

Turkey Digital Media Landscape

2023



1 Overview of Turkey

**2 Media Consumption and Behavioral
Patterns**

3 Sectoral Perspective



Summary

In 2023, Turkey's digital growth continues steadily.

The increased digital presence of traditional media publishers plays an effective role in making digital platforms more **inclusive**.

As digital channels gain greater prominence in Turkey, the platforms' structures, usage objectives, and durations are evolving as well.

- We use **Instagram** the most among social platforms (**92%**)
- Messaging applications (**91%**) follow Instagram.
- The world of **TikTok** is **growing** day by day.
- Gaming consoles and mobile games are becoming increasingly widespread.

In each platform, adapting our efforts according to the **nature, audience, and the perspectives of the audience** on life will make them more efficient.



Overview of Turkey

Digital World is Growing



86 million

Women-Men
evenly distributed



82 million

04:17 hours
actively using



71 million

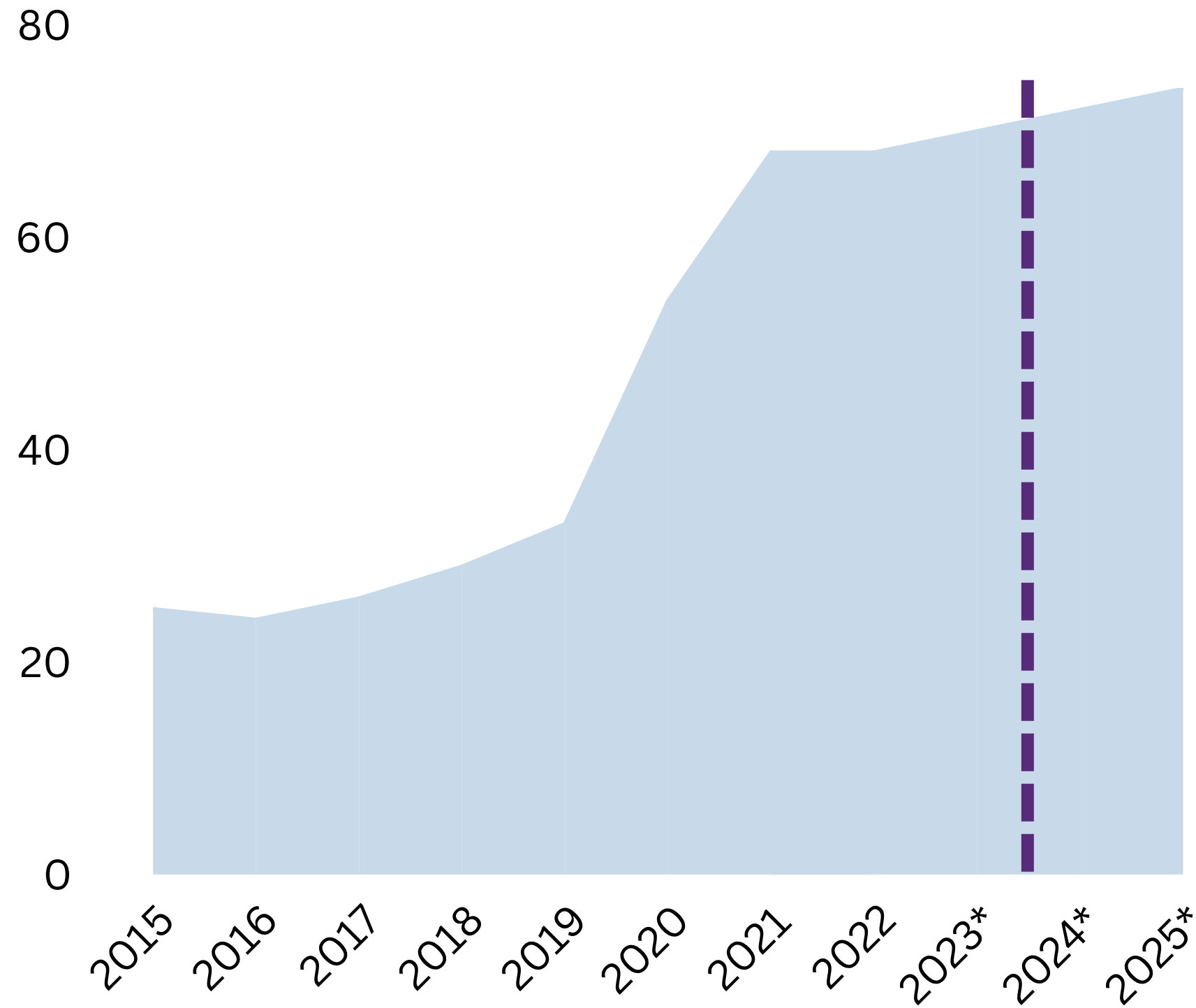
%82
regularly using



62 million

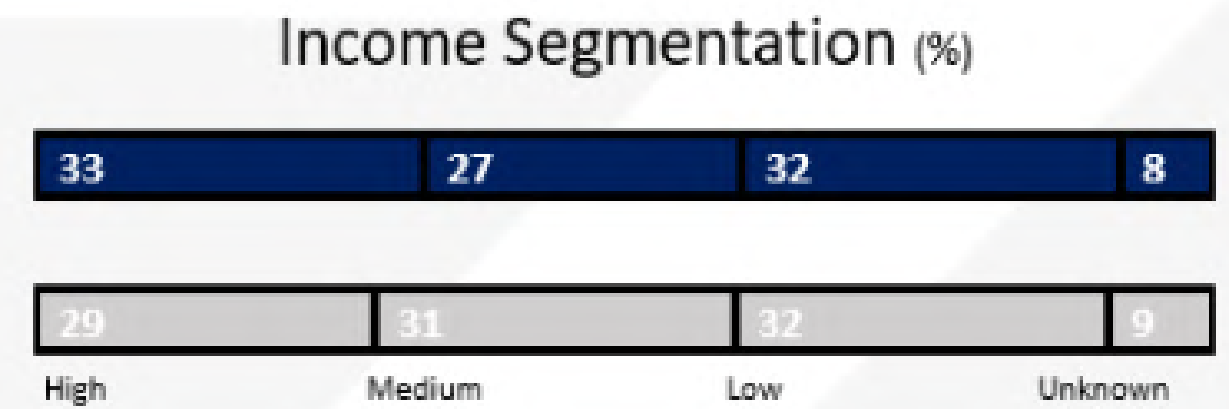
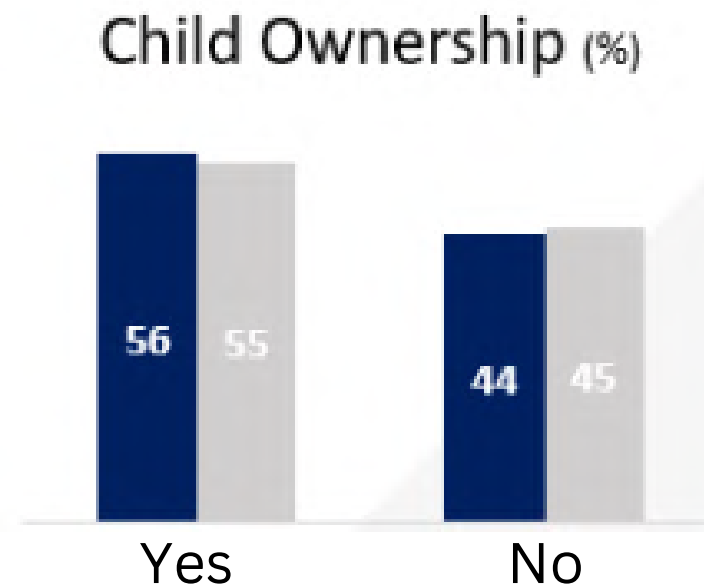
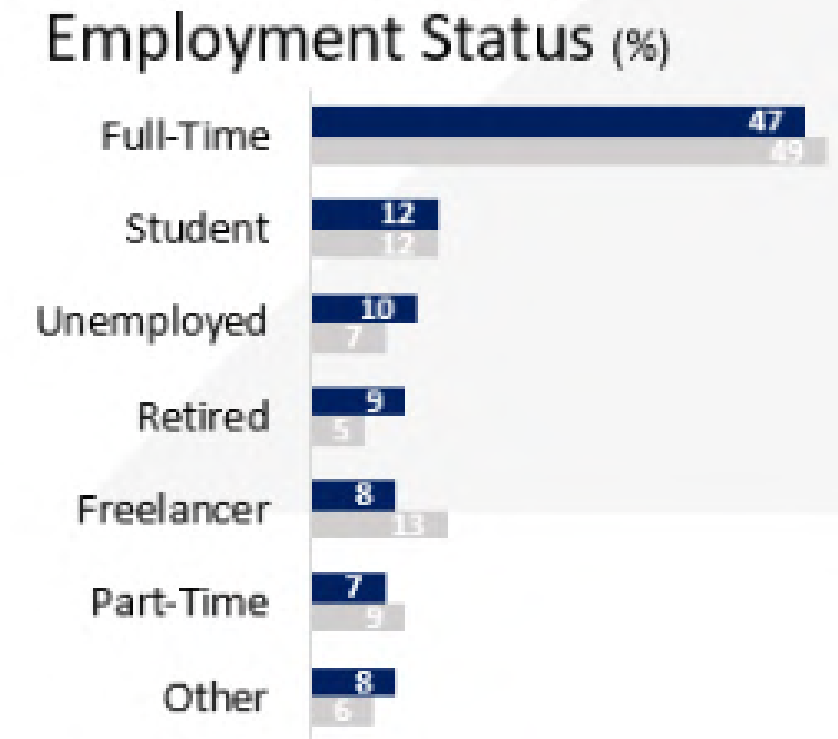
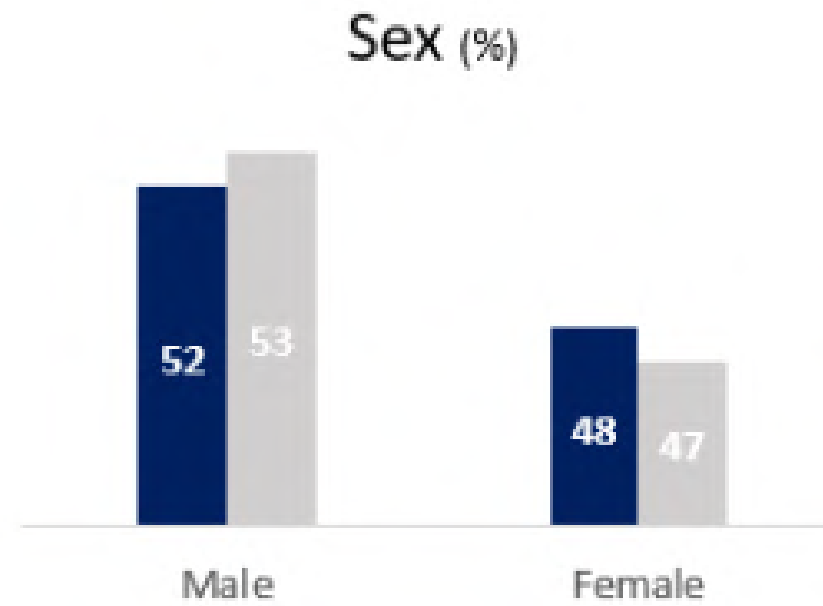
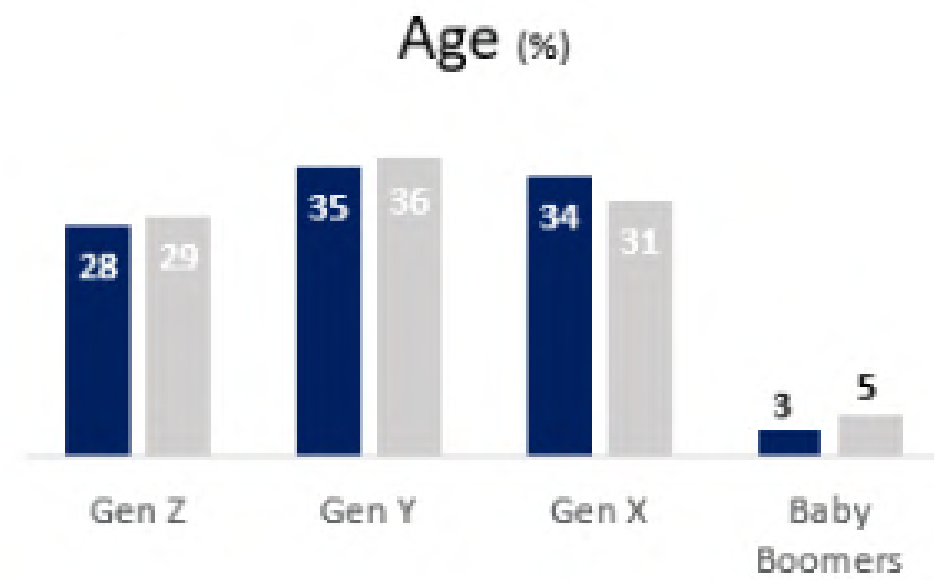
%92
active on Instagram

