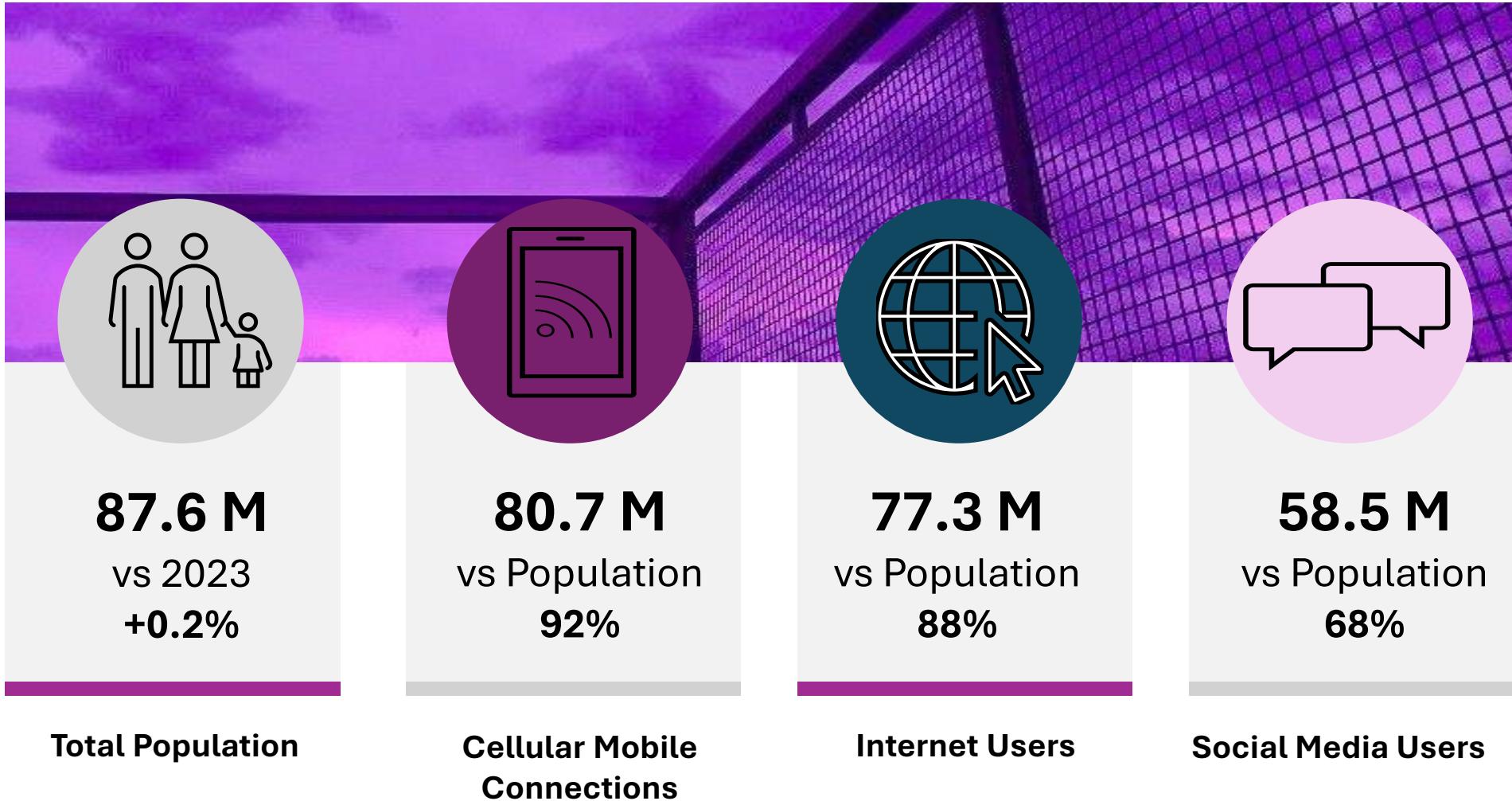




Digital Media Landscape

2025 H1

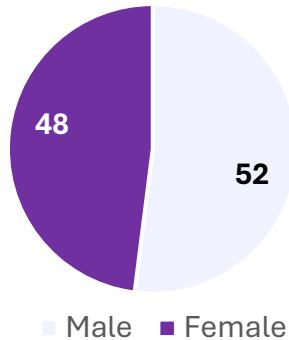
SUMMARY OF DIGITAL MEDIA LANDSCAPE



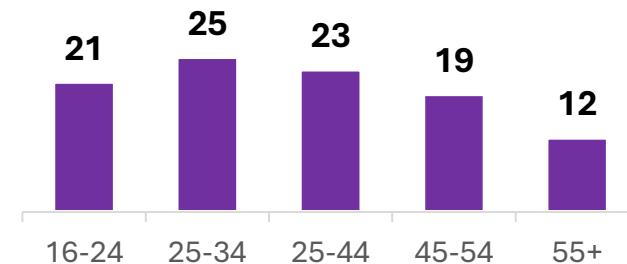


Demographic Overview

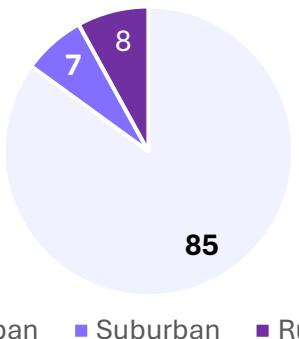
Gender



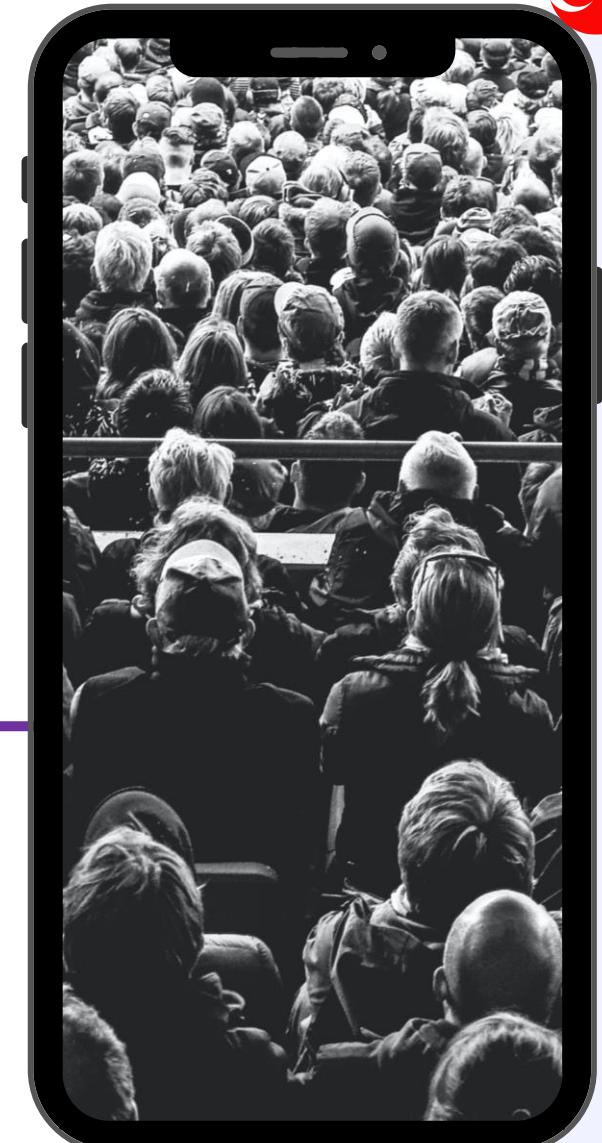
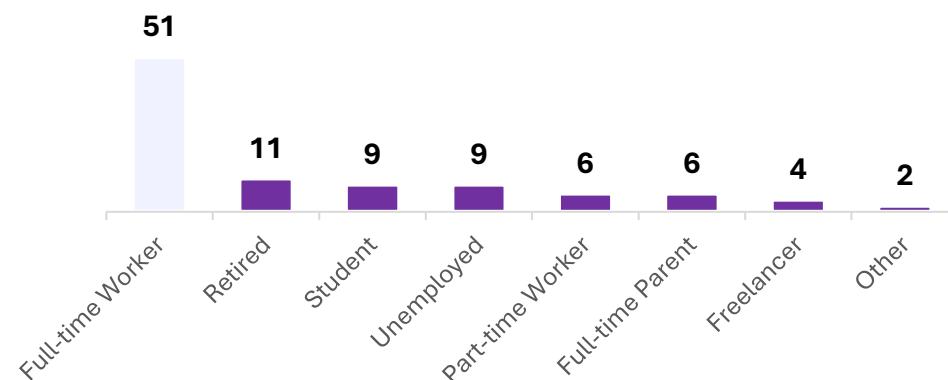
Age Groups



Urban Context



Working Status





Generations in Turkey

Gen Alpha



- Fully mobile-native
- Screen-first (tablet, smartphone)
- Short video & gaming focus (YouTube Kids, TikTok)-
- Early adopters of voice search & AI

Gen Z



- “Always-on” generation
- Heavy social media users (TikTok, Instagram)
- Video & streaming-centric consumption
- High trust in influencer content
- Active in gaming & esports

Gen Y



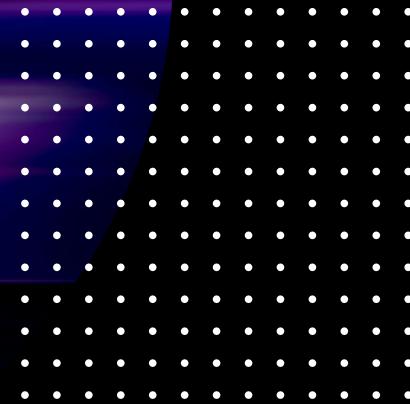
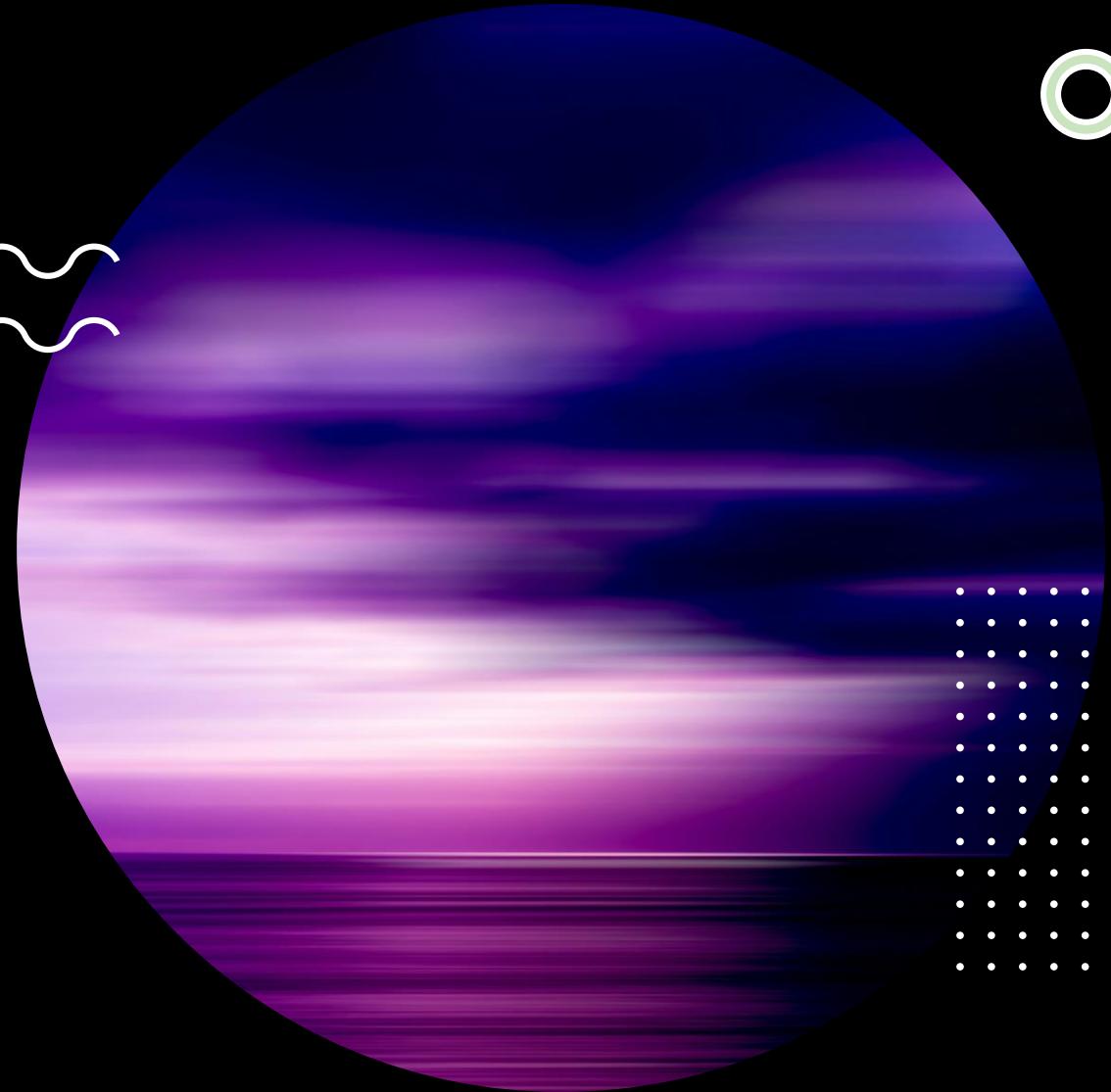
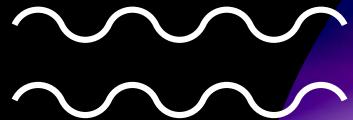
- Multi-device usage
- Strong in e-commerce & fintech
- High adoption of subscription services (Spotify, Netflix)
- Organize work & social life digitally (LinkedIn, Zoom)

Gen X



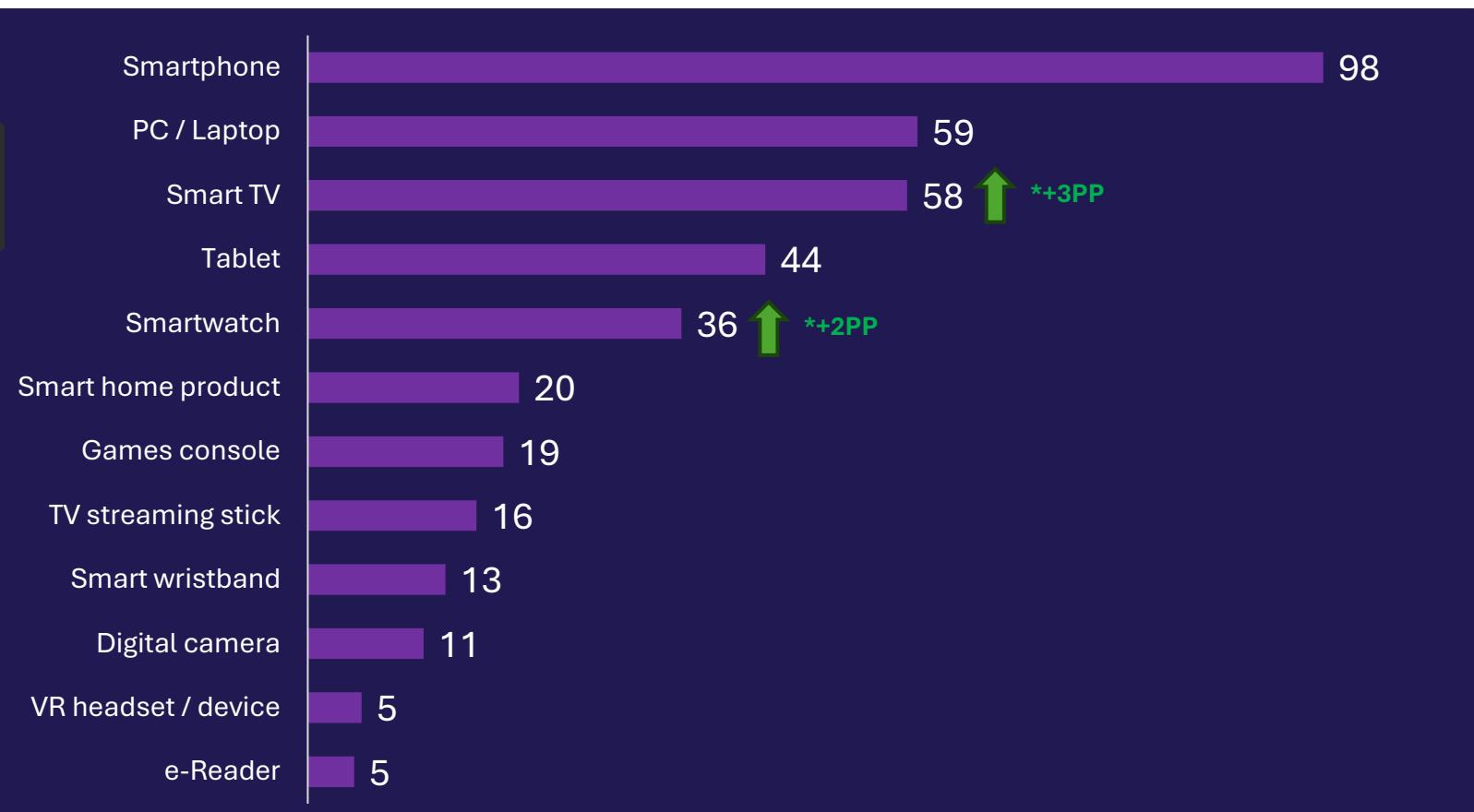
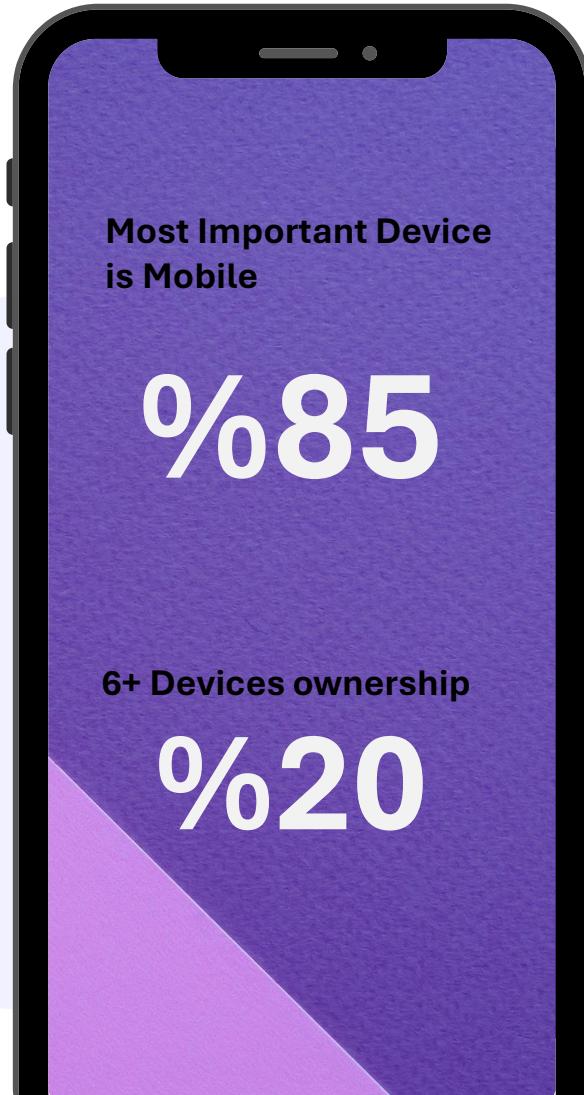
- Late internet adopters
- Mainly Facebook & WhatsApp users
- Prefer digital for news & information consumption
- Online shopping adoption growing
- Higher concerns about digital security

