

TÜRKİYE GAME MARKET REPORT 2022

- Acer
- Adidas
- Altınyıldız Classics
- Amazon
- AOC
- Arko Men
- Asist Analiz
- Asus
- Axe
- Bacar Automotive
- Bahçeşehir Üniversitesi
- Biocore
- Binance
- Bitci.com
- Bitexen
- BKM Express
- BMW
- Borusan Otomotiv
- BursaGB
- ByNoGame
- CarrefourSA
- Chupa Chups
- Coca-Cola
- Corsair
- Doritos
- ESA
- fastPay
- GameSatış
- Getir
- Gillette
- Gökral
- Grimelange
- Hawk
- HDI Sigorta
- Head & Shoulders
- Hepsiburada
- Hi2Games
- HyperX
- İnce Hesap
- ininal
- ITOPYA
- Karnaval
- KFC
- Little Caesars
- Logitech G
- Maximum
- McDonald's
- Mercedes
- Migros
- Monster Energy
- Monster Notebook
- MSI
- Nike
- Nescafe
- Nimo TV
- Old Spice
- Olips
- Omen By HP
- Ozan SuperApp
- Papara
- Paribu
- Pastavilla
- Puma
- Rampage
- Razer
- Razer Gold
- Red Bull
- Regnum Carya
- Samsung
- SteelSeries
- Supradyn Energy
- TikTok
- Tosla
- Türknet
- Vestel
- Vodafone
- Wulfz
- Yemeksepeti
- Zio
- X-Drive

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



ESPORTS GAMES

TÜRKİYE GAME MARKET REPORT 2022

- Age of Empires
 - Among Us
 - Apex Legends
 - Arena of Valor
 - Assetto Corsa Competizione
 - AutoChess
 - Battlefield 2042
 - Beat Saber
 - Brawlhalla
 - Brawl Stars
 - Call of Duty Mobile
 - Call of Duty Modern Warfare
 - Call of Duty Warzone
 - Clash of Clans
 - Clash Royale
 - Counter Strike: Global Offensive
 - DOTA 2
 - EA Sports UFC 3
 - eFootball 2022
 - eFootball 2023
 - Fall Guys: Ultimate Knockout
 - FIFA 2022
 - FIFA 2023
 - FIFA Mobile
 - FIFA Online 4
 - Football Manager 2022
 - Formula1
 - Fortnite
 - Free Fire
 - Genshin Impact
 - Gran Turismo 7
 - Halo
 - Heartstone
 - Just Dance 2022
 - Kafa Topu 2
 - League of Legends
 - League of Legends: Team Fight Tactics
 - League of Legends: Wild Rift
 - Legends of Runeterra
 - Madden NFL 22
 - Madden NFL 23
 - Mario Kart 8 Deluxe
 - Mobile Legends: Bang Bang
 - Mortal Kombat 11
 - NBA 2K22
 - NBA 2K23
 - NBA 2K23
 - NBA 2K23
 - New State
 - NHL 22
 - OSU!
 - Pokemon GO
 - PUBG Mobile
 - PUBG: Battlegrounds
 - Quake
 - Roblox
 - Rocket League
 - RUST
 - Smite
 - Starcraft 2
 - Street Fighter V
 - Super Smash Bros Ultimate
 - Tekken
 - Tennis World Tour 2
 - Tom Clancy's Rainbow Six Siege
 - VALORANT
 - World of Tanks
 - World of Warcraft
 - WWE 2K22
 - ZULA



TURKISH ESPORTS MEDIA CHANNELS

TÜRKİYE GAME MARKET REPORT 2022



- Acunn Medya
- Dijital Sporlar
- Elektronik Sporlar
- Espor Analyst
- 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

- 5mid
- Dijital Sporlar
- Espor analyst
- Espor Gazetesi
- Espor
- Espor.online
- Esporin
- Esport Times
- Esports 360 Mag
- Fanatik Espor
- Flank Esports
- Gamerbase
- Hubogi
- Hürriyet Espor
- Medya Espor

- Multiplayer
- Mynet Espor
- Playerbros
- Save Butonu
- SporX Espor
- Esporkolik
- Invade Espor
- Migros Espor
- Mobidictum
- Onedio Gaming
- Red Bull Espor
- TeknoDiot
- Bolumsonucanavari
- Shiftdelete
- Turkmmo

2021

2022

** Esports media channels are listed alphabetically.*



TOP GAMING SITES (2022 TRAFFIC)

TÜRKİYE GAME MARKET REPORT 2022



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



TOP ONLINE SALES WEBSITES (2022 TRAFFIC)

TÜRKİYE GAME MARKET REPORT 2022



- bynogame.com
- oyunfor.com
- gamesatis.com
- klasgame.com
- midasbuy.com
- kopazar.com
- kbasakalonline.com
- mtcgame.com
- perdigital.com
- vatangame.com
- oyunalisveris.com
- gold.razer.com
- foxngame.com
- dijiipin.com
- durmaplay.com
- yesilyurtgame.com
- epin.com.tr
- playsultan.com
- joyalisveris.com
- bursagb.com

** Listed according to total traffic.*



TOP ONLINE GAMING PLATFORMS (2022 TRAFFIC)

TÜRKİYE GAME MARKET REPORT 2022



- Steam
- Epic Games
- itch.io
- Battle.net
- GOG
- Rockstar Games - Social Club
- Playstore.com
- Ubisoft Store
- Humble Bundle
- Kinguin
- Origin



GAMING MAGAZINES IN TÜRKİYE

TÜRKİYE GAME MARKET REPORT 2022

Oyungezer



Level



[Oyungezer Digital Archive](#)



2022



2022



**EXPERT
OPINIONS**

TÜRKİYE GAME MARKET EXPERT OPINIONS

TÜRKİYE GAME MARKET REPORT 2022



**ALPER AFŞİN
ÖZDEMİR**

TESFED
FOUNDING CHAIRMAN
EUROPE FOUNDING
BOARD MEMBER
ESPORTS FEDERATION

We can say that 2022 was a good year for us and our community. As an output of the new sports law, our federation was granted the same status as the other sports federations in our country with the communique published on the official gazette dated November 18, 2022. With our new status, we are now able to act in a much stronger and more effective manner. In 2022, our 4th TEFED Turkey Cup was held with the participation of thousands of esports players under 11 branches. Passing the national elections, our champions participated in international tournaments and we achieved pretty good results. In the tournament held in Azerbaijan by the European Esports Federation, we ranked 4th among European countries in the Rocket League, and awarded with the silver medal taking the second place in the Efootball branch of the Montenegro leg.

We expect really good developments in 2023. We have 10-year long-term plans in the MoU we signed with the Global Esports Federation in 2022. We will also carry out many global and regional activities in the esports field within the scope of the collaboration agreements signed with the esports federations of Singapore and Saudi Arabia. We also plan to continue the global events we introduced to our country.



ERDİNÇ İYİKUL

RIOT GAMES
TÜRKİYE COUNTRY
MANAGER

We, Riot Games, celebrated our 10th anniversary in our country in 2022, and offered special experiences to raise a big excitement for our entire community remaining with us for 10 years. One of our biggest sources of pride in 2022 was that League of Legends, the first game of the company, remained as the most liked and played PC game in our country exactly for 10 years. LoL is still the most played PC game in Türkiye with more than 22 million accounts. I attach this success to our player-focused approach and constantly updating ourselves according to player expectations. Since our establishment in 2012, we, Riot Games Türkiye, haven't only shaped the game but also changed and developed ourselves along with the players. Our adventure started with League of Legends, and continued with 5 games of different genres and platforms including Teamfight Tactics, VALORANT, Wild Rift and Legends of Runeterra.

We are aware that Riot Games has a long path ahead in order to turn into a game-centric and player-focused entertainment company. We primarily aim to maintain and diversify the services we have been offering to our players in Türkiye for 10 years. We will continue to make efforts to take a part in our players' lives as a cultural value beyond the time they spend playing games, and to be present at all places wherever they are.

TÜRKİYE GAME MARKET EXPERT OPINIONS

TÜRKİYE GAME MARKET REPORT 2022



MEVLÜT DİNÇ
INVENTUNA GAMES
CO-FOUNDER
EXECUTIVE
PRODUCER
AUTHOR

It has been exactly 40 years since I started my career in the gaming sector in 1983 in the UK by pure coincidence.

And it has been 23 years since I started my gaming career in Türkiye in 2000 bringing the knowledge I acquired in the UK to my home country.

Owing to the impact of the 2001 crisis, I was often exposed to the question "Are you crazy? Why did you come here leaving a country like the UK?" But I have always mentioned and will continue to mention the importance and power of gaming.

I'm a firm believer in the young talents and entrepreneurial spirit of our country. So, we went through with our work and efforts under difficult circumstances.

In 2023, our country continues to grow in the gaming sector and secure its position in the global market. All technological developments including Blockchain, AI, etc. come into being and rise in value in games.

Our country has great potential. I hope we will get the most out of this potential as a country. Secondary school students have also been attending the conversation event "Life Is a Game" which I hold regularly. The interest in gaming is gradually increasing, and I hope it will extend to primary schools.

In addition to being a good player, it is very important to utilize the power of gaming on the way to becoming a strong playmaker country.

I appreciate and greet those who took pains with the sector and who had and will have remarkable achievements. I sincerely congratulate the people who prepared the Turkish Gaming Report conveying the developments and trends.

Long live gaming!