Digital Media Investment Share (%)

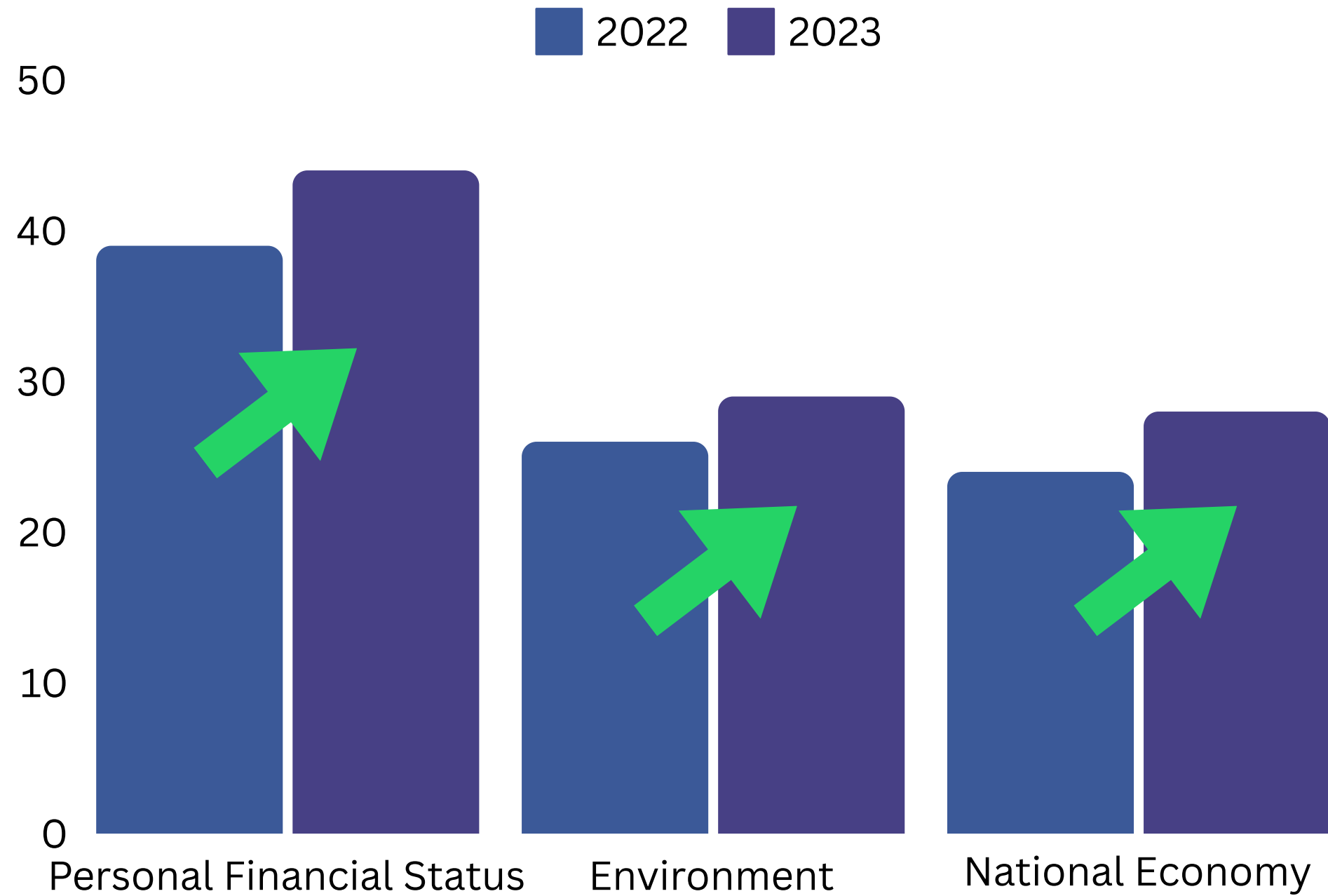


Investments continue to shift towards digital media.

- General Demographics of Turkey -



THOSE WHO THINK THINGS WILL IMPROVE IN THE NEXT 6 MONTHS (%)



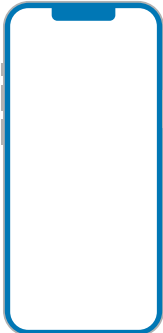
Economic hopes and expectations are increasing.

