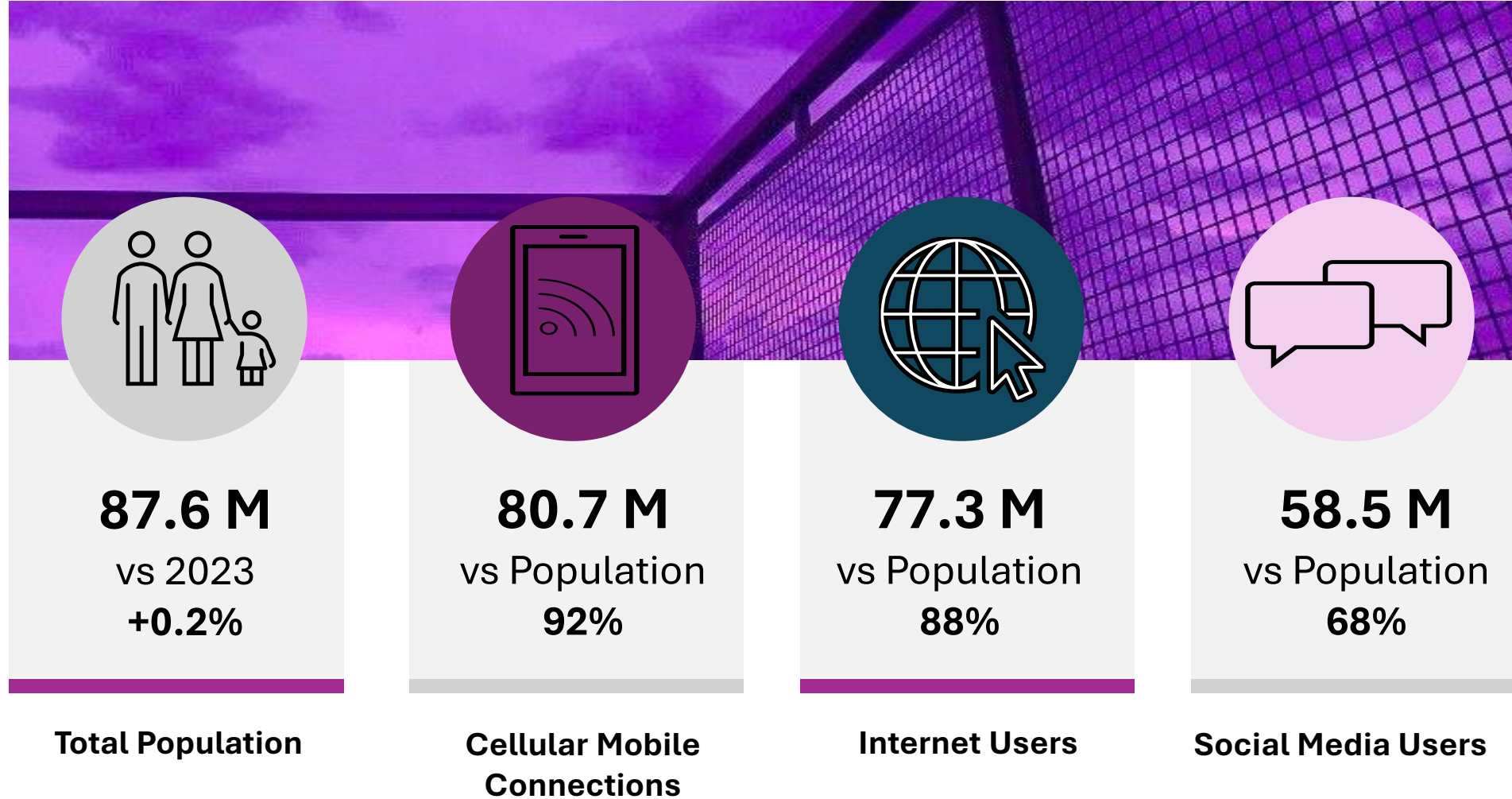




# Digital Media Landscape

2025 H1

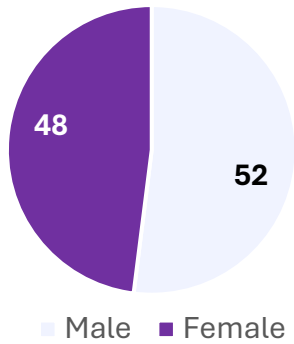
# SUMMARY OF DIGITAL MEDIA LANDSCAPE



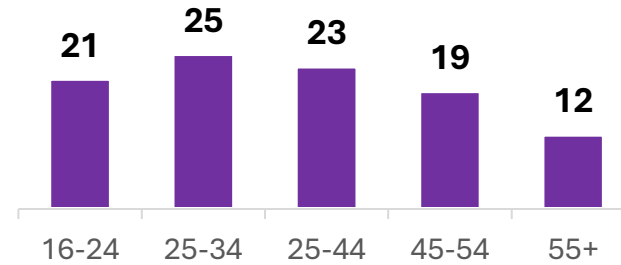


# Demographic Overview

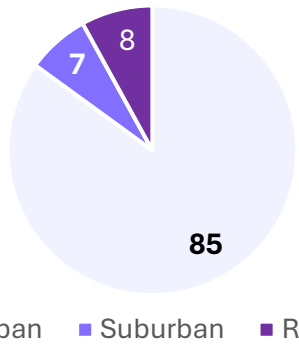
## Gender



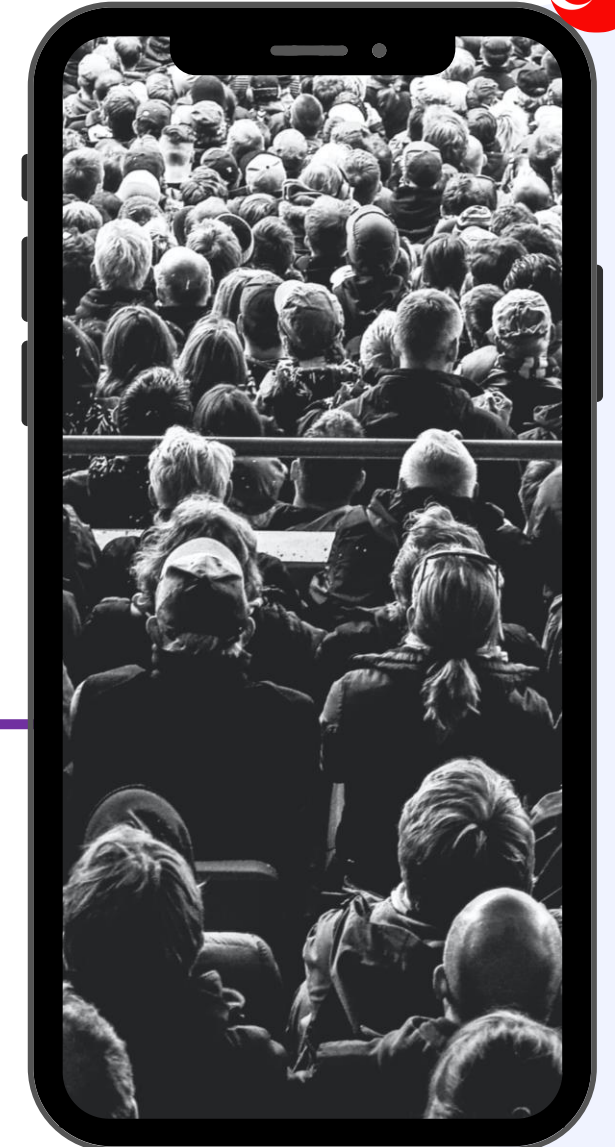
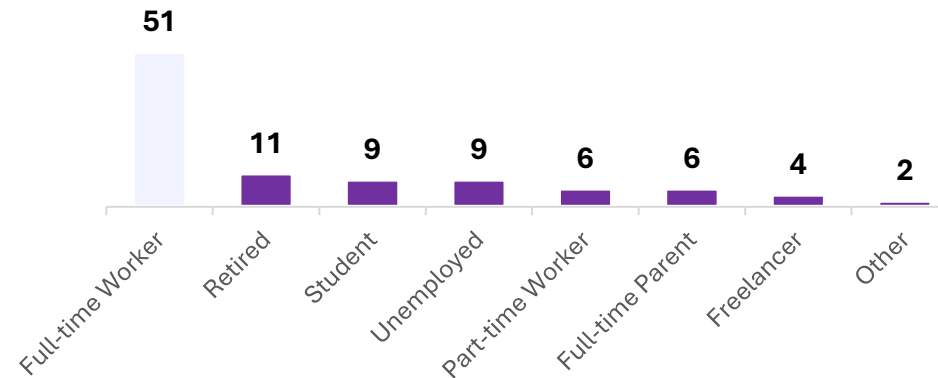
## Age Groups



## 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



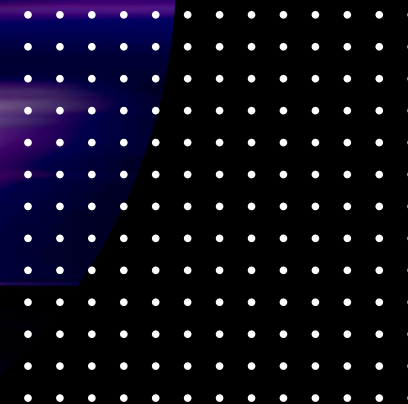
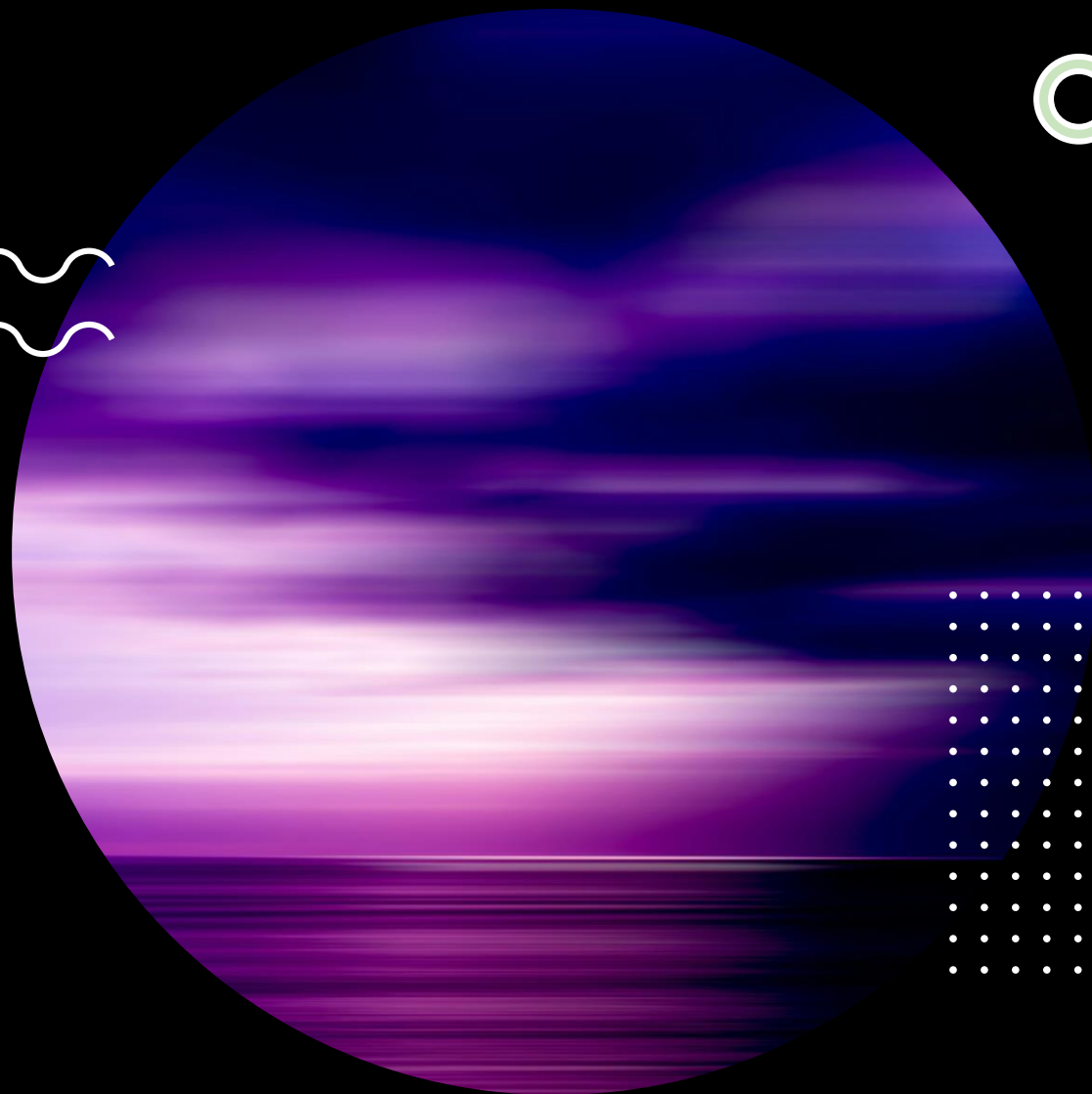
- Multi-device usage
- Strong in e-commerce & fintech
- High adoption of subscription services (Spotify, Netflix)
- Organize work & social life digitally (LinkedIn, Zoom)