TÜRKİYE GAME MARKET EXPERT OPINIONS

TÜRKİYE GAME MARKET REPORT 2022



MURAT KÖMÜRCÜ
BYNOGAME
CEO

Thanks, Game Industry Report!
You will say
"Does the article begin with a thank you?"
Let's get started!

In this report, we, the industry experts ☺ are asked:
"How was your last year and what are your expectations for the next year?"

While I was writing this page, I looked at the history and looked between the lines of my old post.

According to some people, I opened an umbrella to the past rain, I even tried to straighten the sea with a hammer.
But without researching into the past and hooking on mistakes, It was not possible for me to hold a projector to my future.
After all, wasn't it the past that created everyone's future?

The past is a symptom of depression,
the present is a perspective serum,
the future is an art of probability syndrome.

Poets, musicians and screenwriters perform their arts where the paper touches the pen. Writing is the most exceptional act that allows geniuses to open up to the world. To the brightest jewels in the ByNoGame crown in game kingdom, To **Gaming In Turkey** and **Gaming Industry Report**, Thank you for giving us this pleasure.

Last year, "NFTs will turn into a dark dystopia where everyone loses their existence!" I wrote. Also, in my Campaign Turkey Evolution 3.0 Metaverse article, sarcastically,

"We shouldn't be too shocked!" I winked.
Unfortunately, if we do not make the correct diagnosis, treatment is not possible.

Now the NFT Ecosystem has almost completely collapsed...
This was no darker scenario than the destruction of the gaming community. And the veteran players who took care of their characters determined the coordinates of the next habitat...

And Back To The Game!

Why did you despise this world? Isn't that the real metaverse? Stability could only be achieved after the evil was expelled. After the metaverse demons were exorcised, the goods belonging to the players turned out to be digital artworks.

Maybe not right away; it was like the opening and closing of flowers in a documentary, with time-lapse camera plays...

If our 2 million customers are these colorful flowers, Why don't we open up to the whole world and get the rarest ones? We should open up ourselves to the world by disseminating the English language.

Our difficulties and the danger ahead will not disappear if we close our eyes. This year, we aim to make most of our team speak English and become global.

It is better for the followers to leave the leader than for the leader to follow the followers.

I guess it is my destiny to be followed by competitors in innovation. The person who plans the events to flow in the way, without taking any risks on himself,

It means he is living in a fantasy world, in a simulation.
Do not look for the key to enter through the door of the game world, not the fantasy world.

Call us... ☺
ByNoGame Wishes You Good Games!

TÜRKİYE GAME MARKET EXPERT OPINIONS

TÜRKİYE GAME MARKET REPORT 2022



NİLAY ALTAN
TÜRK TELEKOM
FIXED SERVICES
MARKETING
DIRECTOR

According to current research, there are nearly 3 billion active 'gamers' in the world. Our country, on the other hand, is the 7th country in the world where video games are most played with the number of gamers exceeding 42 million. As Türk Telekom, we continue to contribute to the game ecosystem, which has become an important part of the digital experience, and to the development of the industry, with the projects we are involved in. In this context, we add financial value to the gaming ecosystem with our business partnerships and services that we have designed by bringing the gaming world and gamers to the forefront with projects blended with new technologies and trends.

The increasing interest in the game in recent years, and the development of the e-sports and live broadcast sectors, which have achieved great success, show the importance of providing a 360-degree service to gamers. We, as Türk Telekom, provide the high-speed fiber infrastructure needed by gamers to all corners of the country and directly contribute to the development of the gaming ecosystem. In the first quarter of 2022, we launched the only game-focused brand in the industry, 'GAMEON', which we created for this purpose and will contribute to the expectations and needs of the gaming world.

With Türk Telekom GAMEON, we took part in the game ecosystem last year with game-oriented fiber internet campaigns, gamer-specific modem, brand discounts, collaborations with popular games frequently preferred by gamers, tournaments, gamer-oriented 24/7 internet support service, and many more in Turkey and broke new grounds. As Türk Telekom, we will continue to stand by gamers by embracing the ecosystem 360 degrees with 'GAMEON' in the coming years.

TÜRKİYE GAME MARKET EXPERT OPINIONS

TÜRKİYE GAME MARKET REPORT 2022



KERİM YILMAZ
GAMER ARENA
CEO & CO-FOUNDER

In 2022, the Turkish game industry broke a new record, a total of 333 million dollars was invested in game companies in the first half of the year, and we became the country that received the most investment in the game industry in Europe. Our country continued to prove its success and growth potential in the gaming industry.

We have seen that the Play-to-Earn projects, which have become popular in the last two years and appear in many places, have not met the expectations despite the large investments they have received. I think the main reason for this is too much focus on winning and blockchain technology, but it was overlooked that the main reason for players to play games was entertainment, and the gaming experience in the developed games caused the users to lose interest quickly.

As Gamer Arena, we developed our own games in 2022 and completed the development of our new product, our mobile application. We are excited to launch our application in the first quarter of 2023 and to offer our users competitive gaming experience with our own games.

I predict that in 2023, the adoption of the blockchain gaming industry will accelerate both in Türkiye and in the world, and that important steps will be taken to shape the future of the gaming industry, and that the investments and interest of major studios and publishers in this field will increase.

TÜRKİYE GAME MARKET EXPERT OPINIONS

TÜRKİYE GAME MARKET REPORT 2022



BATUHAN TERCAN
GAMER ARENA
HEAD OF
OPERATION

The geometric growth and development rate of the gaming industry continued in 2022 as well. The game industry has been changing its shell regularly, especially in the last 10-15 years, and is advancing beyond the times. With its young and dynamic structure, it adapts very quickly to all the developments in the world. In 2022, we can say that the biggest proof of this is the extraordinary speed of adaptation of concepts such as "Web3" and "NFT", which can still be considered new, within the gaming industry. With these changes, it always manages to stay new and up-to-date. In this case, it attracts the attention of every brand at a very high rate. We can say that the general player type has changed in a big way permanently.

As Gamer Arena, 2022 was a very active year for us as well. In addition to providing the players with the opportunity to compete in their favorite games and win tokens with 150+ tournaments and 70,000+ duels we organized, we also experienced the excitement of listing our cryptocurrency, GAU Token, on foreign exchanges. In 2023, we will be carrying out overseas expansions of the platform and we will be launching our mobile application by the end of March 2023. Of course, the overseas listings of GAU Token will continue. Our excitement is extremely high and we believe that 2023 will be a very good year.

TÜRKİYE GAME MARKET EXPERT OPINIONS

TÜRKİYE GAME MARKET REPORT 2022



TUNGA SANALP
JIB GAMES
CEO & FOUNDER

We left behind a year full of good news for the industry but also experienced economic difficulties. However, we had to send many valuable game developers/artists abroad. Foreseeing this and knowing that the workforce is the most important parameter of this industry, we collaborated with JIB Academy with various universities to reach new graduates, promote game production and encourage game development. We completed 2022 by bringing Polity, which we continue to develop, to pc and mobile platforms. We started 2023 with play-tests.

While developing Polity, we also aimed to provide "equal education opportunities" to individuals playing games in our country and around the world, rather than just publishing "another game". As you know, the value offered to the user by almost all products developed in the sector is entertainment. As Jib Games, what we want to do with Polity is to help the player develop intellectually. Duolingo and Udemy, which are among the most successful projects ever made in this regard, do this very simply using only the interface and are thriving. We will do the same by presenting a context to the user, and we will provide users with memorable experiences on that subject with the contexts created in our Polity world.

We have often heard a student in a mathematics class say "what will it do in my life" while learning a subject such as a logarithm. The reason for teaching these subjects is not that we will do a calculation in real life, but rather to enable problem-solving methods and tools on a subject by "establishing new connections" in the learner's brain. These neural connections will enable you to solve unexpected problems in your life, and as a result, it will become important not what we learn at that moment, but what methods and tactics we develop after what we learn. In summary, with Polity, we want to present these new models and experiences to our players beyond modern education.

No matter which social network makes people more depressed, which makes people angrier, which game is harmful and which is harmless, we call it education education education. Our door is always open to anyone who says "I understand what you want to do and I want to contribute".

I would also like to thank Ozan Aydemir and his team for preparing this report. I wish all stakeholders a successful year.

TÜRKİYE GAME MARKET EXPERT OPINIONS

TÜRKİYE GAME MARKET REPORT 2022



FATİH YALÇIN
XDRIVE
GENERAL MANAGER

2022 was a tumultuous year for the gaming industry. It generated around \$180 billion in revenue from over three billion gamers worldwide. In my view, 2022 was a corrective year for the gaming industry after two years of pandemic-induced growth. Looking back to pre-pandemic times for the gaming market, while revenues from 2020-2021 were higher than expected, 2022 was more subdued compared to those years. This may seem like a decline for the gaming market, but the total revenue generated from 2020-2022 is nearly \$43 billion higher than pre-pandemic estimates.

I believe that 2023 holds promise for the gaming industry to be an interesting year. I anticipate that the ongoing recovery in the market will continue, and growth will persist even with small figures. Speaking about xDrive: Our company, which was founded in 1983, established a new industry in Turkey with its first professional gaming chair produced in 2016. xDrive branded professional gaming chairs, born out of a skillful combination of technology, experience, and advanced engineering, were introduced to the users' liking and quickly achieved significant sales rates. Today, it continues to dominate the gaming chair market with a serious sales rate of 90%. The most important factors that have brought the xDrive brand to where it is today are the quality of its products and the satisfaction it provides to its customers.