Media Consumption and Behavioral Patterns

Usage Times continue to increase



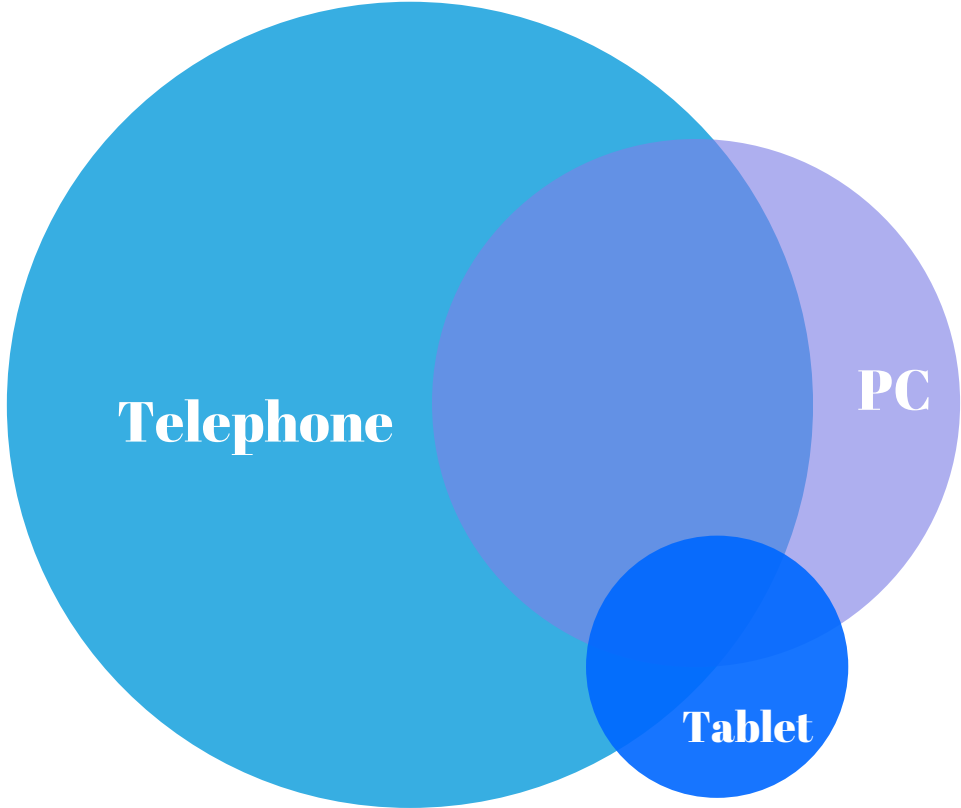
Internet
7:17 hours



Mobile
4:17 hours

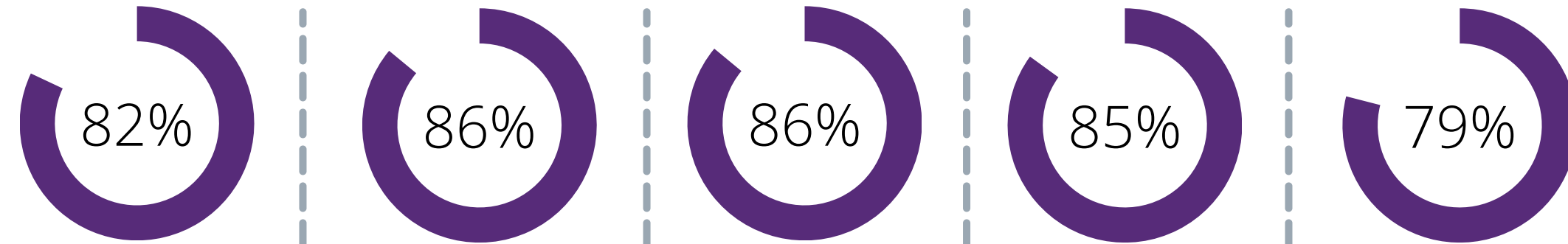


PC/Laptop/Tablet
3:00 hours

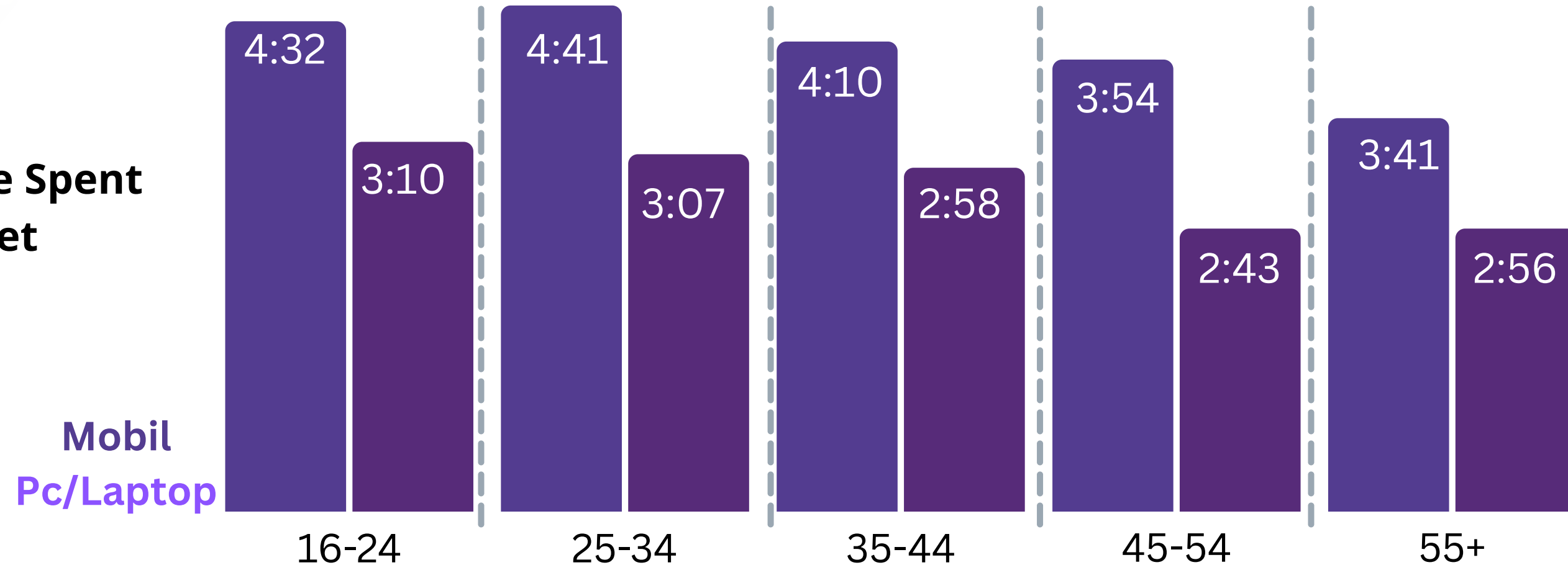


Mobile is Now for All Ages!

Percentage of people in Turkey who think their Smartphones are their most important item