## 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





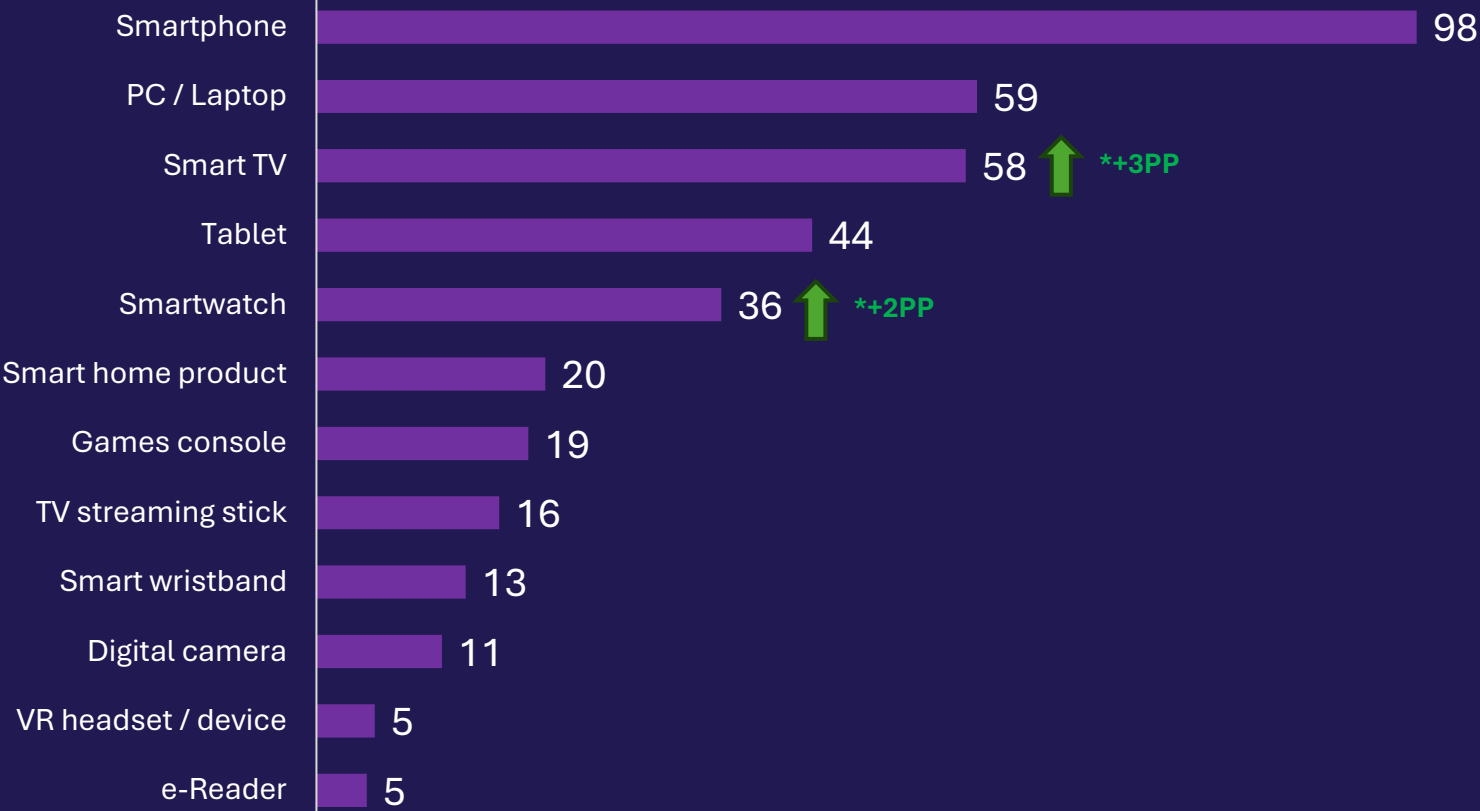
# Device Ownership

Most Important Device  
is Mobile

%85

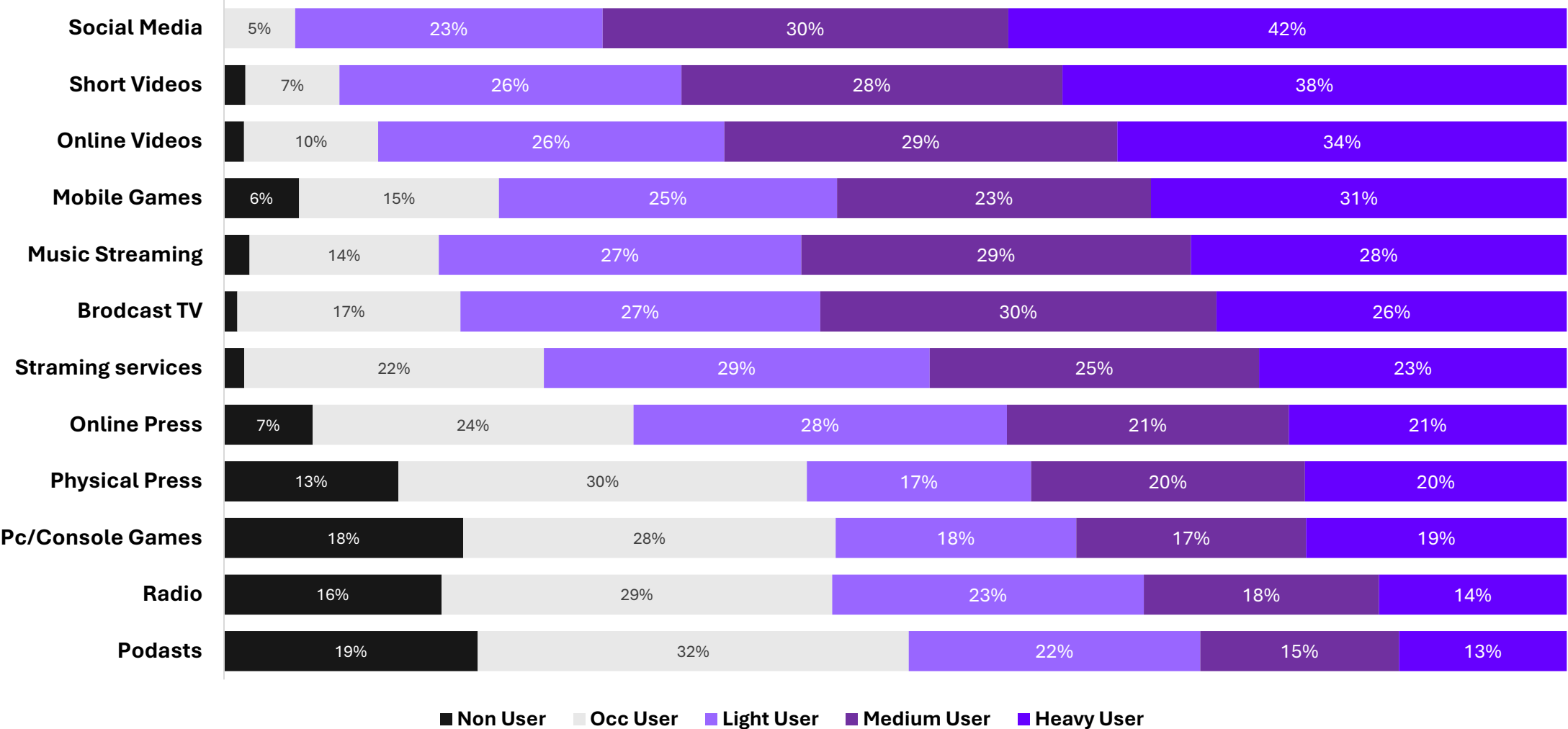
6+ Devices ownership

%20





# Media Users Segmentation

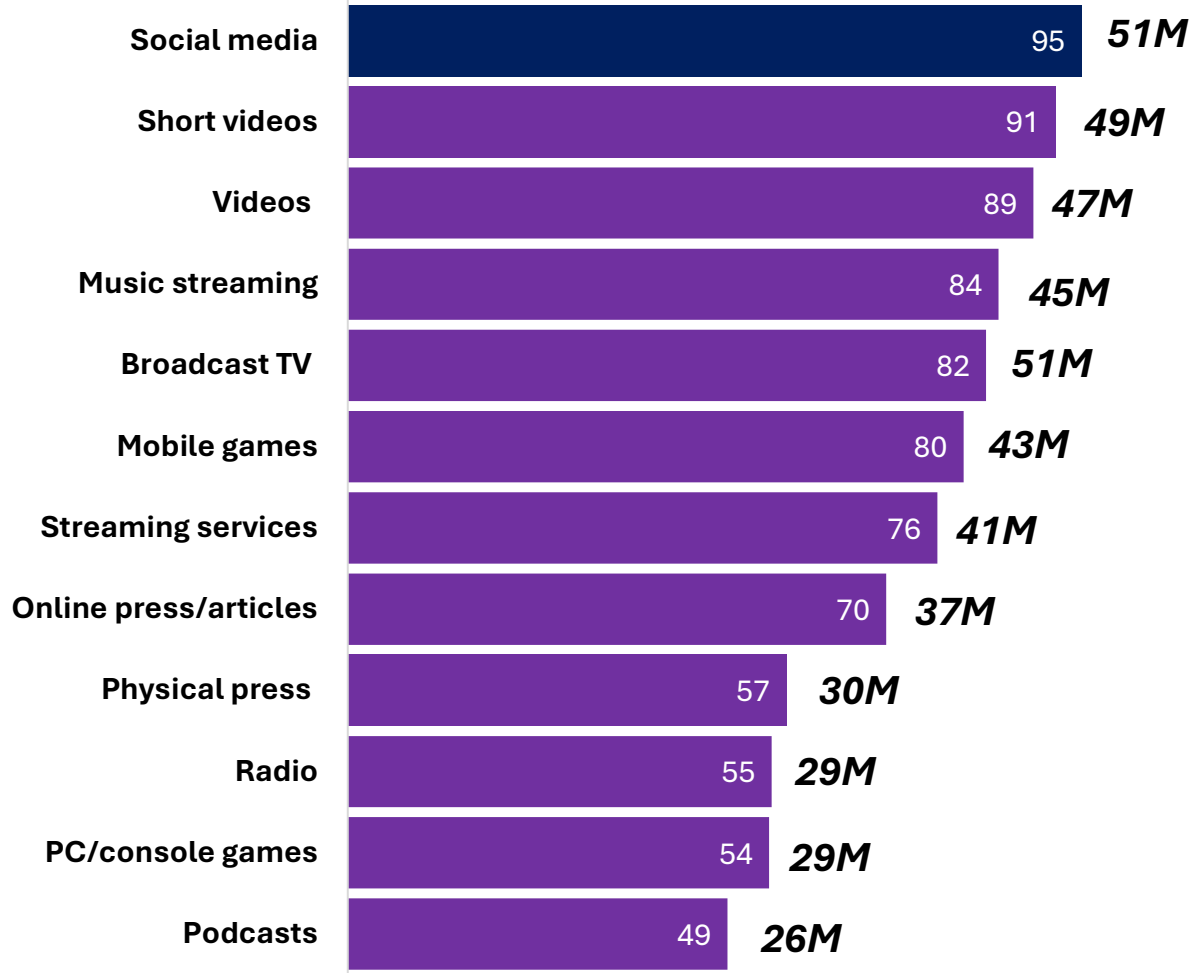






# Penetration & Universe Size On Media

*\*Penetration & Universe 16+*

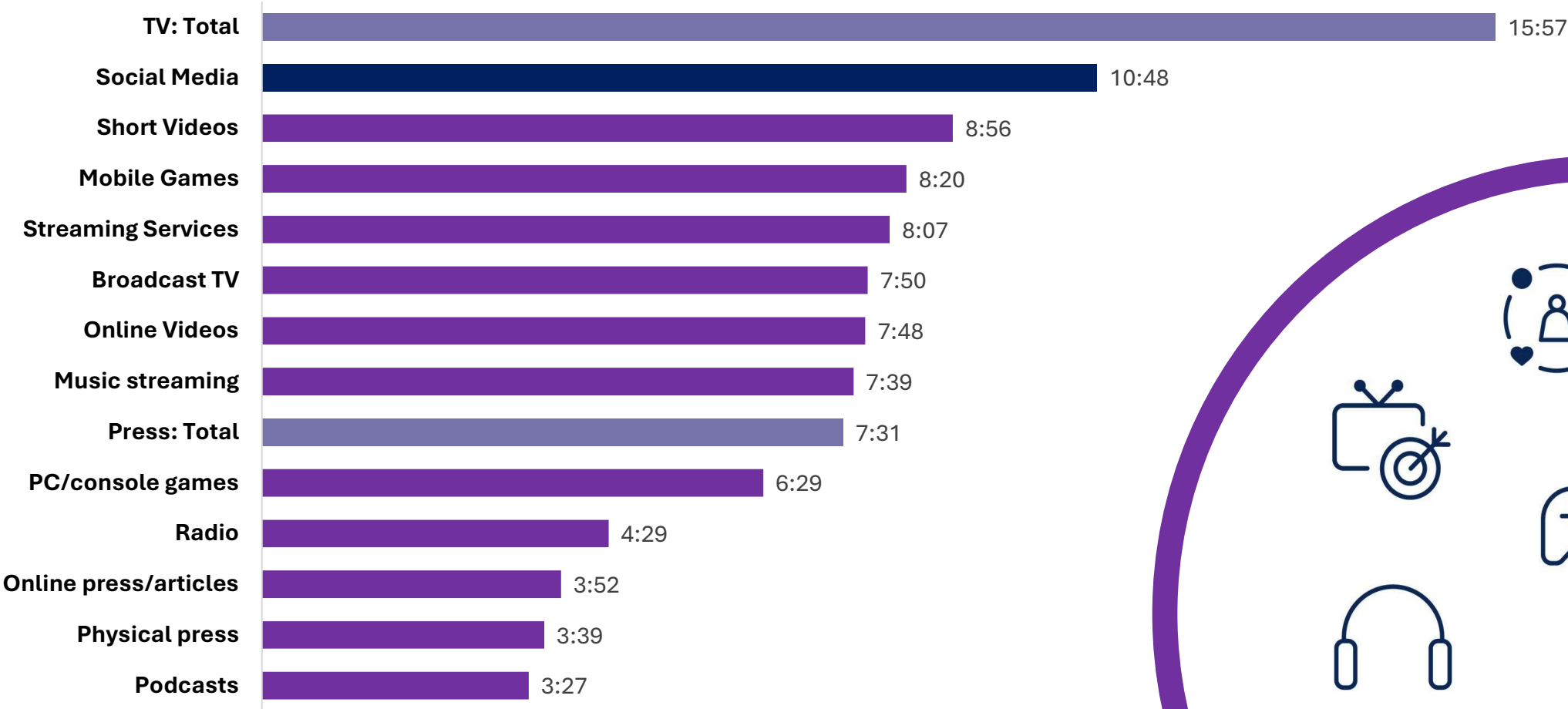




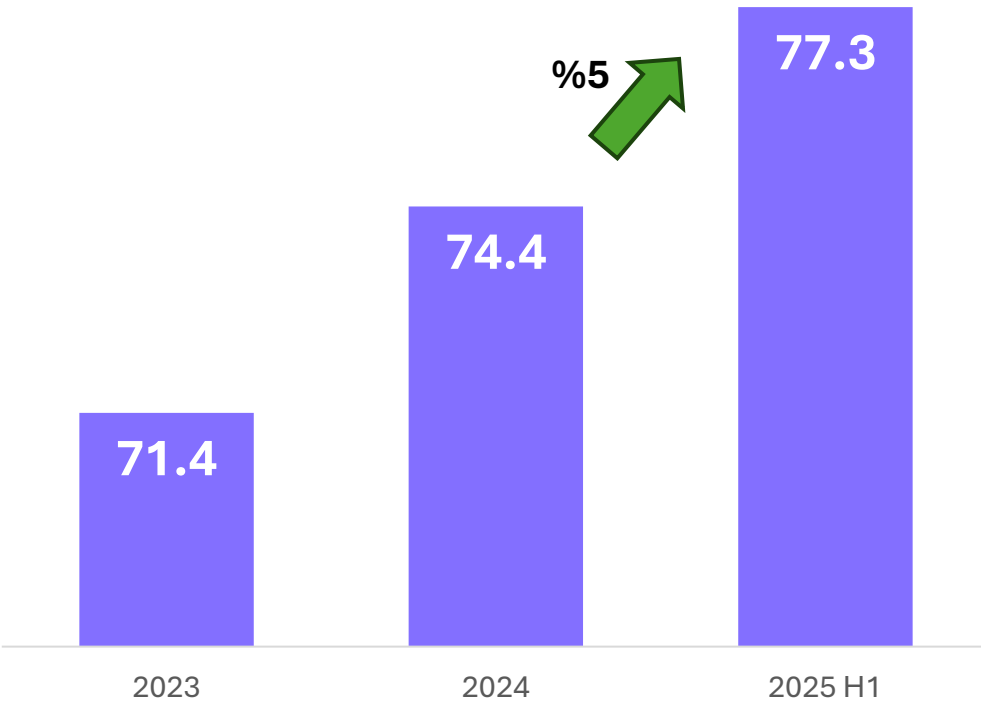


# Average Time Spent On Media

*\*Hours Spent a Week*

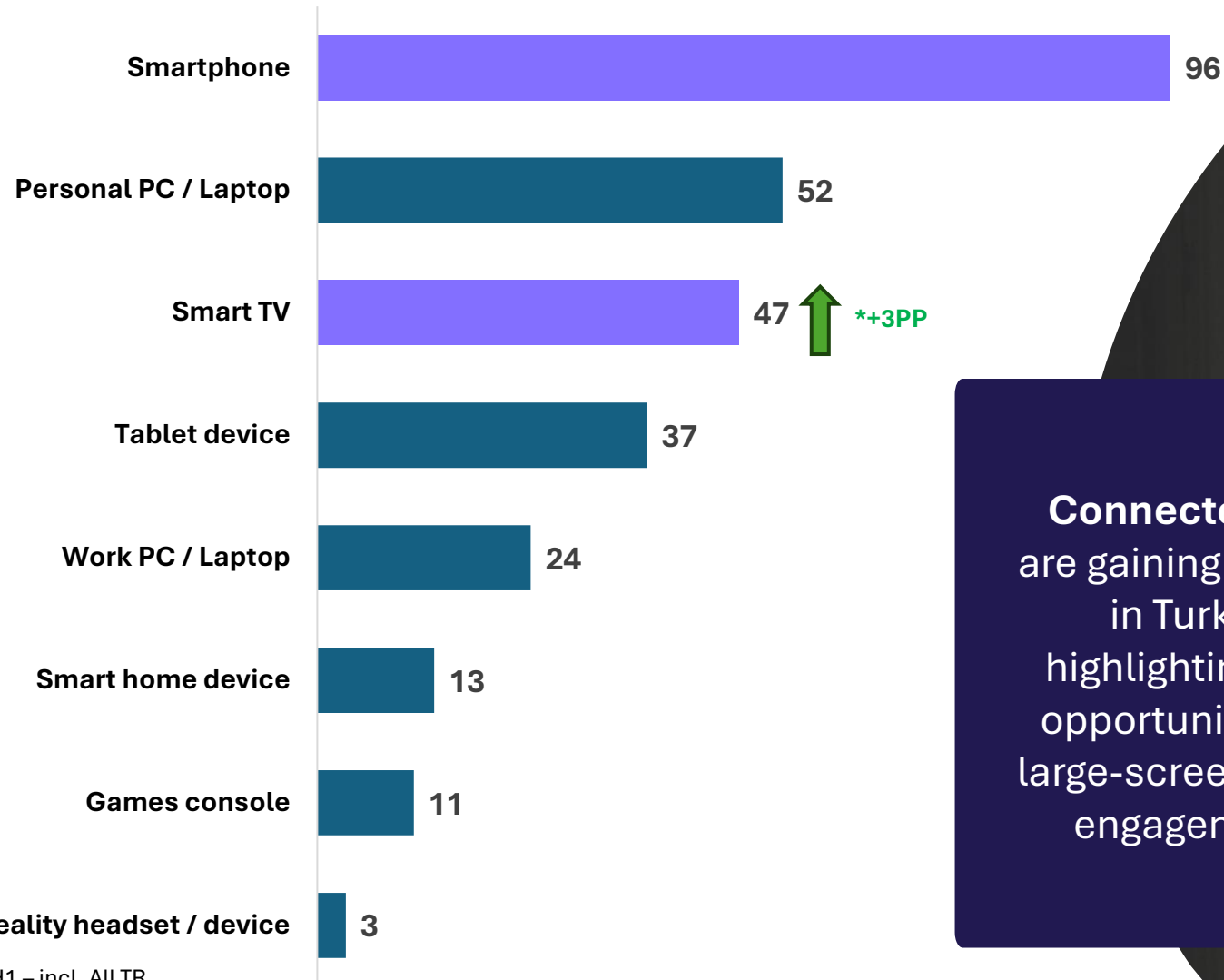


# Internet Users in Turkey Rise to 77.3 Million





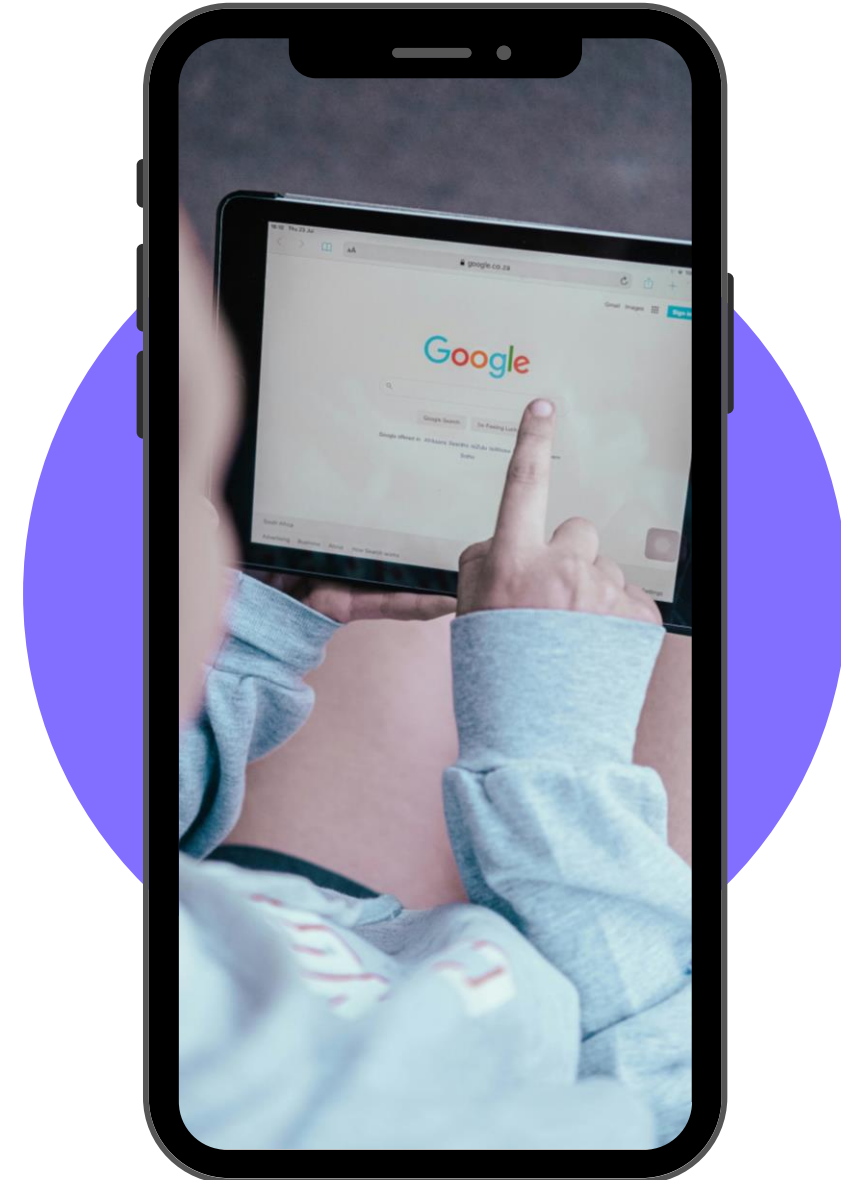
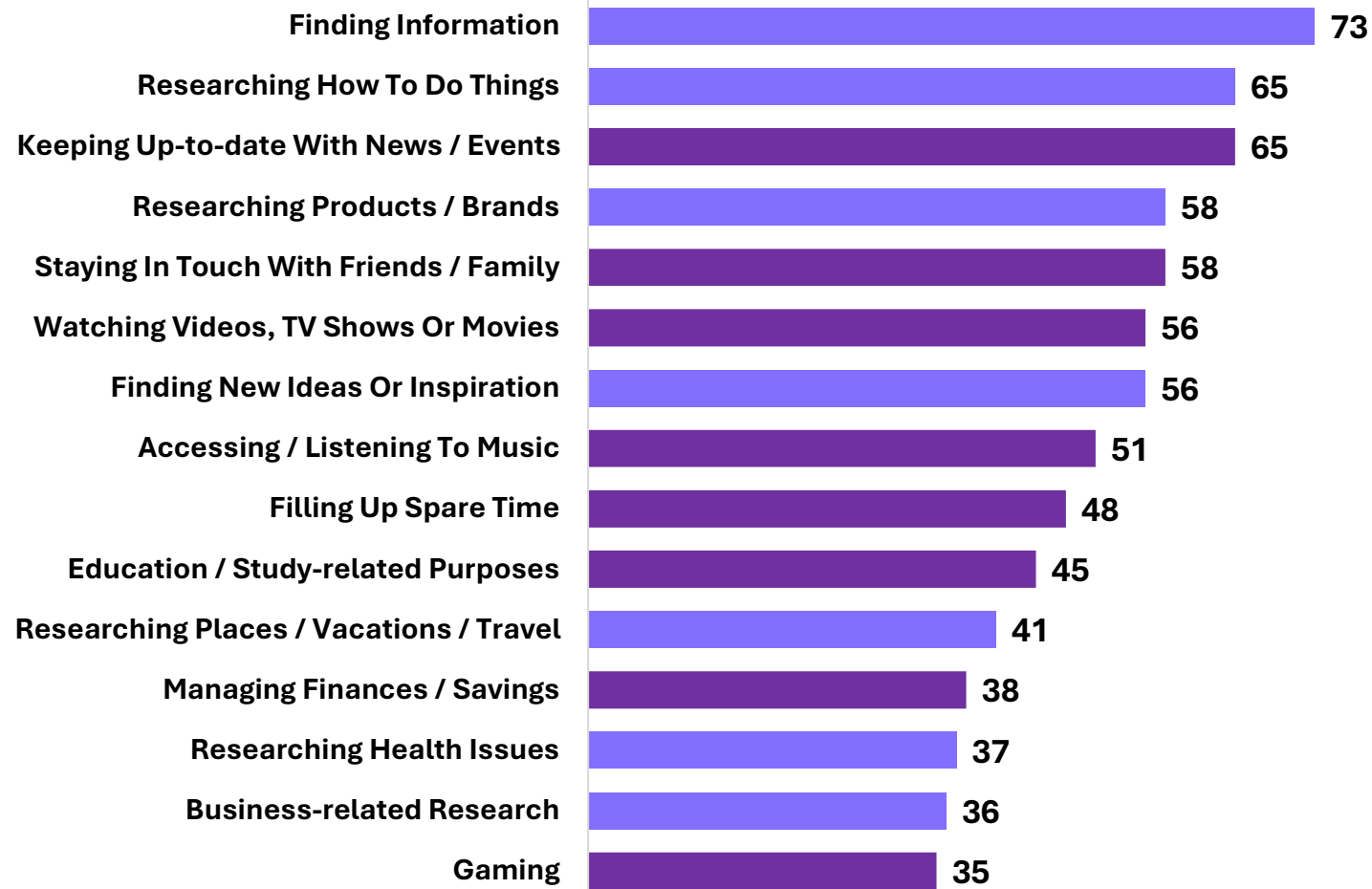
# Devices to Access Internet