MEDIA OVERVIEW



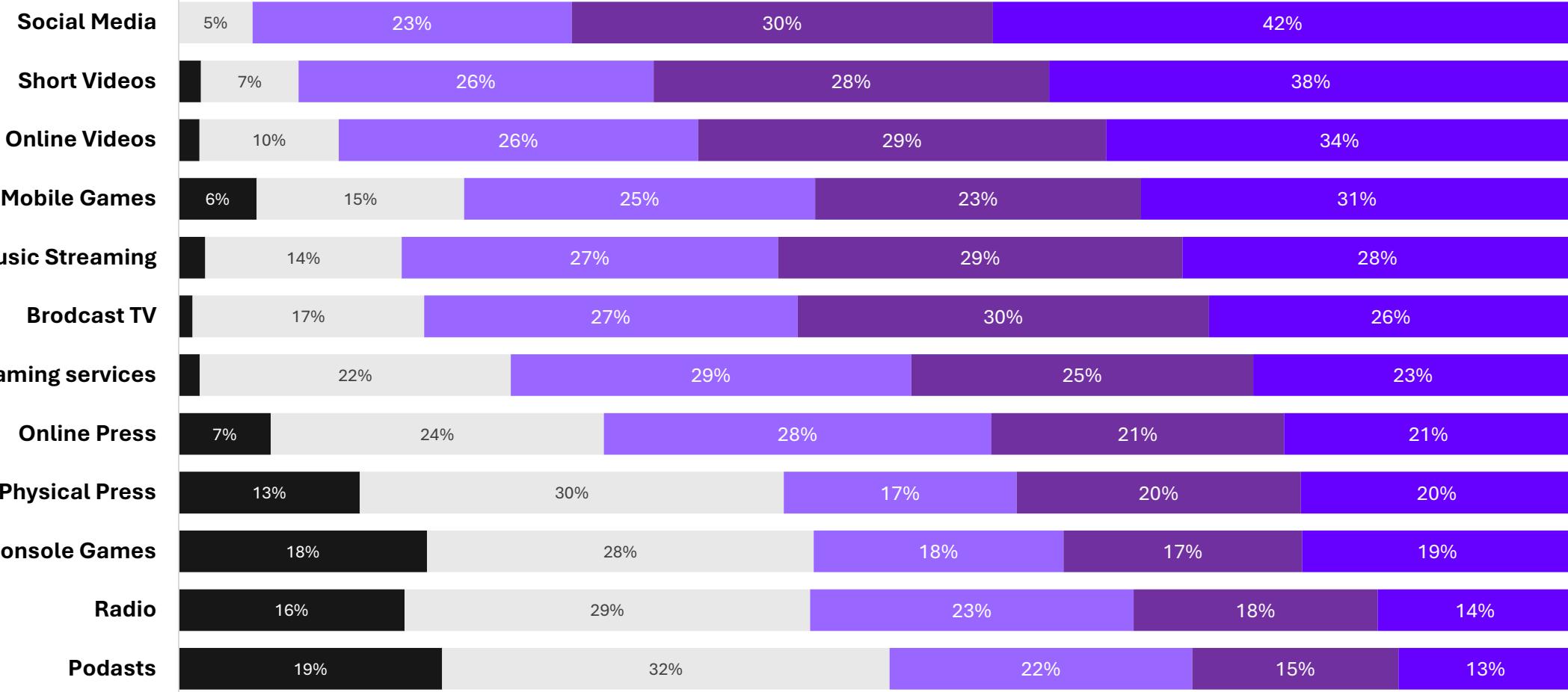


Device Ownership





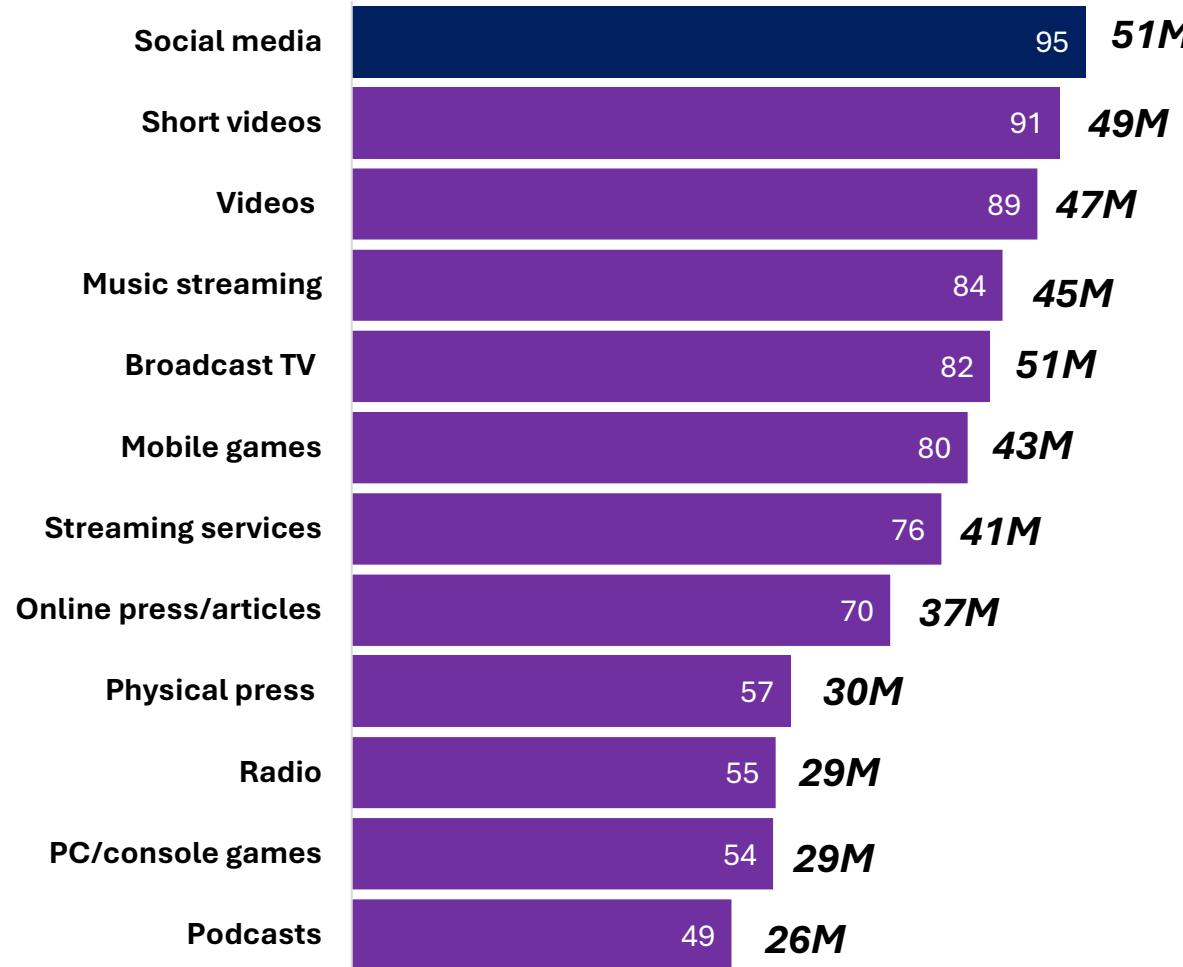
Media Users Segmentation





Penetration & Universe Size On Media

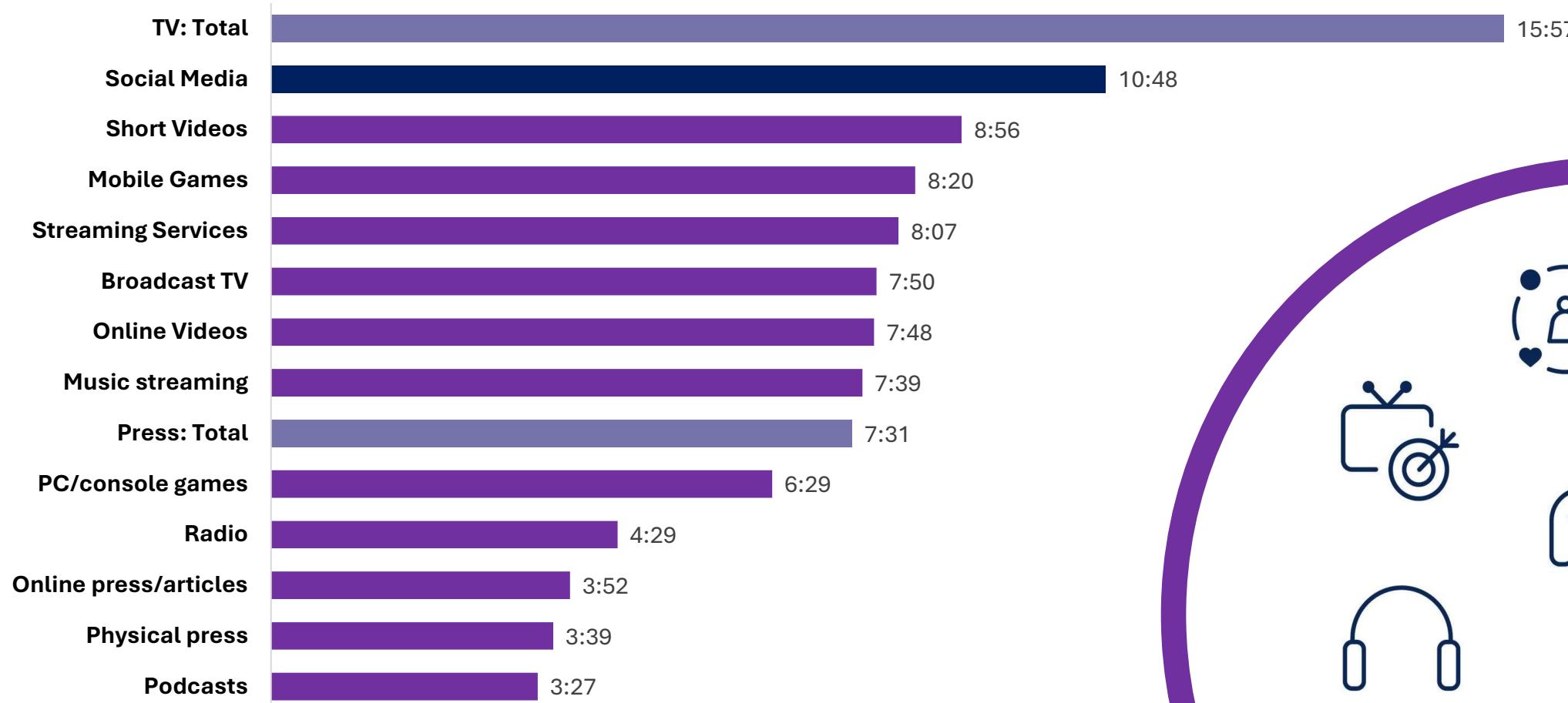
*Penetration & Universe 16+





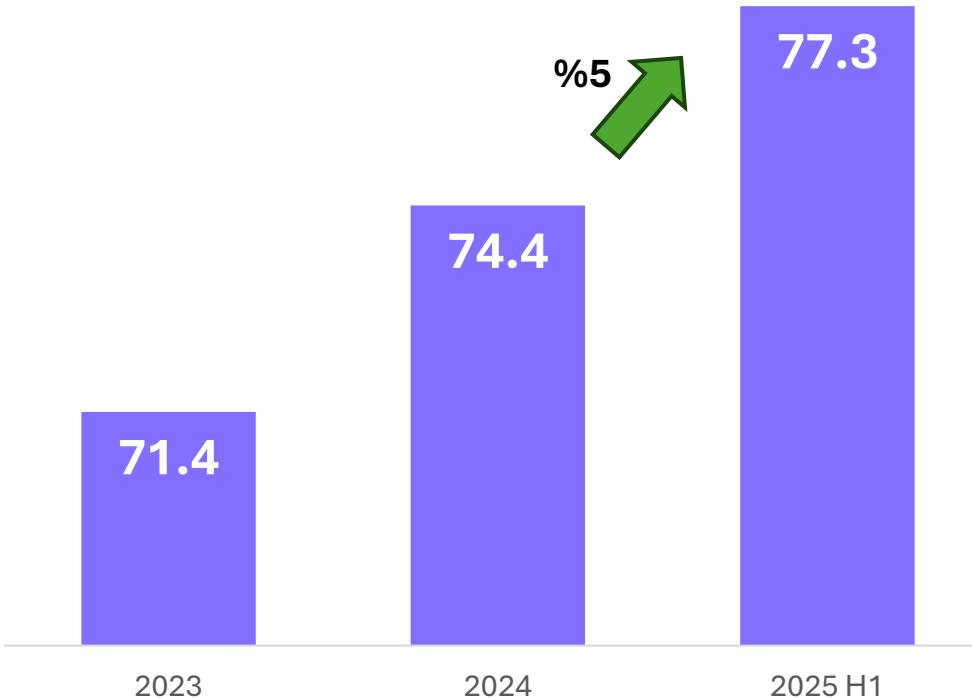
Average Time Spent On Media

*Hours Spent a Week



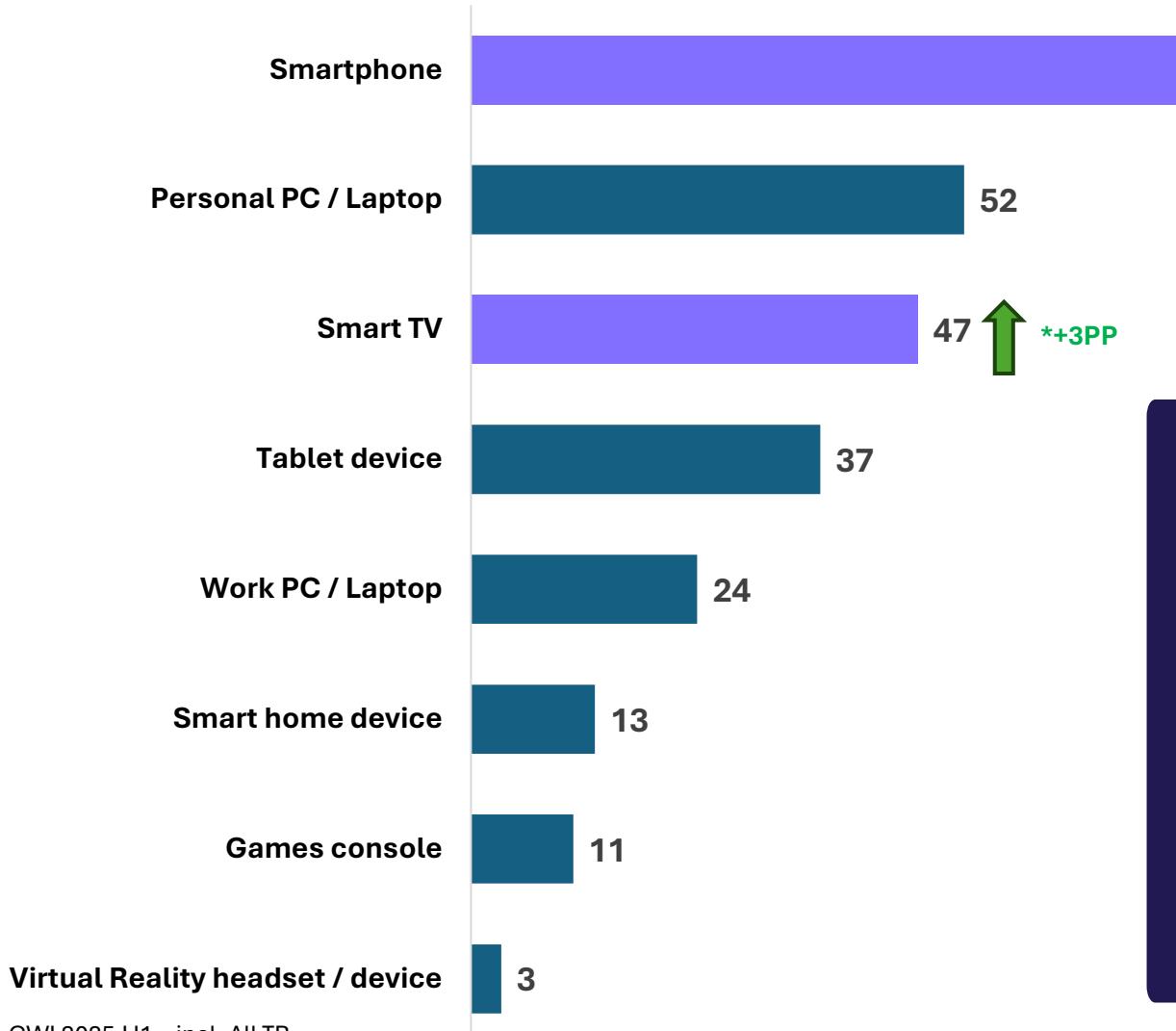


Internet Users in Turkey Rise to 77.3 Million





Devices to Access Internet

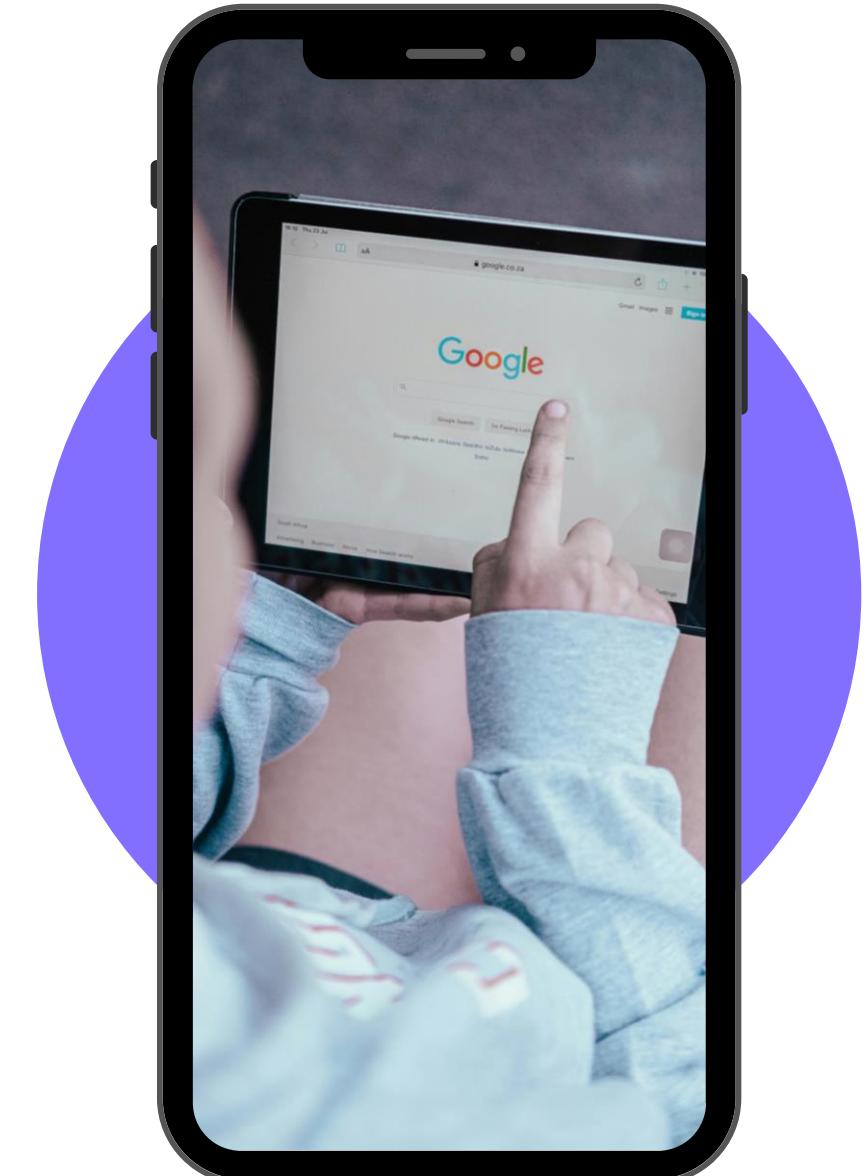
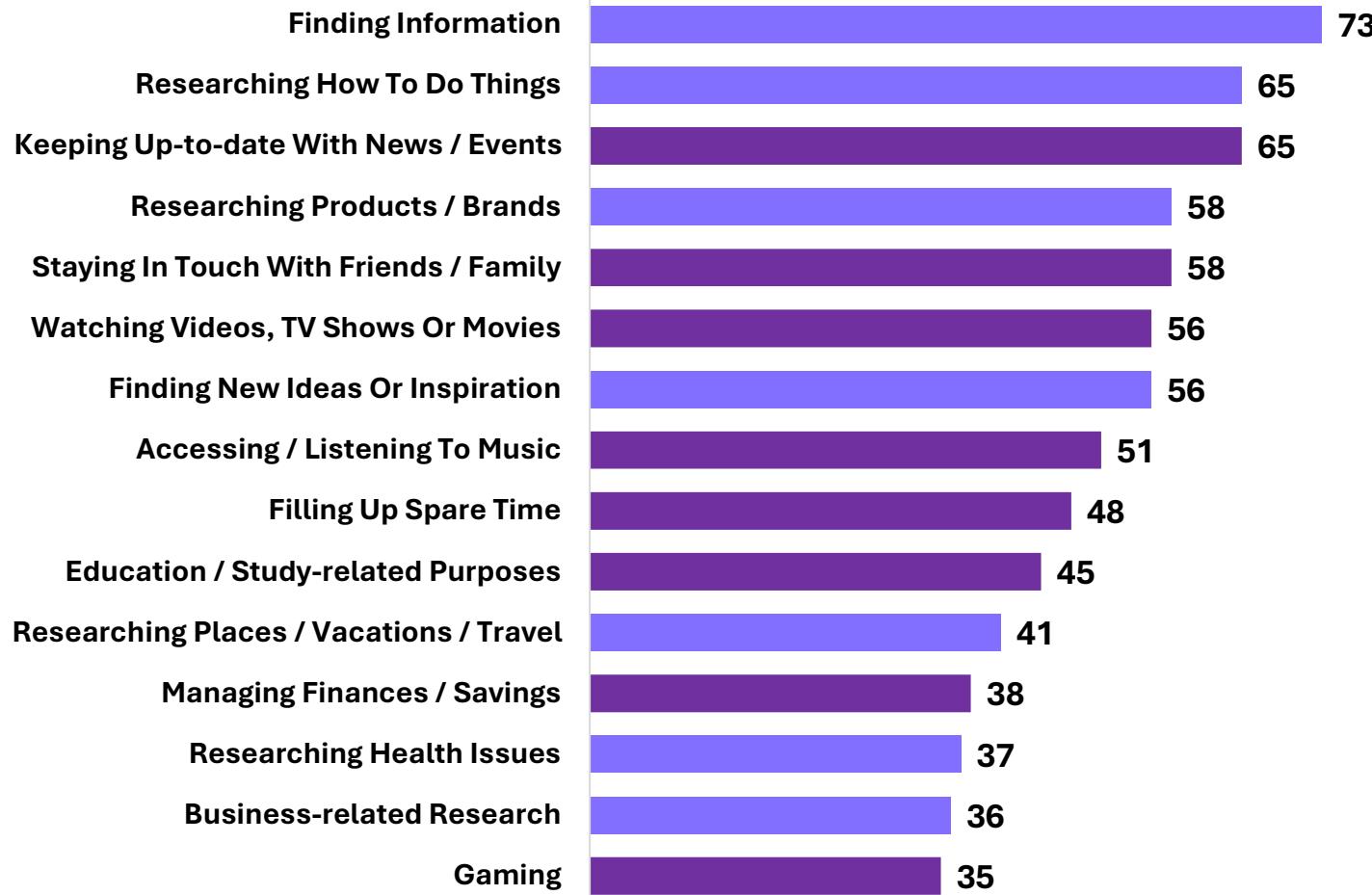


Connected TVs are gaining traction in Turkey, highlighting new opportunities for large-screen digital engagement.



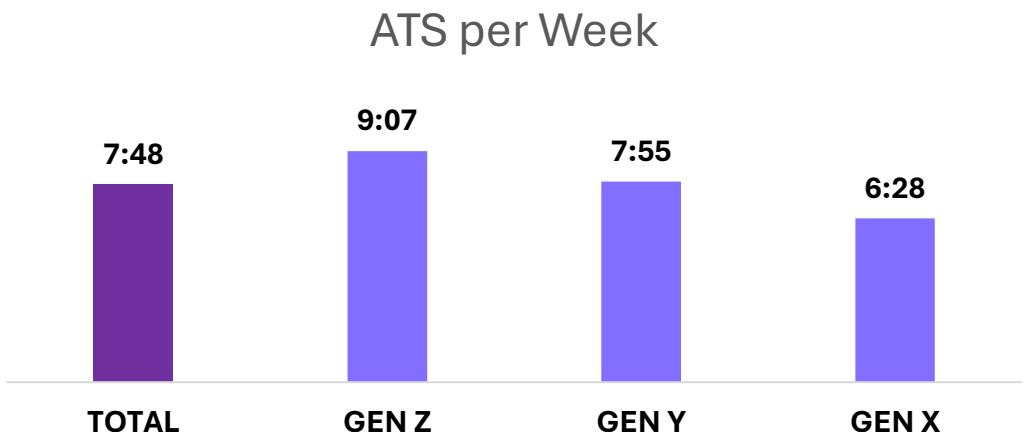


Reason For Using the Internet: Searching



Daily Routine: Watching Online Video

Watching online videos has become a **daily routine** across generations.