Average Daily Time Spent on the Internet



Media Consumption Durations

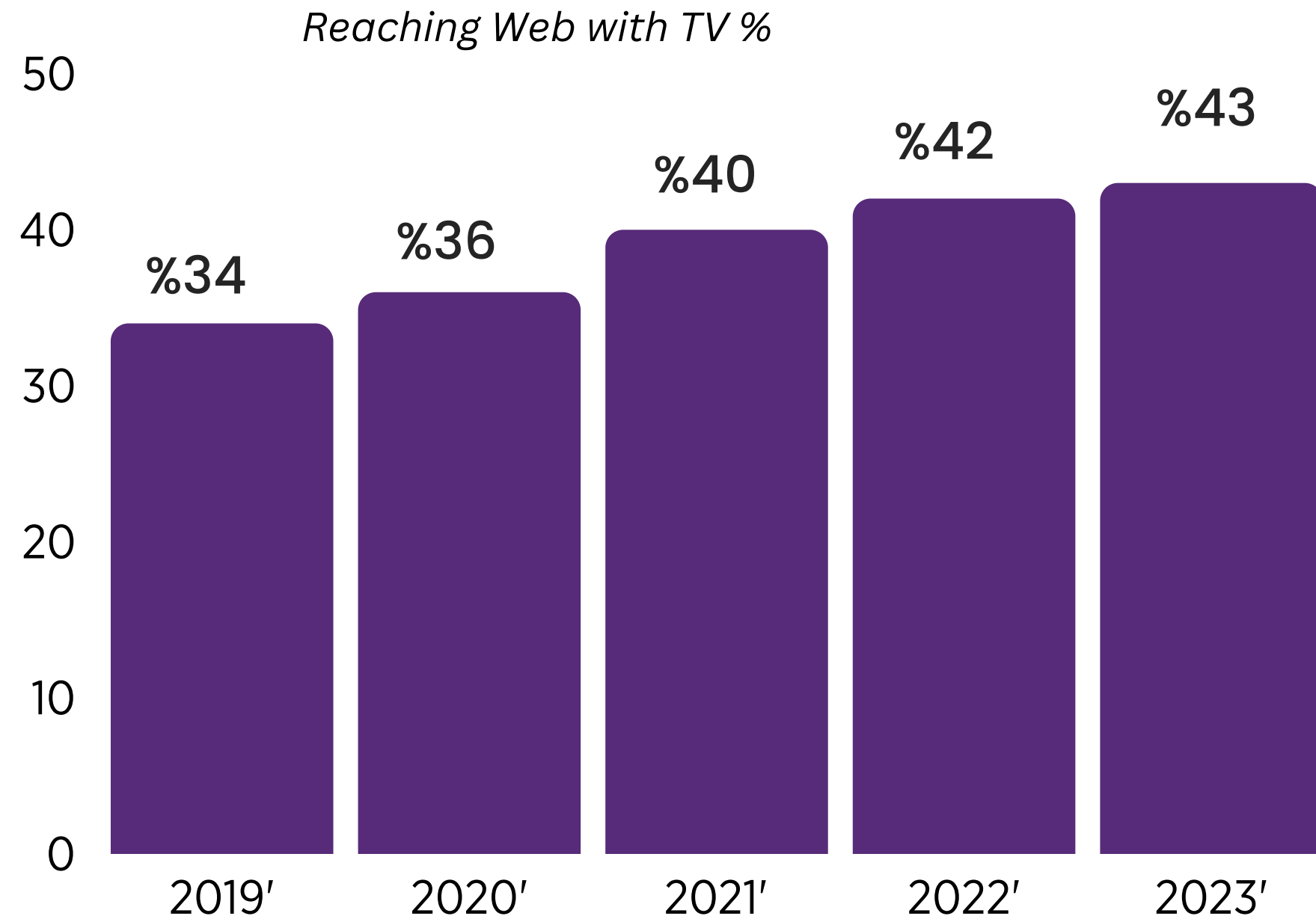
In 2023, when looking at the daily average media consumption times, the time spent on social media takes the lead.



Social Media		2:48 sa	↓ -3%
TV		2:14 sa	↓ -5%
Music Streaming		1:40 sa	↑ 5%
Online TV		1:29 sa	↑ 5%
Gaming Devices		1:06sa	↑ 6%
Online Press		0:58 sa	↑ 4%
Podcast		0:47sa	↑ 4%
Radio		0:46sa	↑ 2%
Printed Press		0:43 sa	● 0%

*Compared to 2022

Although the role of television in our lives is changing along with the digitalizing world, its usage duration does not decrease; in fact, it increases its presence within the digital realm.



**DON'T
GIVE UP!**

Watching television is a significant activity of the day.

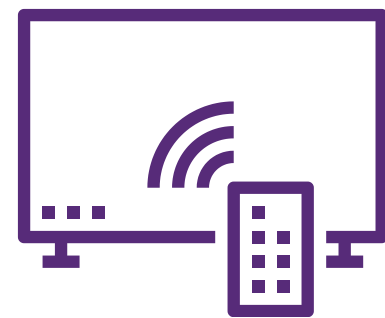
Daily TV Consumption Duration 3:43 Hours