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

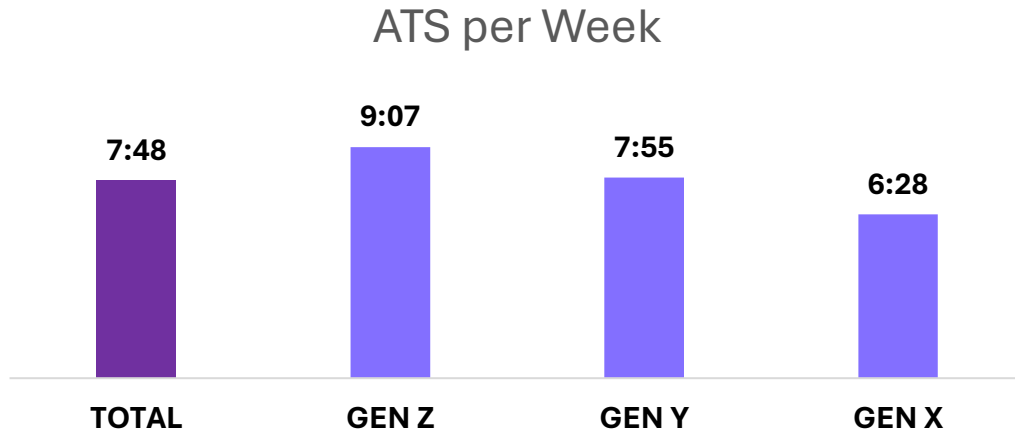


# Reason For Using the Internet: Searching

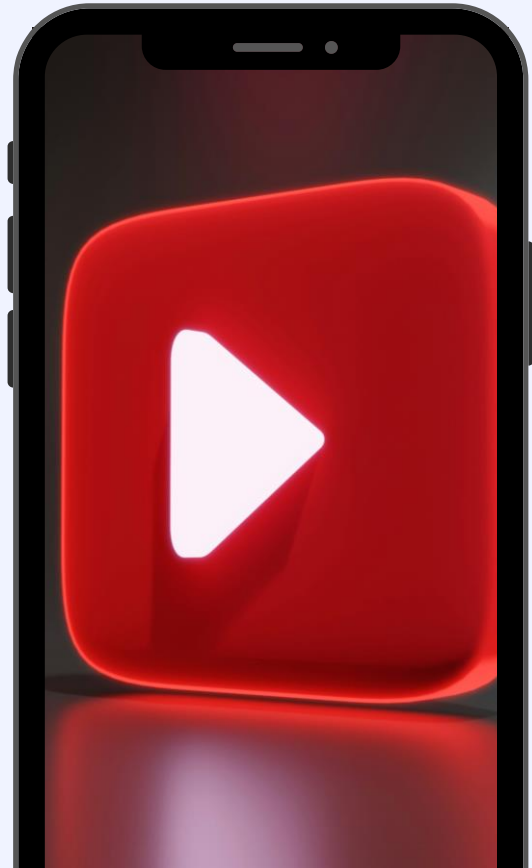
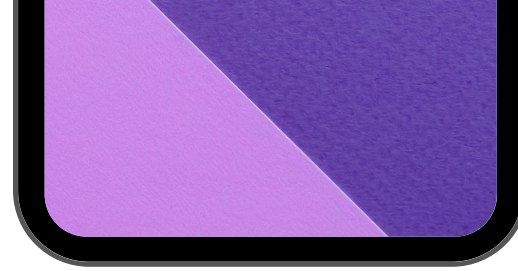


# Daily Routine: Watching Online Video

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



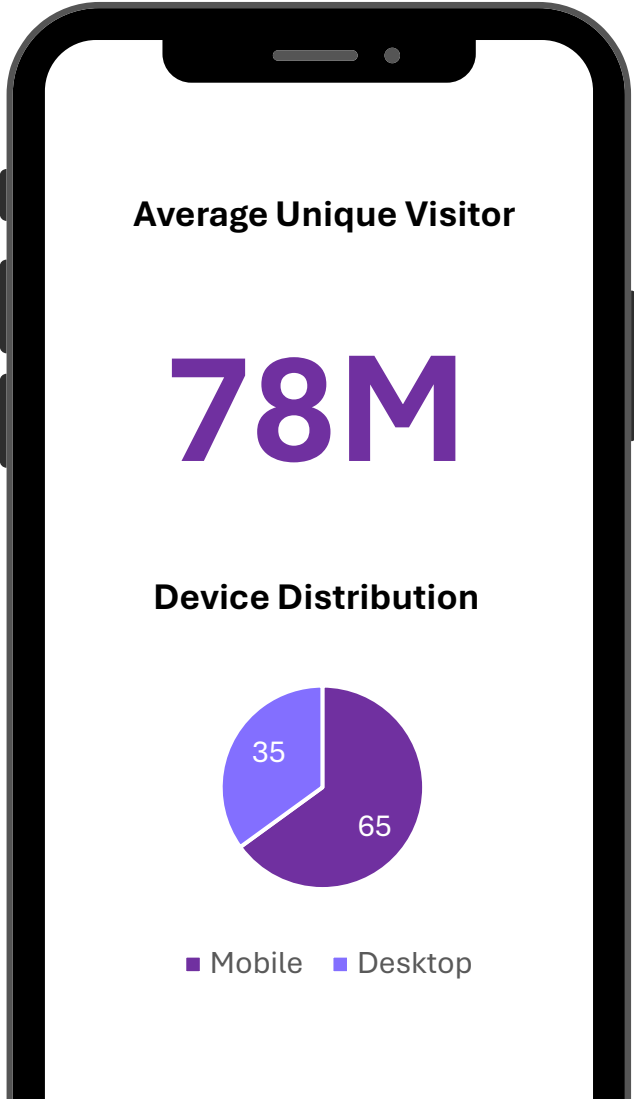
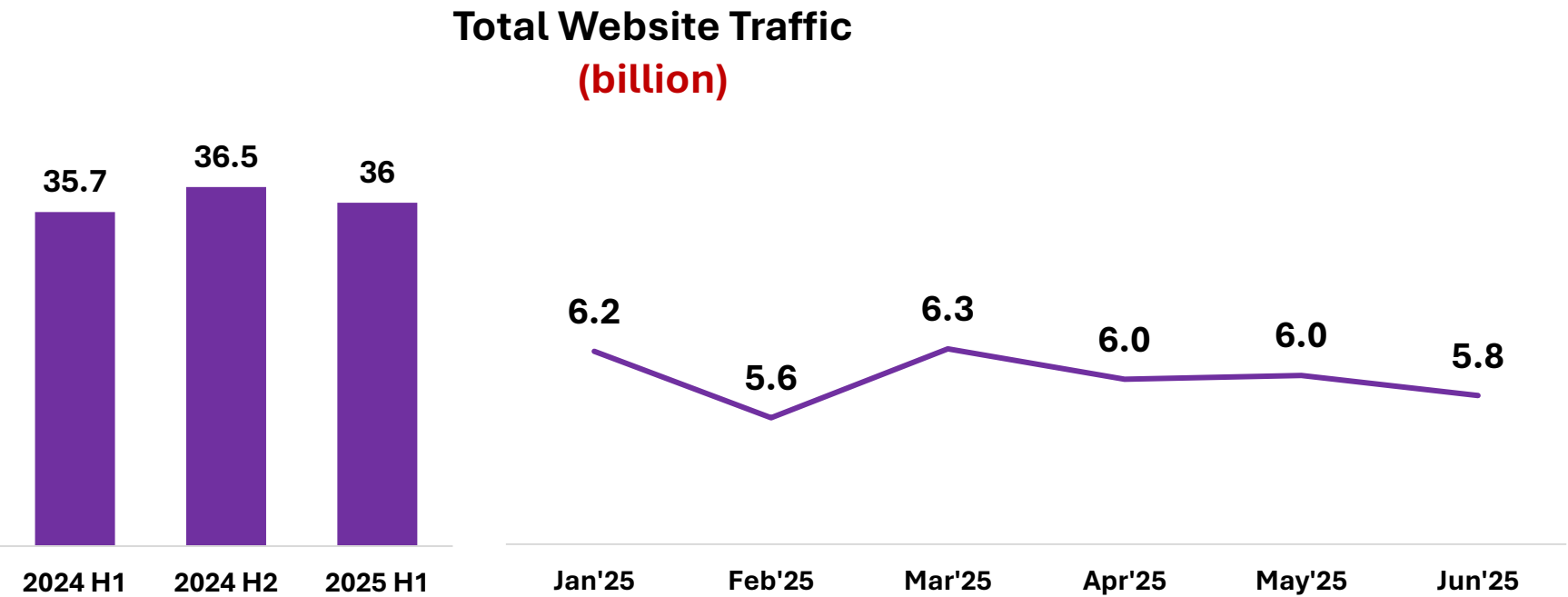
Online video is no longer just entertainment - it has become a **primary medium for learning, leisure, and cultural engagement** in Turkey.





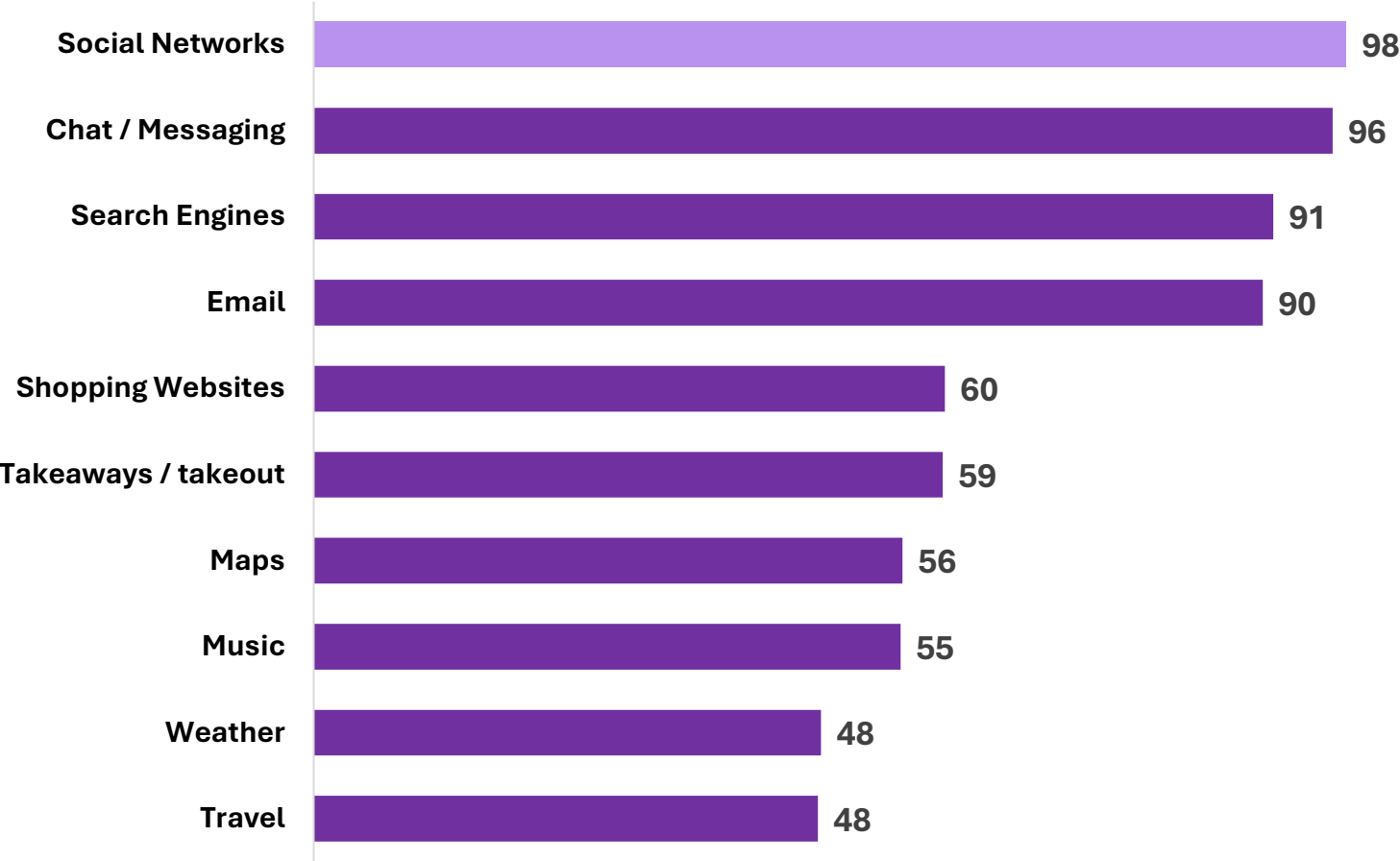
# Website Traffic and Online Reach in Turkey

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





# Types Of Website&Apps





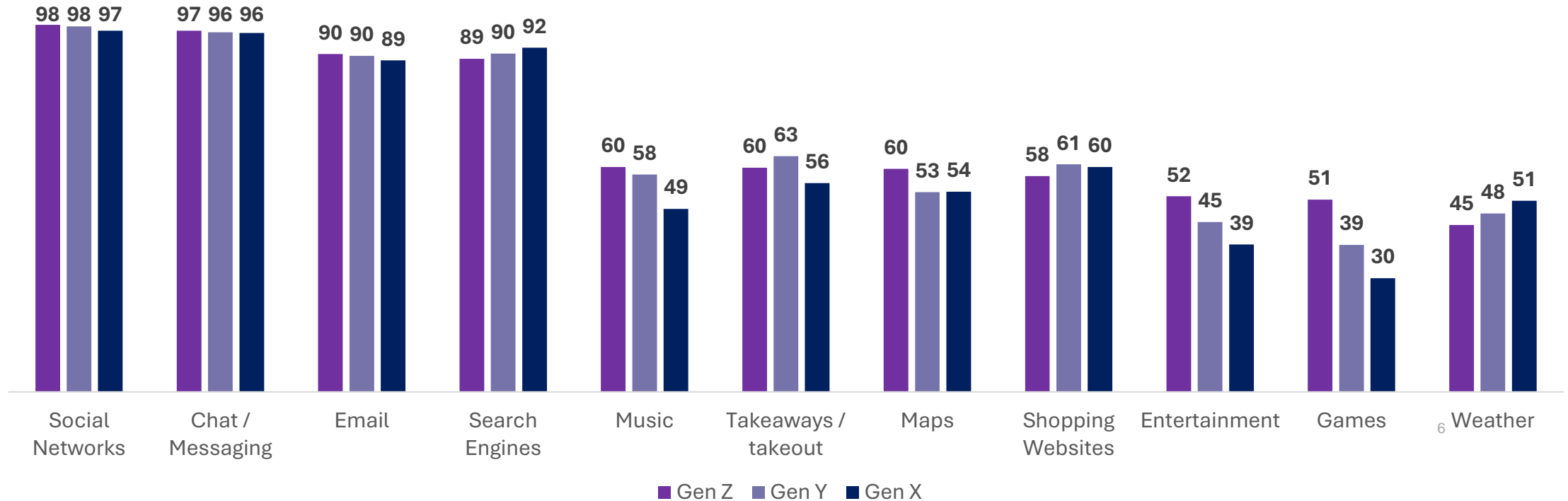


# Types Of Website&Apps

**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

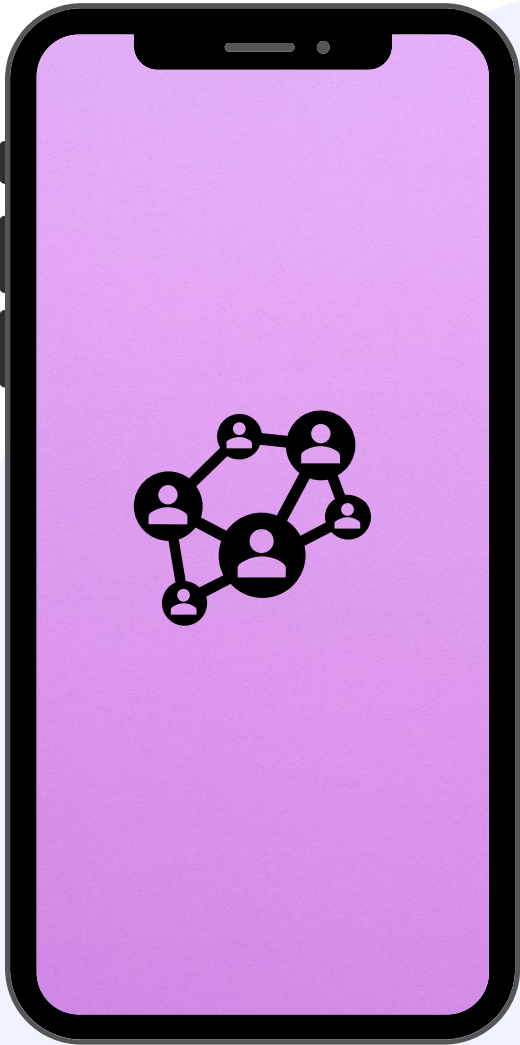
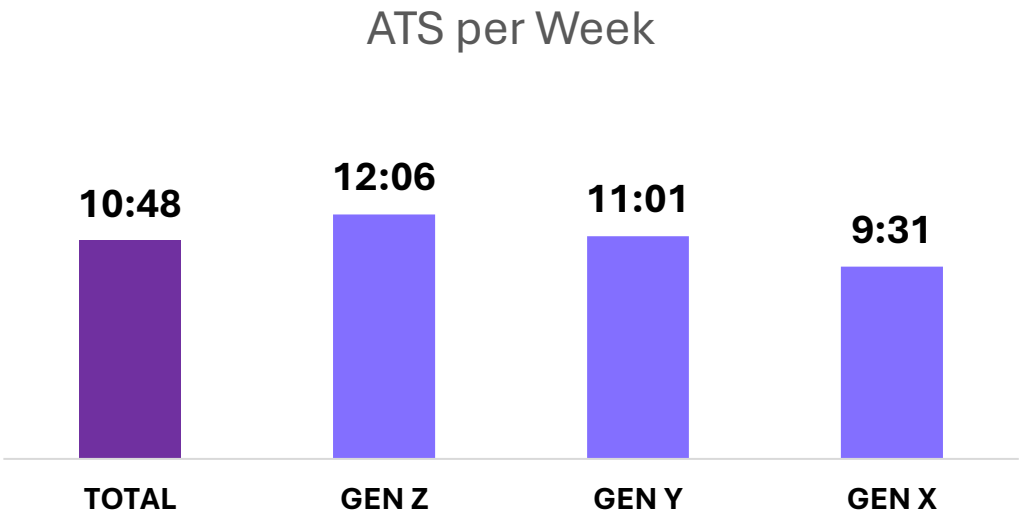
**7.6**

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**.