As it is known, people spend at least 15 years of their lives sitting. xDrive produces health and comfort-oriented chairs for the work environment to ensure that this process is sustained healthily. In our design process, we develop products that are human-centered, value human beings, and protect our health and productivity, thanks to the feedback we receive from professional gamers and physiotherapists. For us, the "x" in xDrive means human, and we value people.

As one of the leading actors in the gaming ecosystem in our country, we continue to support gamers and e-sports through both the collaborations we develop with other stakeholders and the work we carry out under the xDrive umbrella. Since 2016, we have been involved in extensive e-sports events both in Turkey and abroad. We have supported local and foreign YouTubers and streamers, provided support for an e-sports-themed movie, sponsored the national e-sports team, and served as the main sponsor for many e-sports events and tournaments. While continuing our support and investments in the e-sports field, we are also strengthening our dominant position in the Turkish gaming market and continuing our international investments. We have also made significant strides in our already strong e-commerce business. We have strengthened our European operations based in Germany and built the infrastructure for our upcoming operations in America, which will start very soon.

As xDrive, we continue our investments to meet the increasing sales volume. The foundation of our high-tech factory with an annual production capacity of over 300,000 gaming chairs, planned to be located in approximately 20,000 square meters in Sakarya 2nd OSB with a \$10 million investment, is planned to be laid in the last quarter of 2023. When our factory is completed, we will become the largest manufacturer in Europe and MENA region and continue our excitement towards becoming a global brand.

TÜRKİYE GAME MARKET EXPERT OPINIONS

TÜRKİYE GAME MARKET REPORT 2022



BARİŞ ÖZİSTEK
BOĞAZIÇI VENTURES
YÖNETİCİ ORTAK

The world is passing through an important economic crisis, and gaming is one of the least affected sectors as in the previous crisis periods. Offering a big, easily accessible entertainment to billions of people especially on mobile devices at a very low cost, the gaming sector continued to grow in 2022, and I am certain that we will see strong growth in 2023 and beyond as well.

As the gaming companies have attained top quality with increased competencies and the high-performance mobile phones and other equipment to play games have become affordable, I think gaming will continue to grow crushing down other entertainment verticals.

And Türkiye switched from being a significant market for playing games to being one of the most important centers of the world in terms of game production. The most important reason is that the talents of the country are rushing to this field. Successful gaming companies arise with the combination of different competencies. With the increased global competition, gaming companies are now required to have super-qualified teams. So, talents rushing to this field are very valuable for Türkiye. I'm sure that much stronger and much more competitive gaming companies will emerge in Türkiye.

Considering esports, I think that development has slowed down. It was sure affected by the pandemic somewhat but the essential point is that esports hasn't brought a strong financial model beyond making a significant contribution to players and brands. I also think that brands haven't exactly understood esports, yet. They continue to spend more money on such fields that have far fewer viewers than esports. Esports and related fields are the best communication channel for many brands. I hope this will be better understood in 2023 and beyond.

We, as Boğaziçi Ventures, consider gaming among our primary investment fields. We are pleased to offer the first Gaming and Technology stock fund in Türkiye to investors in early 2023. Thus, we started the new year strong with our fund including the stocks of powerful gaming and technology companies that are managed as "Venture Capitals" but promising

TÜRKİYE GAME MARKET EXPERT OPINIONS

TÜRKİYE GAME MARKET REPORT 2022



İLHAN YILMAZ
MONSTER
NOTEBOOK
FOUNDER & CEO

The Turkish gaming sector broke new records last year. And we, as Monster Notebook, took the lifelong connection we have built with our customers a step forward. We organized several tournaments, openings, meetings, etc. We built a new gaming studio called Semruk Games. But what is more important to us is that we could bring entertainment and joy to our users wherever they are.

Last year was full of records and achievements for the Turkish gaming sector. The sector broke the all-time record last year with \$437 million invested, and ranked 4th in the world in terms of the investment amount received. As a company aimed at taking place at every point in the gaming ecosystem, we were very busy throughout 2022. We launched important projects in order to deepen the lifelong connection we have built with our customers.

In 2022, we enhanced our collaborations with world's leading companies including Intel, Microsoft and NVIDIA. As an example of these collaborations, we can mention about the tournament Intel Monsters Reloaded 2022. That tournament took four months and drew considerable interest from the game enthusiasts. Also attended by the international teams and individuals, Intel Monsters Reloaded 2022 ended with a fantastic final event held at the end of the year.

In the last quarter of 2022, we launched our commercial film "The Only Monster That Kids Aren't Scared of". By this film, we actually shared a story, which we had kept to ourselves for many years, to everybody. We, as Monster Notebook, explained that the happiness of our users was even more important than ranking in the top technology companies of the world while touching many people with our PCs, accessories and gaming monitors. I think that this is the most valuable wealth we acquired in 2022.

We held many meeting events throughout the year in order to increase our physical meetings with our customers, and we aim to further increase them in 2023. We are trying to grow our presence in the gaming world by building a large ecosystem. We took the gaming business, which we knew very well, a step forward by establishing Semruk Games. In this studio, we started by producing mobile games but we are planning to produce PC and console games soon.

As Monster Notebook, we continue to improve our foreign operations in line with our vision to become a global brand growing out of Türkiye. We operate in Cyprus with our Nicosia store. We are expanding to several countries including Saudi Arabia, Kuwait and Egypt through our operations in Dubai. We manage our European operations from our store located in Alexandrepplatz, Berlin. Our Berlin store operates as the biggest gaming experience store in Europe. Moreover, our UK office continues to operate without interruption as well.

Although 2023 is anticipated to be difficult in terms of economic data, I believe that the gaming sector will be among a few sectors which will continue to grow both in Türkiye and in the world.

TÜRKİYE GAME MARKET EXPERT OPINIONS

TÜRKİYE GAME MARKET REPORT 2022



MURAT KAHRAMAN
GAME FACTORY
CO-FOUNDER

Despite some slowdown compared to the previous years, gaming sector still continued to grow in Türkiye in 2022. With regard to the gaming investments, although we lost the European 1st place to UK and there was a serious decrease in investments globally, the investment volume in Türkiye continued to grow and the gaming continued to be Türkiye's leading sector.

We, as Game Factory, continued our programs also in 2022. 28 studios were graduated from the Game Factory Booster acceleration programs carried out with Google. In terms of investment, we mediated for 8 new investments increasing the number of our investments to 25 in total. 2023 will be more of a survival year for our sector. We will see differences in business models. Particularly, we expect the mobile publishers to fundamentally change their models. On the side of independent studios, the most important matter will be funding. As more studios have turned towards self-publishing, we will need people having different specialties. On growth and monetization side, there are serious shortcomings in our talent pool.

Additionally, prominent projects await us on Web3 side. As it will be harder to access funds in 2023, the studios which can't improve their expenditure and profitability will have difficult times, and those which can better manage these matters will succeed.

TÜRKİYE GAME MARKET EXPERT OPINIONS

TÜRKİYE GAME MARKET REPORT 2022



**DR. ÇAĞLA GÜL
ŞENKARDEŞ**

BOĞAZİÇİ VENTURES
İSTANBUL BİLGİ
UNIVERSITY

The fact that female producers and consumers are relatively fewer in the gaming ecosystem has long been on the agenda for those who mind inclusion in the sector. Also studied a lot in the academic world, inclusion is discussed over prejudices and acceptances as well as game design and the masculine structure of their contents. The good news is that women's perception of gaming has recently changed, and the number of female game designers have increased. A study conducted in 2021 shows that the rate of women increased by 8% on production side in 7 years considering the gender distribution of existing game developers from 2014 to 2021. (IGDA, 2021) Moreover, there are many women in the developer teams of those games that are mainly considered to appeal to men such as Assassin's Creed, FIFA, HALO and Far Cry. The consumption statistics are also promising. According to a study conducted as of 2021 by Entertainment Software Association, the rate of female players increased by 10% in 16 years from 2006 to 2022. Of course, it is also true that these data have changed dependent on cultural dynamics. For example, women play games to seek competition in France, for achievement and social reasons in Taiwan, and to keep themselves socially engaged and maintain relations in the US.

And also, Web 3.0 and a gamified world have entered our lives. Blockchain-based games and metaverse platforms have the potential to accelerate the rise in the number of women producing or consuming games. Recently started to accelerate, maybe metaverse platforms and blockchain-based games will bridge that gap between genders because they come with more inclusive designs and experience alternatives.

Leaving all these positive developments to the report 2022 with pleasure, I have one last message: "Instead of leaving the vision of an inclusive gaming ecosystem to its fate, we should continue to raise awareness by making inclusion a top agenda item for the investors and entrepreneurs in the gaming industry by supporting the global and local NGOs and platforms working in this field."

TÜRKİYE GAME MARKET EXPERT OPINIONS

TÜRKİYE GAME MARKET REPORT 2022



MERİÇ ERYÜREK

GAMING İSTANBUL
INDIEWAY
UPGRADE
ENTERTAINMENT B.V.
VARDİYA
CO-FOUNDER

BAHÇEŞEHİR
UNIVERSITY
BUG LAB
NİŞANTAŞI
UNIVERSITY İSTİNYE
UNIVERSITY
INSTRUCTOR

The Turkish gaming sector experienced a U turn in 2022 and we started to get positive results from that turn. In metaphorical terms, the semi-artificial dynamism triggered by the mediatic rise of the mobile game development companies, which I call “gold rush”, has slowed down with the maturity of the sector and saturation of some segments, and by the end of 2022, well-equipped teams have started to “extract” real gold with well-designed projects. Maybe this will not have a very positive impact on the year-end closing statements, but it will considerably accelerate the Turkish gaming sector in the next one or two decades.