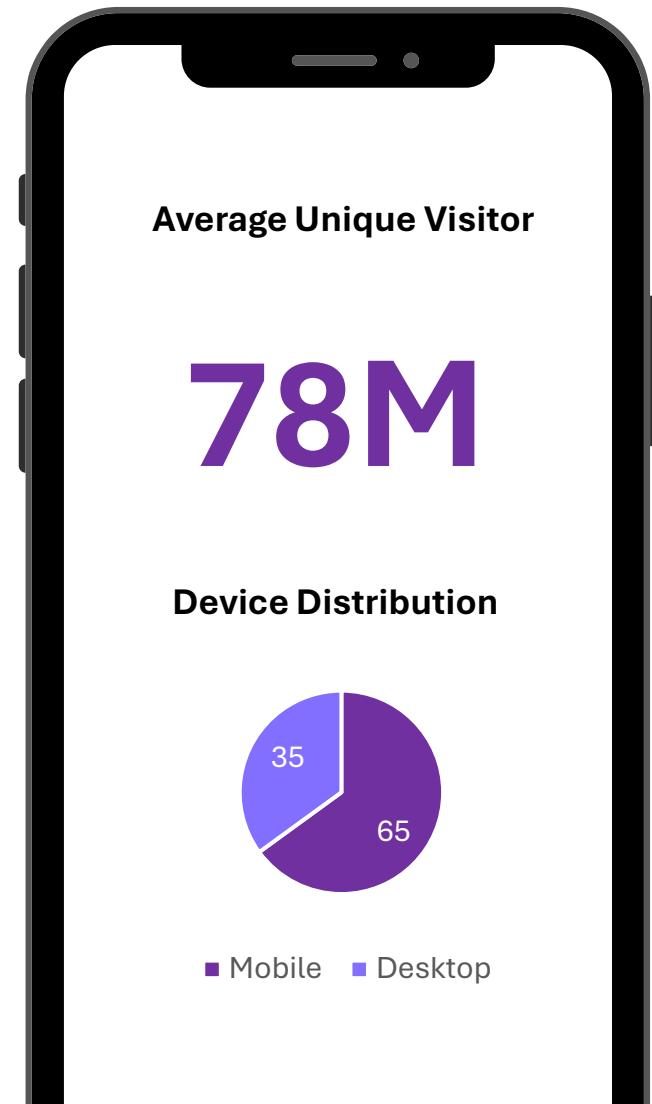
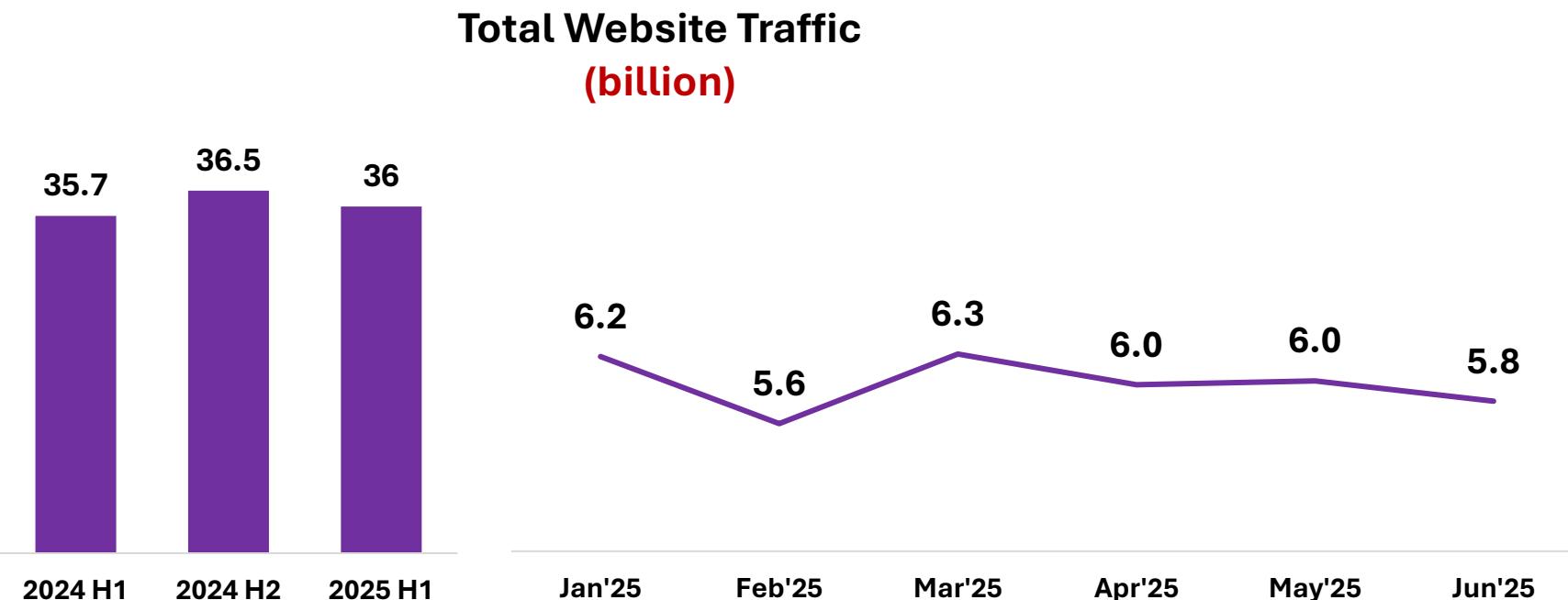
Online video is no longer just entertainment - it has become a **primary medium for learning, leisure, and cultural engagement** in Turkey.





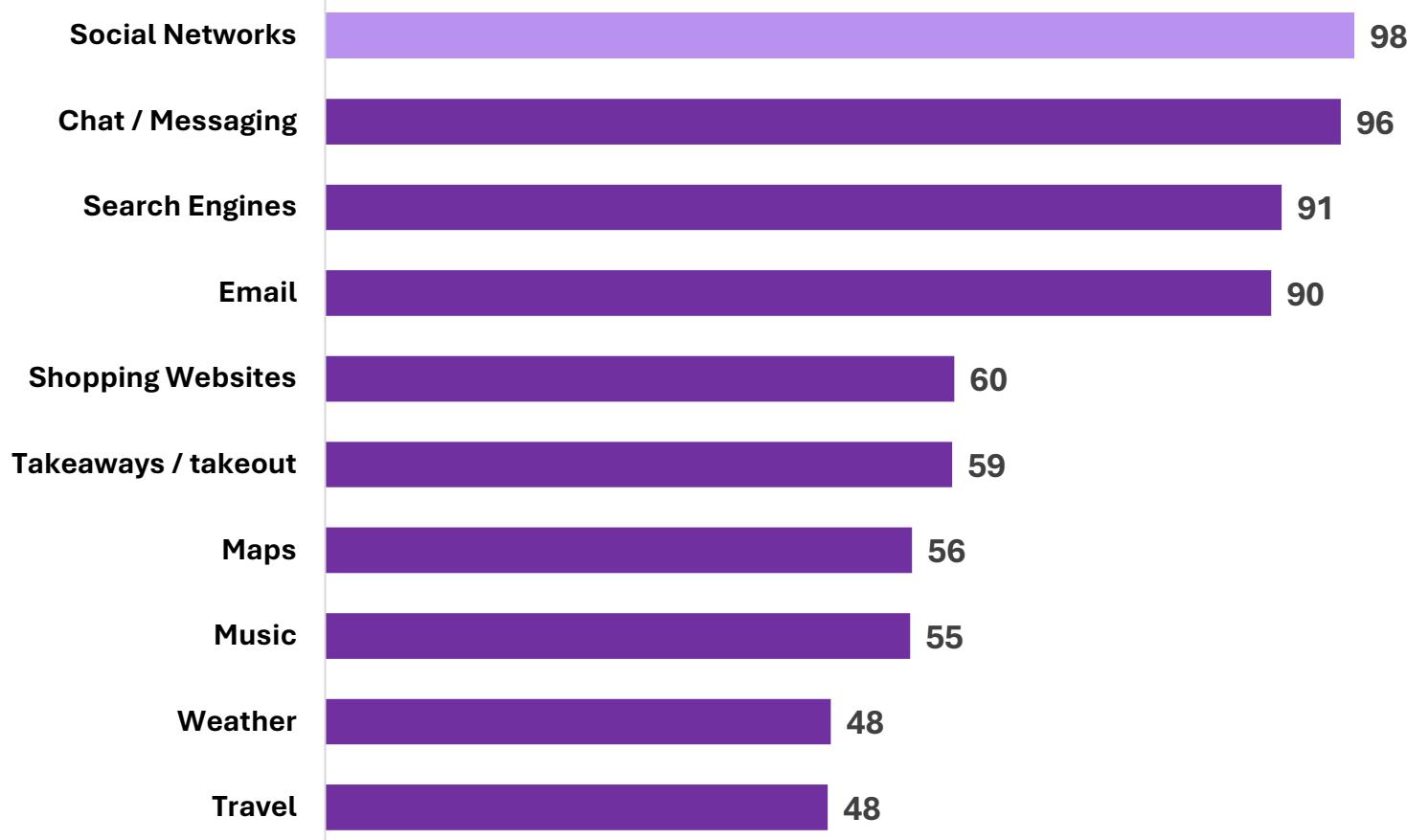
Website Traffic and Online Reach in Turkey

Turkey's website traffic stable at **36B** visits, driven by **78M** unique users
– mostly via mobile.





Types Of Website&Apps



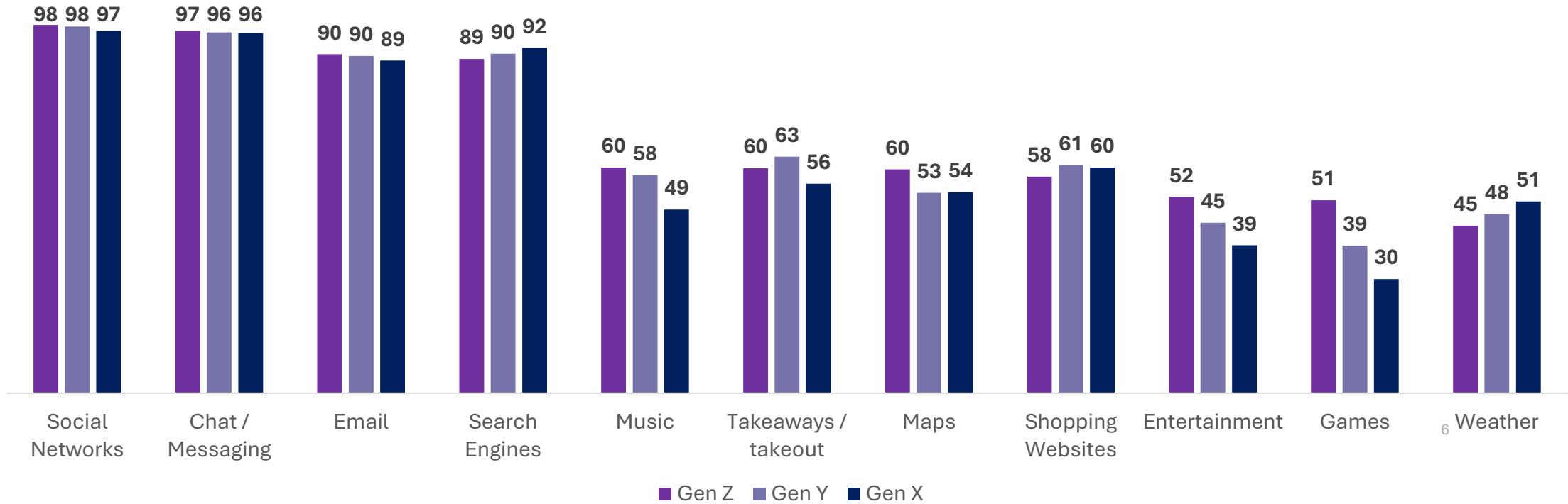


Types Of Website&Apps

Gen Z → Entertainment & Gaming Focus 🎮

Gen Y → Consumption & Convenience 🛒

Gen X → Functional & Informational 🔎



Social Media Usage in Turkey

58.5M

Total Number of Social Media Users

%68

Social Media Penetration in Population

10:48h

ATS per week on Social Media

7.6

Average number of
social platforms used
each month

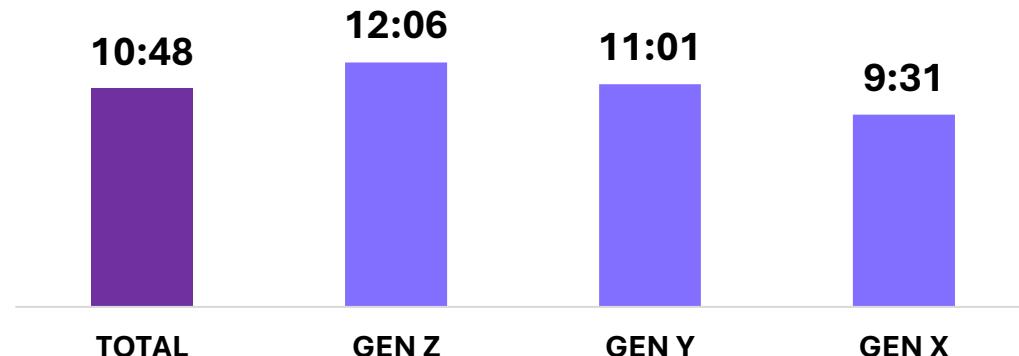




Social Media Consumption by Generation

Gen Z leads social media consumption with over **12 hours** weekly, while **Gen X** engages the least at under **10 hours**.

ATS per Week

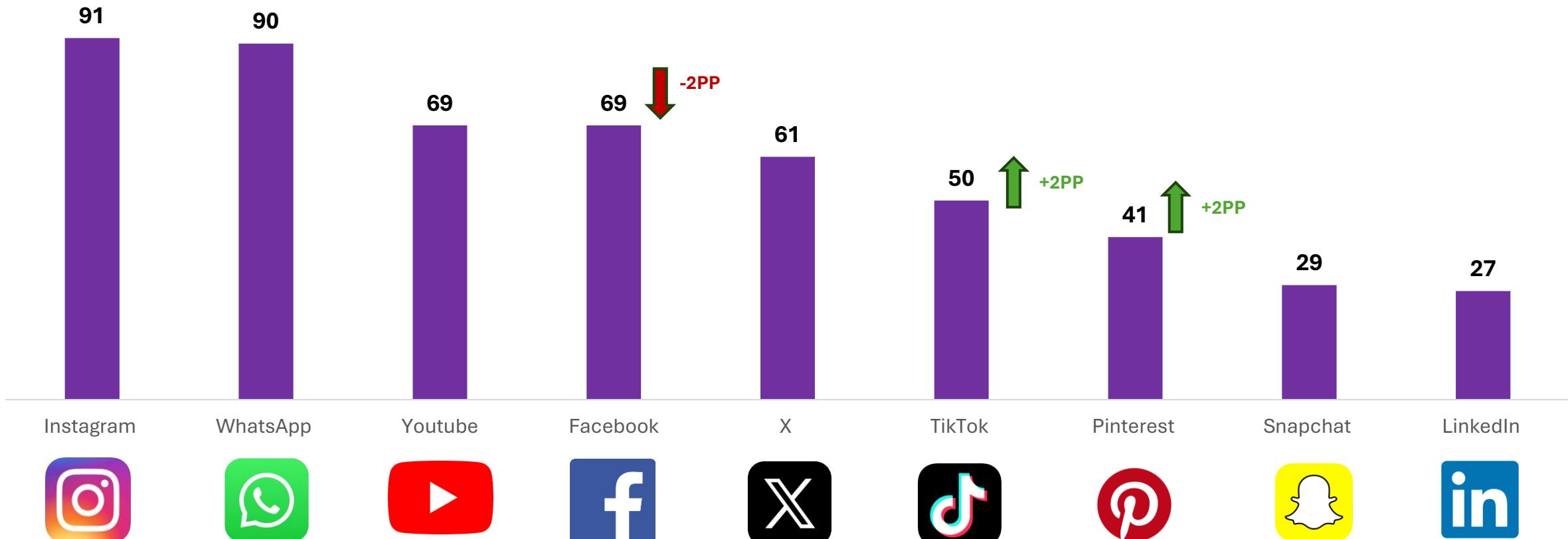




Social Media Platform Usage in Turkey

Instagram and **WhatsApp** dominate social media in Turkey, while **TikTok** and **Pinterest** show steady growth