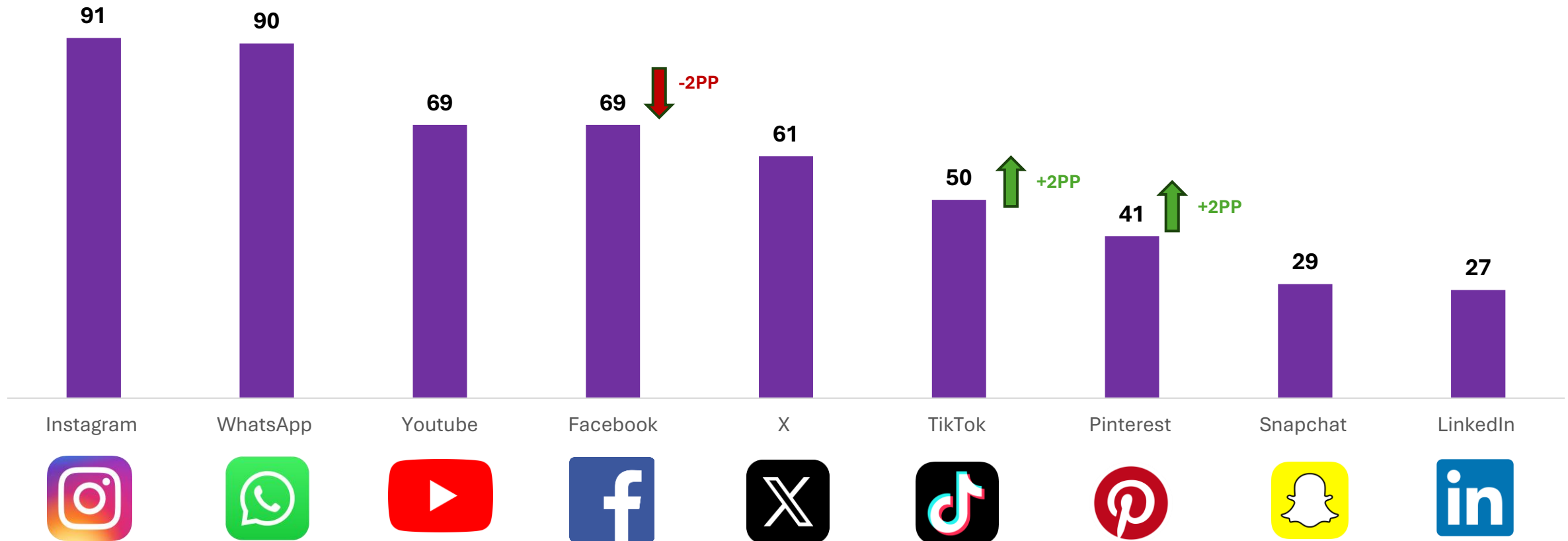




# Social Media Platform Usage in Turkey

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

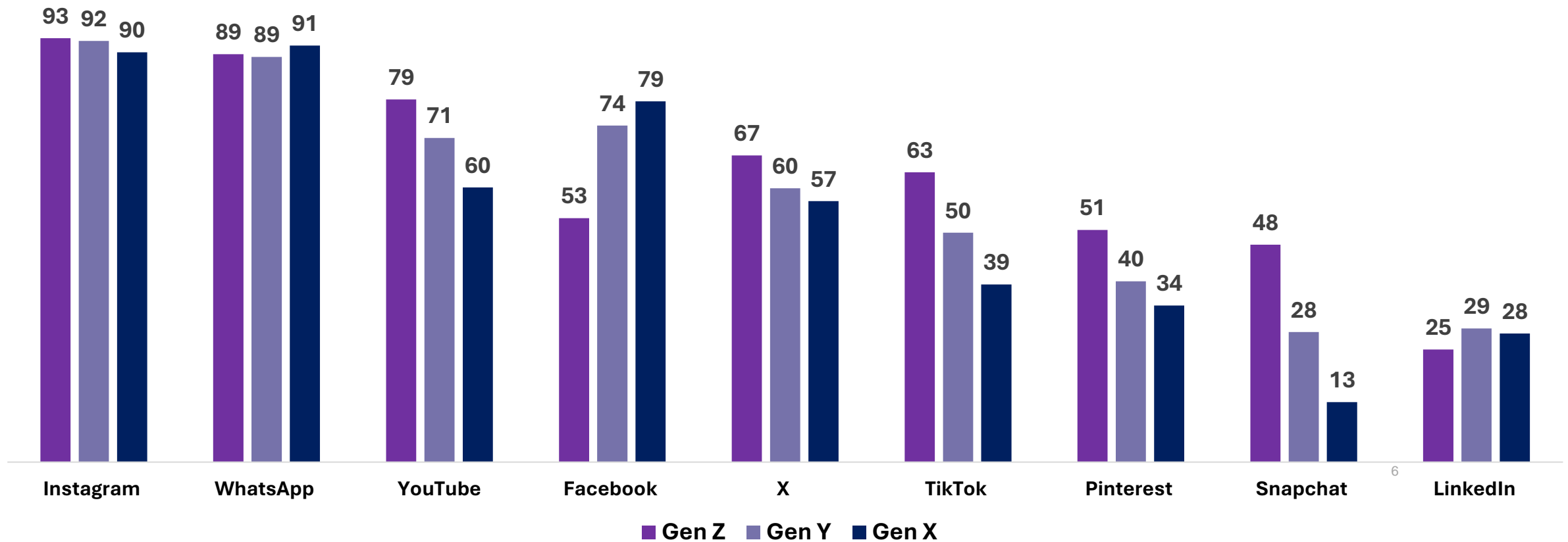
*Engagement %*





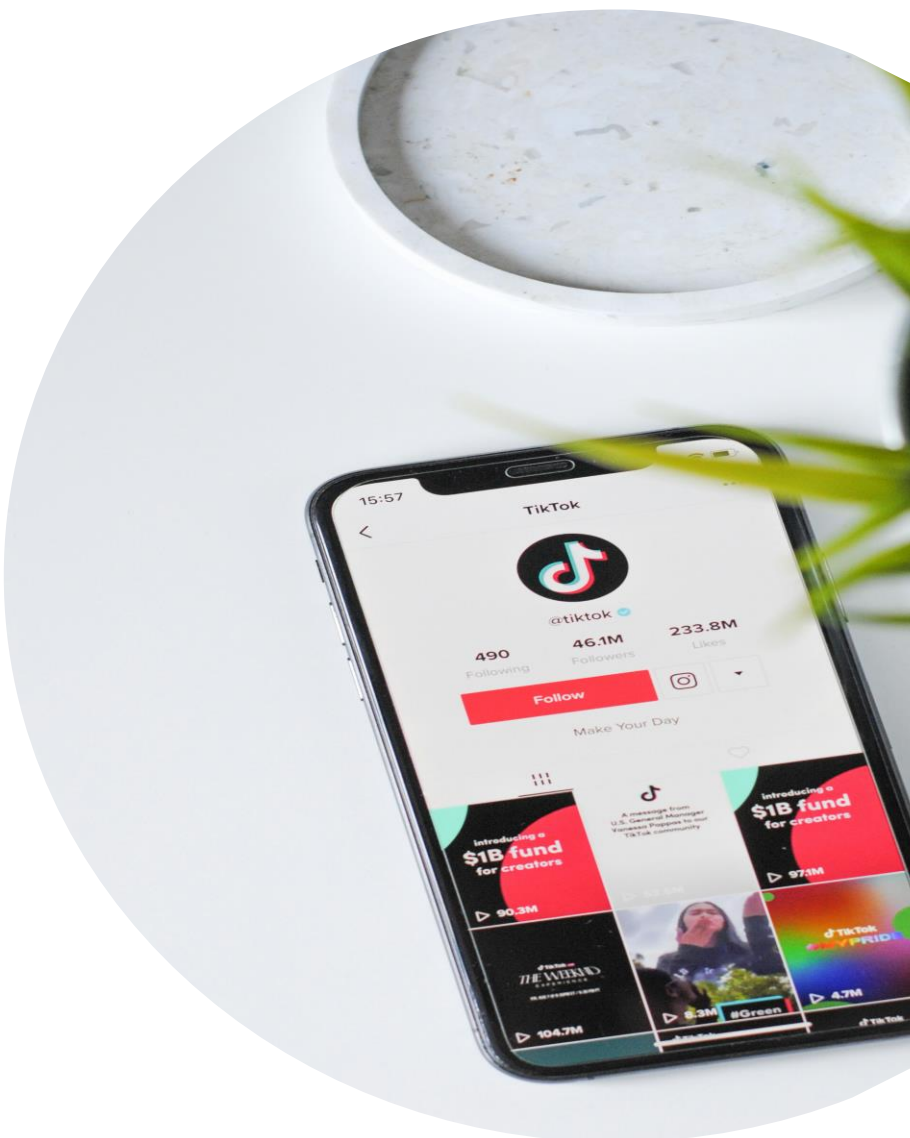
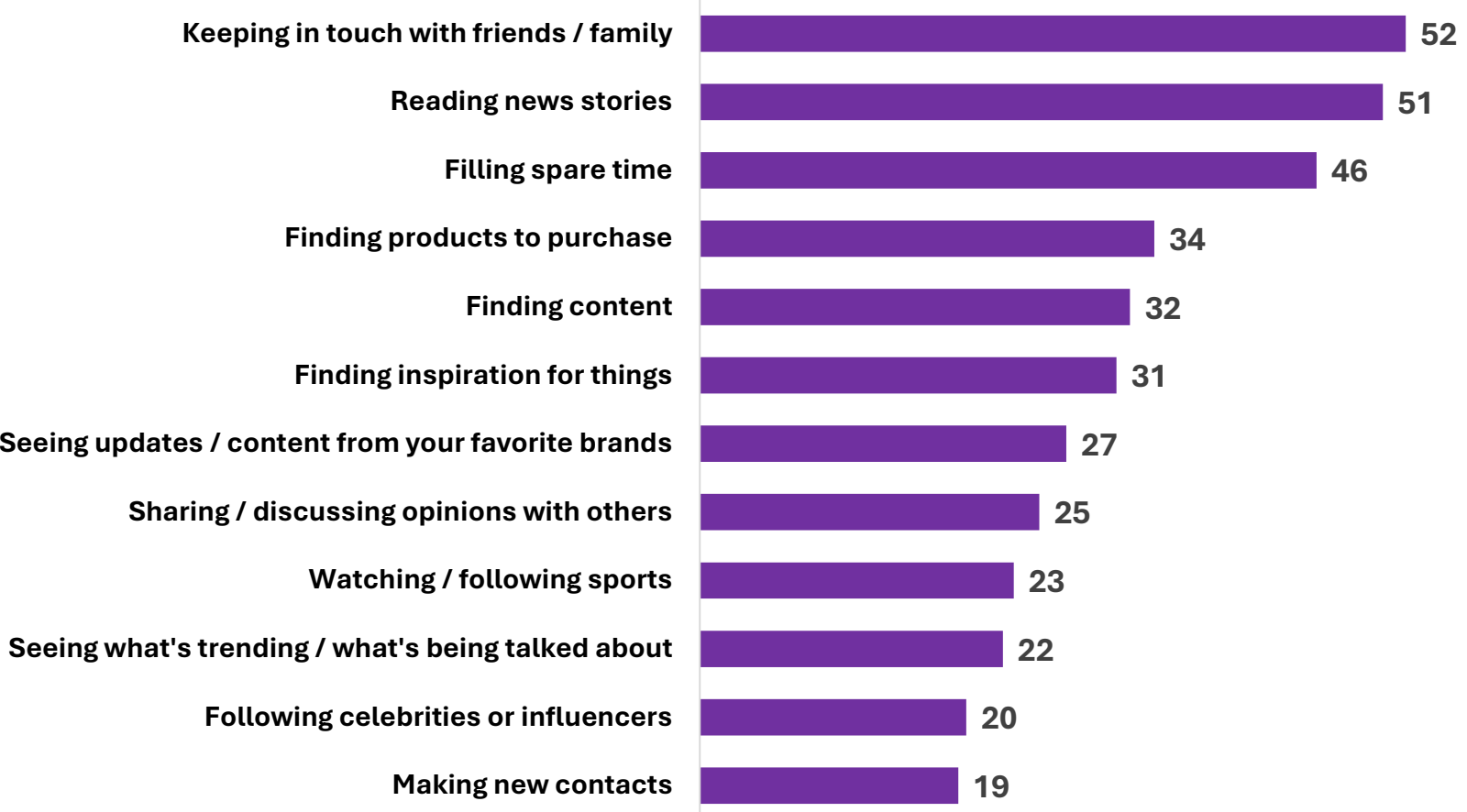
# Generational Use of Social Media Platforms

**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

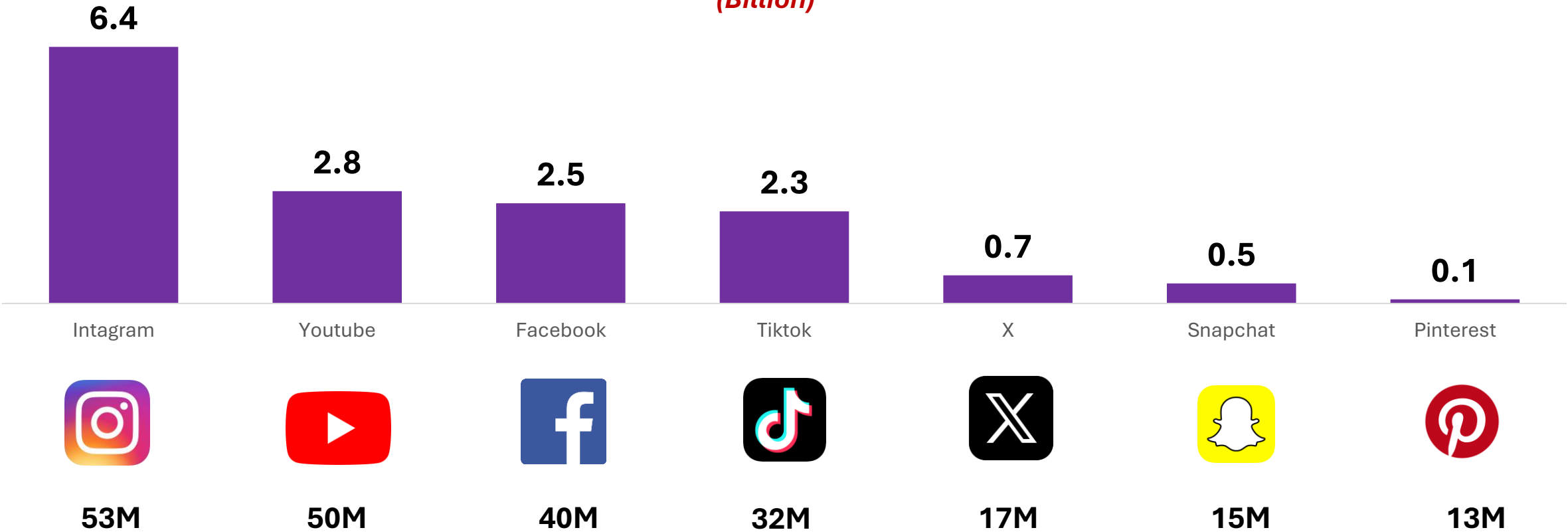






# Traffic Of Social Media Apps

Average Monthly Traffic  
(Billion)





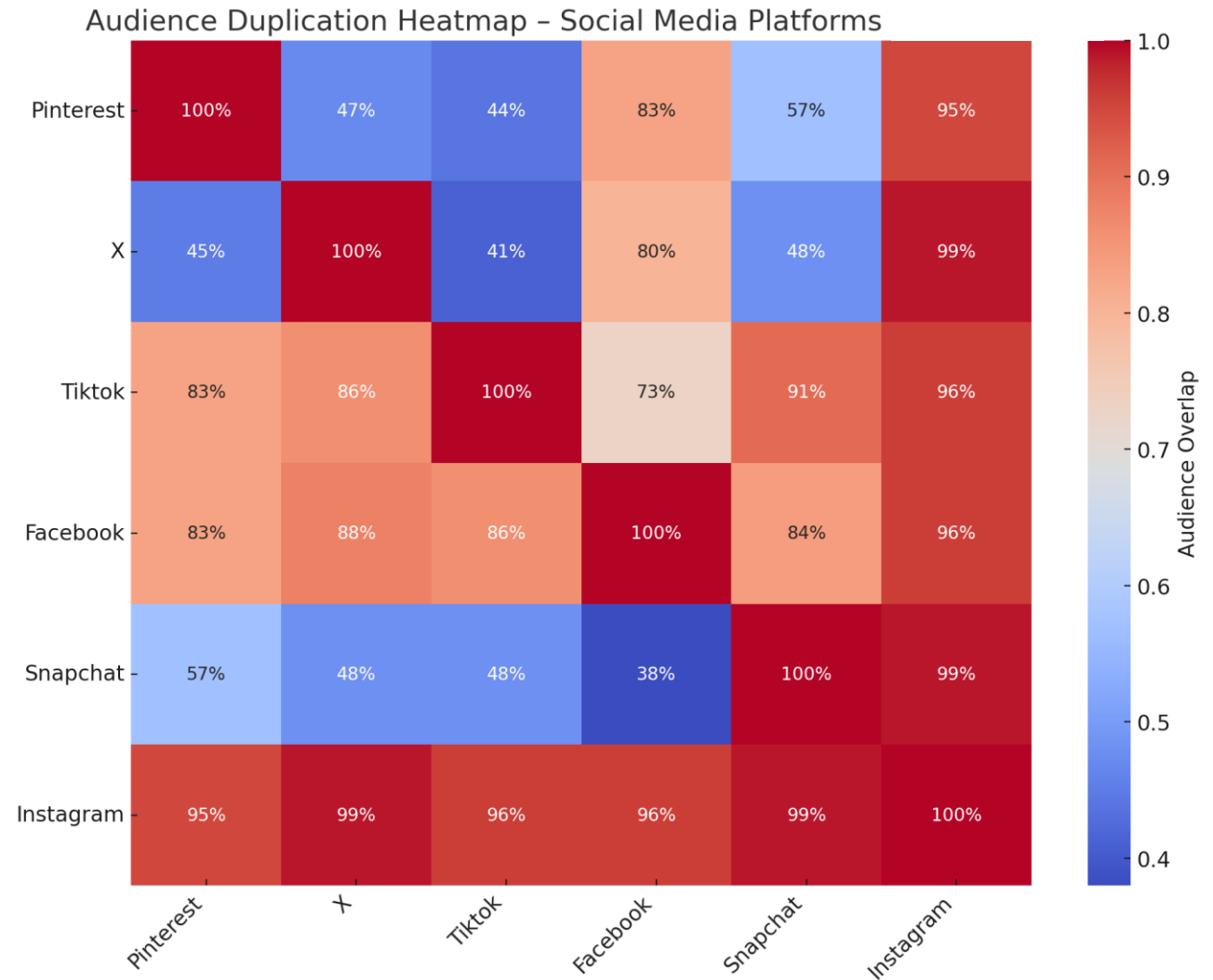


# Audience Overlap Across Social Media Platforms

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.

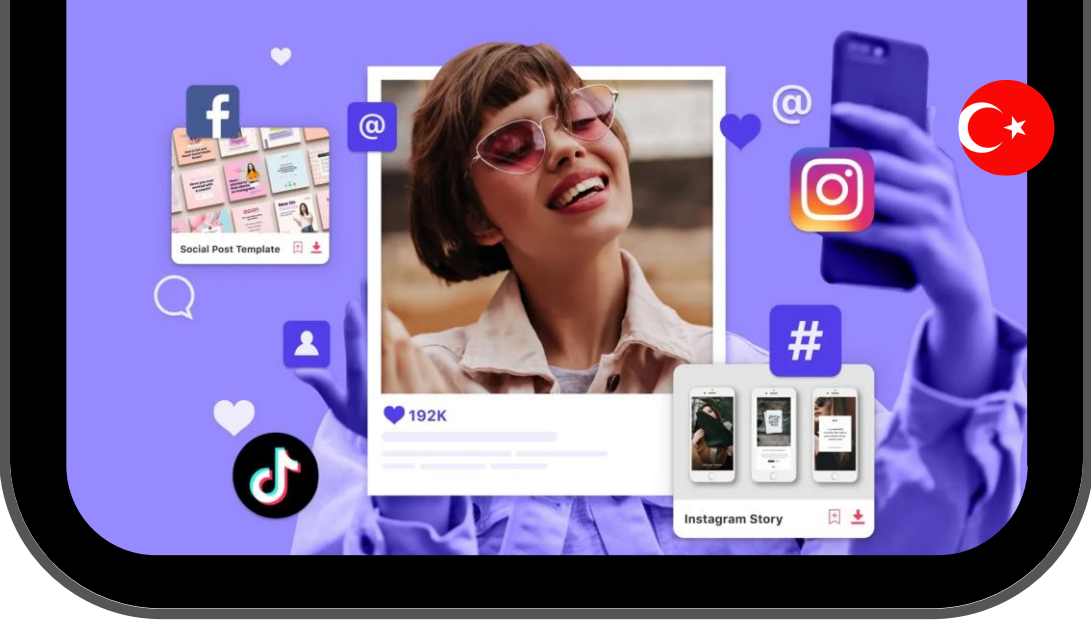


# Influencer Marketing in Turkey

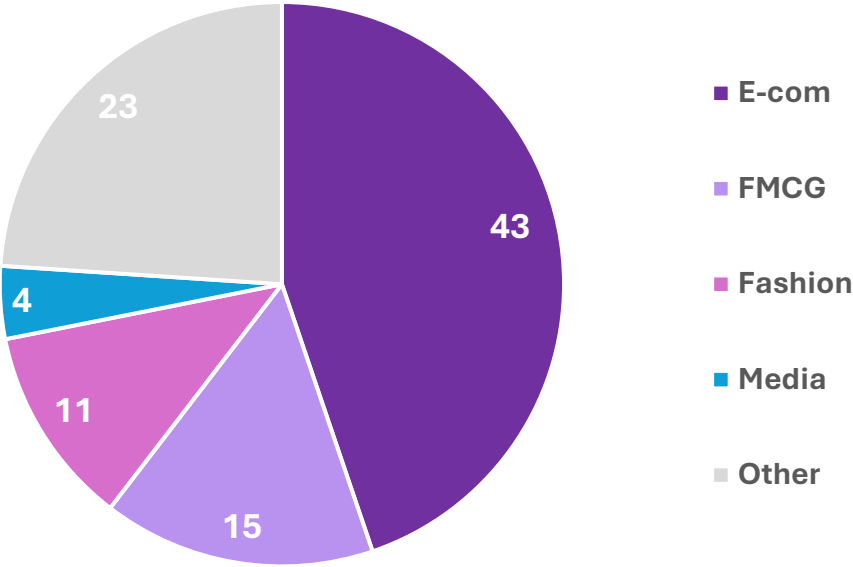
In Q2 2025, **63%** of advertisers actively leveraged influencer marketing, showing continuity from Q1.