While Gaming İstanbul received nearly 100 indie game applications and hosted 36 teams in previous years, this year there are over 250 applications and we are able to host more than 50 indie teams in Indieway as sponsored by İstanbul Metropolitan Municipality. In the next two years, the games developed by those teams will start to succeed in the PC and console sector.

Here, the success belongs to everyone who works together for Türkiye to become a global actor producing high-quality games, not a cheap labor source, particularly to our visionary young teams, professionals, universities and investors.

In the global market, game development is divided into two different concepts: the high-budget massive projects, and the low-budget, medium-scale impressive projects created by small but idealist creative teams which are financially far above the budget/performance expectations. Türkiye is able to become one of the biggest actors of the latter concept at a global scale with its young and creative workforce, the support of the senior and mid-level managers who know gaming and understand dynamics well, and a visionary investment perspective. Working towards this goal must be our first priority because we need at least ten years to compete in the other league.

Gaming and esports are getting rid of the effects of the big hype created intentionally, and both sectors are getting more refined. This trend will support the rise of the teams that know gaming and esports well in the market. We need to support especially education and universities in order to follow this trend and remain above the wave. Third generation game developers, esports players and peripheral service professionals are now a part of the global network, and we should primarily aim to accelerate the progress of that population constituting the experienced elements of the sector.

TÜRKİYE GAME MARKET EXPERT OPINIONS

TÜRKİYE GAME MARKET REPORT 2022



İLKER KARAŞ
ESPORTS360
BRAND
COMMUNICATIONS
MANAGER

During the last 2 years, the pandemic has changed many habits in our lives causing us to learn and adapt to the new normal. Compared to our business as usual, we, as eSports360, moved almost all our tournaments and live stream projects to online between 2022-2022. In that period, we launched PROTALITY SERIES, the most prestigious PUBG league in Türkiye and MENA region. What is more, PROTALITY went beyond itself and we created an EMEA-wide show called PROTALITY DROPSTARS with a prize pool of 4,000,000 USD which invited the most renowned European PUBG teams competing in the PUBG Global Championship, and it was livestreamed in 5 languages including Turkish. PROTALITY DROPSTARS became the most powerful event of PROTALITY history reaching more than 18 million people. Here, I must give particular mention to KRAFTON and PUBG Esports teams which cooperated with us from the beginning all that time.

Looking at our achievements in the last 2 years, I see that we produce more competitive, focused and creative things than in previous years. Starting from myself, I think this is mainly because we achieved a perfect focus. We learned how to get rid of the burdens and focus. If survival requires so, we will now focus on growing stronger in the future without losing those habits and see how the things not killing us will turn us into a monster.

For that transformation, we will move away from the Online world returning to our origin, i.e. Offline, to the field, even to the stage. We all know the position of the exciting gaming fairs and events in our lives well, and returning back will do good for all of us. Of course, I don't announce that "PROTALITY WILL HOLD AN OFFLINE EVENT!!!", but why not?;

Apart from this matter, I expect that in 2023, the impact of the rapid change occurring over the past 2 years will decrease even more, and different economic expectations and stages will arise.

TÜRKİYE GAME MARKET EXPERT OPINIONS

TÜRKİYE GAME MARKET REPORT 2022



UMUT ERSARAÇ
AWS FOR GAMES
MENA & TURKEY
SENIOR BUSINESS
DEVELOPMENT
MANAGER

In 2022, Turkish gaming companies gained success both in Europe and North America in terms of investments and games released. Türkiye also witnessed a rise in the number of game-focused investors as well as an acceleration in the incubation centers located in the region. Additionally, studios focused on developing hybrid-casual game projects rather than hyper-casual games, and they continued to consider Web3, metaverse, and blockchain technologies for their games.

Today, game developers, game publishers and almost every company supporting the gaming sector are able to access every market in the world quickly and effectively thanks to cloud technologies. We, as AWS for Games, make efforts to reach all game developers, cooperate with the investors as well as the acceleration programs and incubation centers supporting the gaming industry, and offer them the new technologies immediately. AWS for Games support the goal-oriented game developing skills utilizing the AWS services, AWS solutions and AWS Solution Partners in order to help the developers create, run and expand their games.

Looking ahead, we see that our gaming customers in Türkiye are focused on PC and console games in 2023, independent studios are increasingly turning towards cloud, and additionally, large Turkish studios and publishers will continue to develop mobile games which will succeed both regionally and globally.

TÜRKİYE GAME MARKET EXPERT OPINIONS

TÜRKİYE GAME MARKET REPORT 2022



LALE ERGİN
ESA ESPORTS &
MEDIA
CO-FOUNDER
& CEO

As a keystone of the new generation entertainment concept, video games and esports market maintained its rapid growth acceleration both in Türkiye and globally also in 2022. The most important factors for the esports followers to increase in number globally can be outlined as follows: popular esports games such as VALORANT getting bigger through franchise leagues; some mobile games such as Mobile Legends: Bang Bang, Wild Rift etc. expanding to different markets thanks to the regional leagues; and the increasing interest in the esports especially in the developing geographies.

I believe that the sector will continue to grow rapidly also in 2023 and beyond. The future potential of esports is far beyond just watching matches and tournaments because of the esports and video game contents sector getting increasingly involved in the popular culture, the professional players and teams turning into publishers that are watched and followed very much, and the resulting increase in its popularity and followers. Accordingly, we can anticipate that the esports investments will increase rapidly.

As ESA Esports and Media, we ended 2022 with very successful growth. We completed the first VALORANT Turkish Regional League, one of the most institutional leagues organized in the sector so far, in 2022 with a very successful performance. Türkiye achieved to become the most watched league by far in the EMEA region. We altogether achieved an exemplary performance by also receiving the support of the global brands that we collaborated in the league. Organizing the VALORANT World Championship 2022 in İstanbul is of course not a coincidence; it was a very important sign indicating the potential of Türkiye in the esports field.

As ESA, our future goals include organizing the most qualified, enjoyable and competitive brand league and tournament series in Türkiye by maintaining our close relationship with the gaming companies as well as creating enjoyable moments for the esports lovers by publishing contents on our digital channels. We also aim to create every content taking part in the "gaming popular culture" by going beyond being just an esports organization company, and to offer unique experiences to the video game enthusiasts both physically in ESA Esports Arena and online through the activities and organizations we realize.

TÜRKİYE GAME MARKET EXPERT OPINIONS

TÜRKİYE GAME MARKET REPORT 2022



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

This year, the distinction between gaming and esports concepts has become weaker contrary to popular belief. I have always considered this distinction as a segment study specific to marketing tools. The studies I made and the events I followed up this year has reinforced my opinion that there is no need for such a distinction. I hope this will be at the top of the agenda and become clearer in the forthcoming period once the status of TEFED is published. The gaming world was also in a closer contact with the new technologies and products such as blockchain, IDO, launchpads, defi, metaverse, gamefi, web3, NFT, etc. in 2022 during which the games became more integrated with those technologies. The developments in the mobile field led to much more intellectual property discussions in the recent year.

I think that the platforms should produce faster and more reasonable solutions in this regard. If this is not possible, the sector can focus on its internal dispute resolution mechanisms. Here, TEFED can be an important address. We also found an opportunity to collectively analyze and document the gaming-related cases and disputes by writing the Digital Gaming Cases section of the Digital Gaming Universe book which we expect to be published soon this year.

We are also pleased to have concluded a lot of investment agreements in the gaming sector this year as in the past. We hope and believe that the discussions and developments of 2022 will actually lead to more ventures, investments, success, products and solutions for gaming in the second half of 2023.

TÜRKİYE GAME MARKET EXPERT OPINIONS

TÜRKİYE GAME MARKET REPORT 2022



ARDA GENÇ
LIVAD
TECHNOLOGIES
FOUNDER & CEO

During 2022, the Metaverse concept was always on the agenda of brands and marketing agencies. While the brands were seeking ways to provide users with enjoyable and innovative experiences in the virtual worlds regarded as the future of the Internet, marketing efforts gained remarkable momentum for the games reflecting the current Metaverse idea which didn't become concrete at that time. Virtual advertising boards started to be included in the standard media plans as the in-game ads became programmatic, and a lot of brands carried out branded activations in virtual worlds. The fact that the next biggest marketing opportunity following social media would be gaming became an accepted reality in the sector. And the esports base continued to grow with every passing year becoming an increasingly more important part of the culture. While the Metaverse excitement seems no longer to be at its peak, for now, the awareness it created will probably be lasting on the gaming side. Those brands that understand, embrace, and speak the same language with the communities playing, watching, and talking about games will continue to win over Gen Z. On the contrary, those brands that stick to traditional media habits struggling to maintain one-way communication will have difficulty in creating a positive among younger generations.

At the end of 2022, the artificial intelligence-based chatbot chatGPT was opened to public, and its abilities threw many users into confusion thus, the creative power of the artificial intelligence became accessible for the first time and it was experienced by large audiences. For 2023, I anticipate that artificial intelligence will leave its mark both in the mainstream media and the gaming and marketing world replacing Metaverse's position in 2022 in a sense. I guess that gaming options will increase as the technical requirements for game development reduce thanks to the artificial intelligence. On the other hand, story and game experience will remain important, and game developers will seek new marketing channels in order to stand out in the increased competition.

