



**TURKISH MMO
MARKET**

e-Genie tells it all !!!



www.gamesultan.com



MARKET OVERVIEW

Southeastern Europe and Southwestern Asia (that portion of Turkey west of the Bosphorus is geographically part of Europe), bordering the Black Sea, between Bulgaria and Georgia, and bordering the Aegean Sea and the Mediterranean Sea, between Greece and Syria

	PAST	CURRENT
Foreign Direct Investments	averaged less than \$1 billion annually	prospective EU membership are expected to boost FDI to \$21 billion
# of Internet Users	5.5 million (2003)	18 million (2006)
Broadband users	1.5 million (2005)	2.5 million (2006)
# of Internet Cafes	1,000 (2000)	20,000+ (2006)



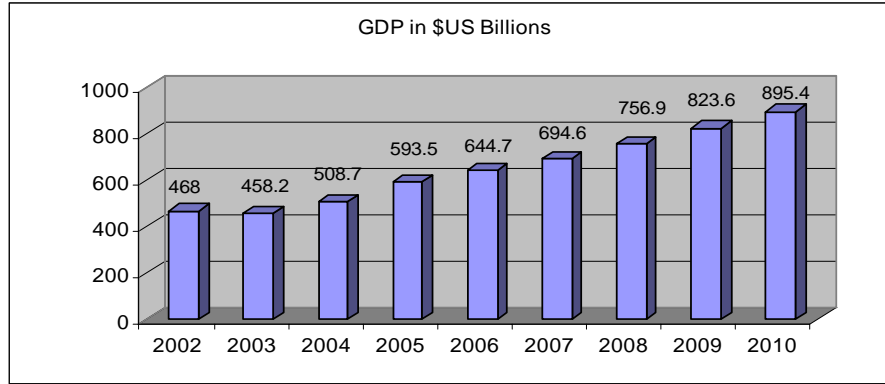
Turkey – Population of 76 Million,
16 Million % Pop (Penetration)



MARKET OVERVIEW

- Turkey's total population is around 76 M and is expected to be 84 M in 2015
- Population distribution is concentrated around 0-14 age group and that makes the %28 of the whole population
- Education level, in 1998, 85% of the population attended primary school and 38% high school. These figures are 90% and 56% in 2007
- Per capita revenues in terms of GDP rise from 6737\$ in 2002, to 8393\$ in 2007
- Computer market's growth in 2006 has been 12%. PC & Internet penetration which was 4% in 2000, moved to 15% in 2007; but the market is clearly far from being saturated.
- Technology market' growth is supported with the foreign investments of several technology and consumer electronic companies, few of which are Darty, Media markt, ebay, Philips, Microsoft, Intel, google... established in Turkey

MARKET OVERVIEW



Source: ekodialog.com

Economic Forecast

Indicators	2004	2005	2006	2007	2008	2009	2010
Annual Rate of Inflation	10.58	10.14	10.51	8.8	7.5	7.256	6.506
FDI in million \$	1,442	8,190	17,067	19,077	21,043	23,067	26,245
Consumer Expenditure in million \$	280,167.61	337,044.86	364,765.51	456,045.41	468,017.43	529,618.22	579,088.24
Annual Gross Income (in million \$)	356,542.99	436,644.99	478,852.95	604,725.73	627,281.61	680,677.05	744,632.85
Consumer Electronics Expenditure (in million \$)	729.24	791.14	782.1	781.63	776.1	797.30	805.73

Source: Today's zaman

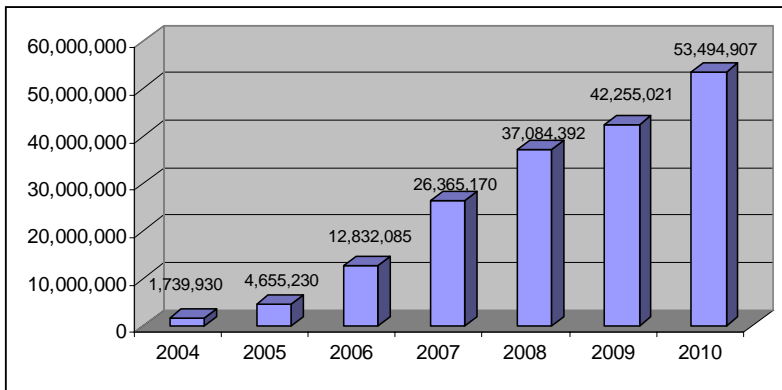


INTERNET OVERVIEW

- Most common connection 1024kbps/4GB (~50%)
- Turkish Telecom has recently introduced ADSL 2, faster Internet
- Subscribers pay \$20-\$30 for a decent Internet connection
- PC Cafes charges \$0.7 for one hour PC use
- Home and PC Café users Internet use rate: 50%-50%
- Top 3 activities on the Internet: chatting (~90%) and playing games (80%)

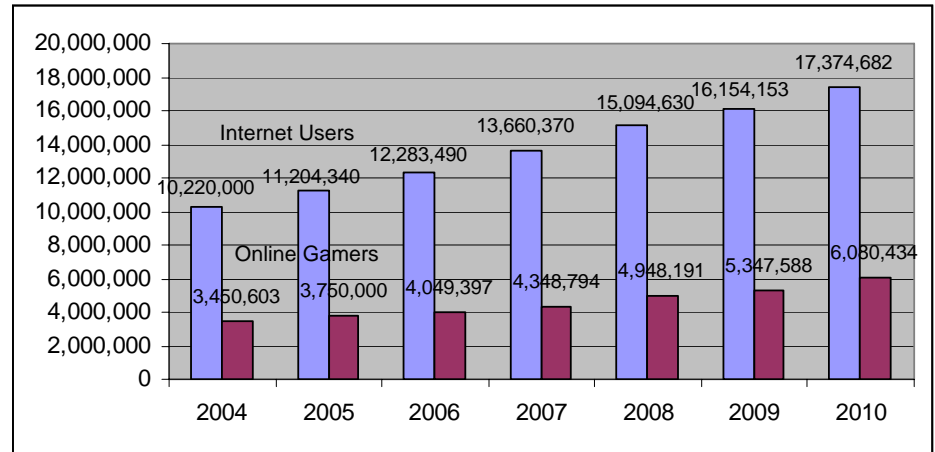
MMO MARKET OVERVIEW

Turkish Market Online Game Revenue (US \$)