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

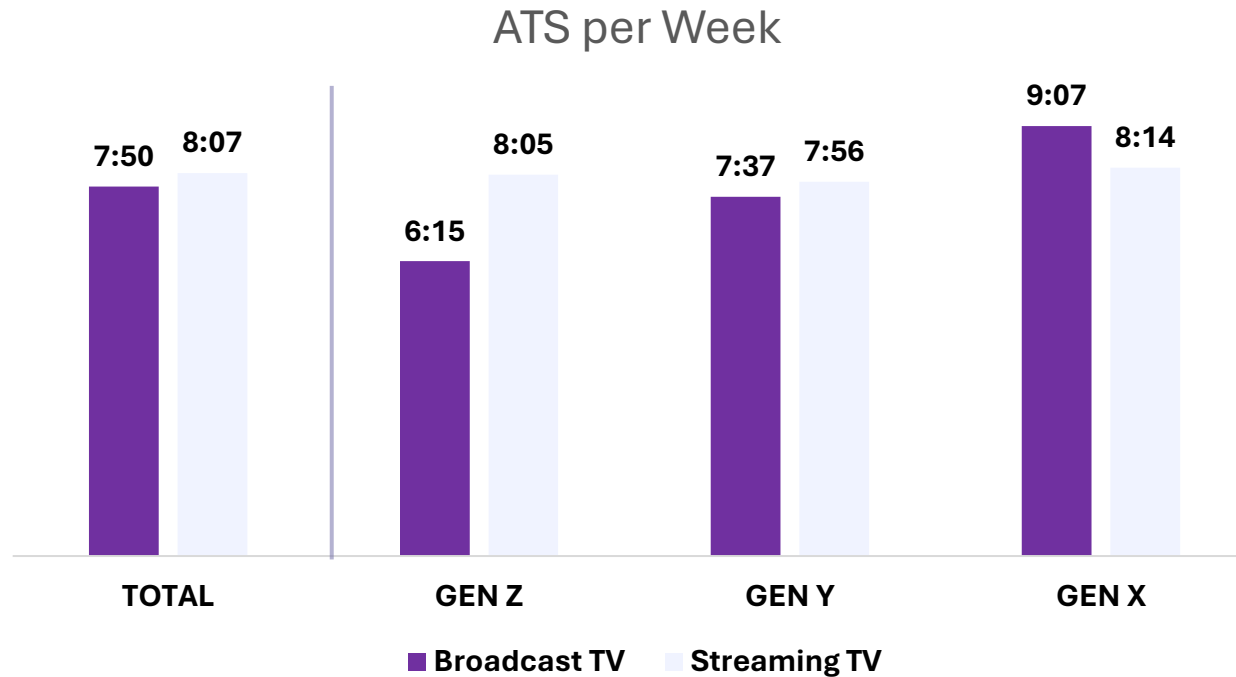


8:07 h



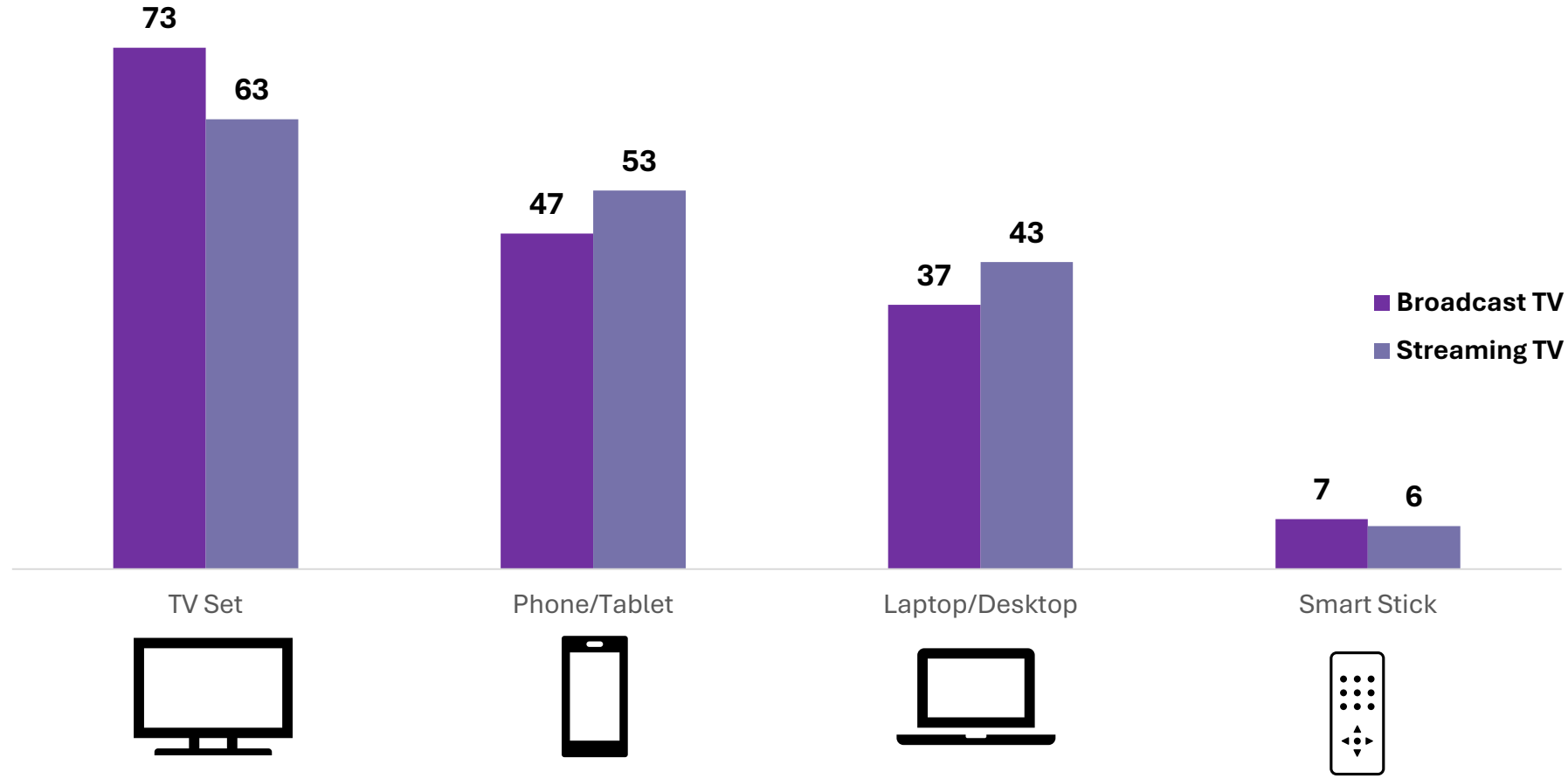
# Streaming TV Overtakes Broadcasting In Turkey

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





# Devices Used To Watch TV

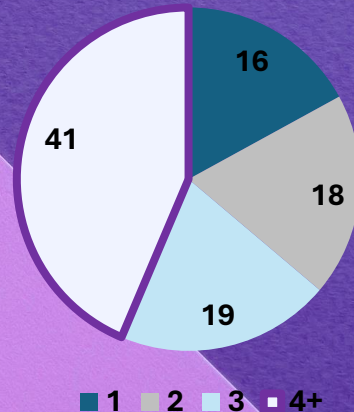


# Film & Video Services

Any Video Service User  
(16+)

# 50M

Number Of Service  
Used

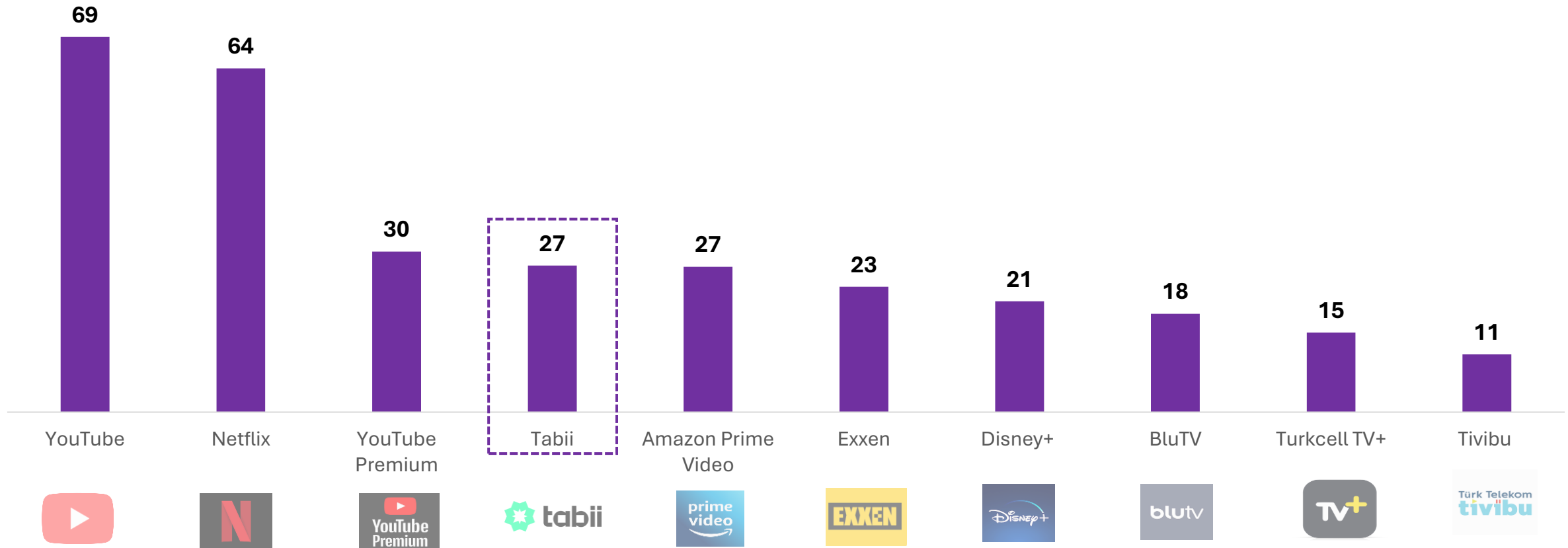


**50M** people in Turkey use online video platforms.

**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



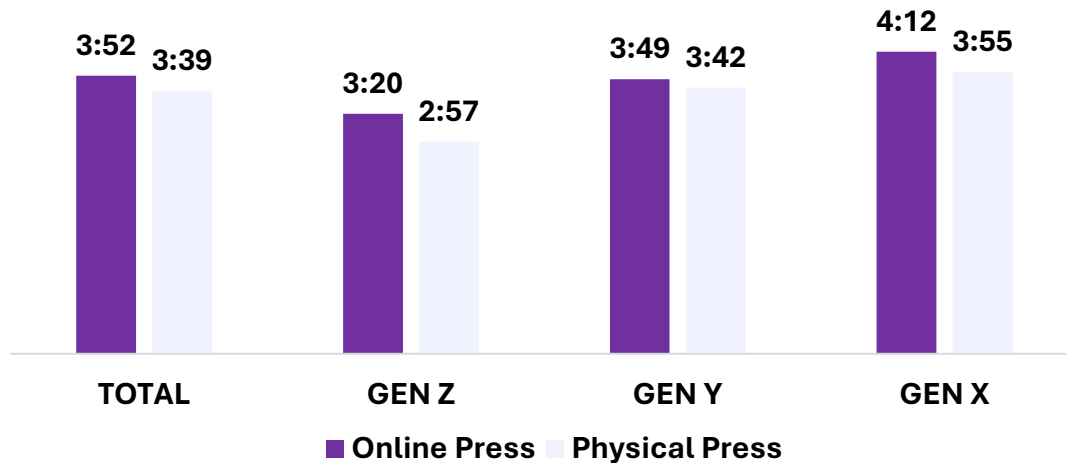
Dayı 2



# 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.

ATS per Week



News Websites

54M

Unique Visitor

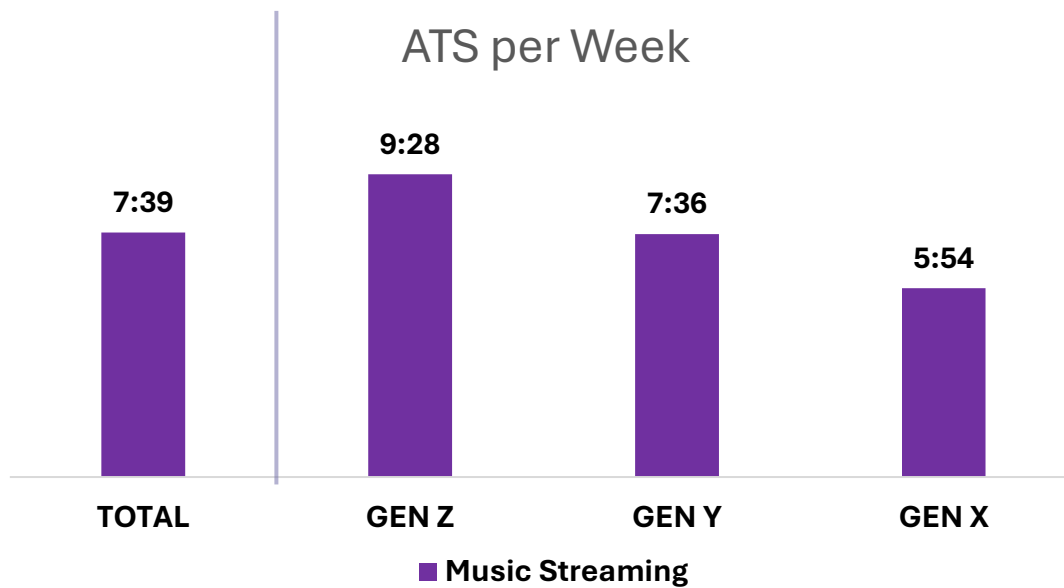
TOP 5  
Player  
(Traffic Share)

- 1- Hürriyet
- 2- Sözcü
- 3- Mynet
- 4- Milliyet
- 5- Ensonhaber

# Music Streaming in Turkey

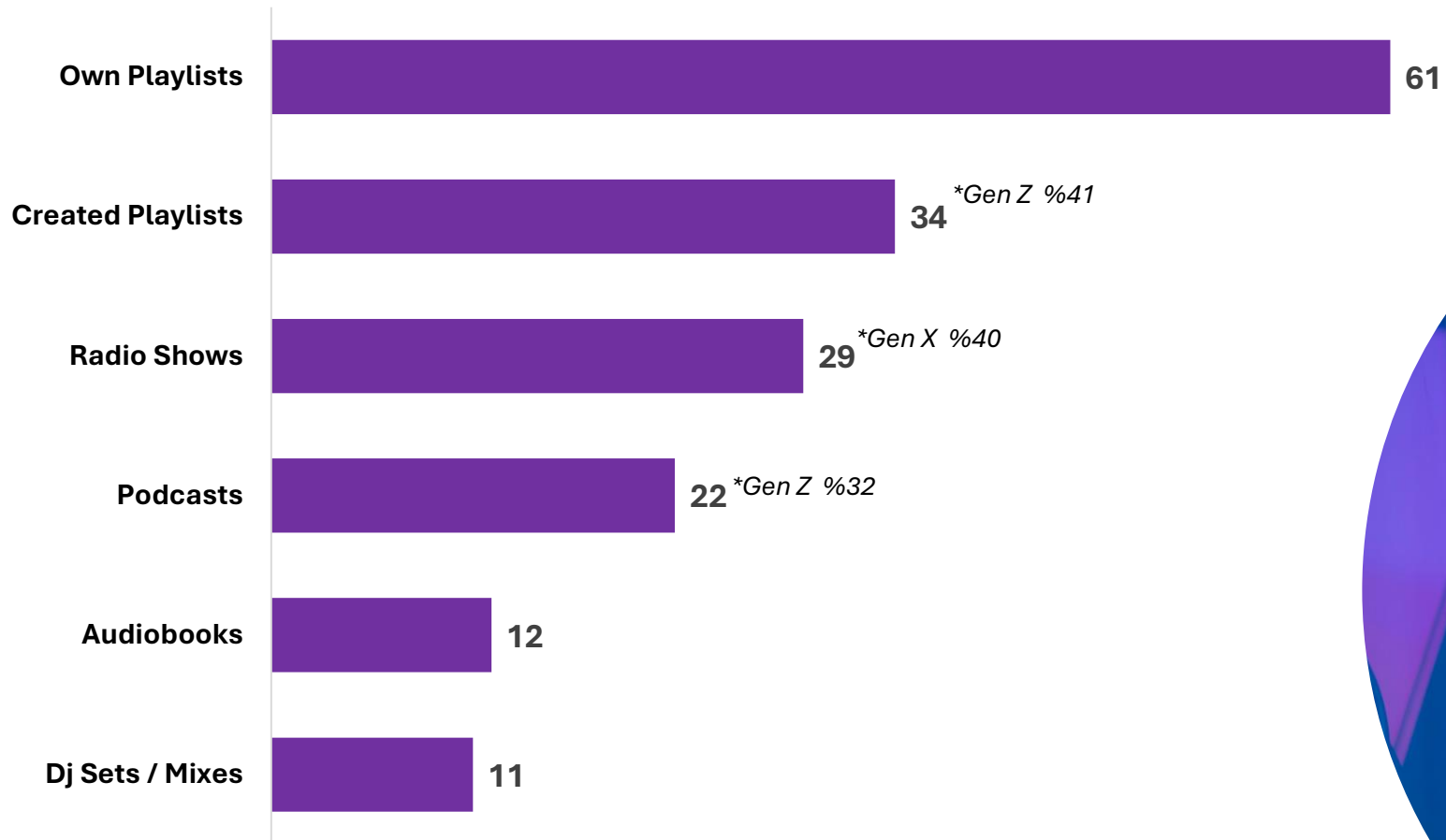
Total Weekly Music Streaming

7:39 h





# Preferred Music & Audio Content



# Music Streaming Platform Usage

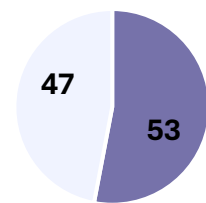
**Spotify** and **YouTube Music** grow steadily; **premium users** now represent almost half of the market.

## Music Services Engagement



**%51** **\*+3PP**

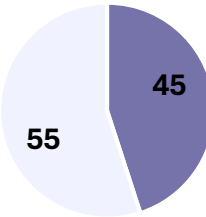
Subs Type



■ Premium ■ Free-Trial



**%48** **\*+3PP**







# Podcast Listener in Turkey

Podcast Listener

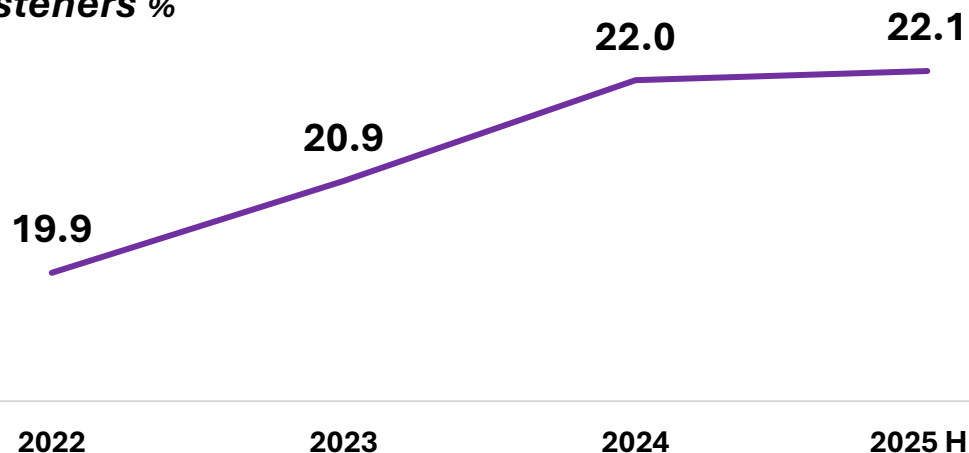
**12M**

ATS

**3:27h**

Podcast adoption in Turkey reached **12M** users in H1 2025, with weekly listening averaging **3.5 hours** – growth is stabilizing but engagement remains strong