TÜRKİYE GAME MARKET EXPERT OPINIONS

TÜRKİYE GAME MARKET REPORT 2022



ZAFER YILMAZ
GAME AND SPORTS
EXPERT
ENTREPRENEUR

In 2022, the gaming industry and esports continued to achieve considerable growth. Causing many people to spend more time at home, the COVID-19 pandemic probably made a contribution to that growth, too. During the lockdown, people turned to play games either professionally or to fill in time as a form of entertainment and socialization. While the mobile gaming sector was living through a real boom, large gaming companies invested in relatively mature and high-potential companies owing to that increased interest; we witnessed very important and big investment processes also in our country. However, I think that their interest, especially in Hyper-casual games, will decrease later on, and more established gaming companies with a mature user base will draw more interest.

For 2023, I think the gaming industry and esports will continue to grow with the technological advancements and increased investments. It can be expected that metaverse concepts will become more widespread in the gaming industry together with virtual and augmented reality, and other forms of content creation will increasingly become more important in the esports industry. With the increased popularity of mobile games, adding alternative payment methods to Google Play and App Stores will enable more people to access games, accordingly increasing the growth.

As more and more people start to be interested in those fields, the gaming industry and esports will become more widespread and accessible. Particularly mobile games will be in the leading position, and we will see new ventures in entertainment, competition, content, etc. fields on mobile side. I think we can see this synchronously in several different and similar sectors, particularly in media and entertainment, education, healthcare, etc.

In general, I expect that the gaming industry and esports will continue to grow considerably with the impact of several factors such as increased popularity of mobile games, technological advancements and increased investments. Although the growth will slow down with the emerging economic difficulties, the interest increased by the impact of the pandemic will continue to be efficient for all stakeholders in the ecosystem.

TÜRKİYE GAME MARKET EXPERT OPINIONS

TÜRKİYE GAME MARKET REPORT 2022



ÖMER SUNER
OZAN SUPERAPP
CEO

The gaming sector, which also includes the players constituting the most important part of Ozan SuperApp's emergence story, reached a global market size of nearly 200 billion USD in 2022 exceeding the expected growth rate. As a part and stakeholder of that growth, we also grew by 4,5 times expanding both our user pool and our financial volume.

We had a pretty good year taking the advantage of being able to touch the players and communicate with them in the same language. We knew that just talking with the players wasn't enough, so we took such steps that would ease their lives against the globally experienced financial bottleneck and inflation. In order to ease the financial lives of the players and professional esports players, we stood by the players by offering a cashback advantage for the purchases made on SN, Xbox and Steam platforms. For the game codes provided in the gaming category, we both gave the most advantageous price and offered a cashback advantage also for those purchases.

Gaming means community. In order to become an important stakeholder in that community, we will continue to create difference, speak more with the players and add value to their lives also in 2023. As Ozan SuperApp, we wish a happy new year for the entire Gaming in Turkey family, and also wish a successful year for the players and ecosystem as a whole thanks to this report regularly issued for years by that family.

TÜRKİYE GAME MARKET EXPERT OPINIONS

TÜRKİYE GAME MARKET REPORT 2022



HARUN YILDIZ
KODOBUR
GENERAL MANAGER

Following the "Boosting" effect of the pandemic on the gaming sector, 2022 was a more settled year. The narrowing on the mobile platform and its negative effect on the market size helped the sector dynamics strike its own balance. I believe that the companies will make more correct inferences and projections based on 2022 data.

The economic crisis occurred in our country and the resulting depreciation of TRY brought good opportunities to the companies exporting goods with a high added value. Many small gaming companies seized that opportunity well enough. Our company primarily focuses on console and PC platforms. Considering 2022 from this aspect, we saw that pretty high-quality games were released or seeded especially on the PC side. With our ability to "be productive also from home" which we became aware of during the pandemic, we saw that groups of 3-4 friends could release games without offices, even without companies. I think these figures and the product quality will gradually increase year by year.

As a person switched to the gaming world from Edtech, I also noticed another thing. As you know, the incomes and funds of our companies are foreign-based by 99%. Expanding the customer base to the world enables partnerships and knowledge share among companies rather than competition. I find this quite valuable for us to grow as a sector.

TÜRKİYE GAME MARKET EXPERT OPINIONS

TÜRKİYE GAME MARKET REPORT 2022



ASLI KARABULUT
ROVIO
SR. PRODUCT
MARKETING
MANAGER

2022 was a rather unsteady year for the gaming sector. The demand for games was at the highest level of all time, and there was a significant increase in mobile game downloads. But again during the same year, we observed a decrease in in-game spending and in mobile game incomes in general. There are two main factors that contributed to the decrease in mobile game incomes this year. The first one of them is that mobile game spending lagged behind among consumer priorities because the spendable income of the people globally remained under an increasing stress due to inflation. The other one is the "privacy" changes which made the mobile games available, especially on the iOS platform very difficult to scale.

The restrictions on identifying and tracking "valuable" players for the mobile games continue to create difficulties for mobile game developers, publishers and advertisers. We expect this change to the privacy policies will soon affect Google Play as well. At this point, for 2023 and beyond, I believe that those mobile game developers that focus on players while developing their games, match the user experience with in-game experience and measure the product-market fit through several tests/methods throughout the lifecycle of the games as well as those publishers that use different levers for their games to reach broader audiences will be one step ahead of the others. We already see the mobile game developers and publishers starting to shift their focus to audience researches, marketability tests and using a broad marketing mix. Additionally, after a long while, mobile game publishers has also started to use their intellectual properties, i.e. IPs, as a lever in order to reach broader audiences and turn them into "players".

TÜRKİYE GAME MARKET EXPERT OPINIONS

TÜRKİYE GAME MARKET REPORT 2022



ALİ BARUTÇUOĞLU

LOCPICK
CO-FOUNDER & CEO

Although 2022 was a challenging year for the global economy, investments in game localization did not slow down at all. And when it came to Turkish game localization, it was clear to see that even smaller publishers were starting to invest in the Turkish market.

The most significant and talked about example of this was Disco Elysium being localized into Turkish by Locpick. A few years ago, no one would have predicted that a story-heavy RPG consisting of 1.2 million words would ever get Turkish localization. After all, for a game to have a good chance of getting full Turkish localization, it had to either be an online competitive game or have a AAA publisher behind it.

Although Disco Elysium falls outside those categories, the game's publisher ZA/UM made the decision to invest in the Turkish market. To say that the player base showed tremendous interest in our monthly updates about the project's progress and the game itself would be an understatement. The community's incredible excitement and support for this project are proof of how starved Turkish players are for experiencing games in different genres in their own language.

We have no doubt that this milestone project will pave the way for many others to come.

ZA/UM was not the only company this year to localize a game in an unexpected genre into Turkish – however we cannot disclose any more information yet due to our NDAs. We will have exciting news for you in 2023!

We also had a busy year working with local game developers who are becoming very aware of how important professional game localization is. We've localized quite a few Turkish games into numerous languages this year, all of which will be enjoyed by gamers all around the world in 2023.

Good luck to all developers and publishers working on new games right now! If you ever have any questions about localization or entering new markets, we are only a message away!

TÜRKİYE GAME MARKET EXPERT OPINIONS

TÜRKİYE GAME MARKET REPORT 2022



**BURAK GÜVEN
AKMENEK**

FRAGRIST.COM &
FİBER PR FOUNDER
GAME PRODUCER

A few decades ago, nobody would have believed if they had been told about today's gaming world. We have progressed from arcade games, which were then considered equal to gambling machines, to global esports tournaments. In 2023, the gaming world and the movie world will be more intertwined. I entered this sector just for fun. But what keeps me here is the ever-evolving nature of the sector without getting monotonous. Doing what you love is a great pleasure.

We will have many new adventures with the hardware and software to be developed in the forthcoming years. Mobile gaming has opened totally different doors. For 2023, I'm very excited that we will play many games postponed due to COVID. Games continue to change with different game mechanics not only on the mobile side but also on the PC side. Specifically, seeing the mechanics of the mobile side also on the PC side is quite normal. After all, production will continue on the supply side as long as it's demanded. The most important indicator of this change is that the gaming world has become more intertwined with the world of movies, series, and even animations. For game production, I consider today's huge production budgets as a significant risk, especially for large companies.

Indie companies will continue to rise but the competition in this is divided into leagues because there is a big difference between them and the large companies. While the larger ones and smaller ones are fighting among themselves, moving from one to another is getting not only more difficult, but also more enjoyable due to the strong competition.

The only thing I feel regret for my country is that our game production boom occurred too late. While the founders, who are the same age as us, of the well-established companies such as Blizzard, etc. are able to focus on their dream games, we have recently had that boom in the sector and there are still many shortcomings despite making a relatively good start. However, our entrepreneurs, who are also the Turkish type managers, are so hardworking and eager that I strongly believe that those shortcomings will be eliminated soon.

TÜRKİYE GAME MARKET EXPERT OPINIONS

TÜRKİYE GAME MARKET REPORT 2022



**FARUK FURKAN
AKINCI**
FIBER GAMES
CO-FOUNDER

Accelerated during the last three years, our production ecosystem seems to become a little bit narrower due to the butterfly effect of the recession expected in the U.S. in 2022. We assess this process as a sectoral self-balancing and a door opening to new opportunities. We expect that the investments and labor accumulated in mobile game production and Web3 projects will be utilized on the PC side in 2023. Mobile will definitely not slow down but the fact that competition becomes riskier especially on the marketing side makes it reasonable for the relatively smaller studios to focus on intellectual property creation and embark on a quest in this field. The user costs increasing in the mobile ecosystem have also increased the production costs especially in the hyper-casual business model. And this shows us that particularly those studios with successful financial management are more likely to survive. Startups must pay attention to their cash flow during this year and put "sustainability" first during this year.