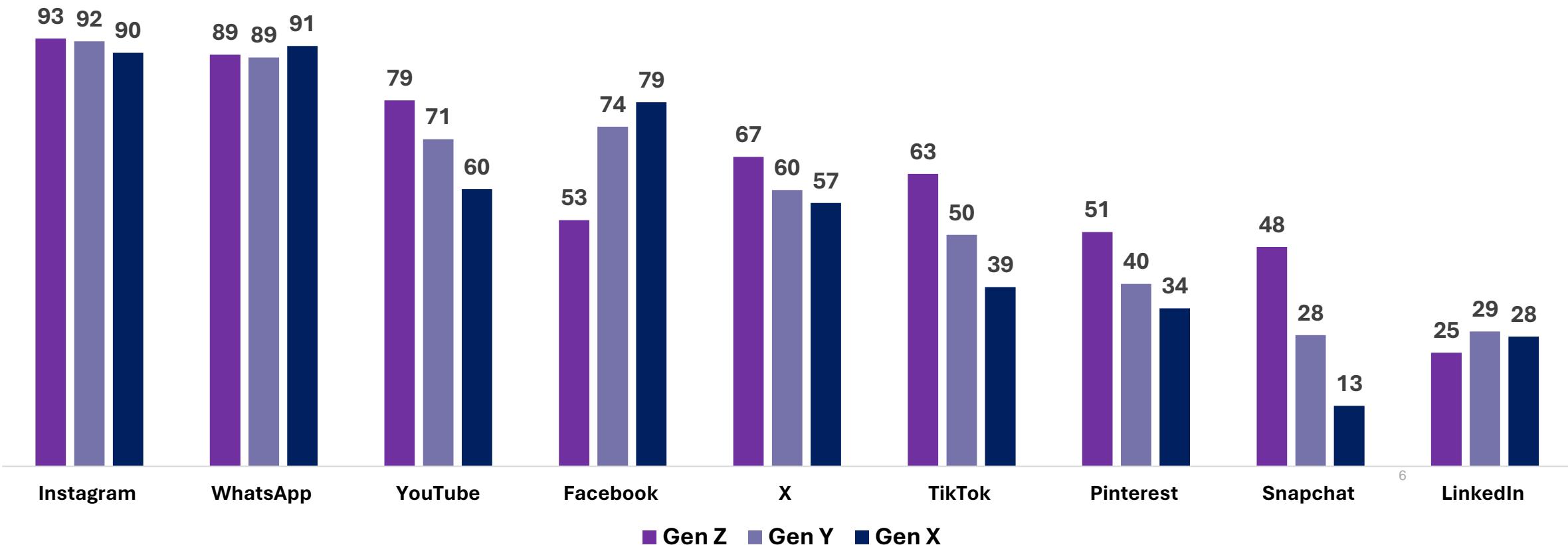
Engagement %





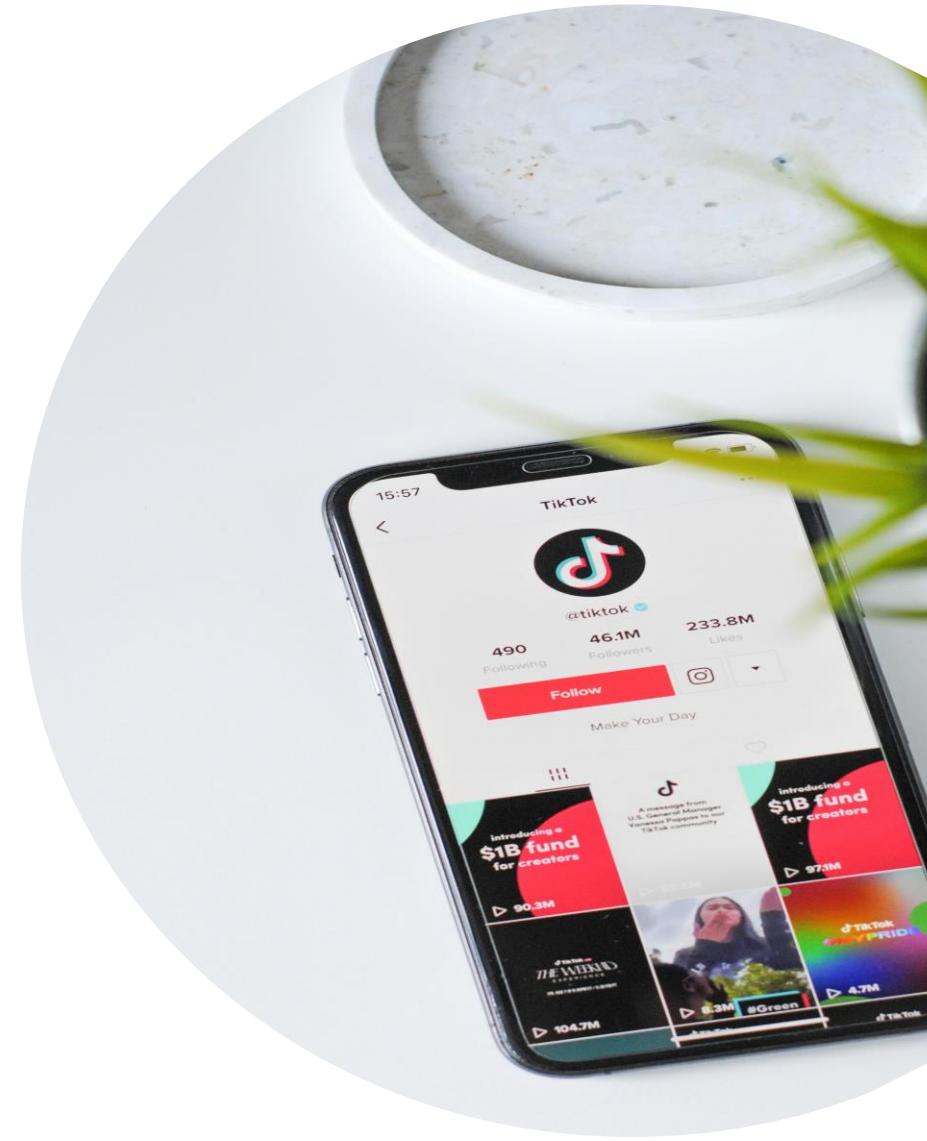
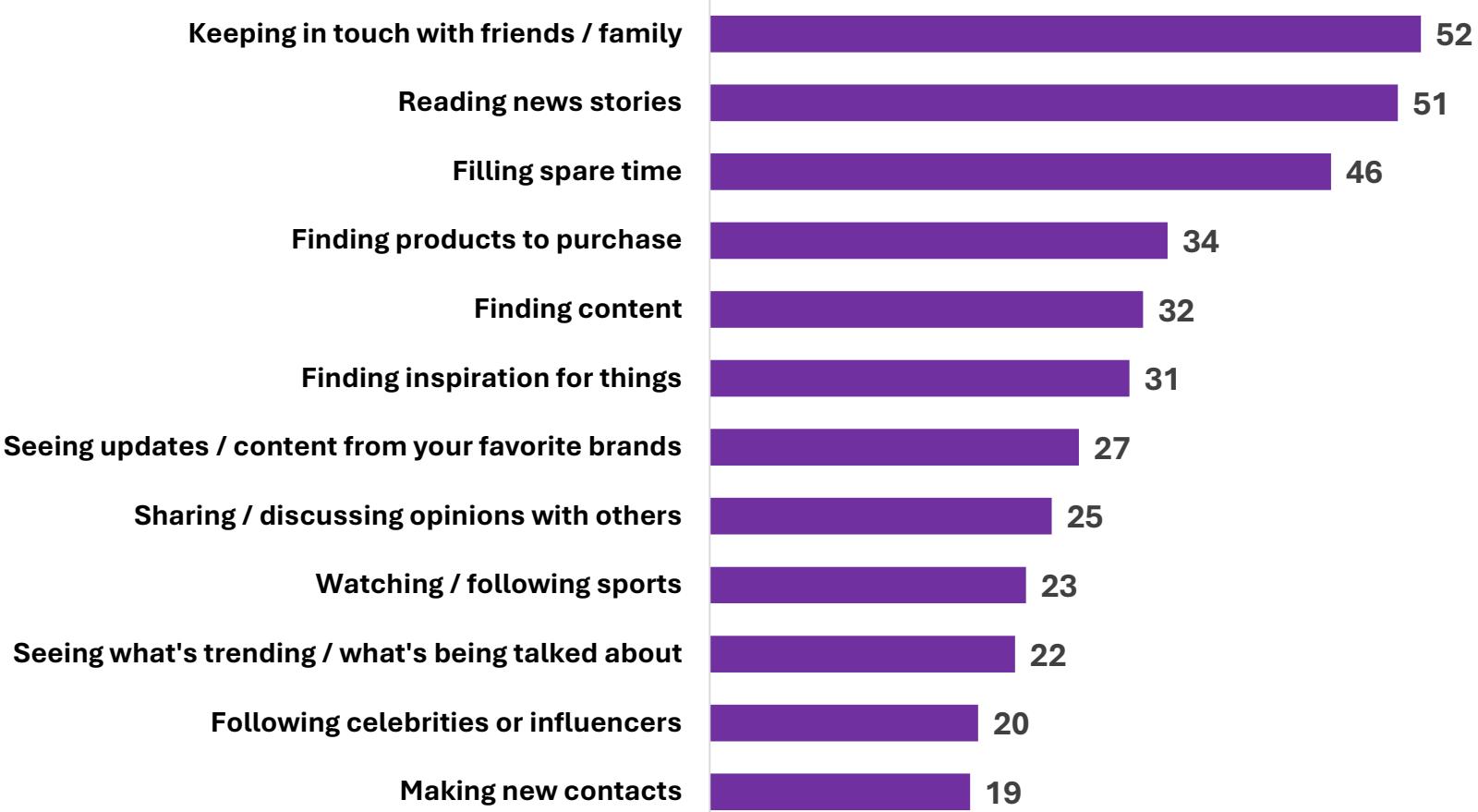
Generational Use of Social Media Platforms

Instagram and **WhatsApp** dominate across all generations, while **Gen Z** leads on **TikTok** and **Snapchat**, and **Gen X** favors **Facebook**.





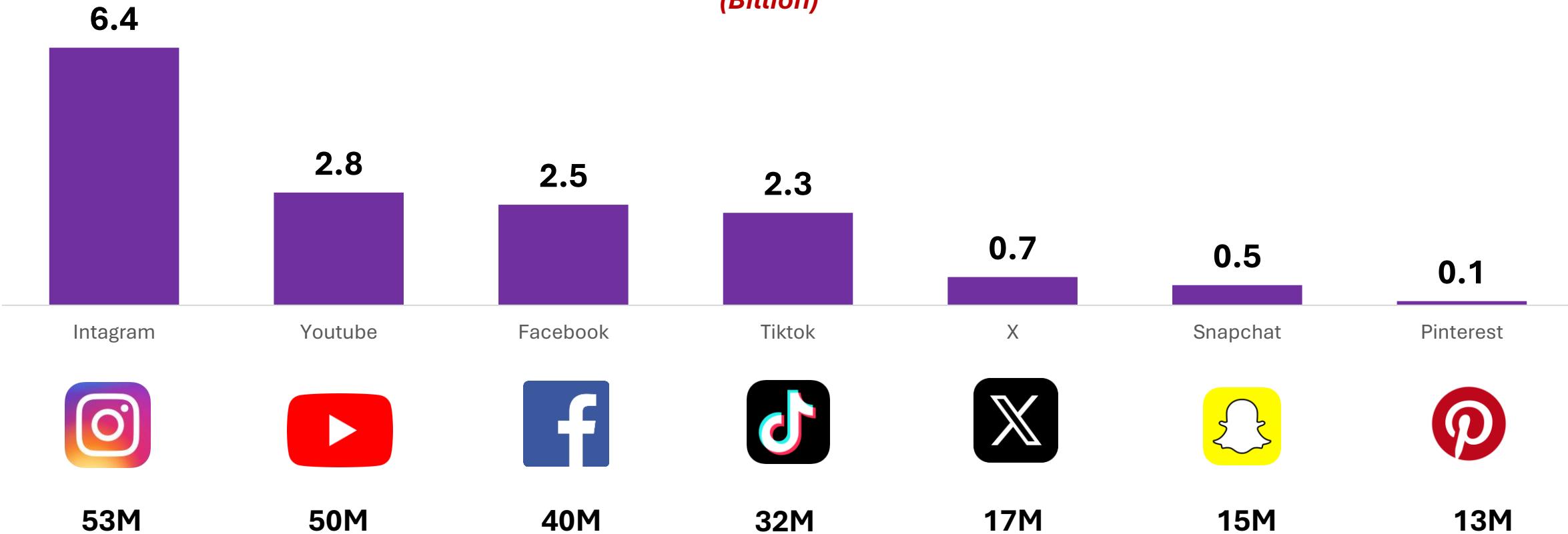
Reasons For Using Social Media





Traffic Of Social Media Apps

*Average Monthly Traffic
(Billion)*





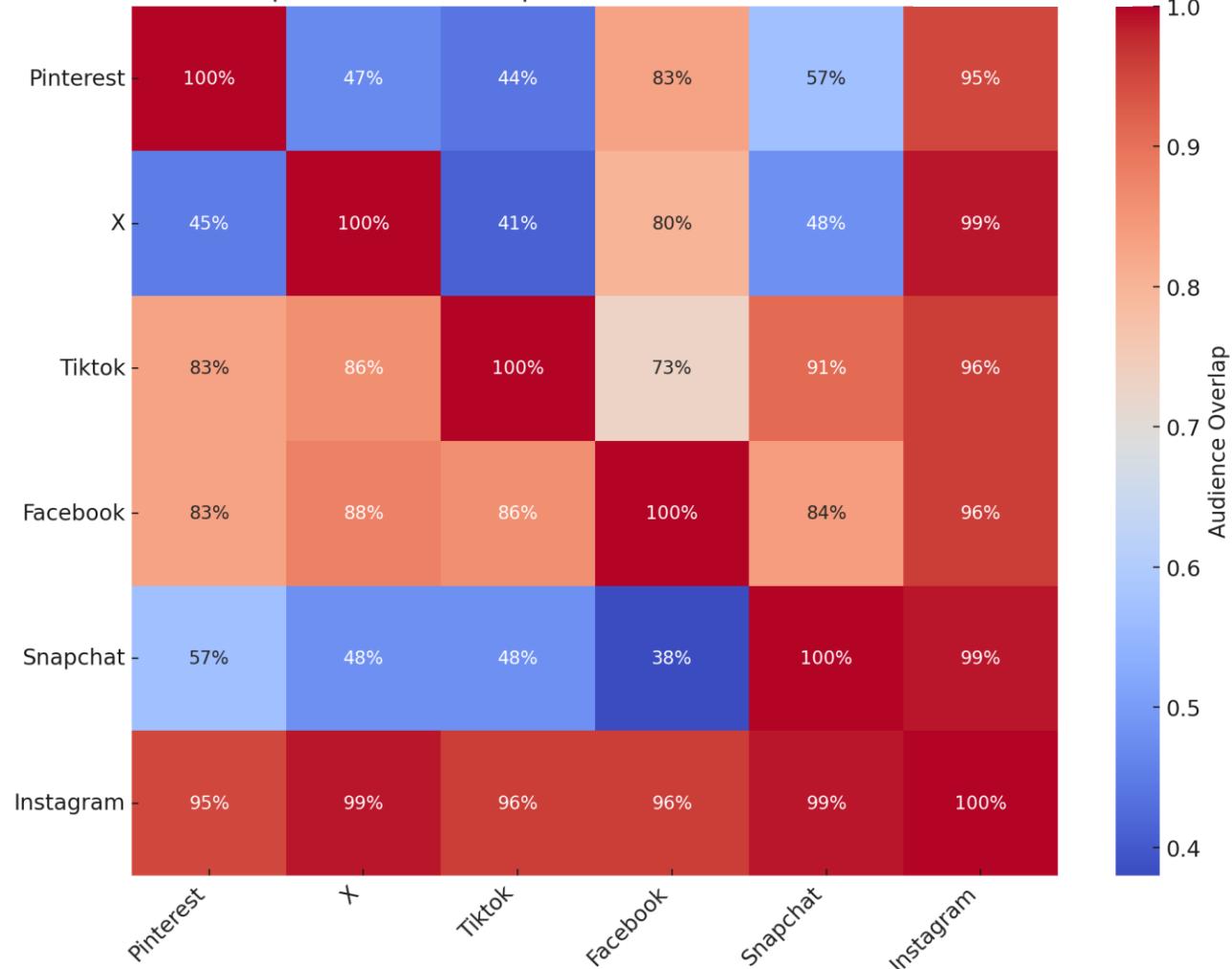
Audience Overlap Across Social Media Platforms

Audience overlap among social media APPs in Turkey is very high, especially between **Instagram**, **Facebook**, and **TikTok** (96%+), confirming their central role in users' daily digital routines.

Pinterest also shares strong overlaps (83–95%) with these platforms, while **Snapchat** and **X** show comparatively lower overlaps, suggesting they serve more **niche audiences**.

This indicates that while cross-platform presence is strong, certain apps still provide unique audience segments for advertisers.

Audience Duplication Heatmap – Social Media Platforms

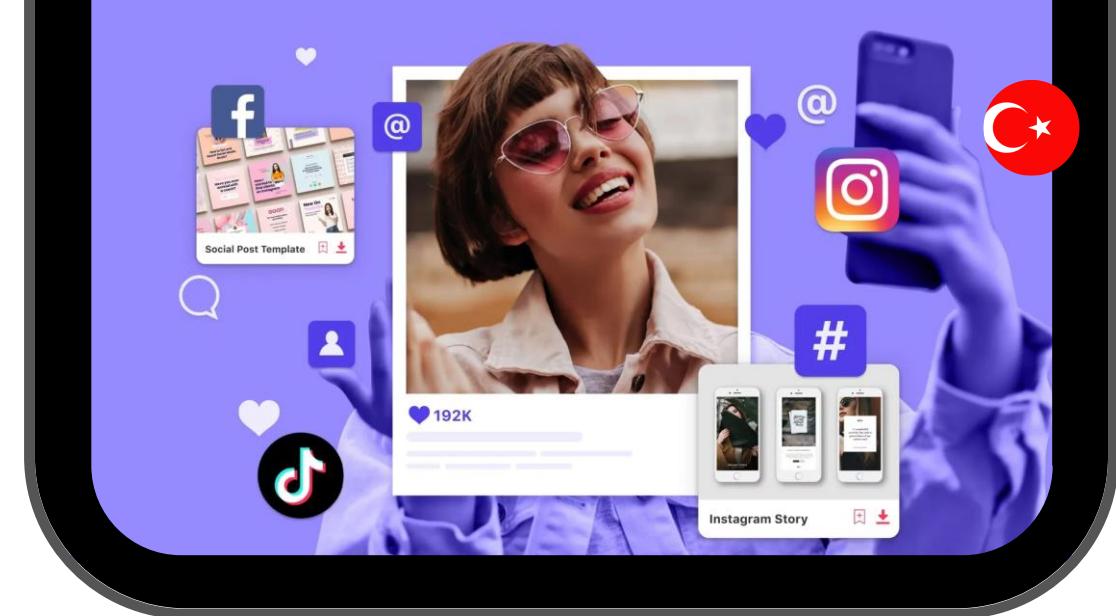


Influencer Marketing in Turkey

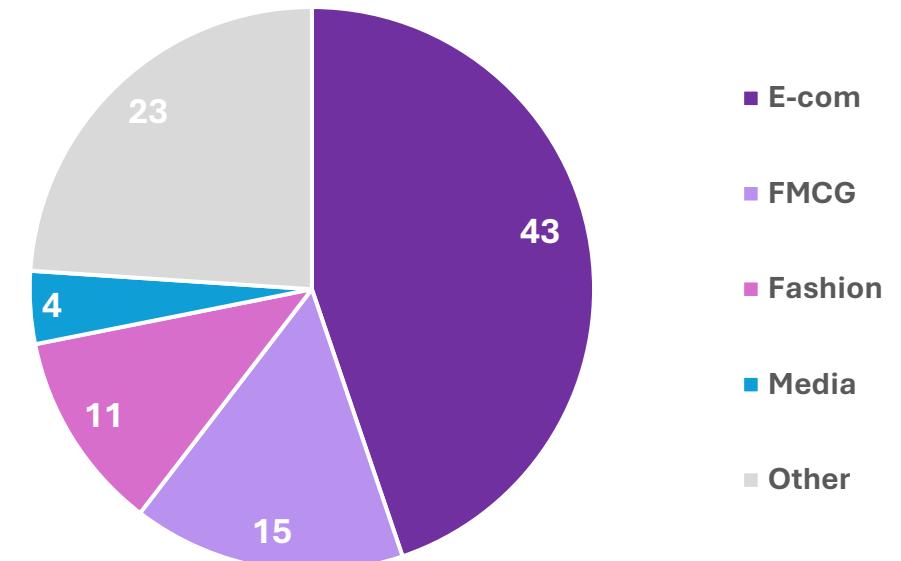
In Q2 2025, **63%** of advertisers actively leveraged influencer marketing, showing continuity from Q1.

E-commerce brands dominated (**43%**), followed by **FMCG** (**15%**) and **Fashion/Footwear** (**11%**), indicating consistent sectoral focus.

Marketplace-driven links (1.1M links) were also crucial, with **Trendyol** (**57%**) and **Hepsiburada** (**25%**) capturing the majority of traffic, While **FMCG** and **Food & Beverage** campaigns on Instagram and TikTok generated the highest engagement through authentic storytelling and natural brand integration.



Sector Share of Inf Marketing





Streaming TV Starts to Overtake Broadcasting In Turkey

Total Weekly TV Watching
15:57 h

Broadcast TV



7:50 h

Streaming TV



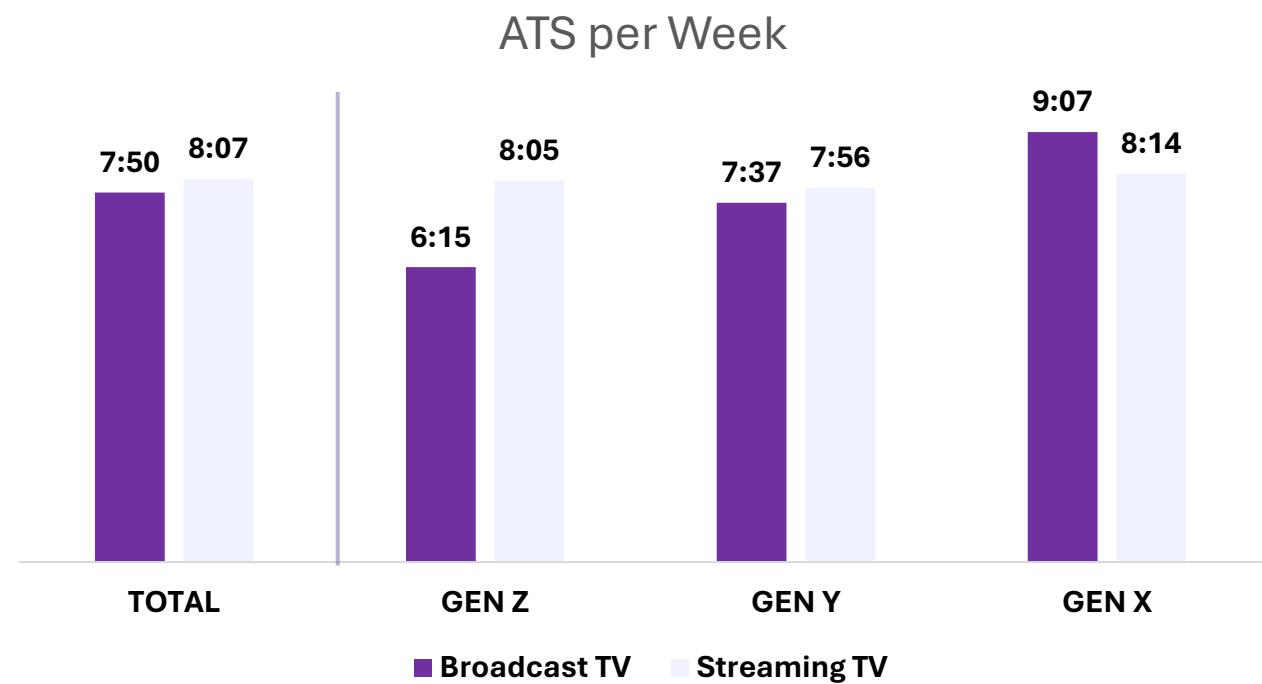
8:07 h





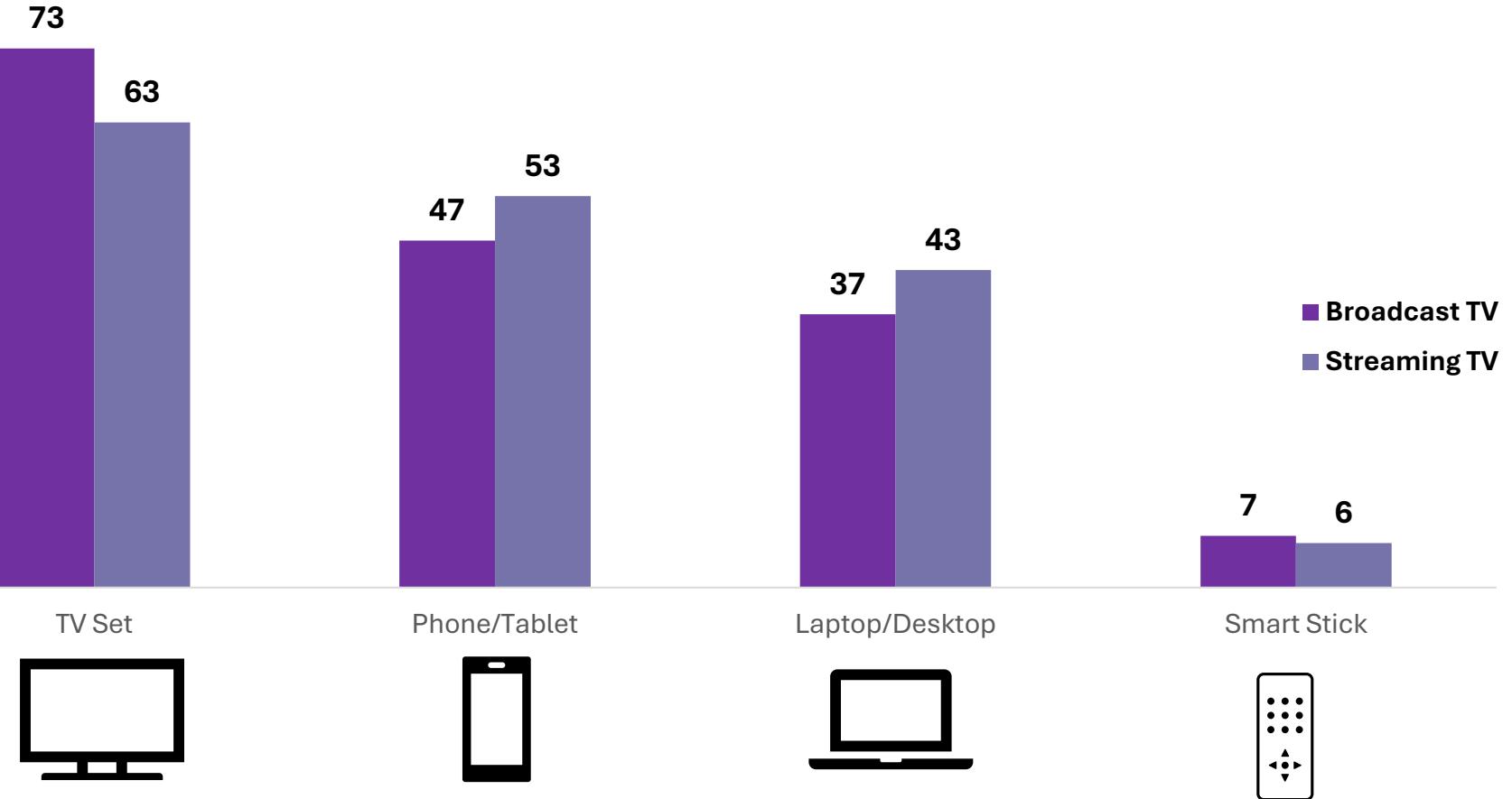
Streaming TV Overtakes Broadcasting In Turkey

Streaming dominates younger generations, while broadcast still leads for older cohorts.