Source: Gamesultan Estimates

Number of Internet Users and Online Gamers



Source: EU Monitor & Gamesultan

- Turkish market is expected to experience relatively strong economic growth rate from from 2006 to 2010
- Despite the high population growth rate, the GDP per capita is expected to rise by 28% from 2006 to 2010
- The key economic indicators point to a positive trend up to 2010

POPULAR GAMES

Client – Based MMOs

- Silkroad Online
- Metin2
- Knight Online

Browser – Based MMOs

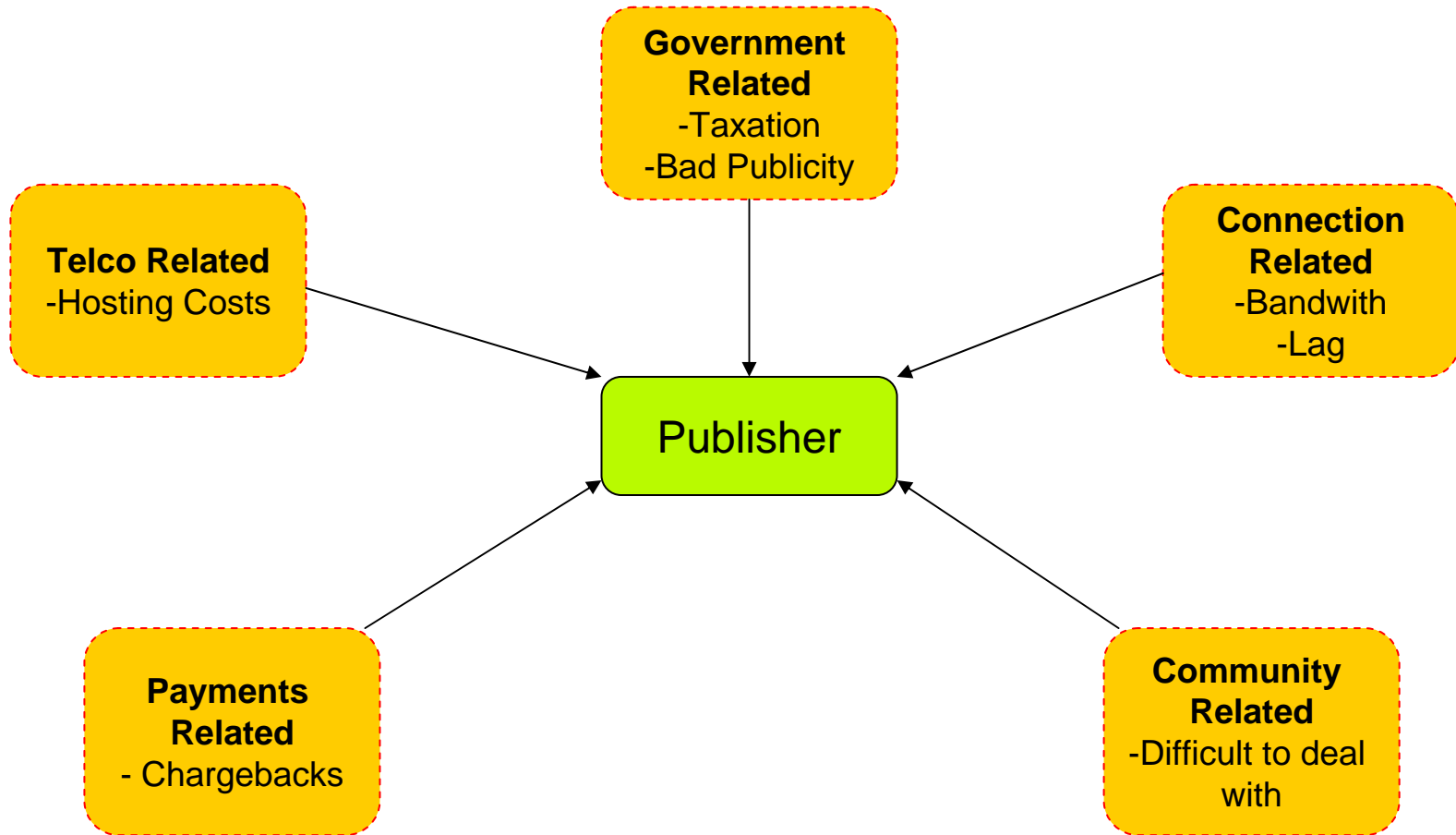
- Travian
- Dark Orbit
- Ikariam



TASTE OF GAMERS

- More PvP action
- Hack'n Slash rather than completing quests
- More community interaction
- Hardcore traditional type of MMOs and browser based MMOs
- Trading in-game item with real money being very popular
- Variety of addicting in-game events
- Playing at PC Cafes

ISSUES OF TURKISH MMO MARKET





MATTERS THAT REQUIRE ATTENTION

- Language
 - Customer Service, Operations, Clients, Community Management
- Game Operation
 - High Hosting Costs
 - Average PC Specs/Connection
 - Hacking and Security Issues
 - Trading of in-game item with real money
- Payments
 - Charge-backs
 - Alternative Payments/Distribution



>>>THANK YOU

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