On the other hand, the narrowing retail market started to turn the games into a means of high customer loyalty for brands. Particularly, the customer engagement happening in the products and services of the brands has switched from the physical areas called POP to the gamified experience and loyalty systems that are embedded in brands' own applications. That means new business models for gaming studios. We predict that this model will grow in the forthcoming period as well.

In this regard, this year, in which new opportunities and models are expected to be introduced, also indicates a transition period which we anticipate to happen in a controlled manner.

TÜRKİYE GAME MARKET EXPERT OPINIONS

TÜRKİYE GAME MARKET REPORT 2022



BATUHAN AVUCAN
MOBIDICTUM
FOUNDER &
MANAGING
DIRECTOR

There is a slowdown in the market, and the labor contracts are cancelled one after another. This may last until June 2023. Salaries are not as high as in the past. Those companies that are financially weak will have difficulties and their talents will switch to stronger companies. In the long-term, the market will push away the weak ones and make the strong ones much stronger. There is already a slowdown in the hyper-casual market, and we witness its examples especially in Türkiye. Large hyper-casual publishers turn towards hybrid-casual and casual games by focusing on different business models. While some studios are going out of business in Türkiye, we also see many studios being built. In this period, valuations will generally decrease but those entrepreneurs who know the business well and build good teams will access funds anyway. We witness that the companies intended to go out of the mobile competition try to develop PC and console games instead. 2023 will also be the year of independent game developers.



ATIL SAMANCIOĞLU
ACADEMY CLUB
FOUNDER & CEO

The news about the Turkish Gaming Sector has always made us happy and proud in the information sector. We are already accustomed to the news about the Türkiye-based hyper-casual games always appearing on the lists of the most played games. Again in 2022, we all appreciated good jobs coming with really good investments in different fields beyond hyper-casual. Especially with the rise of Web3 and metaverse, we witnessed such instances where our startups make long-term plans and realize good projects regardless of the fluctuations in the crypto exchanges. There is no doubt that the sector will progress successfully also in 2023. We wish that this report will shed light on the sector as a whole and guide the investment decisions!

TÜRKİYE GAME MARKET EXPERT OPINIONS

TÜRKİYE GAME MARKET REPORT 2022



**MESUT CAN
COŞKUNÇAN**
DOTS.ECO
PARTNERSHIPS
DIRECTOR

What would you think if I say that you can increase the performance of your game while making a contribution to the world, environment and sustainability?

Let me tell you a bit about the background first:

We all know how much the gaming industry has developed and grown recently. Unfortunately, this growth - considering the contribution of many other related sectors - has also entered our agenda with regard to the negative environmental impact. The production of game consoles, desktop or mobile devices, the carbon emission arising from the energy consumed by hundreds of millions of players and the resulting massive plastic wastes have already become a reality in our lives.

There are several ways to improve that bad reputation such as making products of more sustainable materials. But today, there is also an innovative solution called "in-game eco-rewards" which becomes more widespread day by day. This eco-solution is based on encouraging the players to do something you want by offering eco-rewards. Namely, you offer the eco-rewards as a more meaningful and useful concept in order for the players to spend more time in the game, make more in-game purchases or watch more advertisements. Receiving those eco-rewards, the players can plant trees, rescue turtles, protect the wildlife and clean the plastics in the ocean in the real life. In other words, players make a contribution to an environmental action in the real life each time they achieve something in the game. To this end, they are awarded with a sharable personal certificate.

This eco-incentive system might become "the next big thing" for the gaming sector. This is because that today almost all people from the young to the old have concerns about environmental issues and global warming. So, people naturally want to make positive and meaningful contributions in this regard. This actually means "a big opportunity" for the gaming companies. Because it is possible to find a solution with a win-win business model without disruption by improving the game performance and making an environmental contribution. These eco-rewards have a positive effect on all parameters including engagement, retention, monetization and brand reputation. For this reason, I can easily say that those who seek new and useful contents for their games can try this environmentalist business model. Thus, we can not only make a contribution to sustainability and environment but also achieve a better game performance.

TÜRKİYE GAME MARKET EXPERT OPINIONS

TÜRKİYE GAME MARKET REPORT 2022



YEŞİM ALGAN
RAZER TURKEY
COUNTRY MANAGER

With the changing world, war and economic balances of 2022, we again see that digital entertainment, digital services and gaming products mean a safe harbor for many investors and platforms. While the world is facing another polarization risk, we witness the importance of digitalization and the accompanying services once again. As the chip crisis still affects the world negatively, seeing the affiliated sectors narrowing is not surprising at all. But during such crisis periods, it is very important to provide digital service continuity, be able to manage them, ensure their free movement and offer them to the users through an accessible product under all circumstances.

Last year, Türkiye proved that its region was always present in this field under all circumstances, and that it was a strong market. We achieved to remain essential for the users again with our services and safe infrastructure provided in the current high inflationary environment. I am happy to come over a difficult year even growing stronger than before.

For the new year, the new adventures as well as the growth-driven market trends make the Razer Turkey and Razer Gold teams more excited. We aim to become one of the most popular gaming/entertainment/digital service brands of the year by releasing new digital and hardware products through new channels with an uninterrupted and safe service understanding as well as our advantageous position addressing to broad audiences, and I already believe that we will reach this goal.

TÜRKİYE GAME MARKET EXPERT OPINIONS

TÜRKİYE GAME MARKET REPORT 2022



TUGAY SAKAOĞLU
EMBED
CO-FOUNDER

As EMBED, we stepped into a new process fully qualifying as a corporate on early February 2022. In the first stage, we put emphasis on live stream and organization management but then, we included consultancy, promotion/advertisement videos and moderation items in our business branches realizing the size of the business opportunities and our abilities. We achieved rapid growth in our first year as a corporate adding 15 new teammates to our team, and providing employment opportunities in the sector. In addition to our field and live stream management efforts in gaming fairs such as GAMEX, Gaming Istanbul, etc., we also continued to make efforts for online tournament management. We made a name for our company in the sector in Türk Telekom GAMEON, Intel Monster Reloaded CS:GO Tournament and Pastavilla Mac & Cheese PUBG: BATTLEGROUNDS as well as many successful projects. In that process which we started with the small investment of our own, we could rapidly focus on our growth last year as our network trusted in us and new brands met with us.



ALİ BAKİ DUMAN
EMBED
CO-FOUNDER

Last year was more of a growth year for EMBED. In 2023, we want to reap the fruits of our investments and efforts. In this regard, we not only want to host our own organizations within the structure of EMBED, which we started for livestream management but now intend to continue to proceed on our way as an agency, but also to provide the sector with new ideas in order to move it away from the customary works.

TÜRKİYE GAME MARKET EXPERT OPINIONS

TÜRKİYE GAME MARKET REPORT 2022



ALPER ÖZKAN
ASUS TURKEY OPEN
PLATFORM WORKING
GROUP TECHNICAL
PR MANAGER

As the competitive games became widespread, professional gaming reached a whole new level. Personal ability is still the biggest factor to win the game but with the development of new technologies, the available equipment has become more influential in the gaming performance. The monitor and the peripherals are among the most important components which the player directly interacts with to react. We see that the group which value the hardware at most is the professional players group who want to get the highest performance from their equipment and increase their chances to win even by seizing the smallest possibility in competitive gaming. On the other hand, there is an intermediate players group which do not have a commercial relationship unlike the professional players but want to succeed especially in online competitive games and invest in advanced equipment.

Users mostly prefer such monitors that have Adaptive-Sync support and a refresh rate higher than 144Hz. Although FHD resolution still remains widespread, the number of the people preferring the 1440p and 4K models has significantly increased in parallel with the developments in the graphics card technologies. Combining the realistic color depth and quick response performance, our FastIPS technology enables the users to have an advantage over their rivals by obtaining high-quality, sharp images. We, as ASUS, also provide a 3-year warranty for our monitors aiming to ensure that the buyers use their equipment safely for a long period of time. In the CES fair, we blazed a trail again by introducing world's first professional gaming monitor with a refresh rate of 540Hz. We offer advanced gaming hardware to the players with our new OLED gaming monitors and customizable DIY keyboards. We, as ASUS, will also continue to provide the users with the most innovative and high-performance models in 2023.

TÜRKİYE GAME MARKET EXPERT OPINIONS

TÜRKİYE GAME MARKET REPORT 2022



TUNÇ AFŞAR
PLAYERBROS
CO-FOUNDER

The gaming sector and the esports ecosystem continued to mature at an expected speed also in 2022.

We can clearly see that the interest shown in digital games has increased with the diversity of the games appealing to all ages. We witnessed the worldwide tournaments and a record number of live streams held for some games despite being very young.

In a period of more diversified technological products and services, I think the increased competition in esports fields is also very encouraging for increasing the competition among brands. This has brought a new advertisement model which enables many brands from several sectors to reach their audience through influencers or tournaments.

Türkiye has recently covered a significant distance for both PC games and mobile games. As competitive games attract considerable attention, brands consider it as a directly proportional market. In 2023, it will be pleasing to continuously see the new strategies of the brands in terms of business models and also to see them reaching a high-profile success as the market grows bigger, which is quite important.