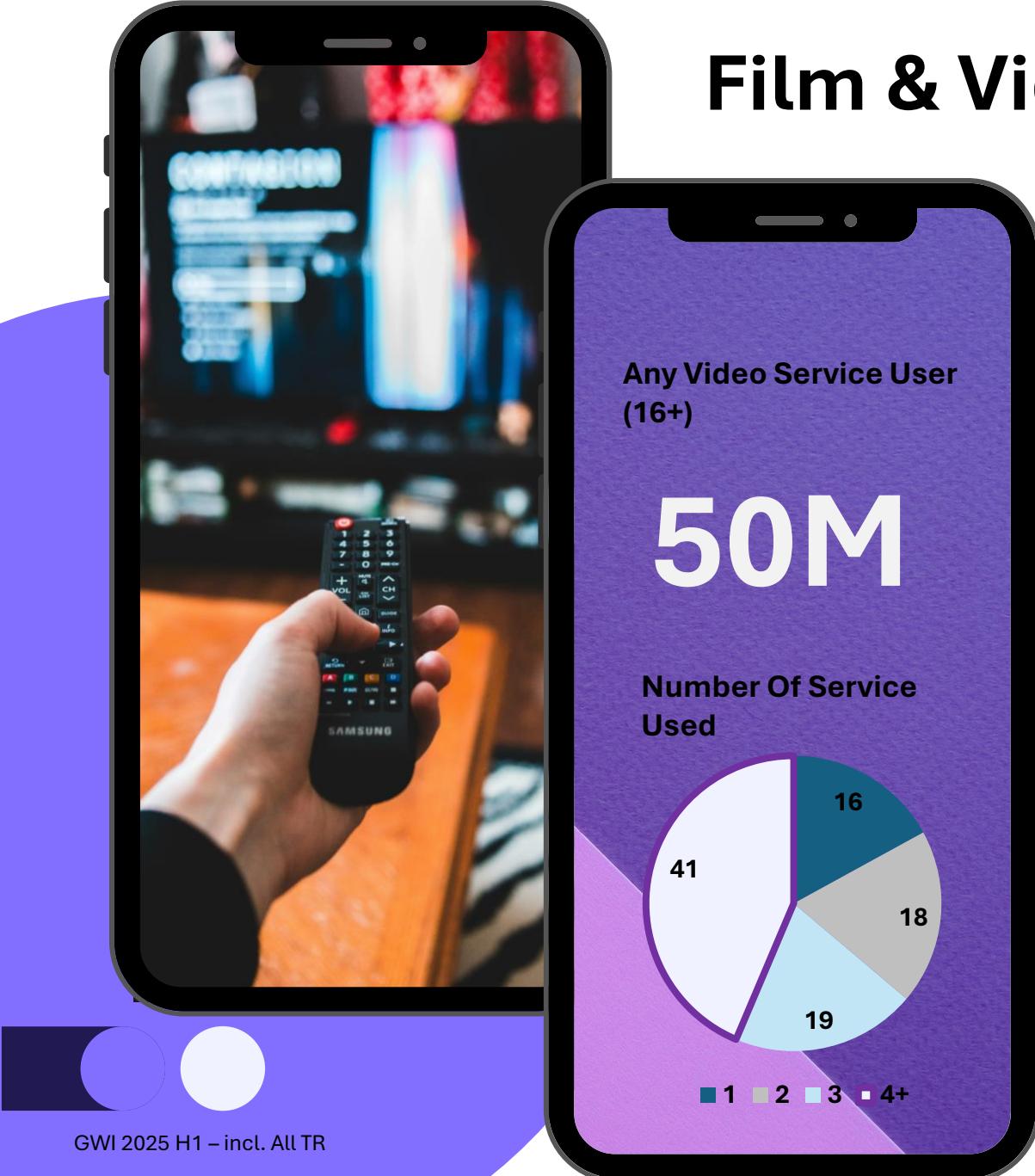


Devices Used To Watch TV





Film & Video Services



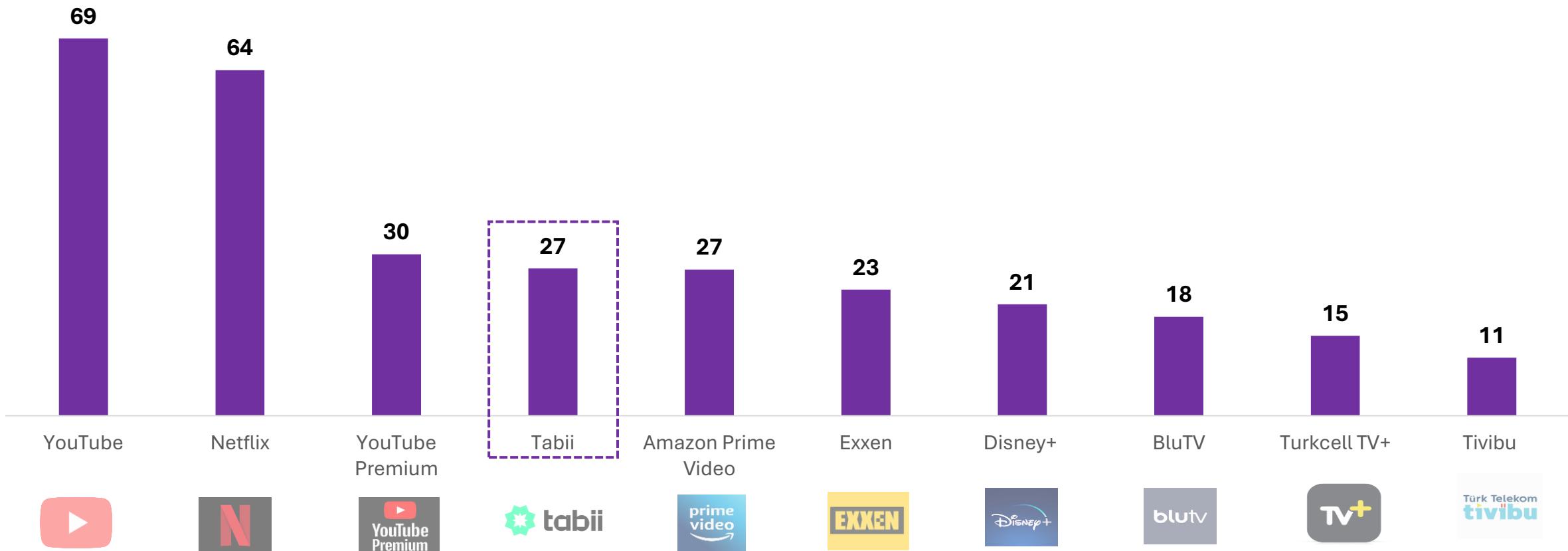
50M people in Turkey use online video platforms.

4 in 10 subscribe to **4+ services** – proving both strong demand and fierce competition



Film & Video Services

YouTube dominates with free access, **Netflix** leads paid streaming, while local player **Tabii** rises with strong **local** and **sports** contents.





Most Watched Local Contents



Kimler Geldi, Kimler
Geçti" S2



Gassal



Dayı 2

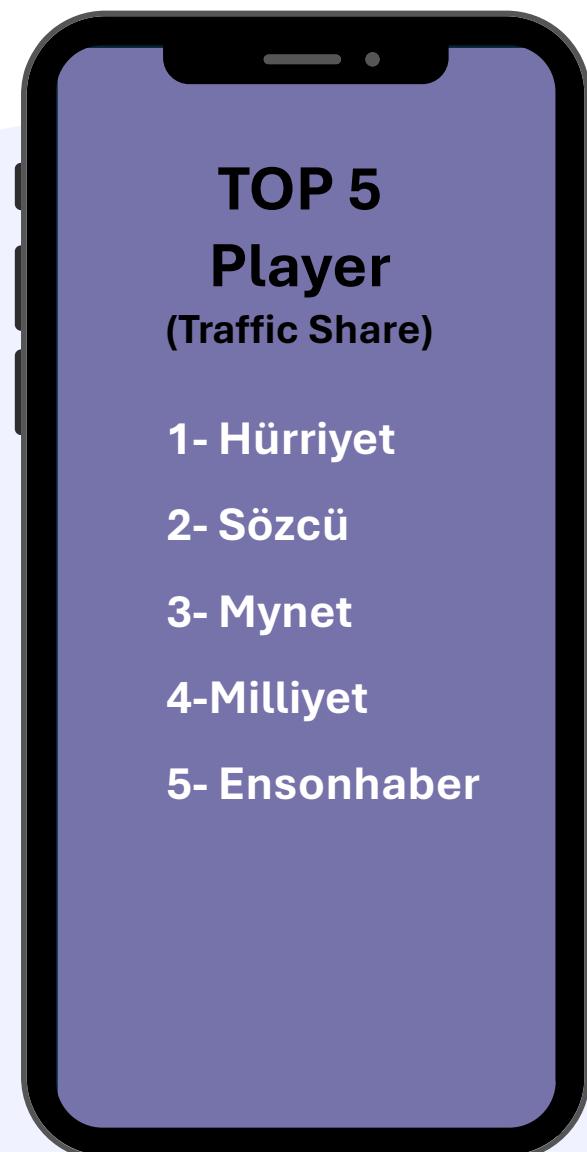
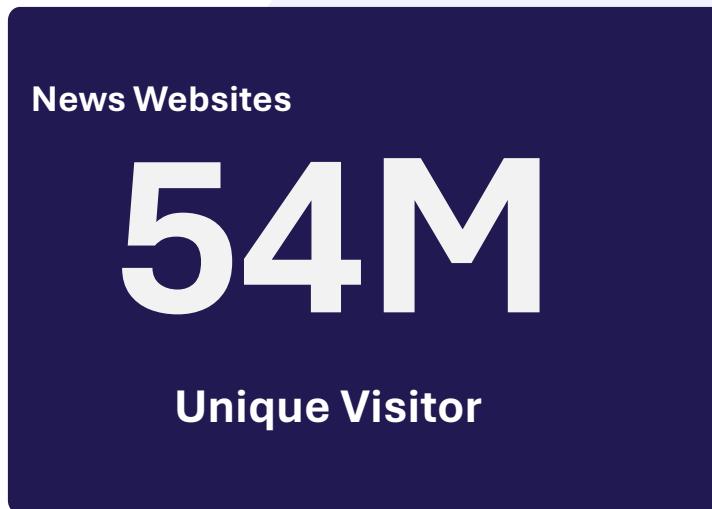
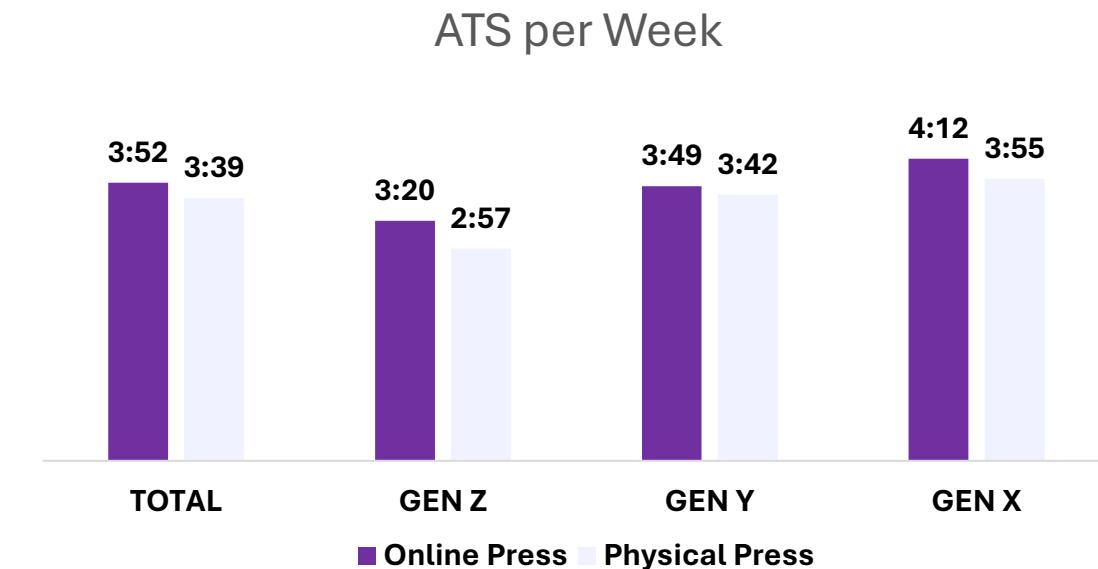




Press Consumption in Turkey

– Online vs. Physical

Gen Z is driving the shift to online press, while **Gen X** maintains a more balanced mix of digital and print.



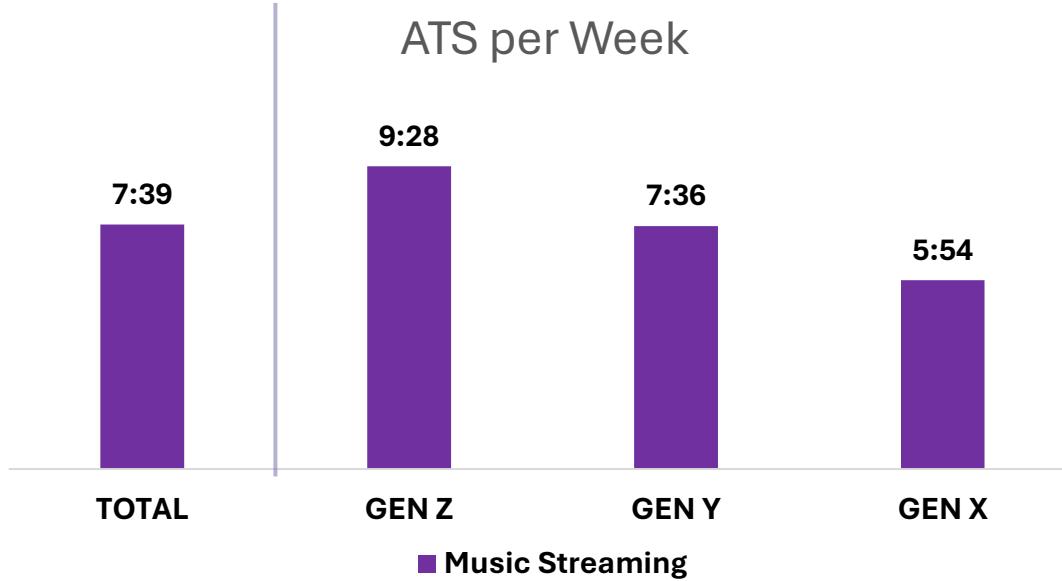


Music Streaming in Turkey

Total Weekly Music Streaming

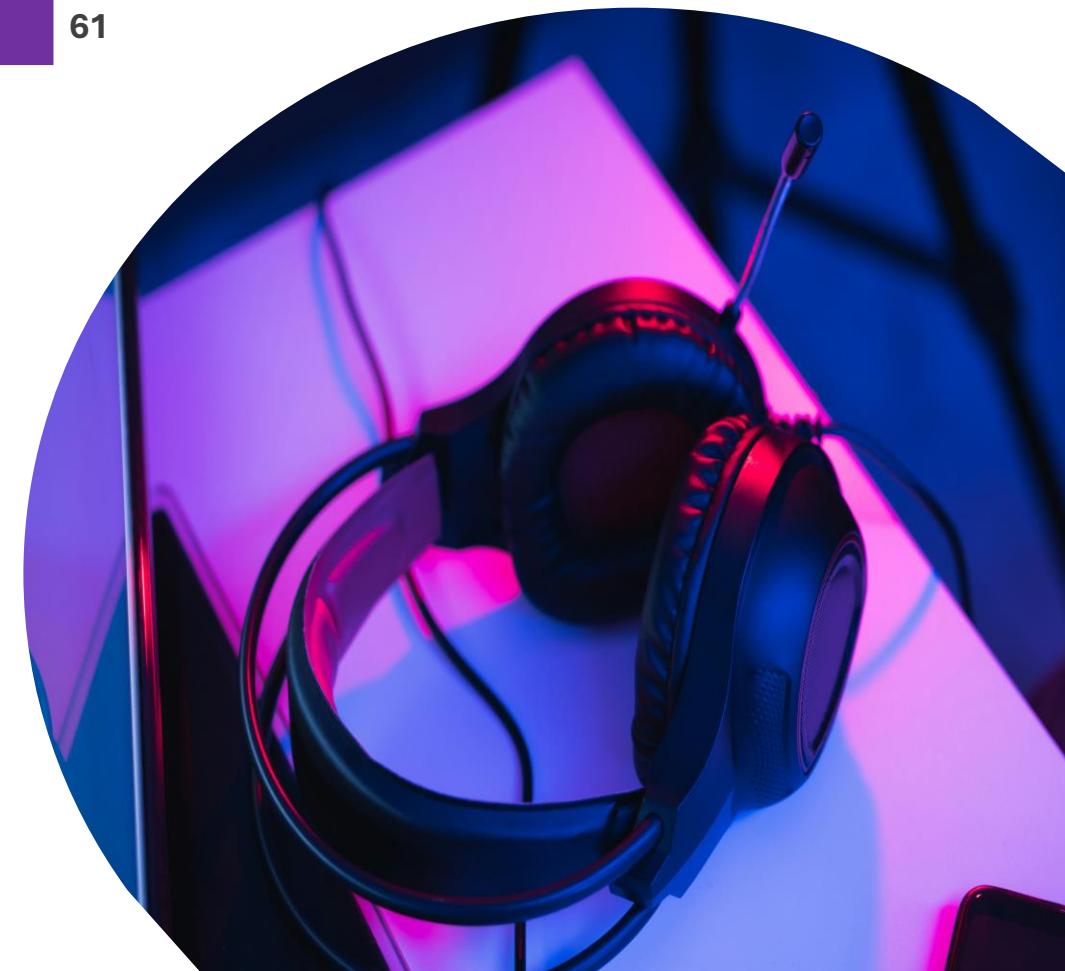
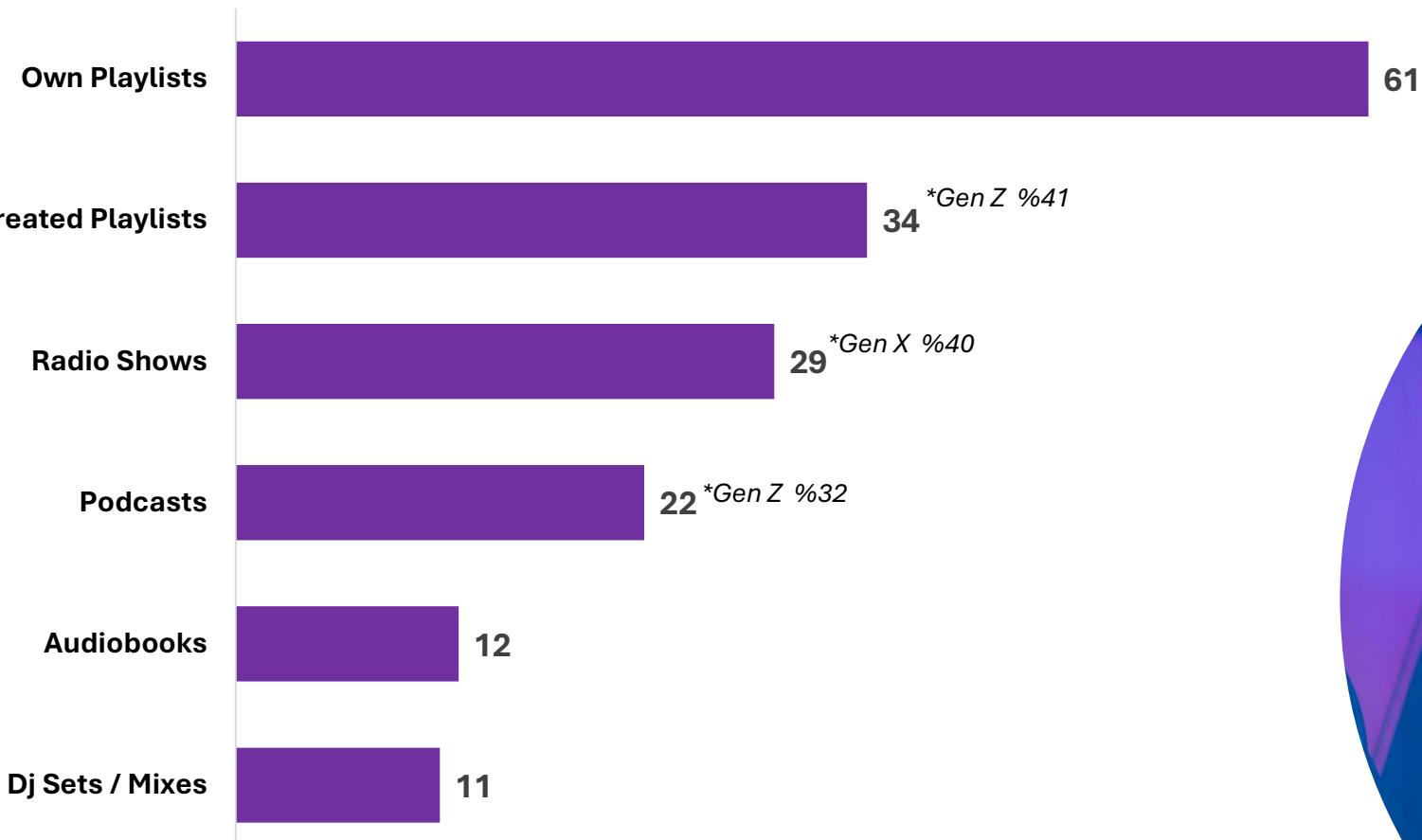
7:39 h

ATS per Week





Preferred Music & Audio Content





Music Streaming Platform Usage

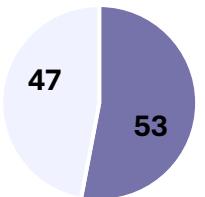
Spotify and YouTube Music grow steadily; premium users now represent almost half of the market.