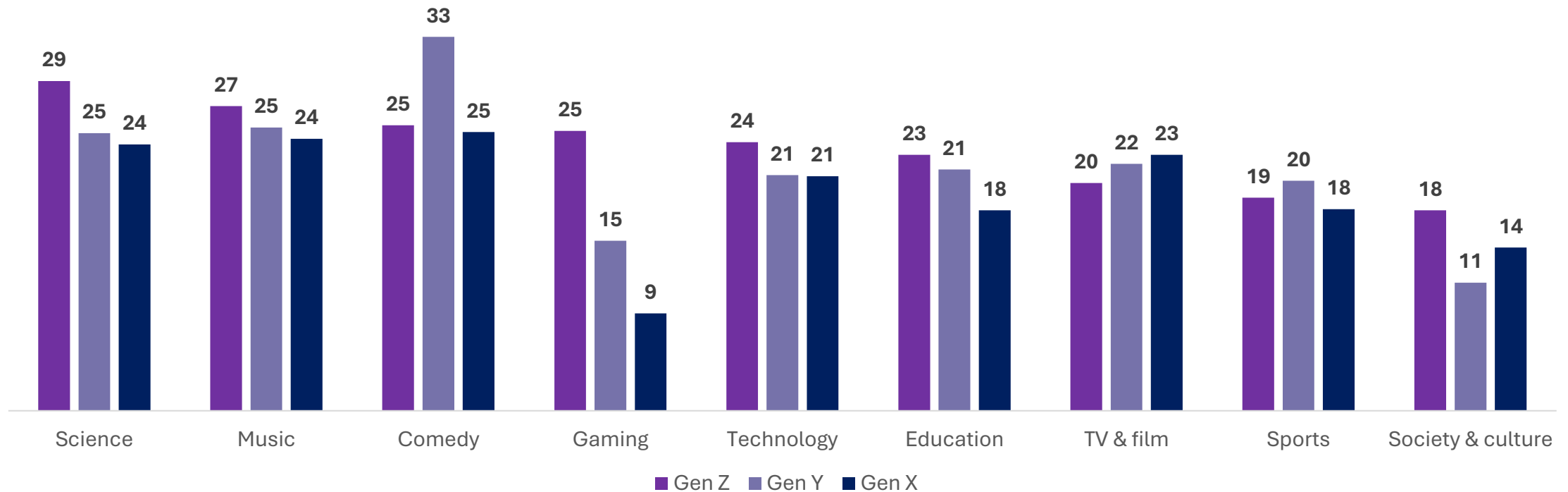
Podcast Listeners %





# 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**



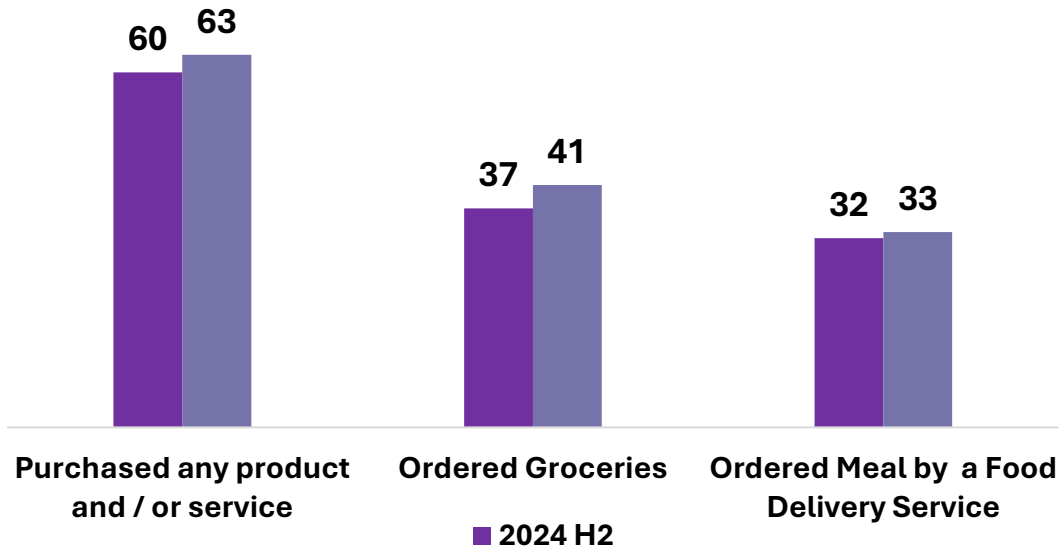
**Retail media** reaches consumers at the final stage of consumer journey, where actions have the strongest impact on conversion .



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



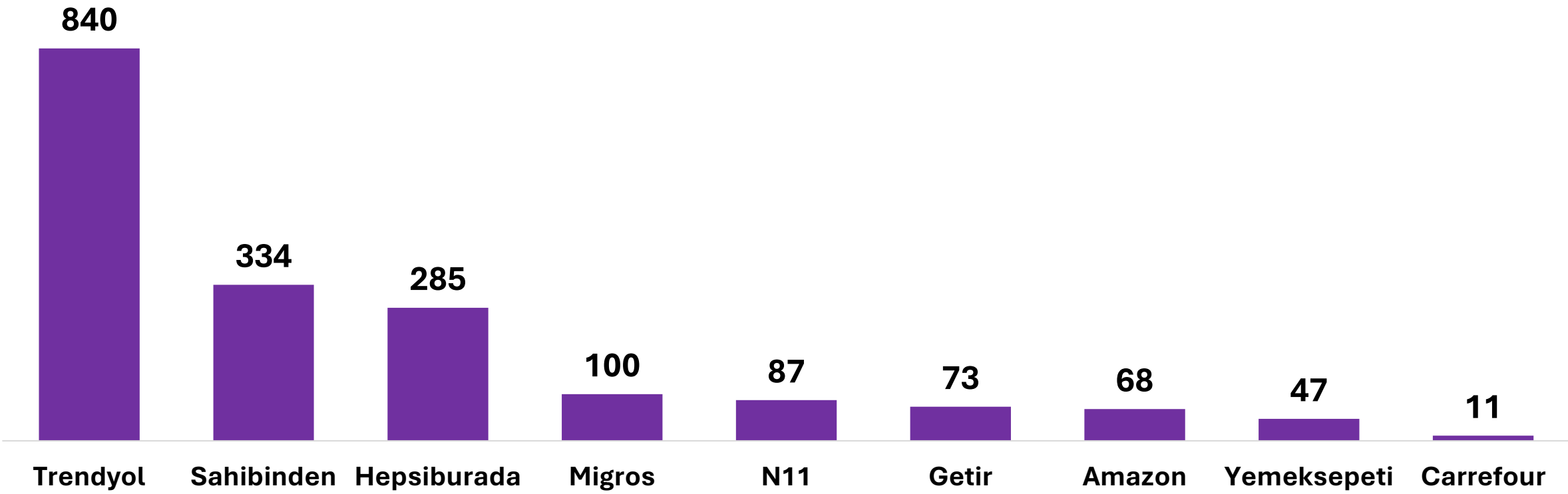
## Online Shopping Behaviors





# 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**

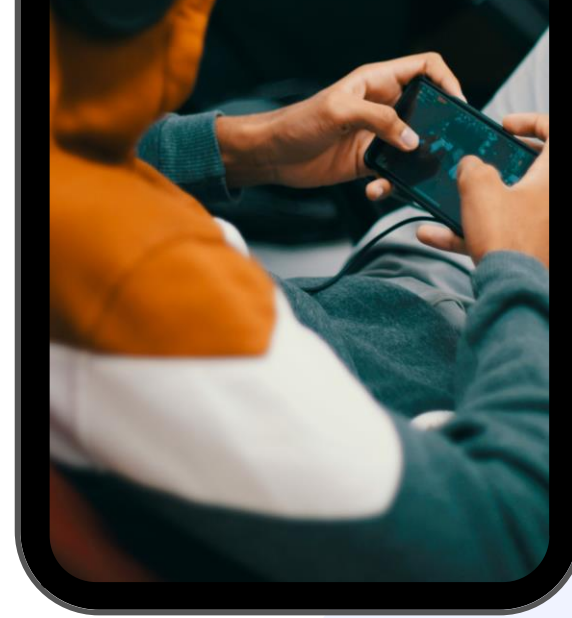
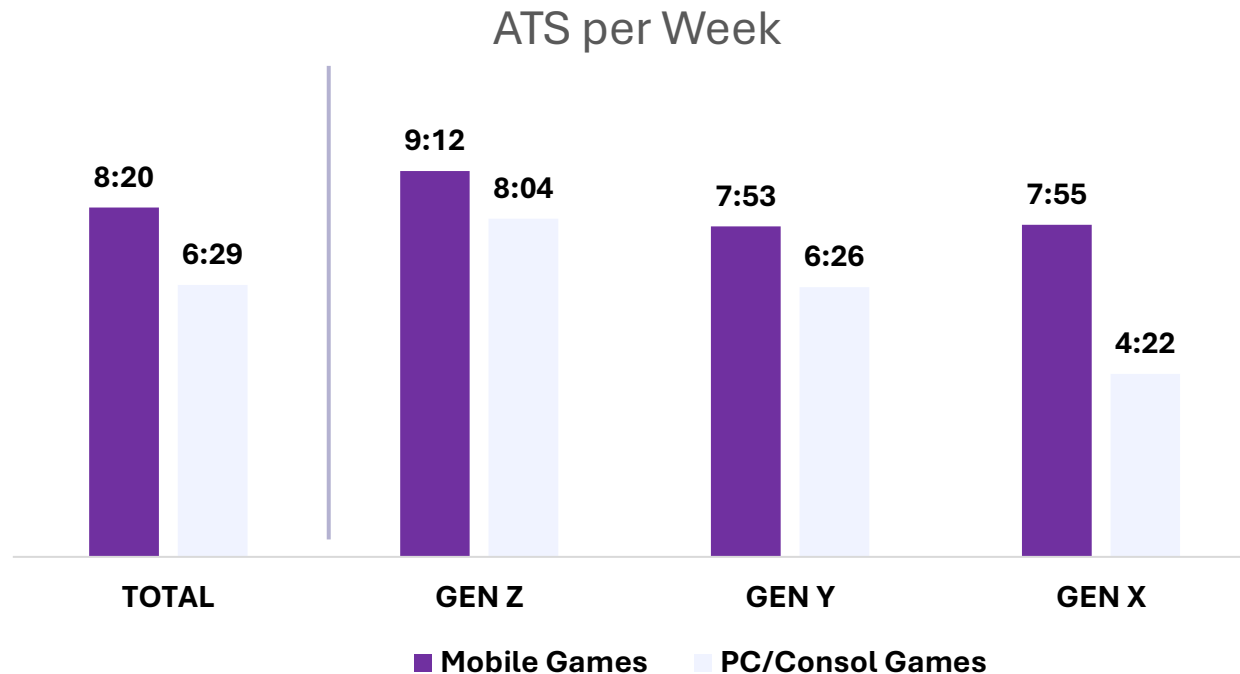


**6:29 h**



# 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*

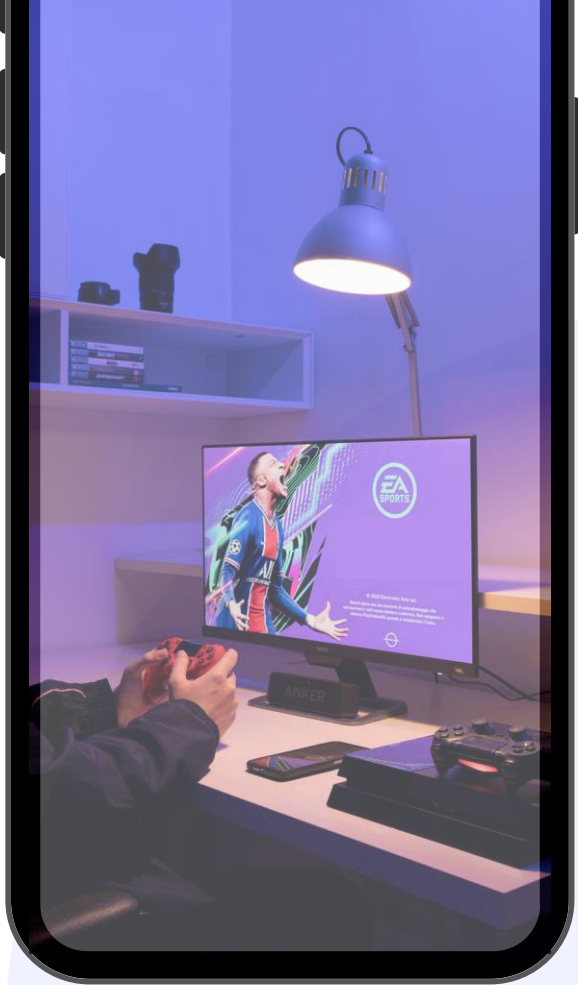
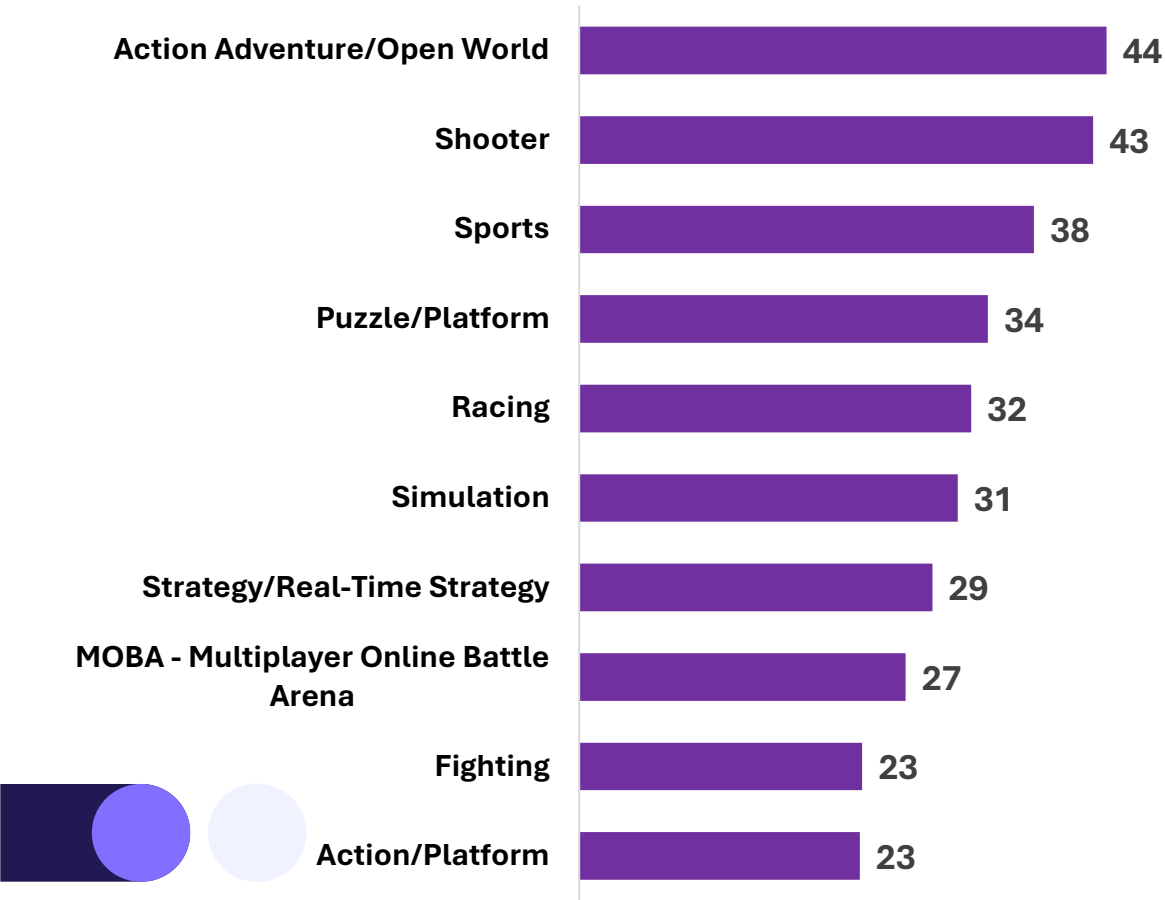


**%5**

*VR*



# Most Preferred Gaming Genres



## TOP Played 10 Games

- 1- Fifa/FC
- 2- Call of Duty
- 3- Minecraft
- 4-Counter
- 5-FM
- 6-LOL
- 7-Roblox
- 8-Valorant
- 9-Mario
- 10-GTA

# AI Adoption & Consumer Behavior in Turkey

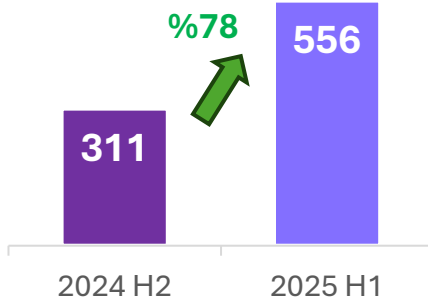


AI is increasingly embedded in everyday life, shaping how people **search, shop, consume content,** and **manage daily tasks.**

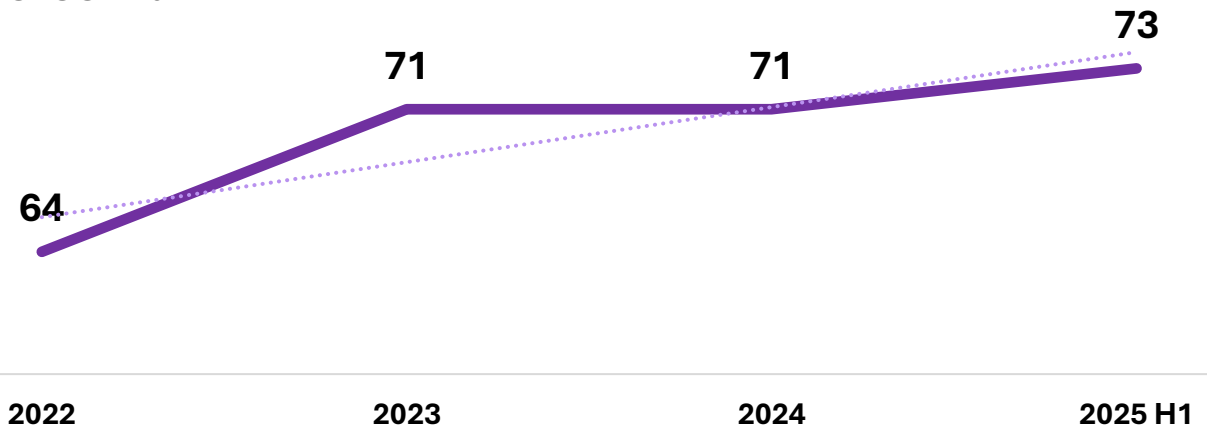
Average Monthly  
Unique Visitor  
(AI Websites)

7.5M

Total Website Traffic  
(million)



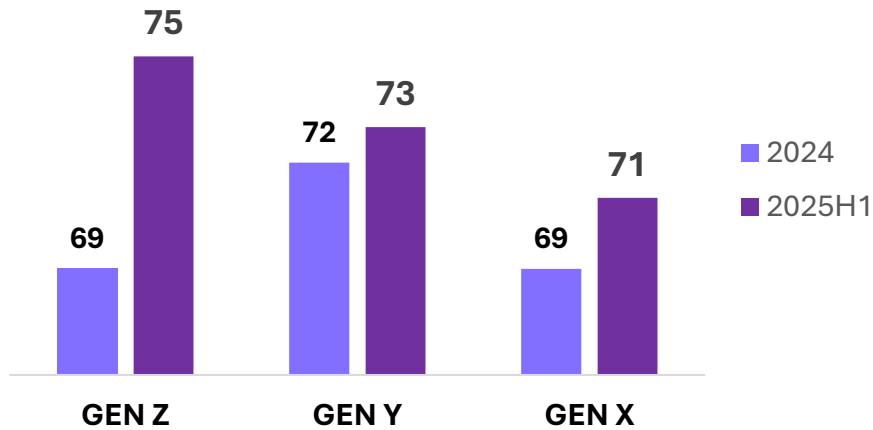
AI Interest %



# AI Adoption & Consumer Behavior in Turkey

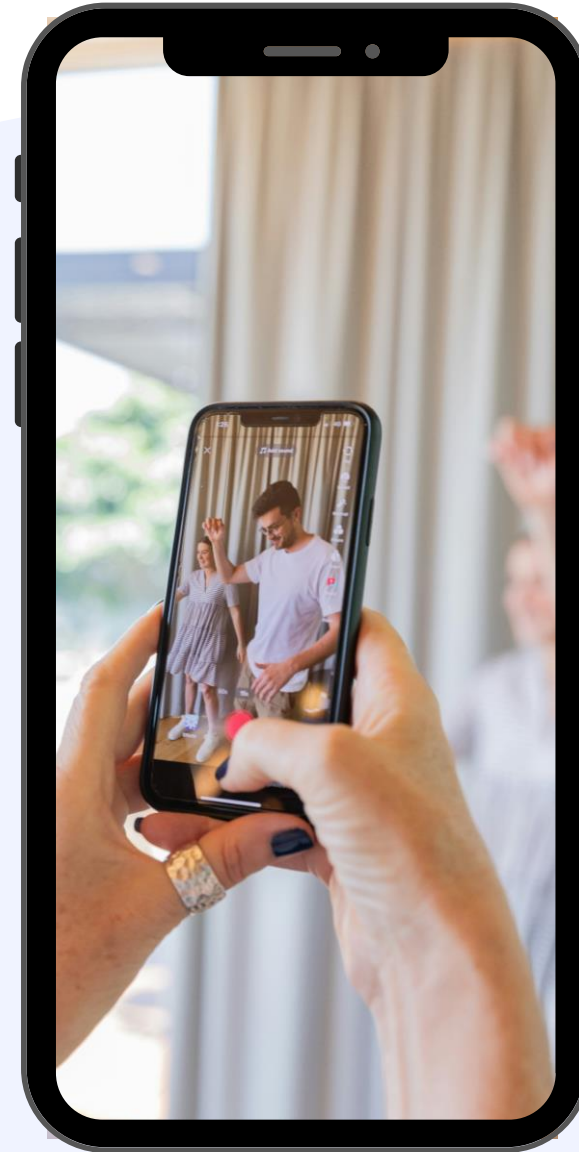
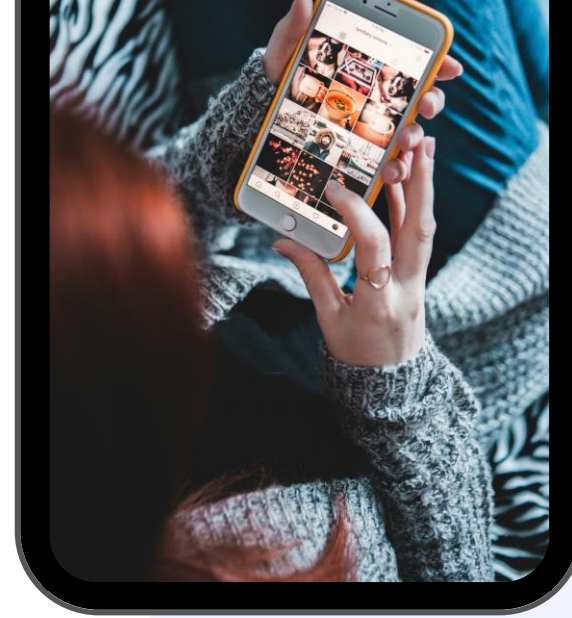
**Gen Z & Gen Y** are the fastest adopters;  
Gen X adoption is slower

## AI Interest



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.