Past our 5th anniversary in the sector in 2023, we, as Playerbros, will also excitedly continue to follow the developments in the esports world and share them to the esports fans.

TÜRKİYE GAME MARKET EXPERT OPINIONS

TÜRKİYE GAME MARKET REPORT 2022



ÇINAR ERGİN
ARİSTO İLETİŞİM
AGENCY PRESIDENT

The gaming sector had a significant growth by reaching its peak during the pandemic in Türkiye as it did all around the world. Furthermore, the sector could not reach its previous speed in the new normal period following the pandemic contrary to the expectations. Instead, the gaming market progresses with an upside growth. Research suggests that the Turkish gaming sector will continue to grow and be profitable in the forthcoming period. According to the “Global Entertainment & Media Outlook” report by PwC (PricewaterhouseCoopers), Türkiye is estimated to become the fastest growing video games market between 2021 and 2026 at a compound growth rate of 24.1%. Türkiye is followed by Pakistan (21.9%) and India (18.3%), respectively.

The gaming sector will also indirectly contribute to the development of the entertainment sector. We expect that the creators will create increasingly more contents on the social media and other online publishing platforms and these contents will be followed up with an increasing interest. Accordingly, this will make other sectors and fields profitable in addition to the revenue generated by the gaming sector alone.

Considering the gaming investments, Türkiye is the most invested country in Europe and the Turkish gaming start-ups received a total investment of \$333 million in the first 6 months of 2022. In the most invested countries ranking of Europe in the gaming sector, our country is followed by the UK with \$158 million and Norway with \$60 million, respectively.

Given that the Turkish gaming sector received a total investment of \$266 million in 2021, it has already exceeded the total amount invested in the previous year even considering the investments received in the first half of 2022. For the Turkish gaming sector, this is a very pleasing development which breaks its own record and gives important hints about the future.

TÜRKİYE GAME MARKET EXPERT OPINIONS

TÜRKİYE GAME MARKET REPORT 2022



ENGİN YÜKSEL
REDIVIDED STUDIOS
CO-FOUNDER &
GAME DIRECTOR

A little good, a little bad!!!

There is a more vivid year ahead...

Almost every year, we globally witnessed how much the gaming sector and accordingly the gaming studios grew in terms of growth and potential also in 2022, and that was particularly obvious from the acquisitions.

It seems that the strong progress of mobile games (Casual and Hyper-casual) might be a little bit interrupted this year. We can still observe how it turns into a more difficult market due to the demand in the simple gamification model.

Compared to the last 3 years, there was a deficiency felt this year as the workload got bigger in PC/Console-based games and the mobile stole a role.

I think the PC & Console platforms will globally stand out again in 2023.

How will the Turkish gaming sector evolve?

The Turkish gaming sector is currently at a very early stage in the PC & Console base, and despite developing rapidly, it will take at least 3 years to show a snowball effect in this field.

During this year and beyond, startups and developers might be required to play for high stakes; we are so close to level up.

I think we will see the innovative ideas to partially expand in the investment network in general this year.

TÜRKİYE GAME MARKET EXPERT OPINIONS

TÜRKİYE GAME MARKET REPORT 2022



ÖYKE CAN ASAAD
BRAND & MARKETING
PROFESSIONAL
(GAMING & ESPORTS)

The hot topic for this year was Google's announcement that it would stop the Stadia project, which it started with great hopes and promises, in January 2023. Although the idea of being able to play games on cloud platforms without being connected to a computer seems very interesting in theory, it seems that as the end-user side still needed devices such as monitor, mouse and keyboard Stadia has not been able to fully fulfill the performance, freedom and mobility it promised. However, due to the fact that it is a new technology, we were faced with the news of the shut down of the program, which is not very surprising, when they could not add games with a popularity that could compete with other platforms in terms of content, as well as the technical problems that emerged in the platform.

Although cloud technology has great promise for the future of the gaming industry, it seems that a similar breakthrough needs to take place in gaming equipment to make Cloud's debut. A future where we can connect to multiplayer games in the AR or VR environment via cloud platform with a glasses and keyboard instead of a monitor, and much more mobile and comfortable game controllers instead of a mouse is not that far away.



SEMA YILDIZ
ACER TURKEY
MARKETING
MANAGER

2022 was a very active year in terms of esports. In the second quarter of the year, we held our online tournament Predator Sim Racing Cup. In this tournament, Türkiye obtained the highest number of registrations among EMEA countries. We also ranked among the top countries in the EMEA Predator League and Rocket League we held in the last quarter. In both tournaments, we awarded the winners with cash prizes and professional gaming hardware.

We will organize the EMEA Predator League again in the last quarter of this year. Unlike the previous year, we think of organizing our local tournament with those games that are popular in Türkiye.

While there was an increase in the number of gaming laptops in 2022 compared to the previous year, we, as Acer, also increased our sales volume and market share. In 2023, Acer Nitro and Predator Helios models will go far beyond the expectations of the players with their renewed technology and design, increased cooling performance, monitors with high refresh rates, and many other superior features.

TÜRKİYE GAME MARKET EXPERT OPINIONS

TÜRKİYE GAME MARKET REPORT 2022



BATUHAN ÖZMEN
GAMING IN TURKEY
MENA | EU

DIRECTOR OF
COMMUNITY &
INTERNAL
OPERATIONS

While the Turkish game industry was struggling in terms of turnover in 2022, it developed itself in different areas. The turnover of the Turkish gaming industry had increased to 1.2 billion dollars in 2021 and we estimate this figure to be around 625 million dollars in 2022. These data also reveal the wounds of the Turkish gaming industry against the dollar.

But on the other hand, gaming education also becomes increasingly popular in Türkiye. In 2022, hundreds of universities and educational institutions have a game design and game development departments in Türkiye. This shows that Türkiye is now able to train the talents, who are needed for the future growth of the gaming industry, by itself.

Additionally, the Discord platform has also become a brand-new channel for brands to communicate with their players. Offering many features to the players, Discord has become an important platform in terms of enabling players to communicate with each other, play games in teams and create events.

And the brands have started to include Discord in addition to their usual social media channels this year to reach the players who prefer that platform almost every day. Organizing several events, sweepstakes, and tournaments to draw the communities to their hosts, brands seem to pay more attention to this channel and increase their communication frequency also in 2023.

TÜRKİYE GAME MARKET EXPERT OPINIONS

TÜRKİYE GAME MARKET REPORT 2022



MİRAC ÖZERCAN
ARİSTO İLETİŞİM
SENIOR BRAND
MANAGER

We can say that we couldn't understand how 2022 passed. The reduced impact of the pandemic which had captivated the whole society for more than 2 years resulted in relieving the stress felt by everyone. After 2 years of restrictions, we have finally turned back to our normal lives and started to spend more time out. However, it doesn't mean that we have moved away from the games which give color to our lives. This is because our phones provide great convenience not only for communication but also for fulfilling any personal needs and activities. Our lives turned to the normal course in 2022 but playing mobile games, which became an important habit during the pandemic, continued in the same way. Waited for excitedly to come together, the gaming fairs started to reopen and we were immersed in that colorful world.

When I was 5 or 6, I was dreaming and asking myself "How will this game look like after 15 years?" but now we see that dream turned into a reality and play an active role in it. The innovations taking place in the gaming sector also attract us to that fascinating world. On the other hand, we used to have doubts about the Metaverse concept standing out as the highest-end technology, but now we follow up on its details live. These developments are so impressive but we have to pay attention to the importance of correct information transfer, useful content, and proper guidance.

The rapid growth in this sector enables us to go deep into the digital world so we can closely follow up on innovations. However, whether individual or corporate, many companies that want to gain a place in their magic world are required to make more efforts and care about creativity paying attention to avoid monotony in their production processes. Like all sectors, the gaming sector is also fast developing. It is necessary to closely follow up the global developments and always stay one step ahead in terms of innovation to be the best.

I believe that this entertainment world witnessing intensive competition will surprise us with innovations also in 2023. Maybe we will see different companies entering the gaming sector this year. So, the forthcoming days are expected with excitement to bring significant innovations which we are looking forward to taking part in.

TÜRKİYE GAME MARKET EXPERT OPINIONS

TÜRKİYE GAME MARKET REPORT 2022



OZAN AYDEMİR
GAMING IN TURKEY
MENA | EU
PRESIDENT

In 2022, we are experiencing the economic repercussions of the fluctuations in international politics all over the world, in Türkiye as well. Especially the loss of the strength of the TL against the Dollar has greatly affected the Turkish gaming industry and continues to do so. Although we are in a very good position regarding the number of players, the economic conditions force the players' purchasing power.

The average dollar rate, which was 8.9 TL in 2021, jumped to 16.58 TL in 2022. This has affected the industry. Although the players whose purchasing power does not increase, still spend money on games, which are their biggest hobbies, the value of the money they spend on the game decreases. Even though some game companies regulate their in-game economies or game sales prices according to Turkish conditions, the majority continue their global strategy. Especially, the fact that the new big games on PC and console platforms have price tags such as 800 – 1500 TL makes it very difficult for the players. In other words, to be able to play a game with a global sales price of \$80 (which is not a very expensive figure for a new game), Turkish players have started to follow discounts and seasonal campaigns.