Music Services Engagement



%51  *+3PP

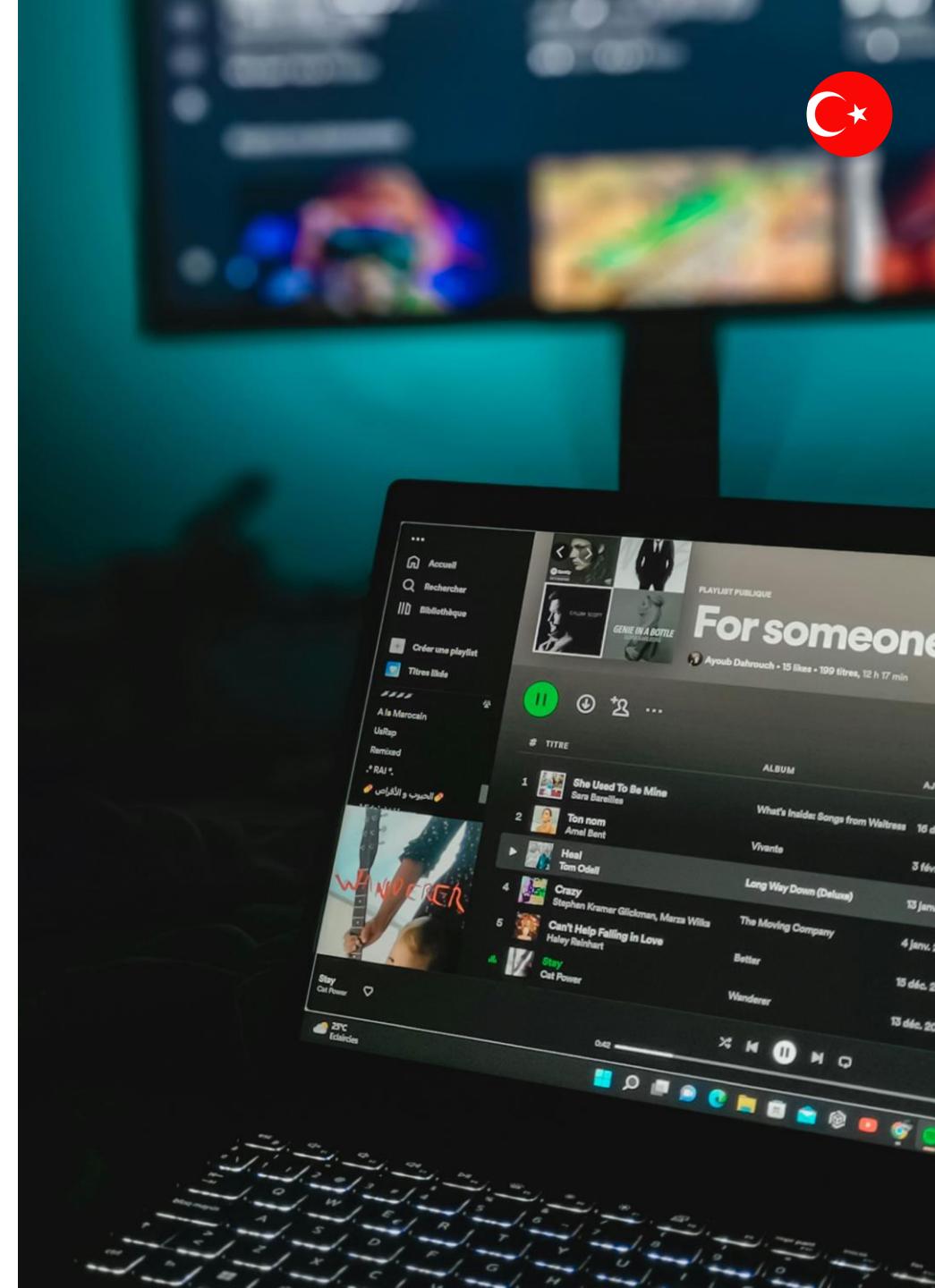
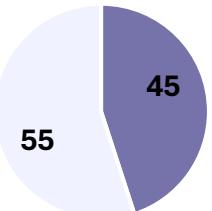
Subs Type



■ Premium ■ Free-Trial



%48  *+3PP





Podcast Listener in Turkey

Podcast Listener

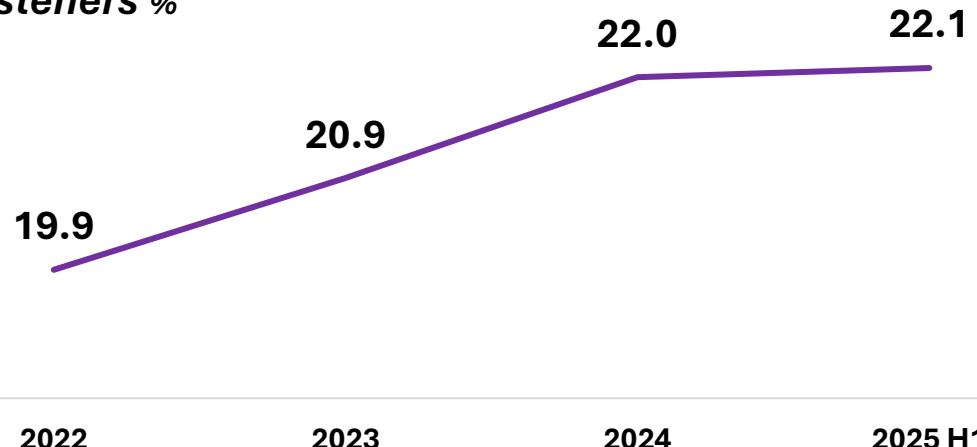
12M

Podcast adoption in Turkey reached **12M** users in H1 2025, with weekly listening averaging

ATS
3:27h

3.5 hours – growth is stabilizing but engagement remains strong

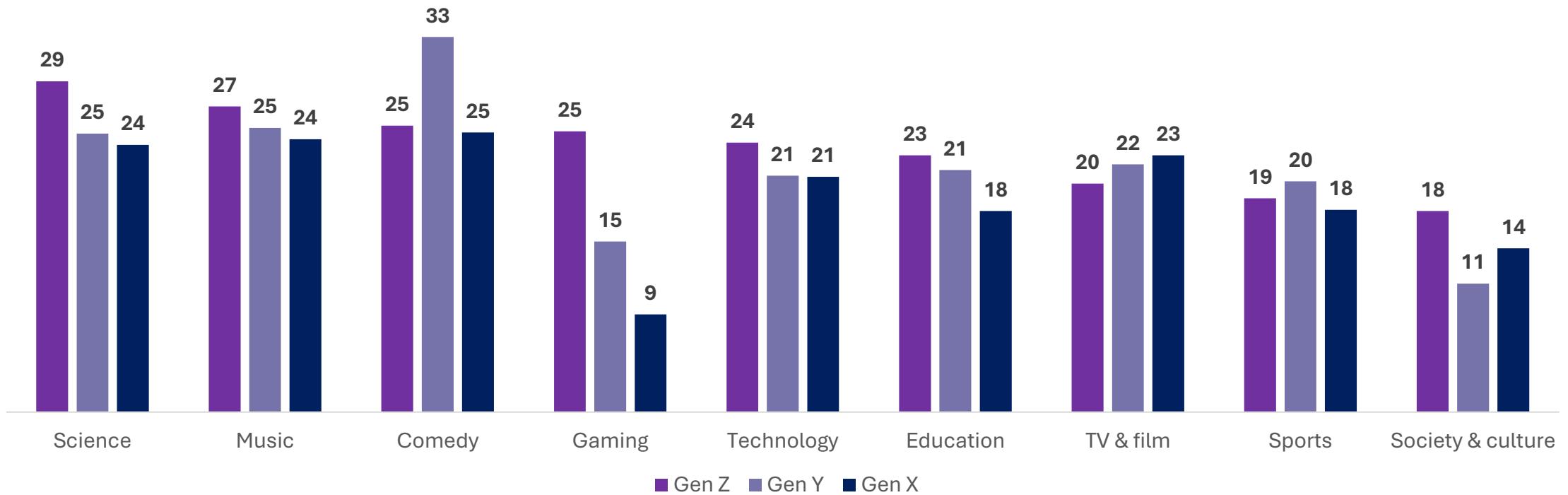
Podcast Listeners %





Types of Podcast: in Generations

Younger audiences seek **fun** and **interactive** formats, while older generations engage more with **educational** and **cultural topics**.



E-Commerce Momentum in H1 Turkey

Based on preliminary estimates, Turkey's e-commerce volume exceeded **2 trillion TRY** in the first half of **2025**.

Considering that growth typically accelerates in the second half of the year, the total volume is expected to approach **5 trillion TRY** by year-end.

(2024 FY = 3.2 trillion TRY)

E-commerce in Turkey is driven by **20–44 year olds**,

- Women leading in **fashion & home**;
- Men in **electronics & travel** —

Peak spending comes from ages 30–34.





Retail Media & E-commerce Behaviors

%24 of People,
Discovery Brand On **Online
Retail Websites**



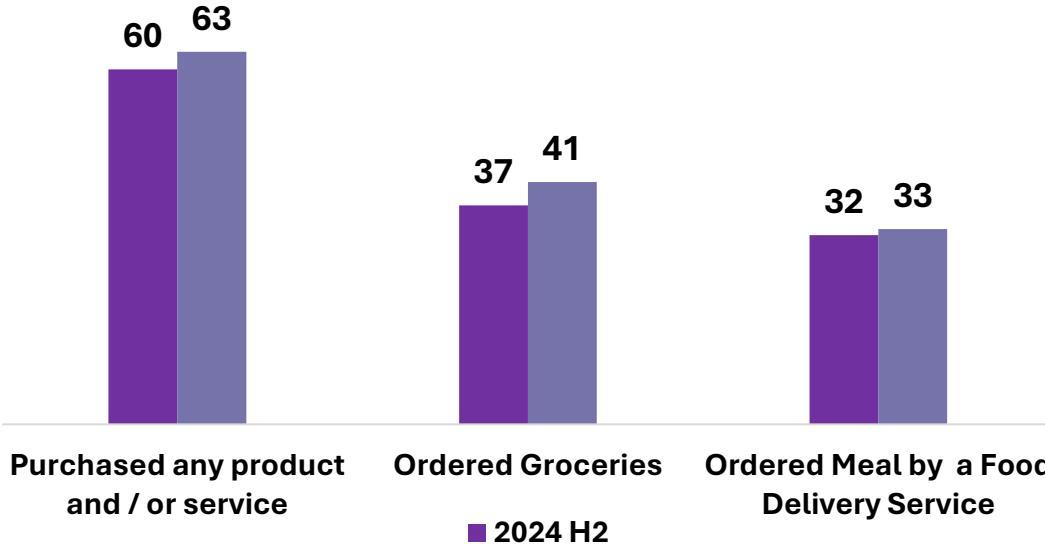
Retail media reaches consumers at the final stage of consumer journey, where actions have the strongest impact on conversion .



Retail Media ads are increasingly **accepted** by consumers, especially when tied to **discounts** or **relevant** product recommendations



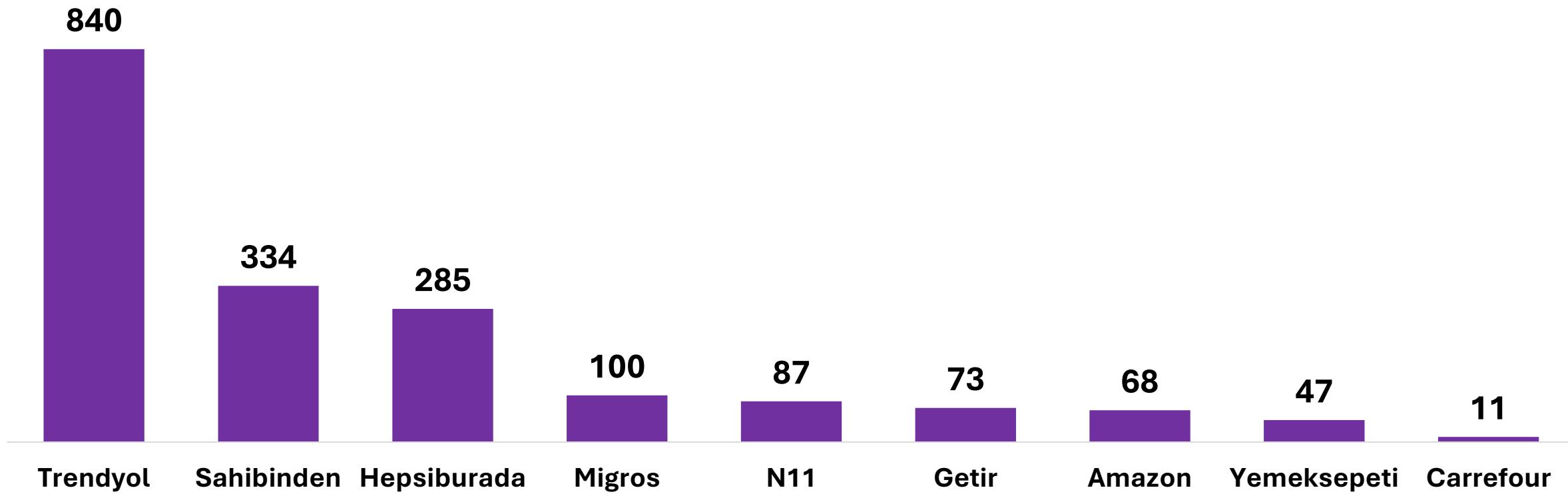
Online Shopping Behaviors





Traffic Of Top E-com Platforms

*Average Monthly Traffic
(APP+Web, Million)*





Common Usage: Gaming

49M

Any device used to play game (16+)

Total Weekly Gaming

14:49 h

Mobile Games

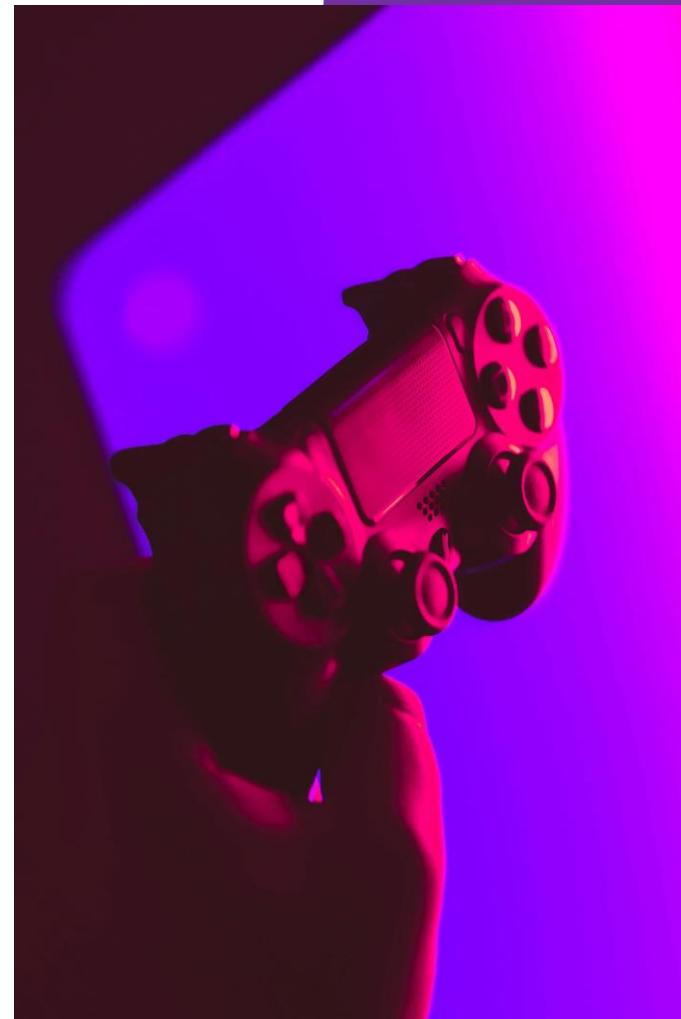


8:20 h

PC/Console Games

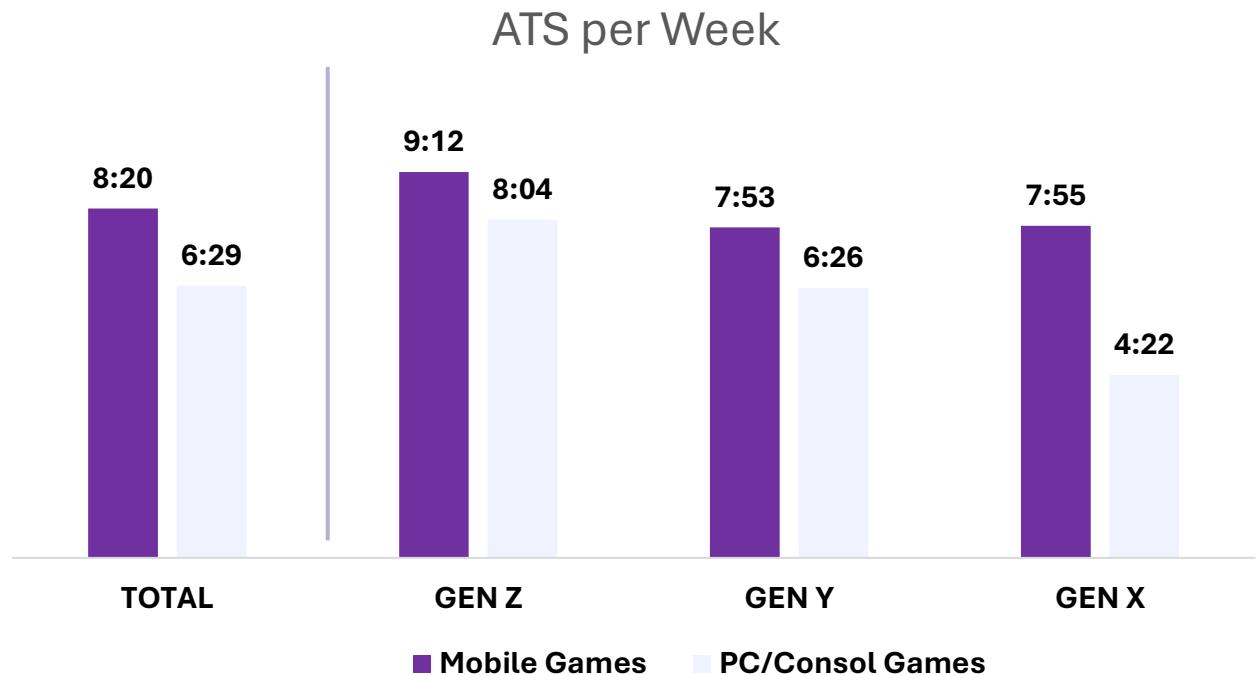


6:29 h



Common Usage: Gaming

Gaming in Turkey is highly popular, with users spending **over 8 hours per week on mobile games** and **6+ hours on PC/console games**. **Gen Z** leads the trend (**9+ hours** on mobile, **8 hours** on console), reflecting their central role in driving the gaming culture.





Device Used For Gaming

Mobile leads gaming in Turkey, **PCs** popular with **Gen Z**, while **VR** stay niche.