Broadcast TV

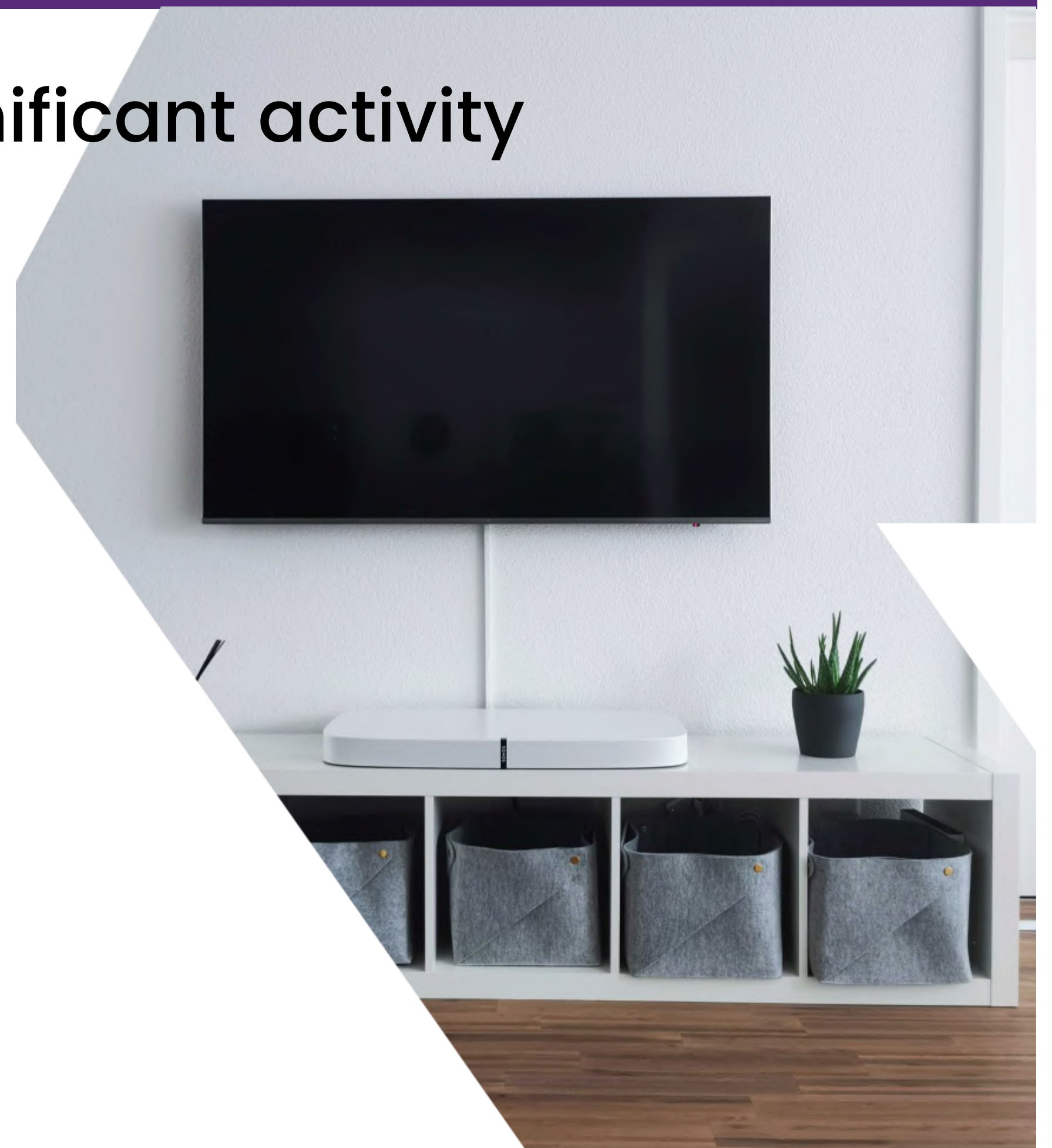


2:14 hours

Online Streaming



1:29 hours



Second Screen Usage

Almost all digital consumers watch television while spending time on mobile devices.