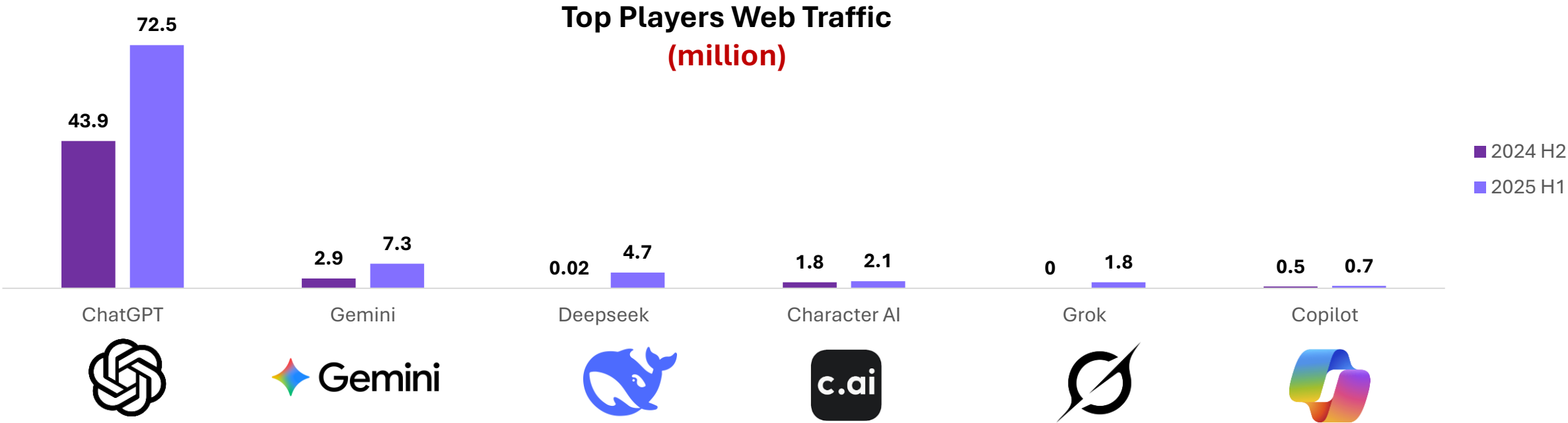




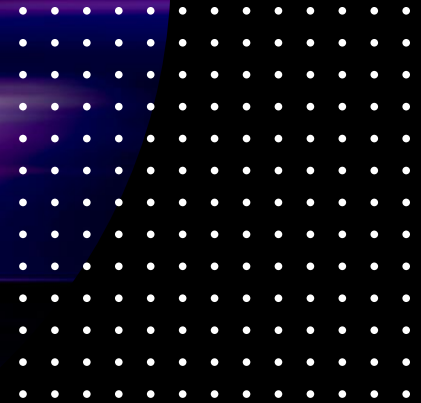
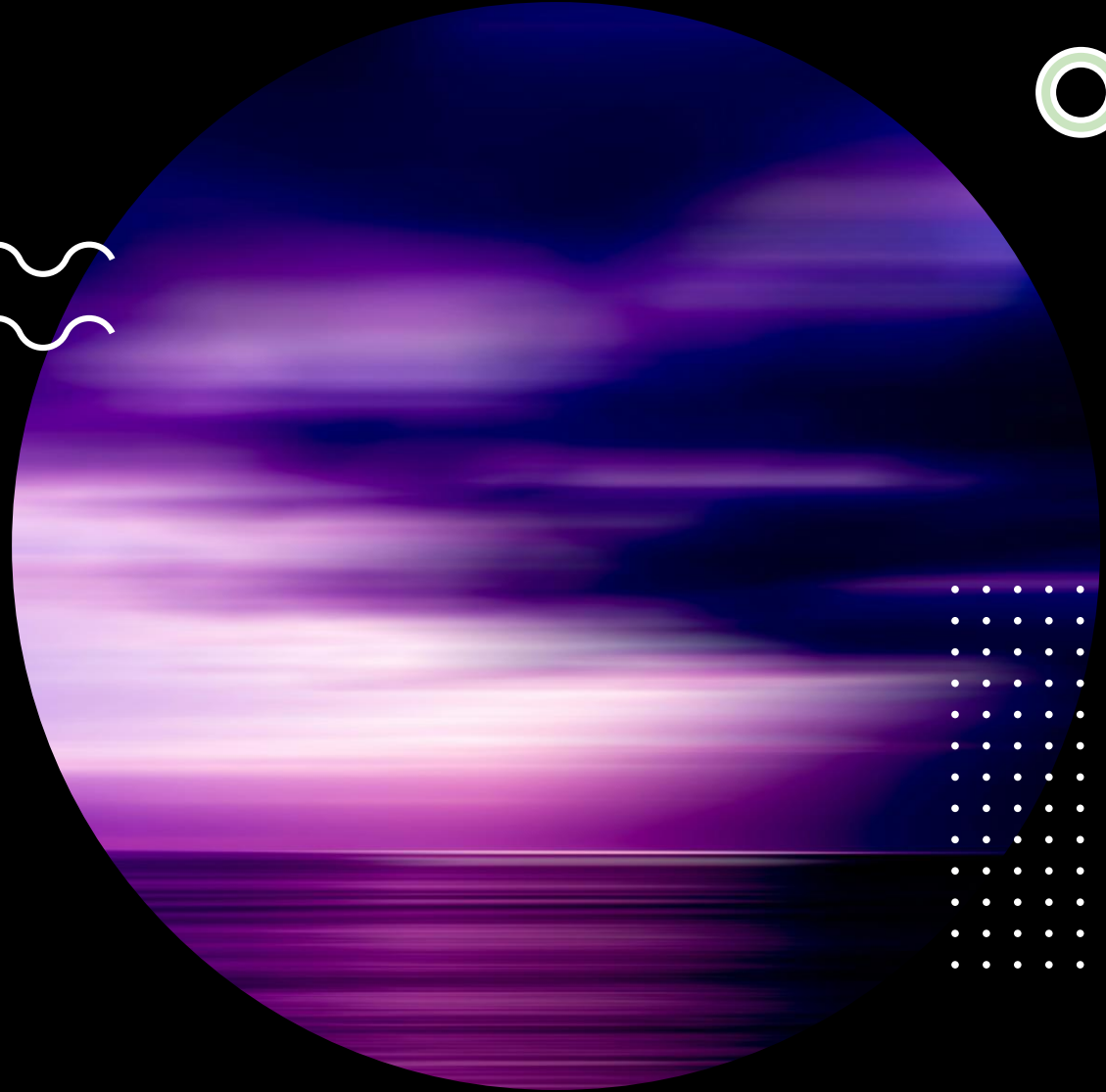
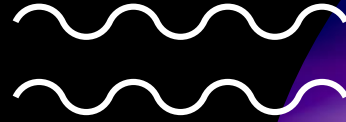
# Top Players in AI

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





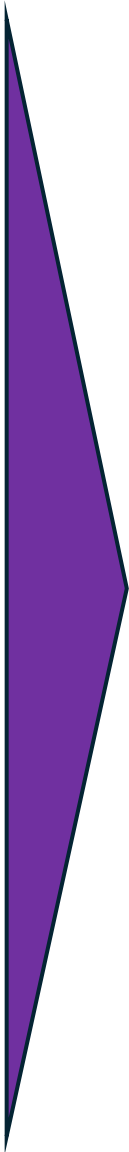
# Shifts in Consumer Behavior & Opportunities

**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

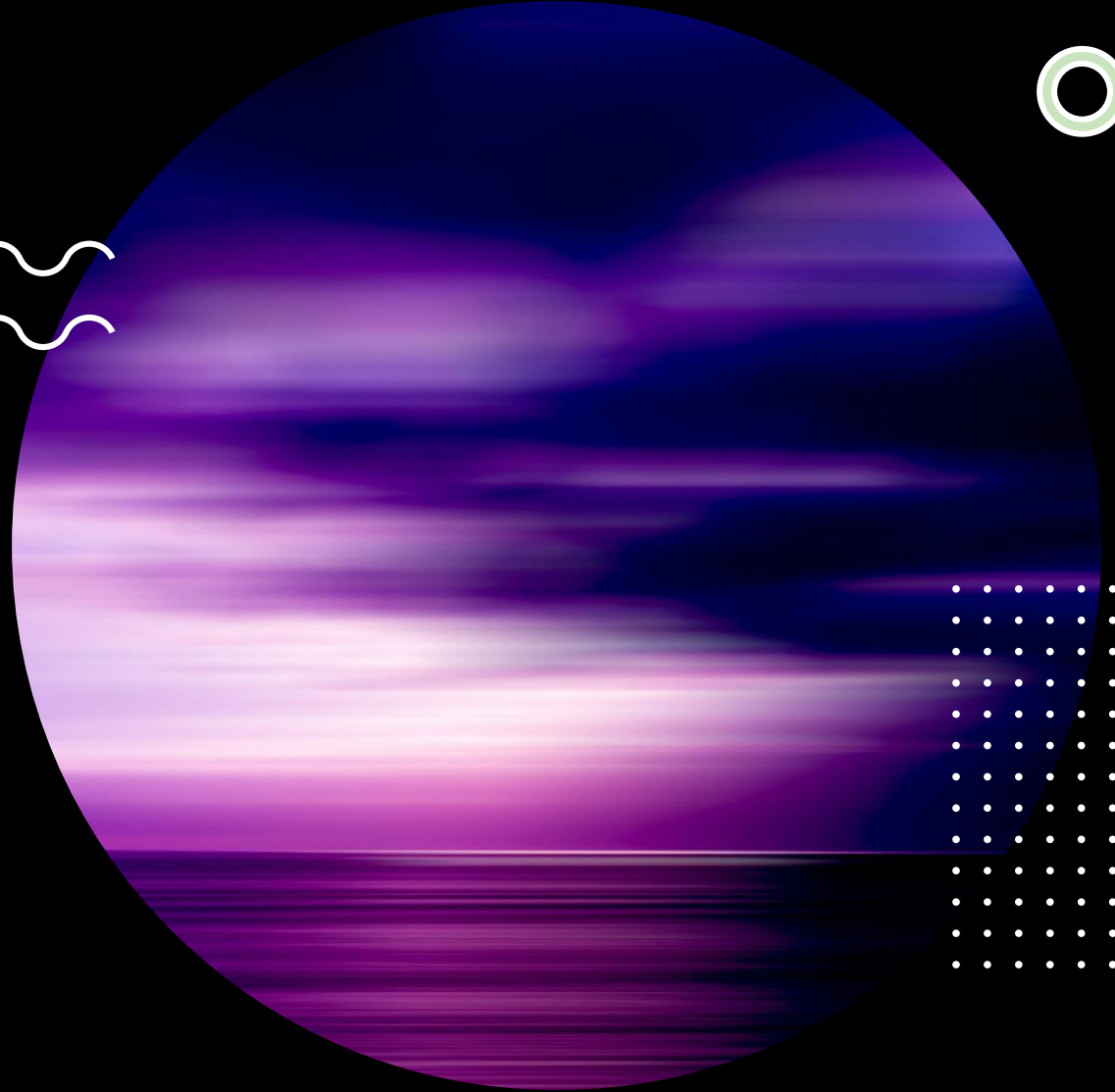
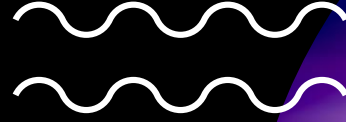
- Offers scalable, brand-safe influencer alternatives
- Growing Gen Z engagement

## Augmented Reality (AR) Shopping

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

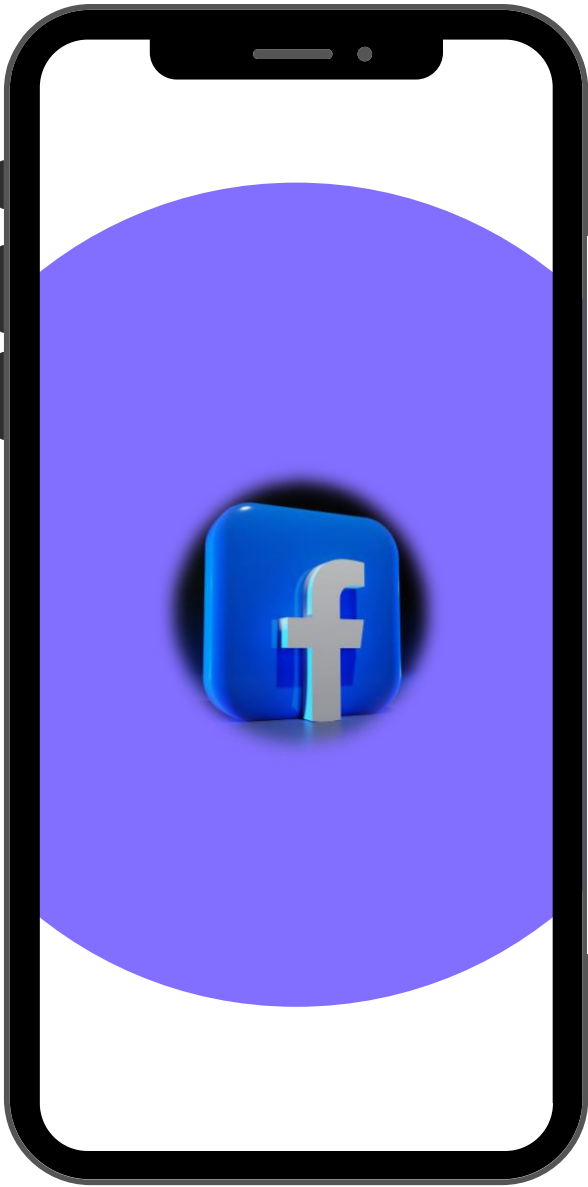
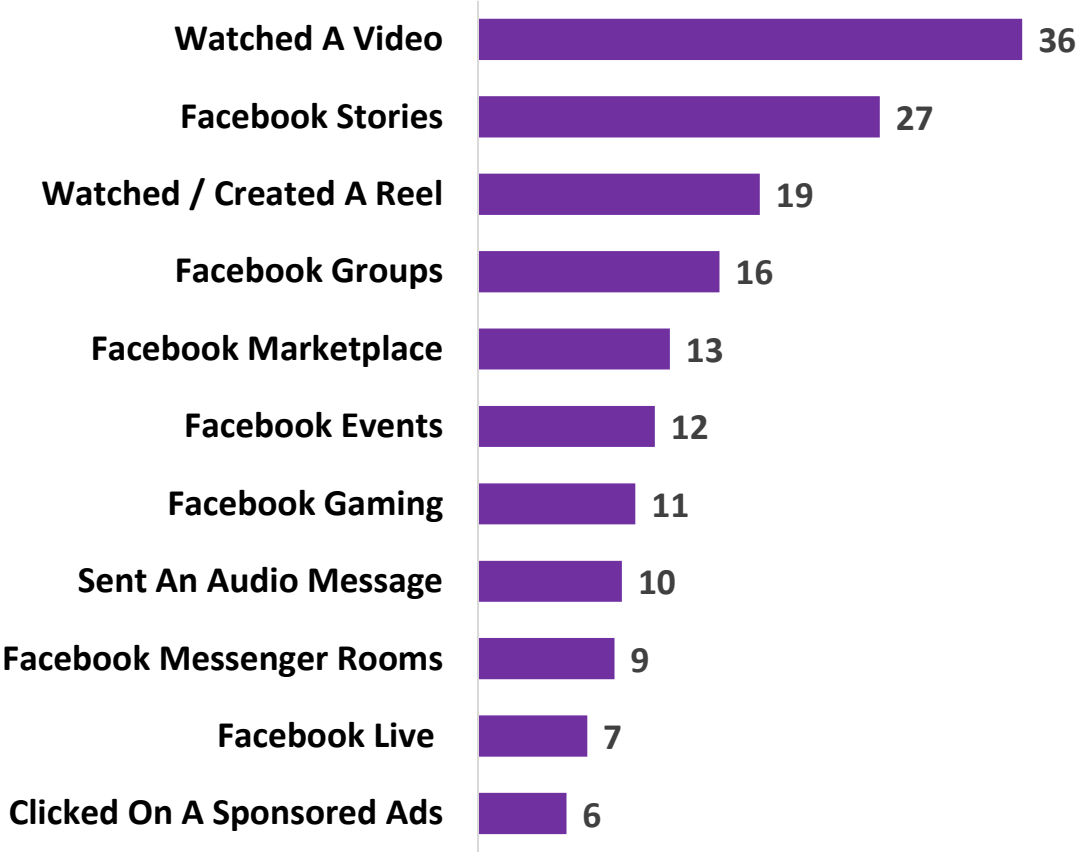