*Gen Y %86



%83

Smartphone

*Gen Z %50



%41

PC / Laptop



%28

Tablet

*Gen Y %32



%27

Game Console

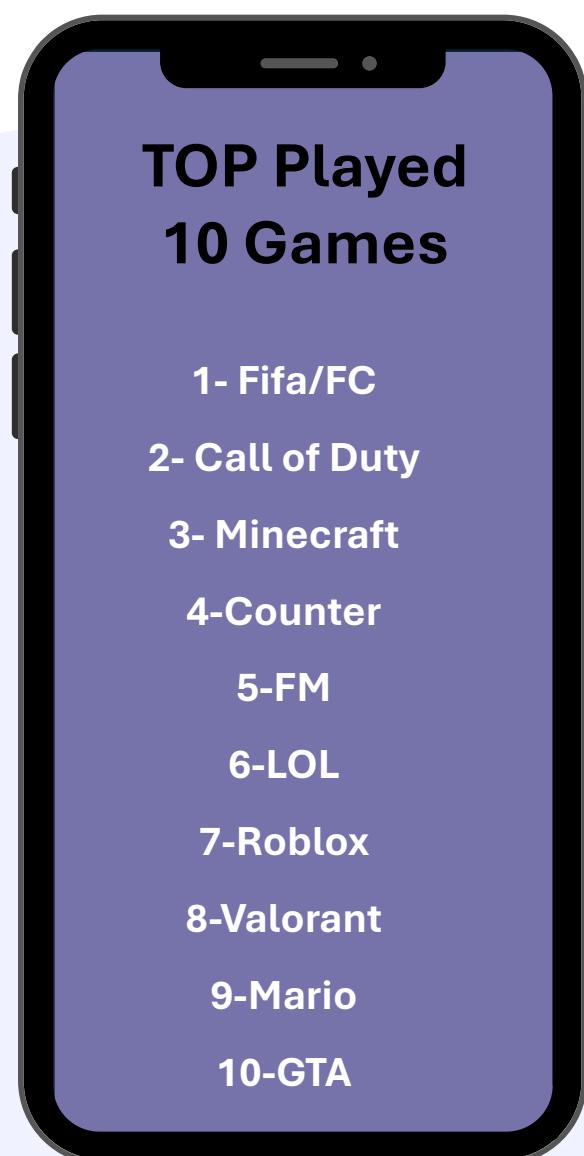


%5

VR

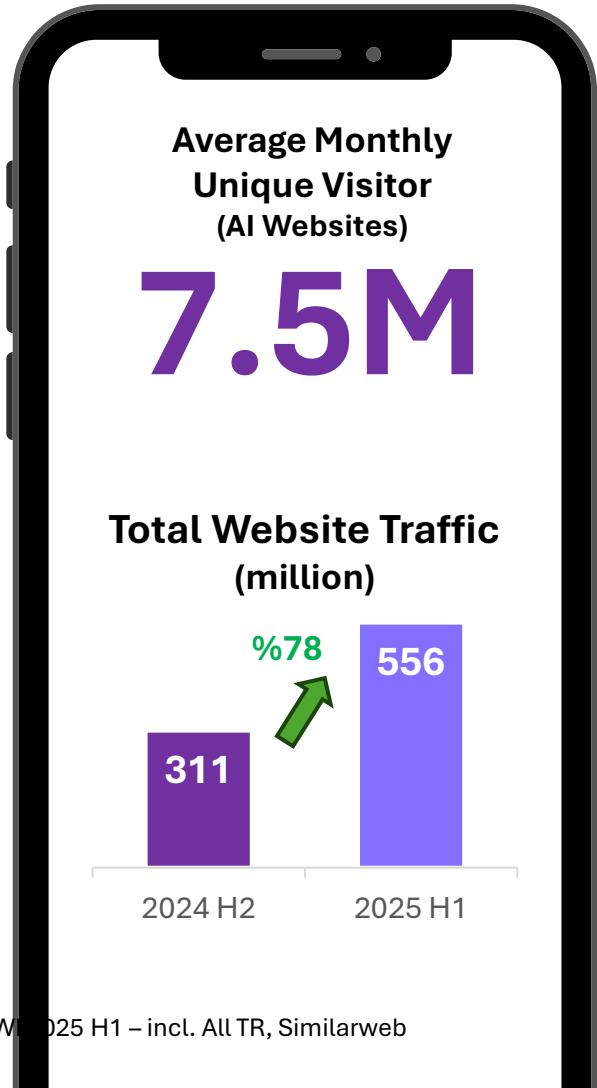


Most Preferred Gaming Genres

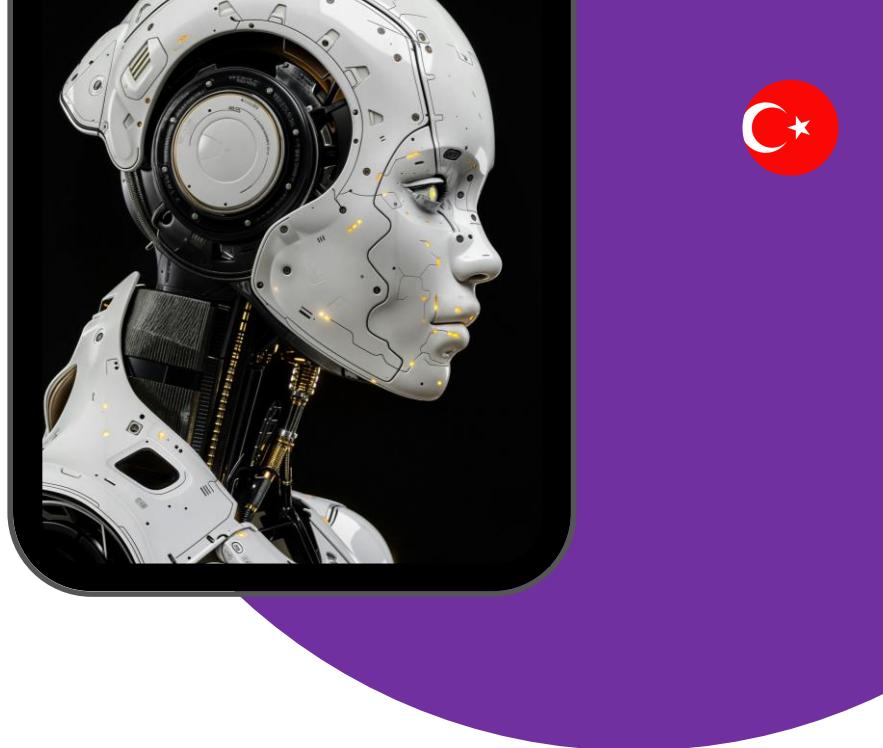




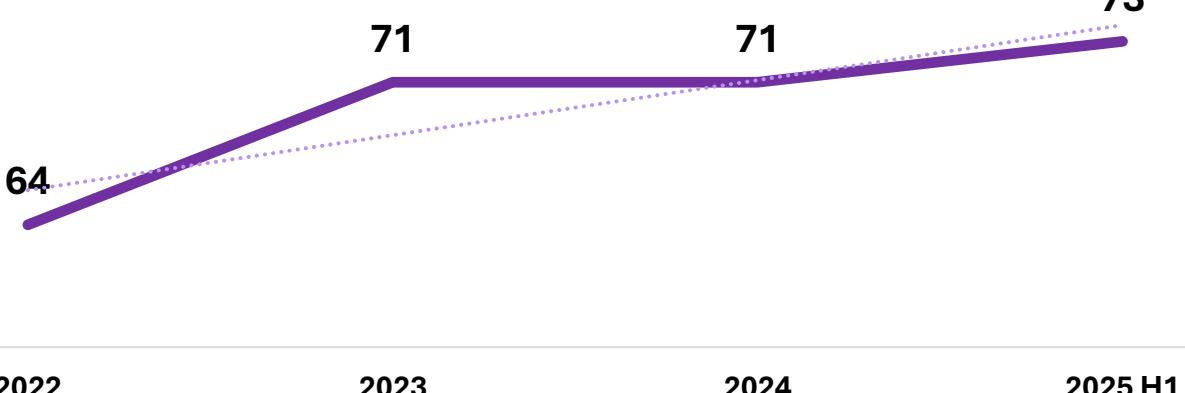
AI Adoption & Consumer Behavior in Turkey



AI is increasingly embedded in everyday life, shaping how people **search, shop, consume content, and manage daily tasks.**

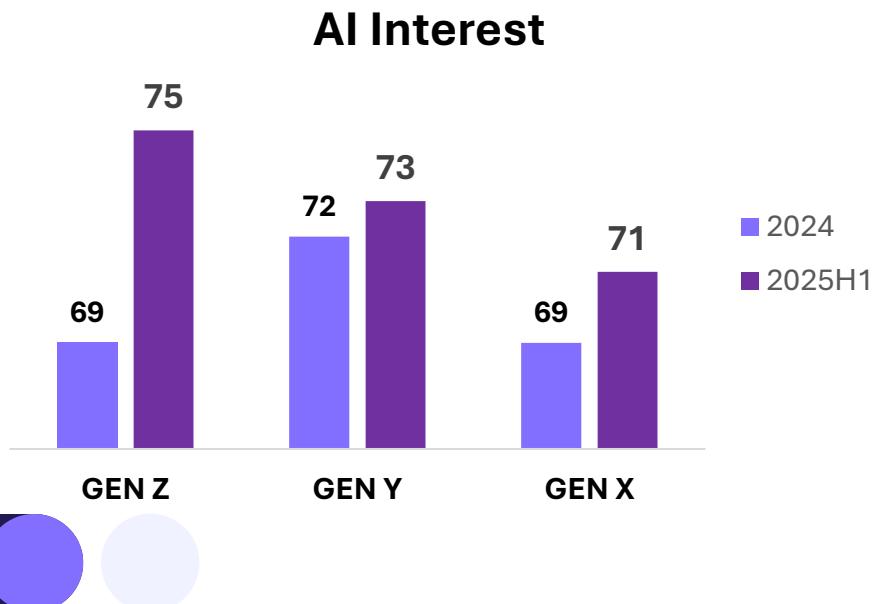


AI Interest %



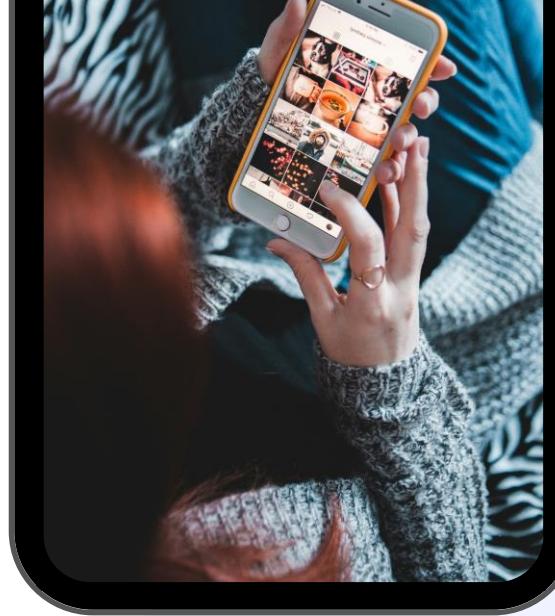
AI Adoption & Consumer Behavior in Turkey

Gen Z & Gen Y are the fastest adopters;
Gen X adoption is slower



Mobile is becoming the main entry point for AI usage

AI is reshaping how Turkish consumers **shop**, **learn**, and **consume** content — with **Gen Z** leading adoption.

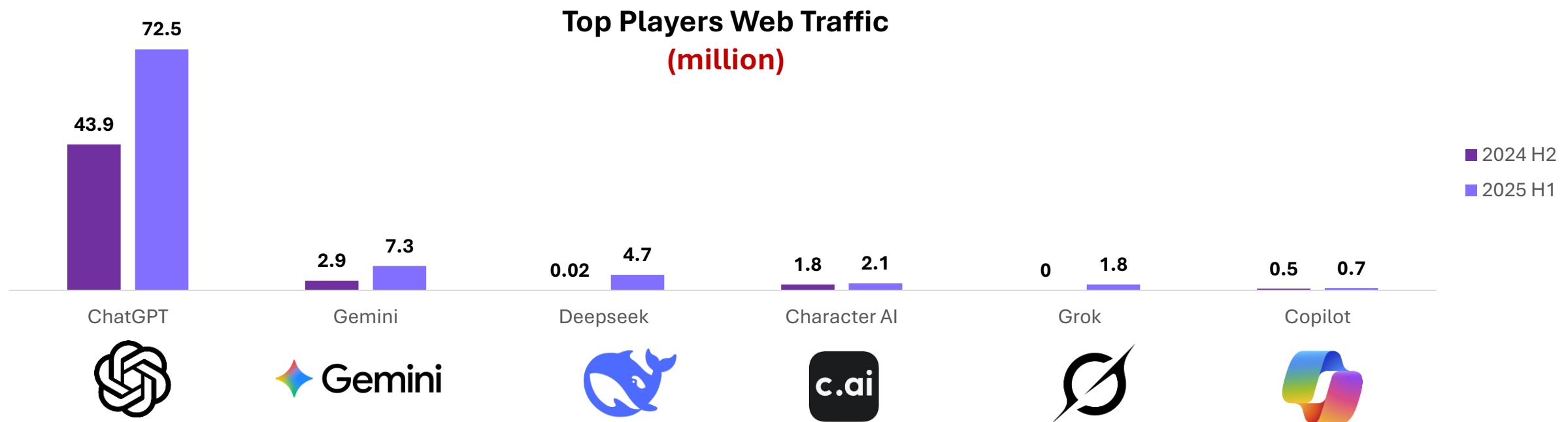




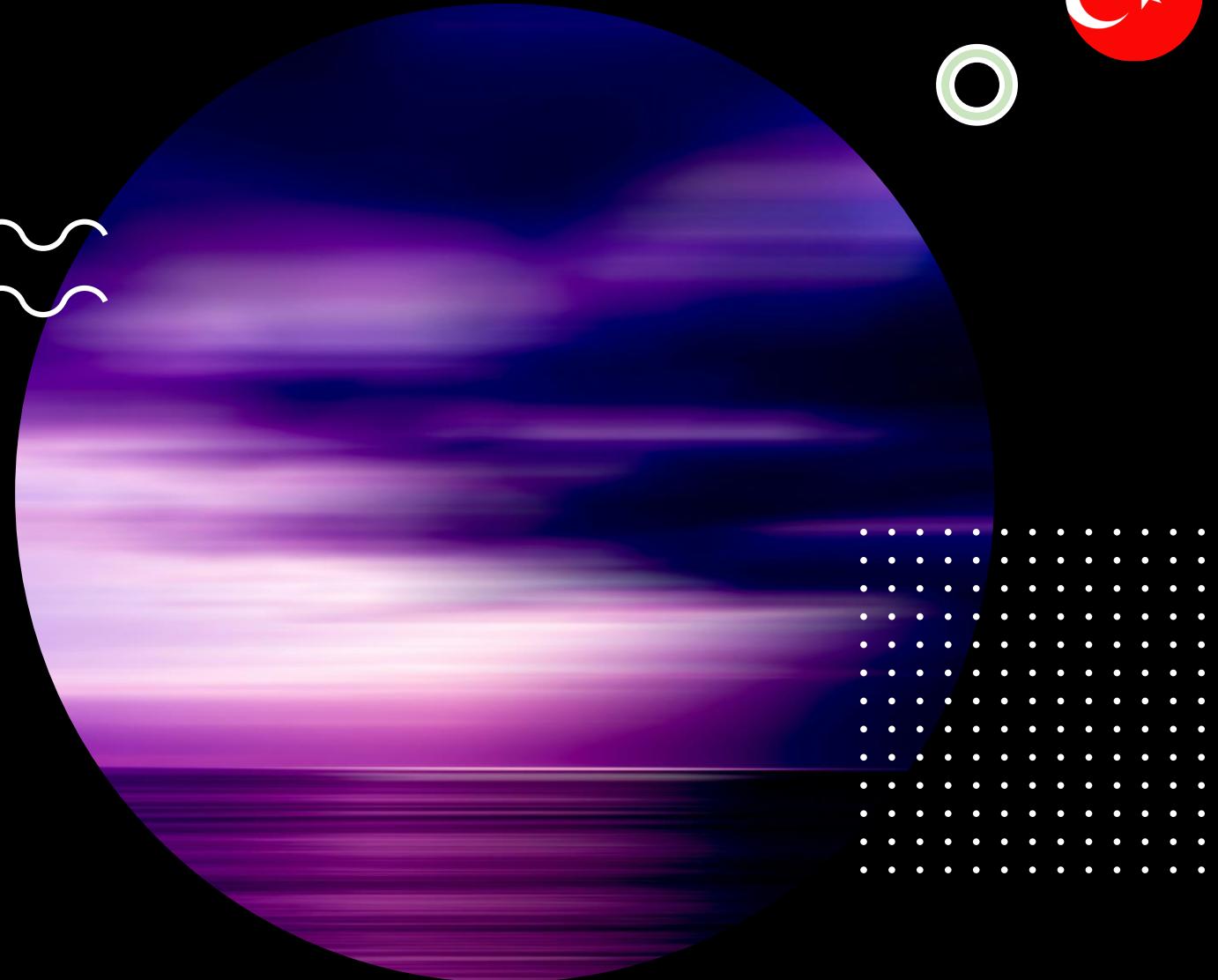
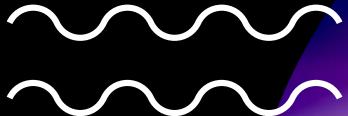
Top Players in AI

AI competition is intensifying: **ChatGPT** leads, but specialized tools like **Gemini**, **DeepSeek**, and **Character AI** are gaining traction with niche use cases

Beyond these major players, many **new AI tools** are being launched every day, with their capabilities evolving rapidly and expanding into new use cases.



CONCLUSION & FUTURE TRENDS



Shifts in Consumer Behavior & Opportunities

Digital at peak: 77M internet users,
96% mobile

Gen Z & Millennials drive video,
streaming, TikTok, gaming.

Media fragmentation: streaming >
broadcast

E-commerce boom: ₩2T in H1 2025
→ ₩5T expected 2025FY ; peak
spenders 30–34

Retail Media: strongest impact at
purchase stage.

Streaming & TikTok: key for
discovery & engagement.

Influencers: boost awareness &
trust.

Music & Podcasts: niche growth,
12M podcast users.

Gaming: 30M gamers, mobile leads.

AI: rising as a search & content tool.



Trend Radar - 2026

Voice Commerce & Voice Search

- Provides seamless, hands-free shopping via AI assistants
- Voice to be ~30% of e-commerce

AI-Powered Personalization & Predictive Commerce

- Anticipates consumer needs, enhances CX and sales efficiency
- Major lift in purchase metrics

AI-Generated / Virtual Influencers

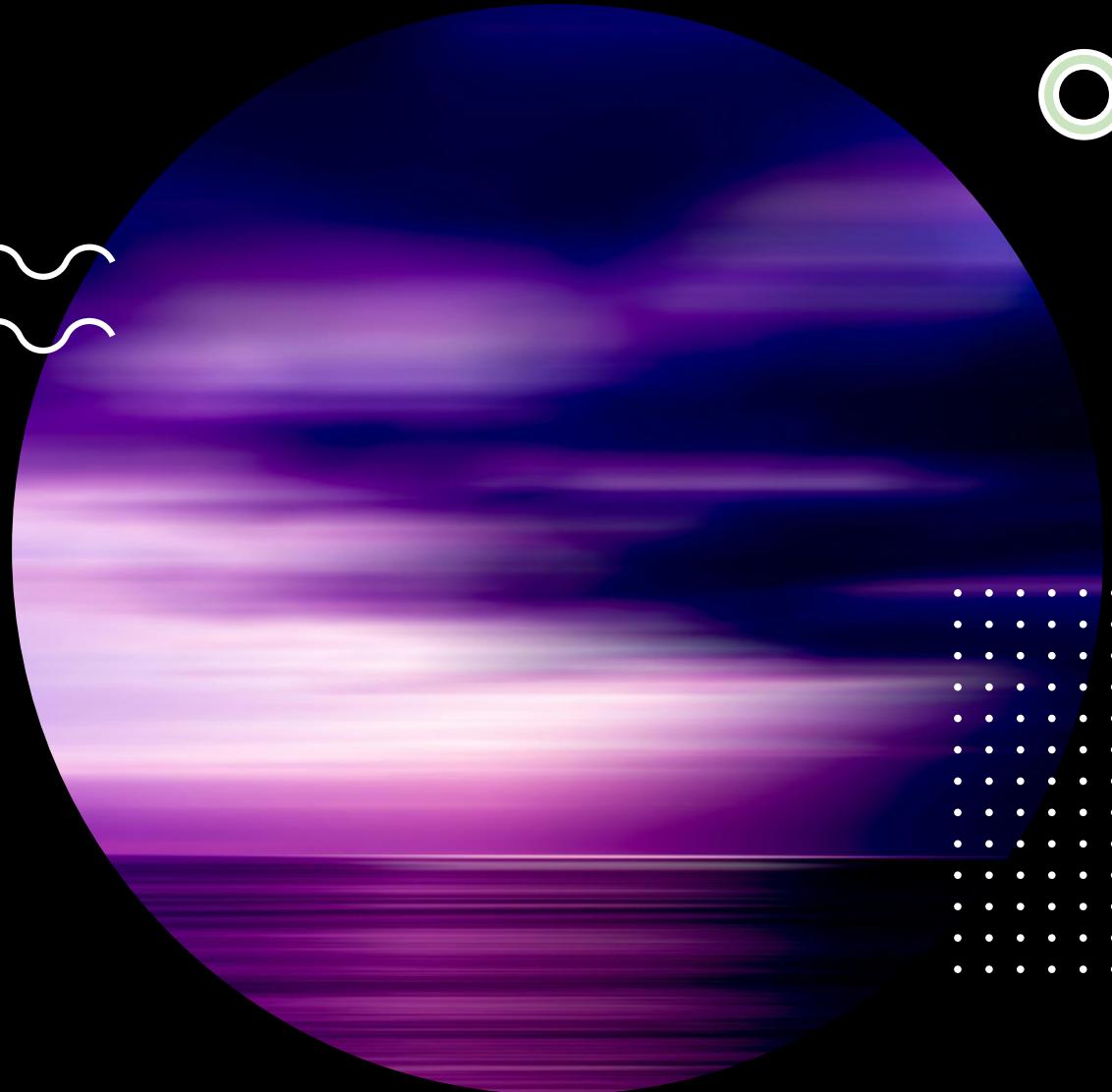
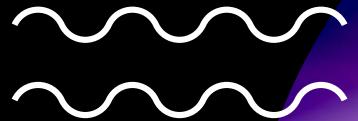
- Offers scalable, brand-safe influencer alternatives
- Growing Gen Z engagement

Augmented Reality (AR) Shopping

- Encourages confidence; early adoption via browser AR tools
- +94% conversion, -40% returns