93%

Mobile

33%

Laptop PC

20%

Tablet

12%

Desktop PC

1%

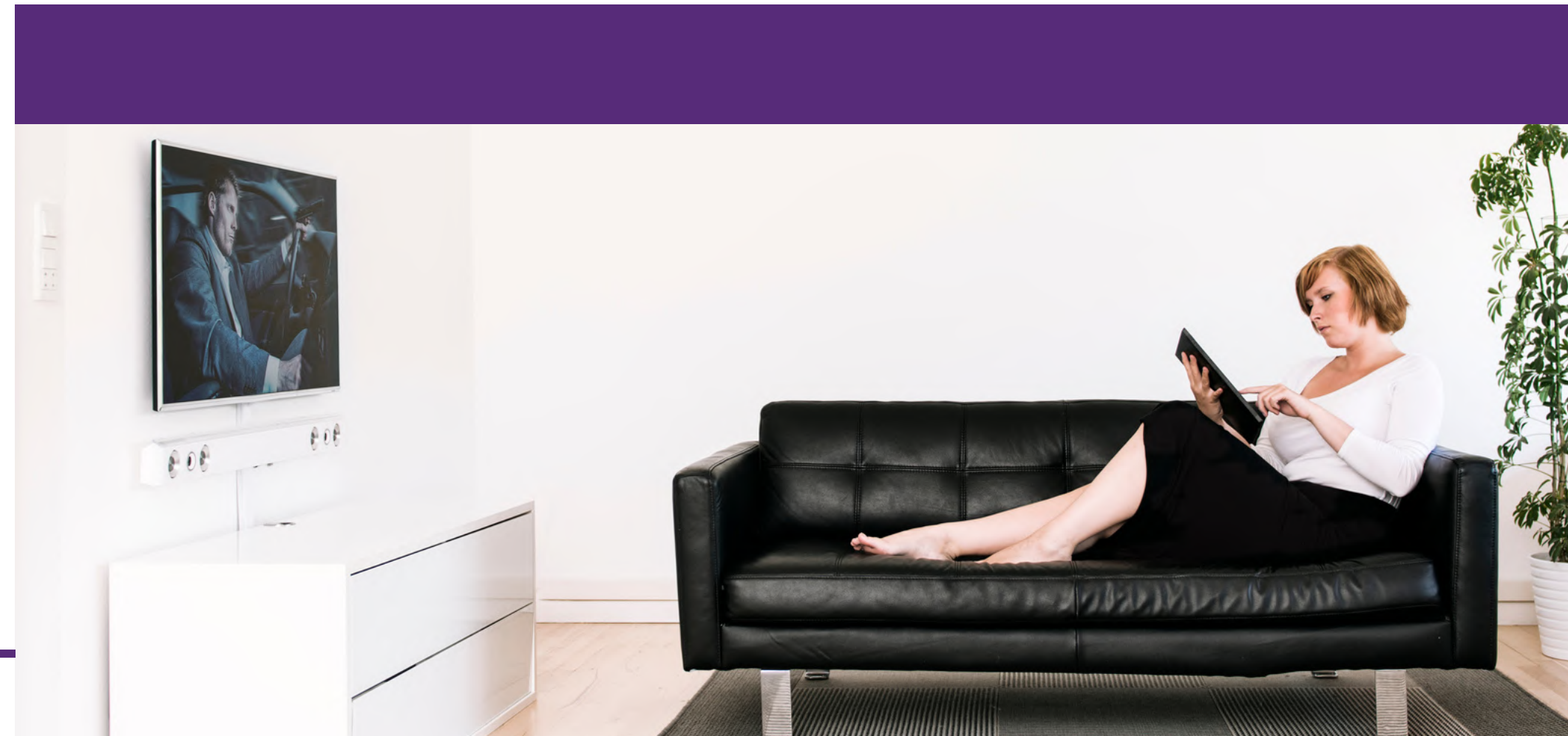
E-Reader

When watching TV

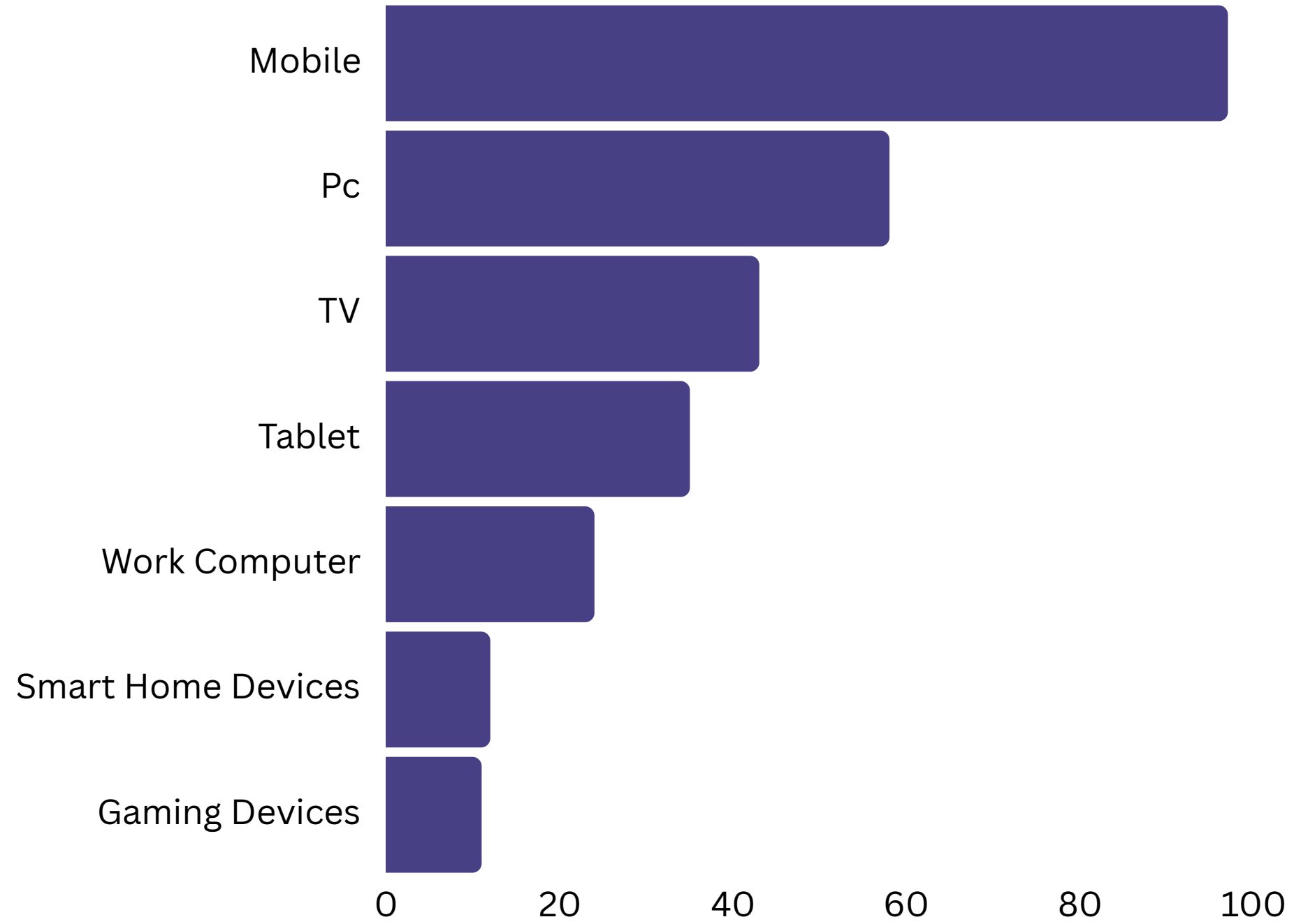
%64 using social media,

%63 texting with friends.

Apart from these, they also engage in activities such as playing games (52%), shopping for products (49%), reading news (47%), and checking emails (41%).



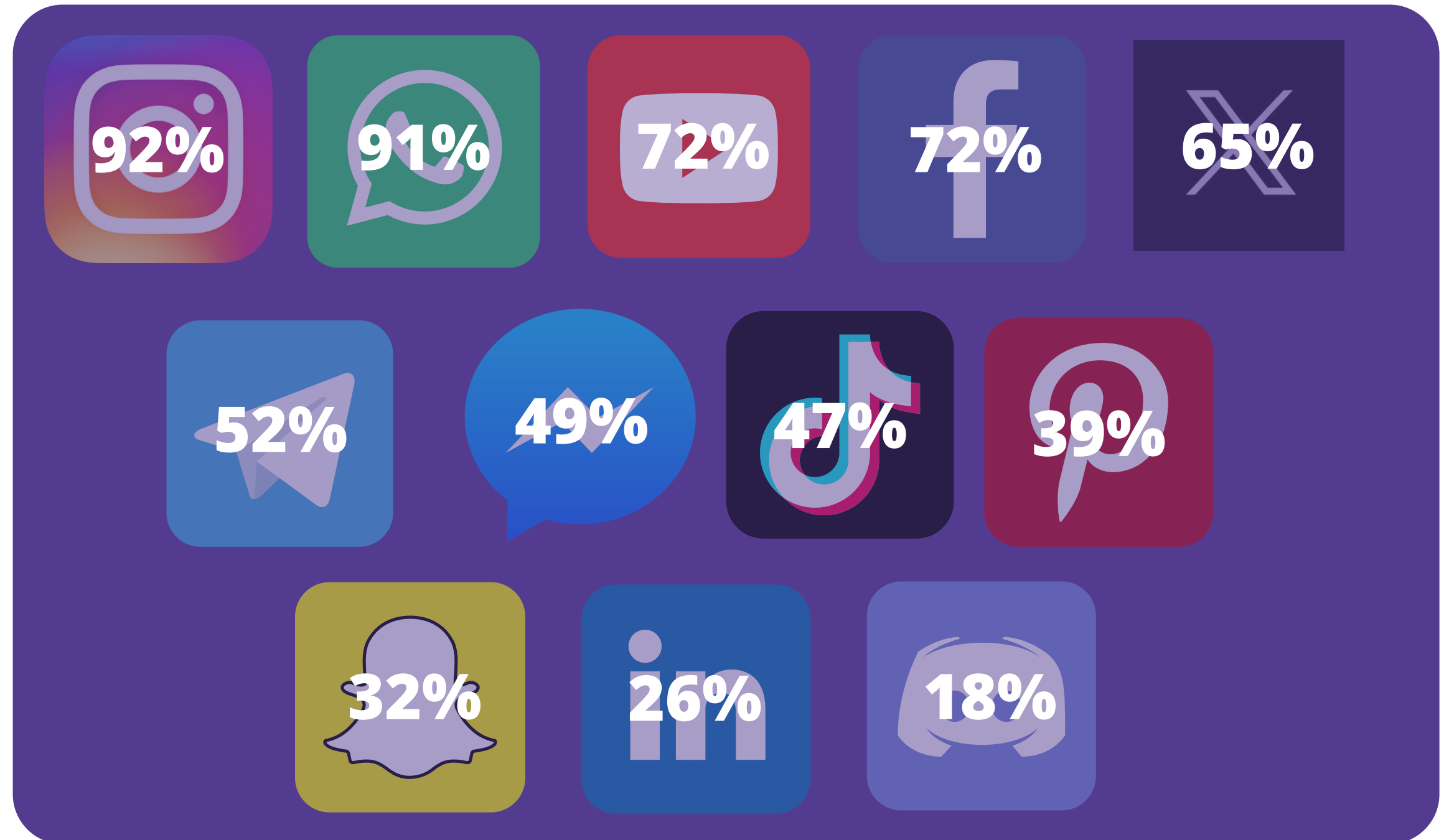
Preferred mobile devices for internet access %