# APPENDIX



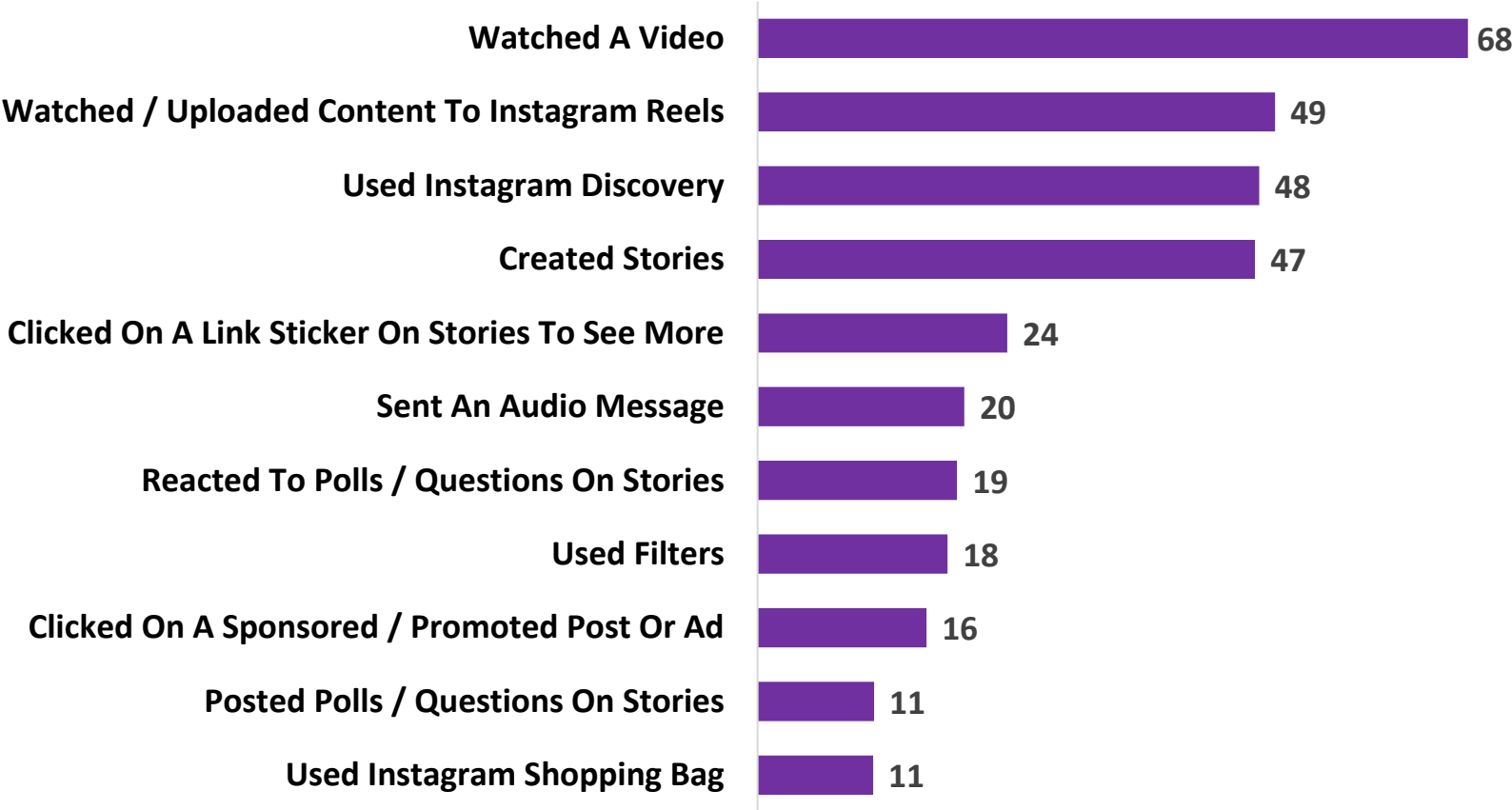


# Platform Spesified Behaviors



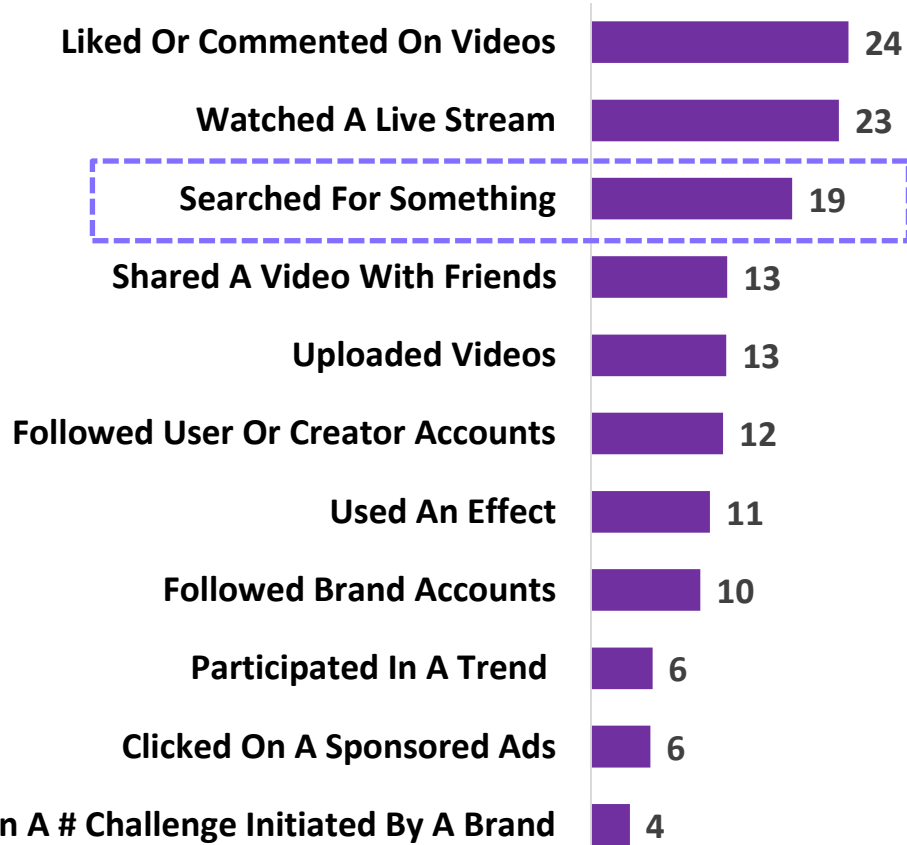


# Platform Spesified Behaviors

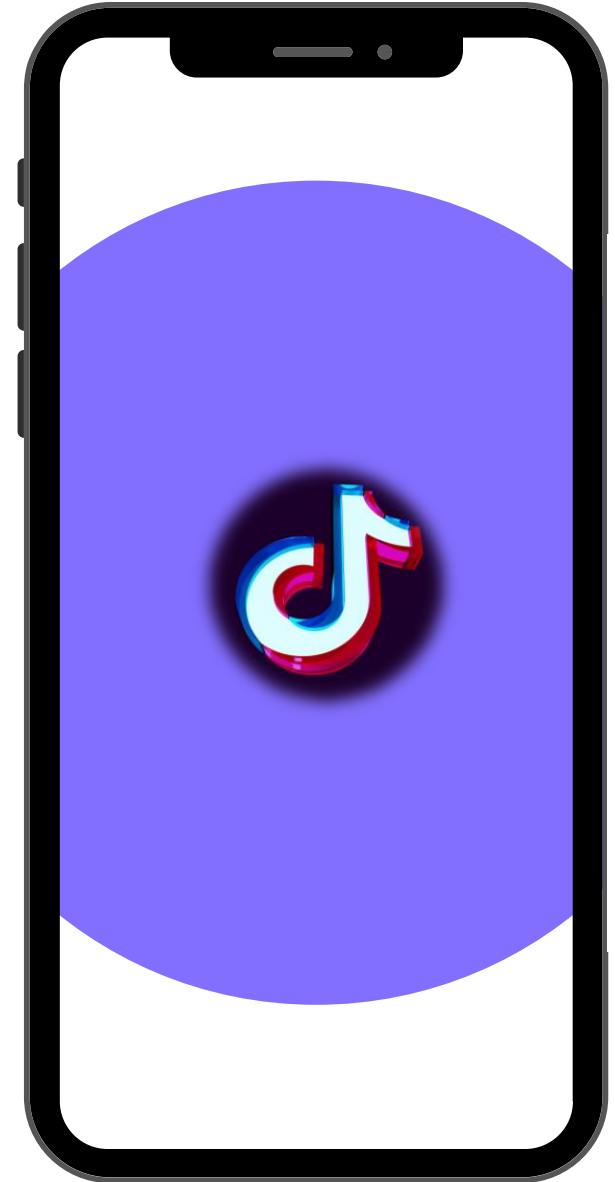




## Platform Specified Behaviors

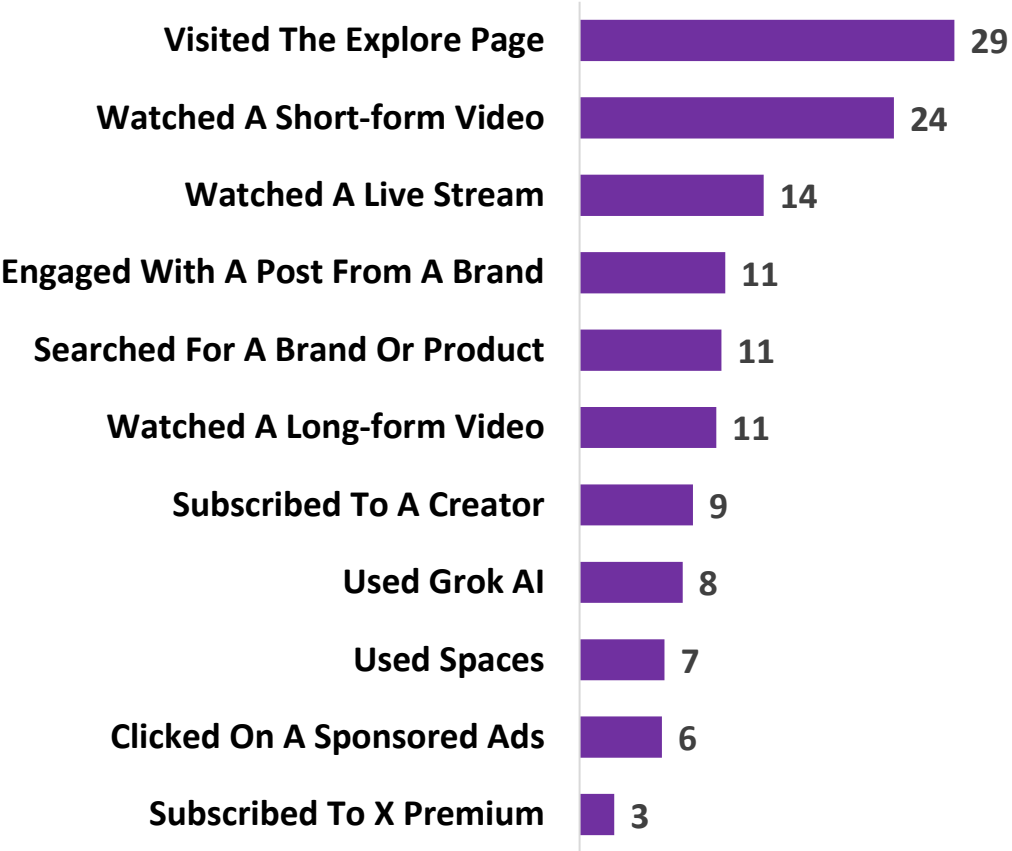


***New Search Engine***  
For Gen Z, TikTok is becoming a go-to search tool for product research





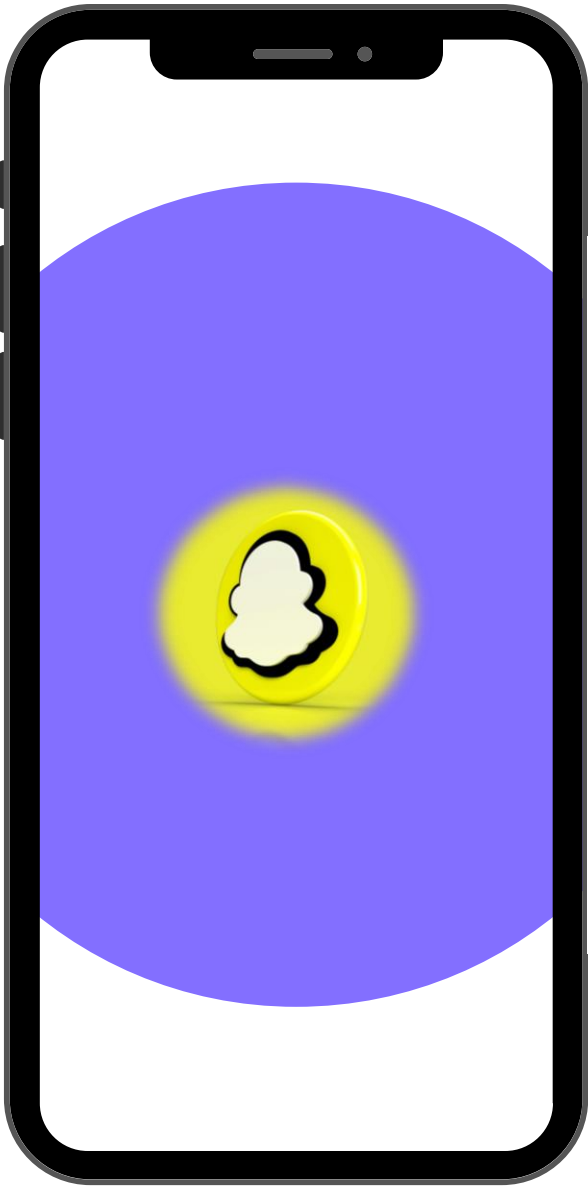
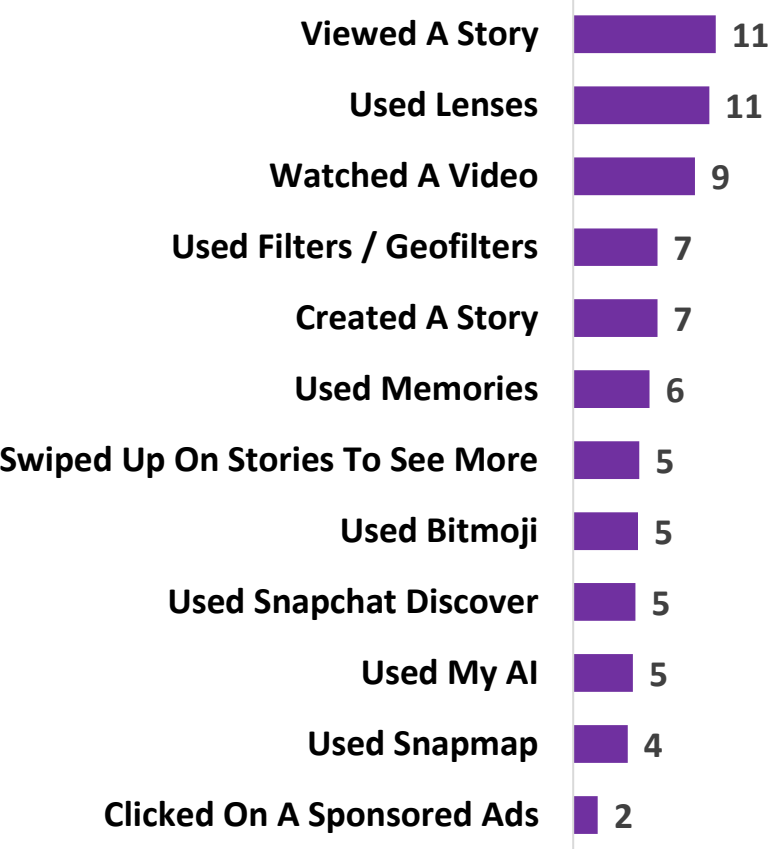
# Platform Spesified Behaviors





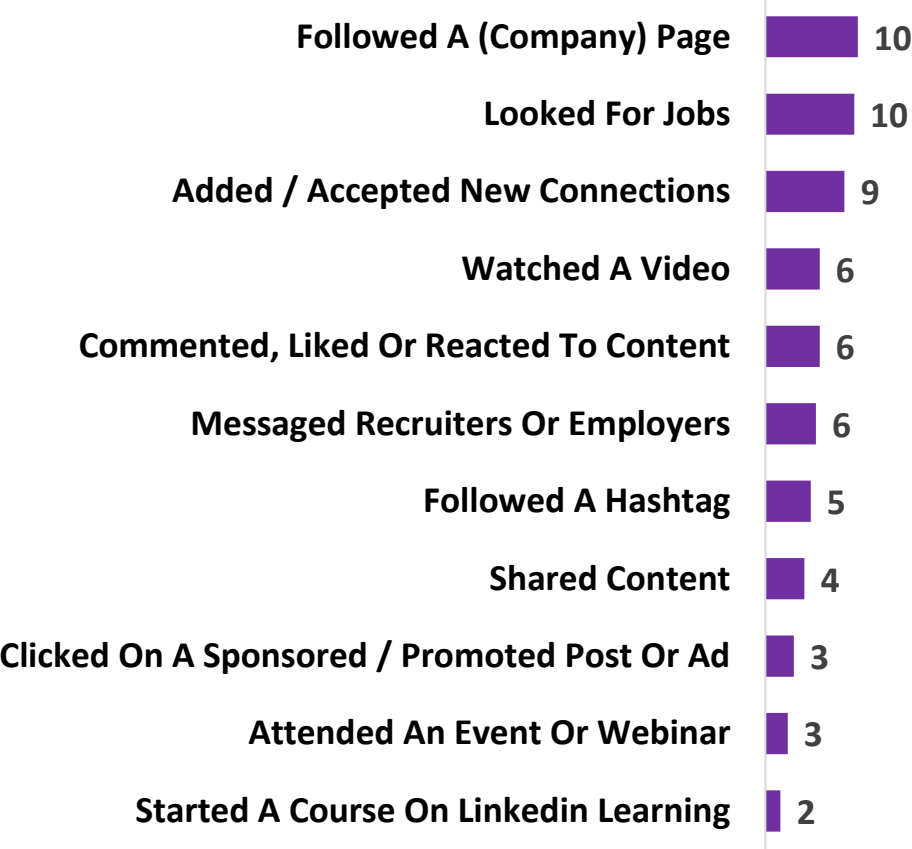


# Platform Spesified Behaviors



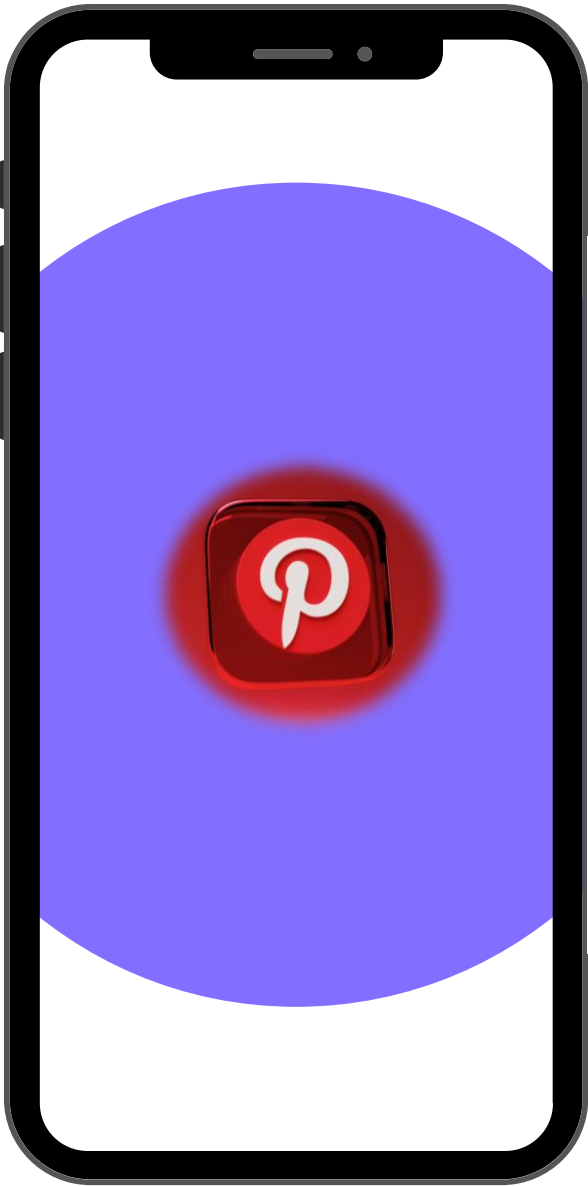
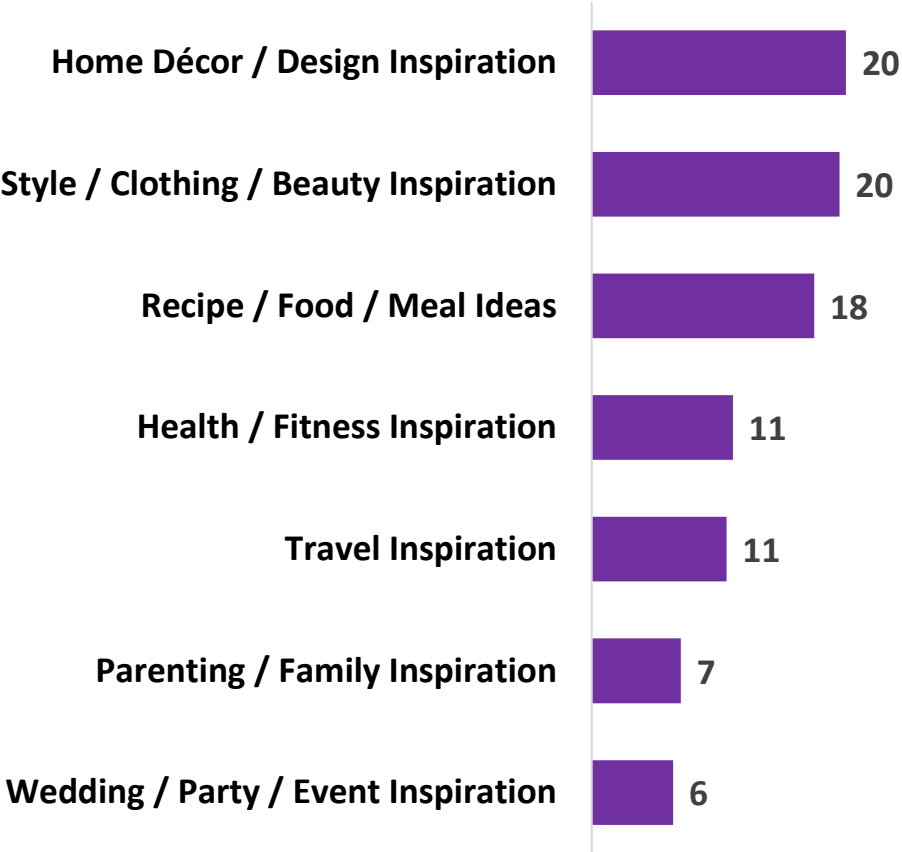


# Platform Spesified Behaviors





# Platform Spesified Behaviors



# Thanks!

**Alperen Arabaci**

Consumer Insight & Strategy Manager

alperen.arabaci@performics.com



DATAINSIGHTS.TR@PUBLICISMEDIA.COM