While some players tried to solve this problem to some extent by switching to a monthly subscription system such as PlayStation Plus, or Xbox Game Pass, some players started to shift to mobile and PC games in the free-to-play category. Hyper-casual games have gradually ceased to be a trend and have been replaced by casual and mid-core-casual games. Battle Royale, FPS, Racing, Sports Strategy, and MOBA game genres remain the most popular genres. Türkiye on mobile in 2022; While we prefer Subway Surfer, PUBG Mobile, Roblox, 101 Okey Plus, Words Of Wonders, Free Fire, Mobile Legends, Genshin Impact, Head Ball 2, and similar games, when we look at PC and consoles; Featured games of God of War: Ragnarök, Genshin Impact, PUBG, Lost Ark, VALORANT, LoL, CS: GO, Minecraft, Roblox, Call Of Duty.



Everything About The Game And The Gamer

ByNoGame.com



ByNoGame has assume two main tasks in the game world:

1. Providing the original **e-pin** and **digital codes** of the games from the game companies and delivering them to the players.
- 2.By building a strong bridge between the players and the games; to create a secure marketplace (middleman), which mediates the sale of items and skins among the players.

We can define it like this:

“ByNoGame is both Amazon and Ebay for gamers.”

In addition, ByNoGame has been providing game publishers (streamers) with donations from their fans for 6 years.

Today, millions of players can turn their spiritual love into material passion and transfer them to the publishers they admire with the help of ByNoGame.

18 years have passed since the creation of our internet cafe with two computers in a narrow dead end in the Çiğli district of İzmir. We have cured the problems of children who do not have a credit card; We provided game products and made them accessible to children. With Bynogame, buying gold bars in Knight Online is a child's play now. We registered the domain **bynogame.com** in 2007, when the instant messaging program messenger exploded. After obtaining the patent of our brand, the small shopkeeper Pashanet Cafe transformed into the powerful platform ByNoGame with a magnificent metamorphosis!

Today, in our 15th year, we provide 24/7 service to our 2 million members with 40 teammates. In the future, we can bring all the players in the world together on this platform, so that they can speak the same language.

We have been supporting many esports teams, esports players and game publishers for years. We create resources for our youth by transferring the money we earn from the sector to the same community.

We aim to create a global Turkish brand by increasing our foreign customer ratio, which is 7.5%, after globalization and providing foreign currency inflows to the country. on the other hand, we aim to create a global Turkish brand by swimming different players from all nationalities in the same pool.

ByNoGame is an active web platform that has been providing all the digital needs of gamers for 15 years.

The strong light reflected from the prism of ByNoGame, the bright star of the game world, has always been a guide for young players!



[Bynogame.com/tr](https://bynogame.com/tr)



Twitch.tv/bynogame



Instagram.com/bynogamecom/



Youtube/bynogame



Twitter.com/bynogame



Tiktok/bynogame



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

12 years
with
increasing investment

Coca-Cola
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 Minera, 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



[Twitter.com/CocaColaTurkiye](https://twitter.com/CocaColaTurkiye)



Facebook.com/cocacolaturkiye



Instagram.com/cocacolaturkiye/



SHOW YOUR POWER!

Show Your Power with Türkiye's fiber power Türk Telekom's gaming and gamers exclusive brand **GAMEON!**



Türk Telekom, which has a long history of more than 180 years, is Türkiye's first integrated telecommunications operator. "Türkiye'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 Türkiye 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 Türkiye, 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/)



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

BEST PLACE FOR COMPETITIVE GAMING



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 active since March 2020 and allows one-on-one Duels and Tournaments with single/multiple participation in more than 20 games played on mobile, PC, and consoles. Thanks to the duels, players have the chance to participate in the fights whenever they want, from wherever they want, and to win.

More than 200,000 duels have been played and 260 tournaments have been organized 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 world. In November 2021, Gamer Arena held the public offering of its cryptocurrency Gamer Arena Utility Token (GAU) in Türkiye, and the GAU Token started to be used as the only valid currency on the platform.

Gamer Arena aims to provide a much better experience to players by developing its games and integrations with popular games in 2022. 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 shortly.

Gamer Arena was founded with the mission of being one of the largest competitive gaming platforms in the world and continues to work with the vision of giving fun, satisfaction, and inspiration to every player it touches.



Gamerarena.com



Twitter.com/gamerarena_com



Discord.gg/Gamerarena



Facebook.com/gamerarenacom



Instagram.com/gamerarena_com

PLAY TO DISCOVER,
MORE TO IMPROVE!



Explore & Construct & Expand & Socialize





Polity started its journey in 2018 as the dream of a small development team. Nowadays, this dream is realized by **Jib Oyun Yazılım ve Pazarlama A.Ş. (JIB Games)** is transforming into a huge gaming platform. With its structure that is also open to content developed by players, the game 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 2022, 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 on new professions by paying attention to the feedback of Polity players, who are majorly from Europe and the 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 where players can train and develop their 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



Discord.gg/polity



Instagram.com/polityonline/

xDRIVE GAMING CHAIR *BRAND OF* TÜRKİYE



@xDriveGaming

xDrive.com.tr/en



xDrive, which was founded under the name "Yıldız Çelik Büro Mobilyaları" in 1983, started with the production of metal chairs and continued with office chair production. In 2016, xDrive became the first company in Turkey to produce gaming chairs, and with investments in its production facilities and assembly lines, it increased its production capacity and entered the corporate structuring process. In 2021, it continued its corporate structuring process with a change in its name to XDRİVE MOBİLYA SANAYİ VE TİCARET LİMİTED ŞİRKETİ.

In addition to its groundbreaking products, **xDrive** has established a new sector in a short time with its production and sales methods and has succeeded in dominating the sector. To achieve the same success in foreign markets, xDrive has increased its investments in exports and offers its customers OEM and ODM services as well as the xDrive brand.

As the largest gaming chair manufacturer in its region, xDrive continues its investments in production to become more competitive day by day with its location and production power. With the land investment it made in Sakarya 2.OSB, xDrive will start building a new factory that can produce 1000 chairs per day when the factory project is ready, and will continue to draw strength from technology and inspiration from innovation.



[Xdrive.com.tr](https://xdrive.com.tr)



[Linkedin/xdrivetr](https://linkedin.com/xdrivetr)



Youtube/xDriveOyuncuKoltuklar



Twitter.com/xdrivetr

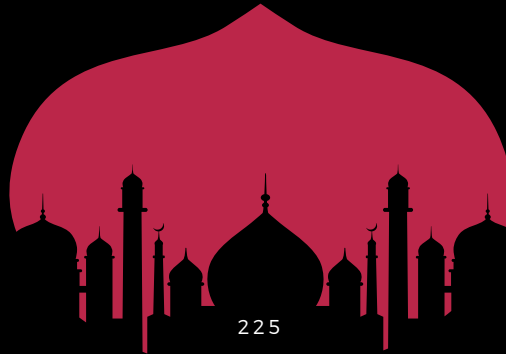


Instagram.com/xdrivetr



Facebook.com/xdrivetr

WHAT ABOUT MIDDLE EAST GAME MARKET?



MIDDLE EAST

COUNTRY RANKING BY REVENUE

- Turkey: 625 Million USD
- Saudi Arabia: 1 Billion USD +
- Iran: 650 Million USD + / -
- Israel: 550 Million USD + / -
- Egypt: 350 Million USD + / -
- United Arab Emirates: 400 Million USD + / -
- TOTAL: 6 Billion USD 2022 Revenue + / -

(Middle East & Africa)

Source: Newzoo - 2022 Free Global Game Market Report



- Population: 1.8 Billion + / -
- Online Population: 1 Billion + / -
- Number of Players: 500 Million + / -

(Middle East & Africa)

2022

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Information Note

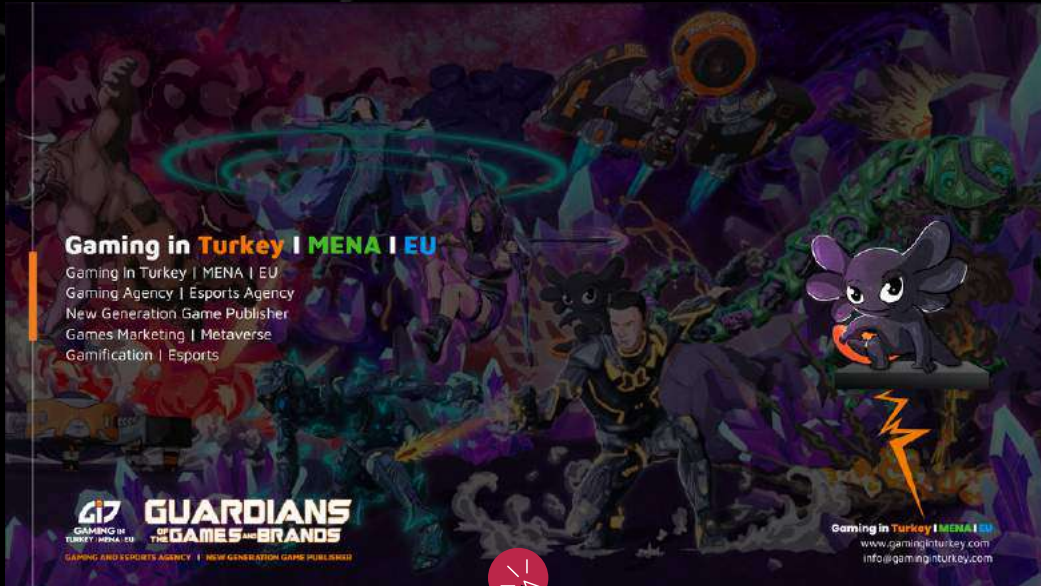
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TÜRKİYE GAME MARKET 2022 REPORT