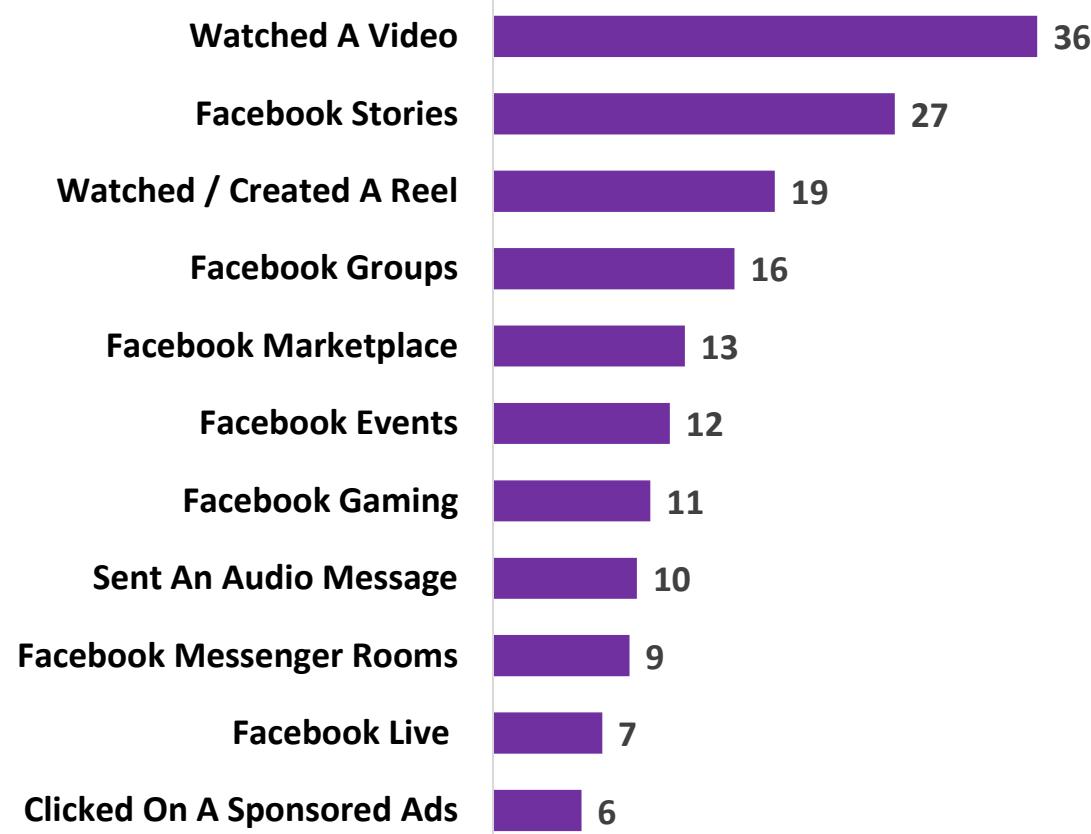


APPENDIX



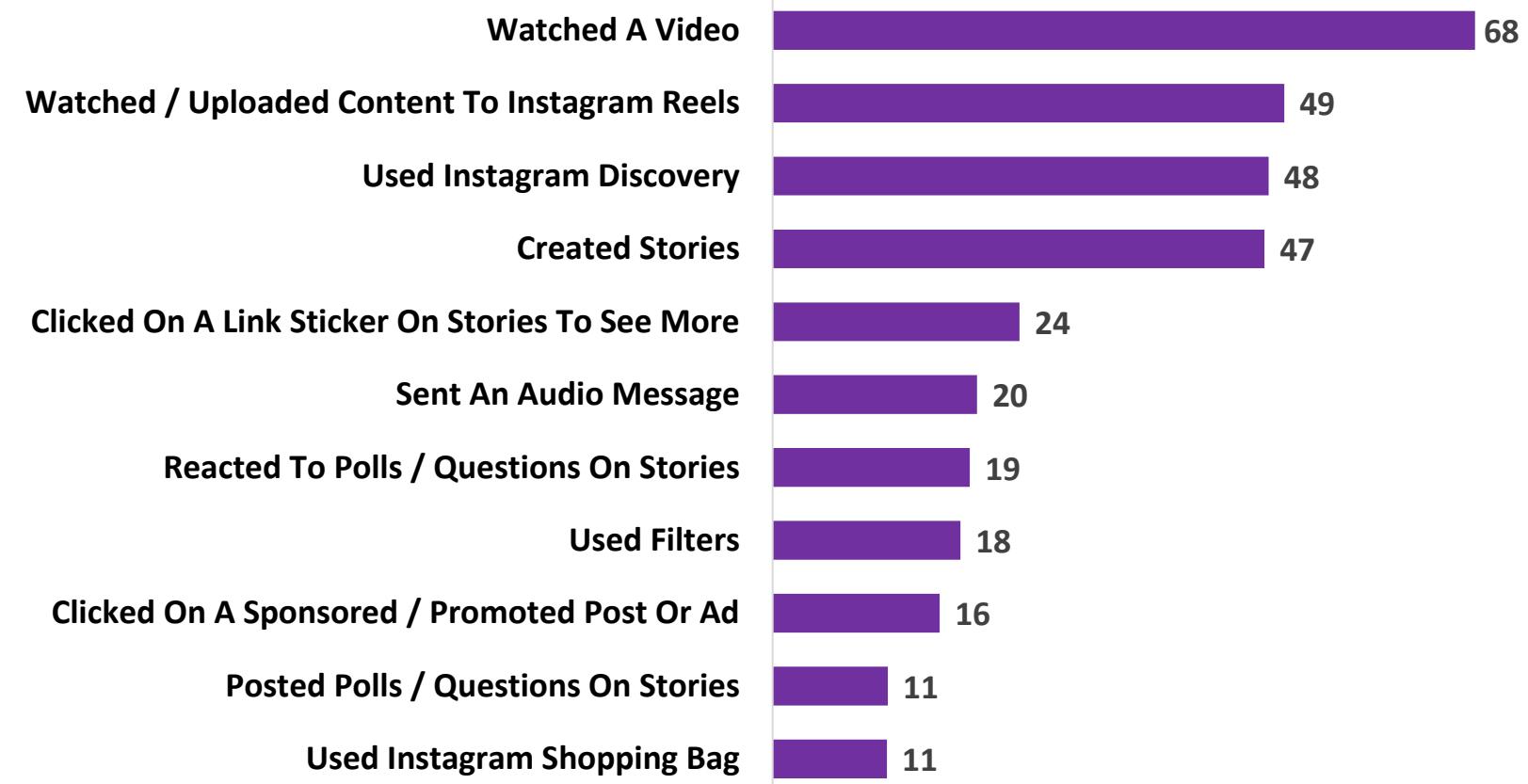


Platform Specified Behaviors



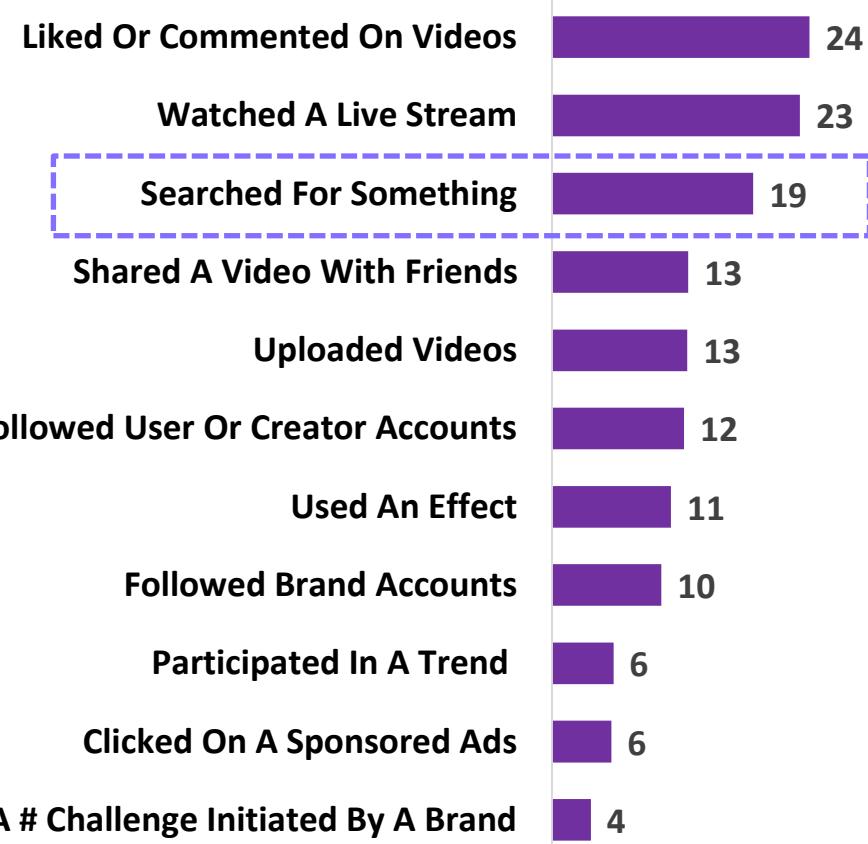


Platform Specified Behaviors



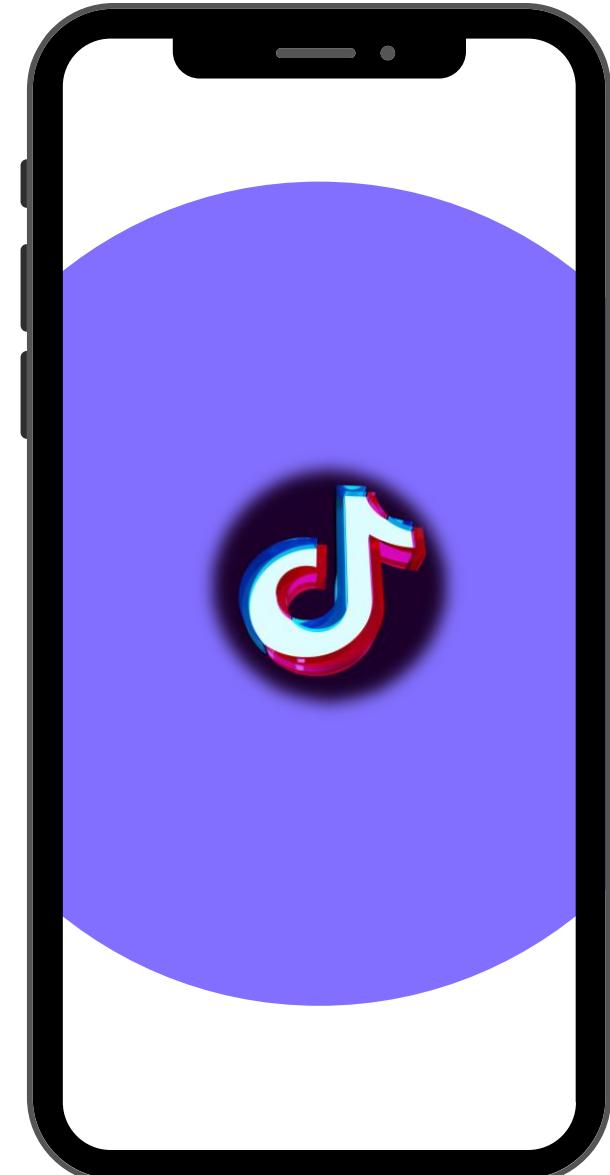


Platform Specified Behaviors



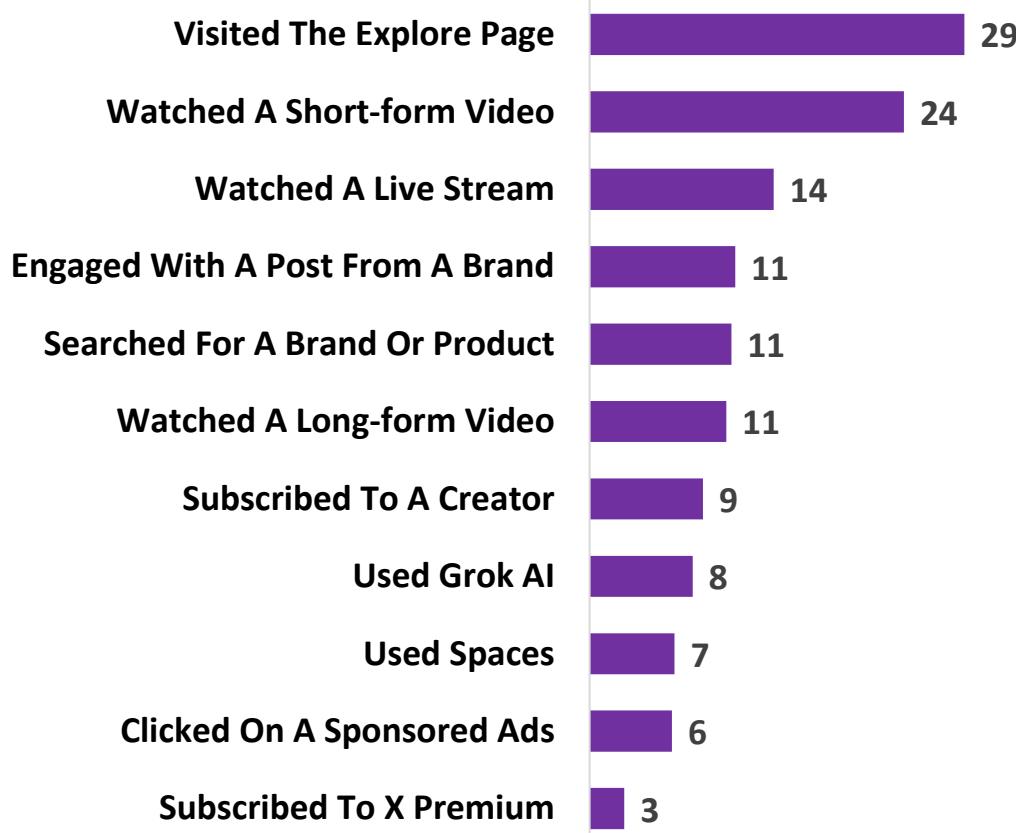
New Search Engine

For Gen Z, TikTok is becoming a go-to search tool for product research



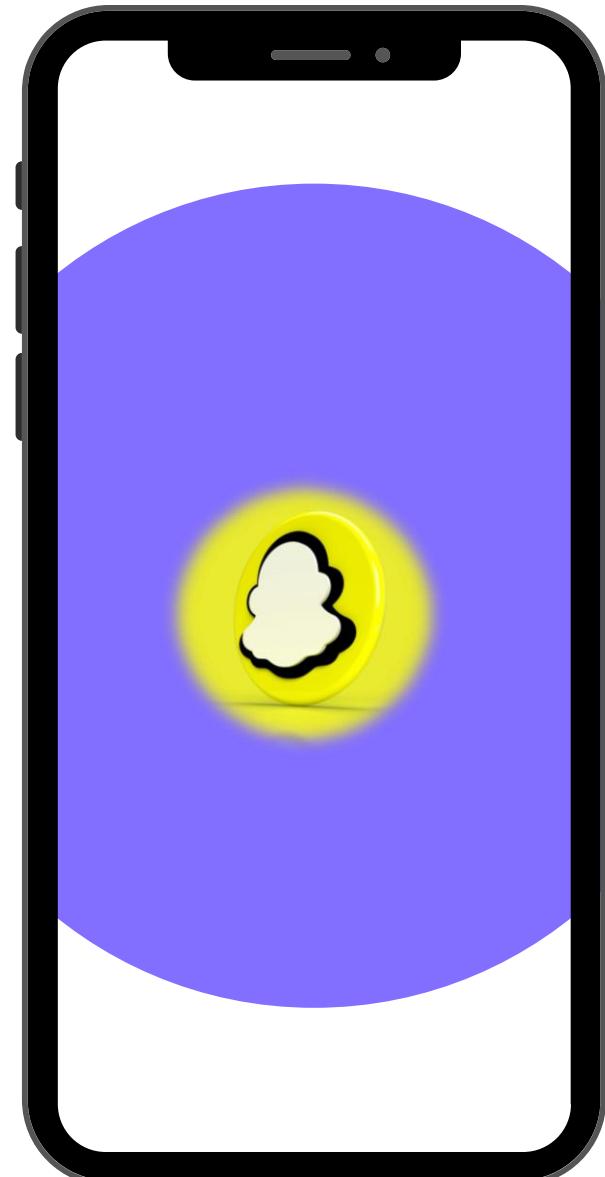
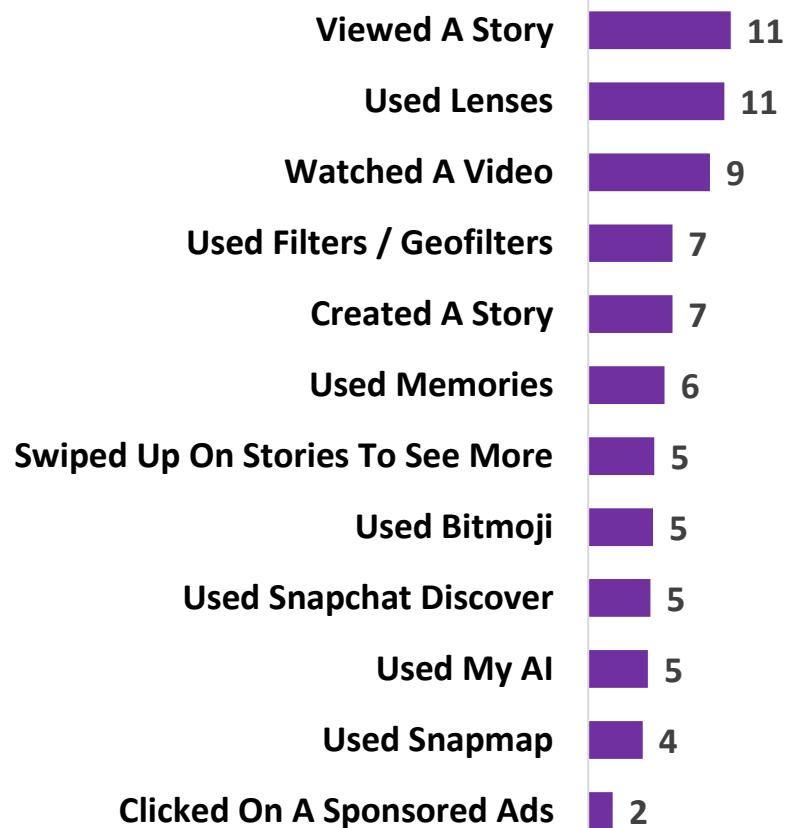


Platform Specified Behaviors



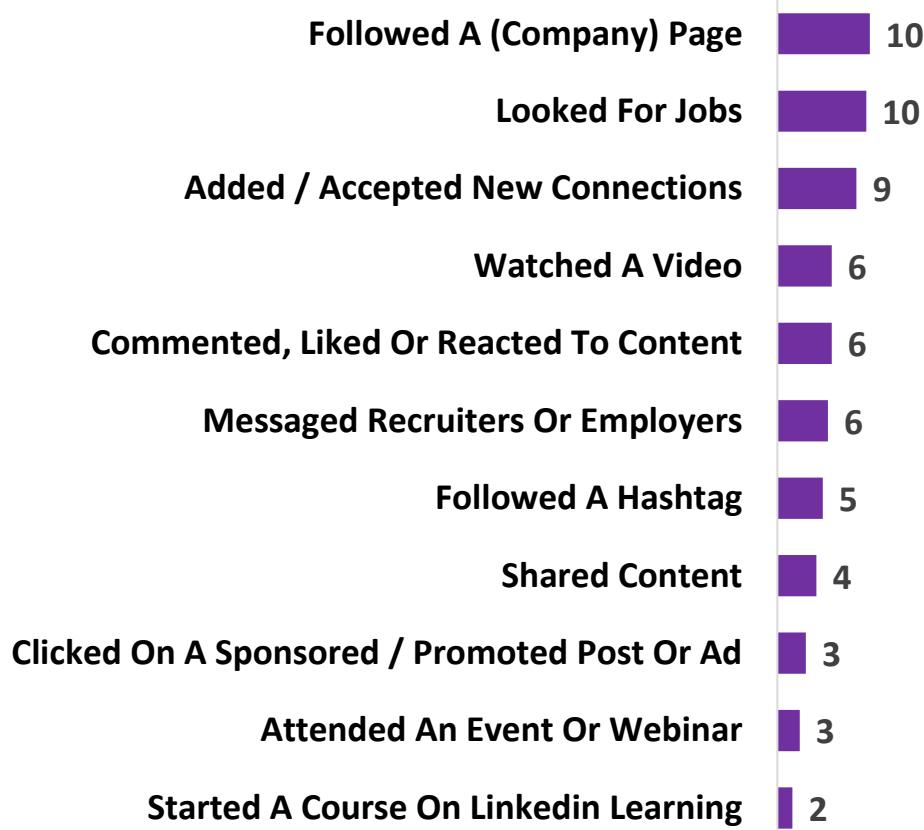


Platform Specified Behaviors



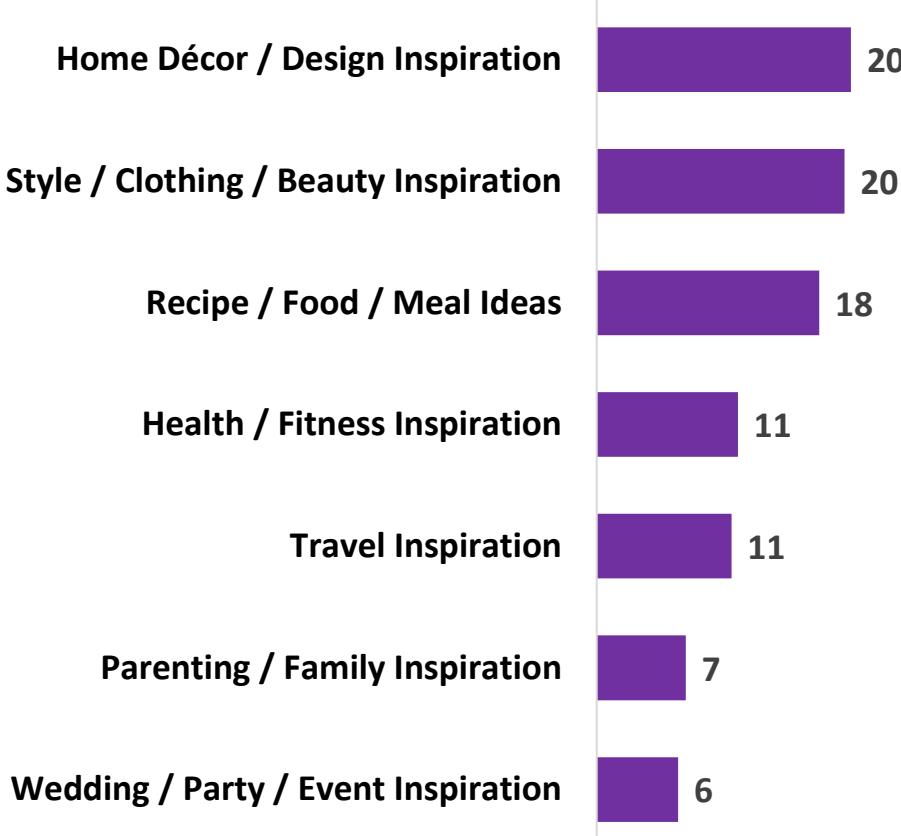


Platform Specified Behaviors





Platform Specified Behaviors



Thanks!

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