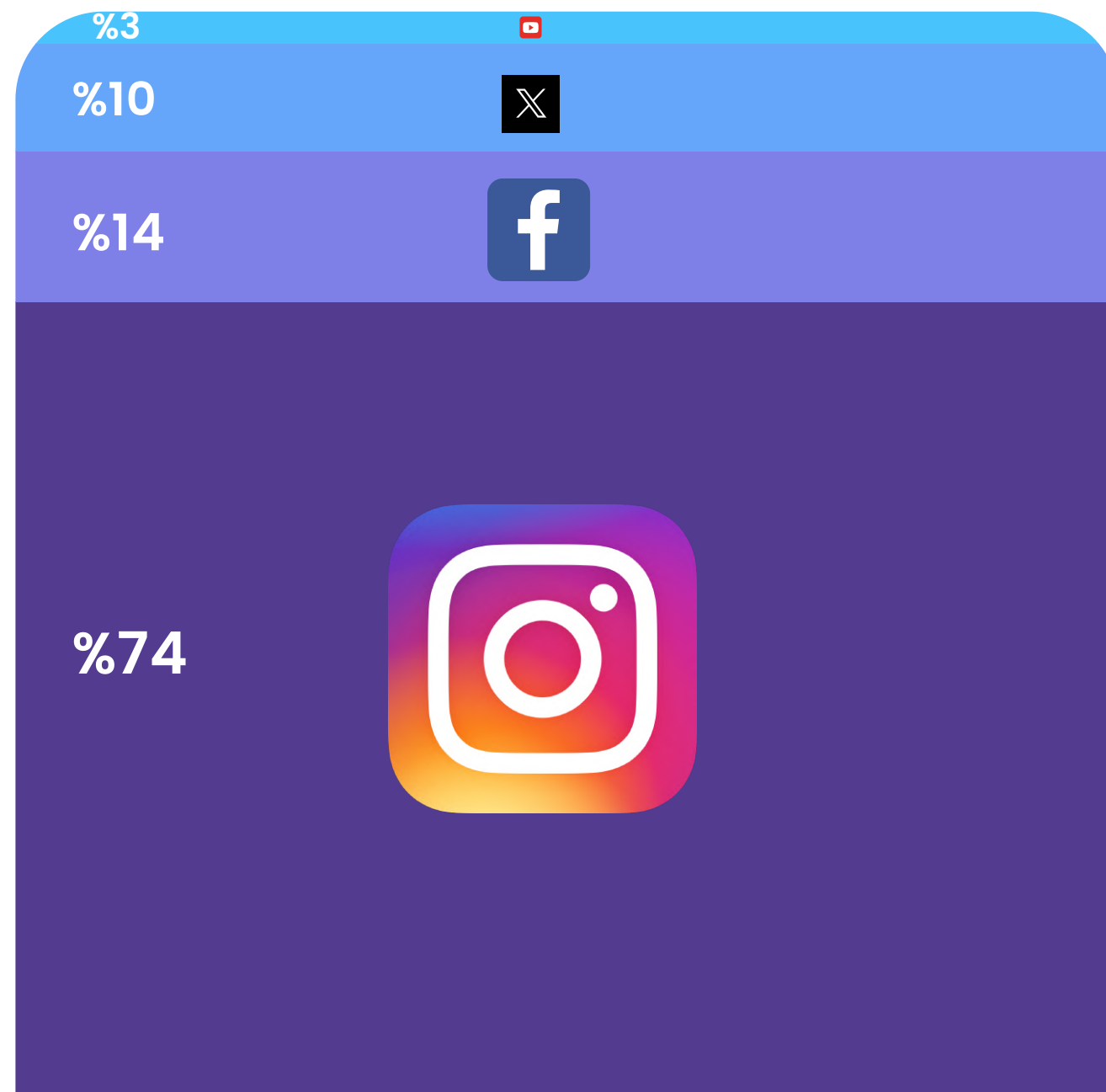
Most Visited Online Platforms: Instagram & WhatsApp

In 2023, Instagram and WhatsApp maintain their leading positions in social media and messaging channels in Turkey.

Compared to the previous year, Facebook usage is decreasing while TikTok and Snapchat usage are increasing.



2023 Social Media Platform Interaction Shares (%)



Social Media's touchpoints to customers: Instagram

In 2023, the highest interaction on social media platforms occurred on Instagram.

In this platform where consumers are highly active, brands can efficiently convey their products and services to consumers through Instagram, indicating that the psychological permeability of this platform is much higher.

The leader in TV/Movie streaming platforms: **Netflix**

In 2023, digital consumers use Netflix as their regular TV/movie streaming service, with 63%. However, there have been slight decreases in usage percentages due to increasing subscription prices and alternative channels.



63%



29%



29%



29%



26%



21%



14%





13%

Music Streaming Platforms

"One out of every two people use Spotify!"

Half of the consumers meet their music listening needs through Spotify or YouTube platforms.

% Music platform used to listen to music in the last 1 month

	<u>2022</u>	<u>2021</u>	<u>Change</u>
 Spotify®	49%	48%	↑ 3%
 YouTube Music	45%	48%	↓ 5%

- Brand Journey -

The way to reach digital users in Turkey is through active use of social media!



Brand Discovery (%)

1	Search Engines	38	32
2	Social Media Ads	38	28
3	TV Ads	37	31



Brand Search Online (%)

1	Search Engines	57	50
2	Social Media	49	45
3	Consumer Reviews	39	37



Referrers to Online Shopping (%)

1	Free Delivery	57	51
2	Coupon and Discounts	42	39
3	Easy Returns	38	24

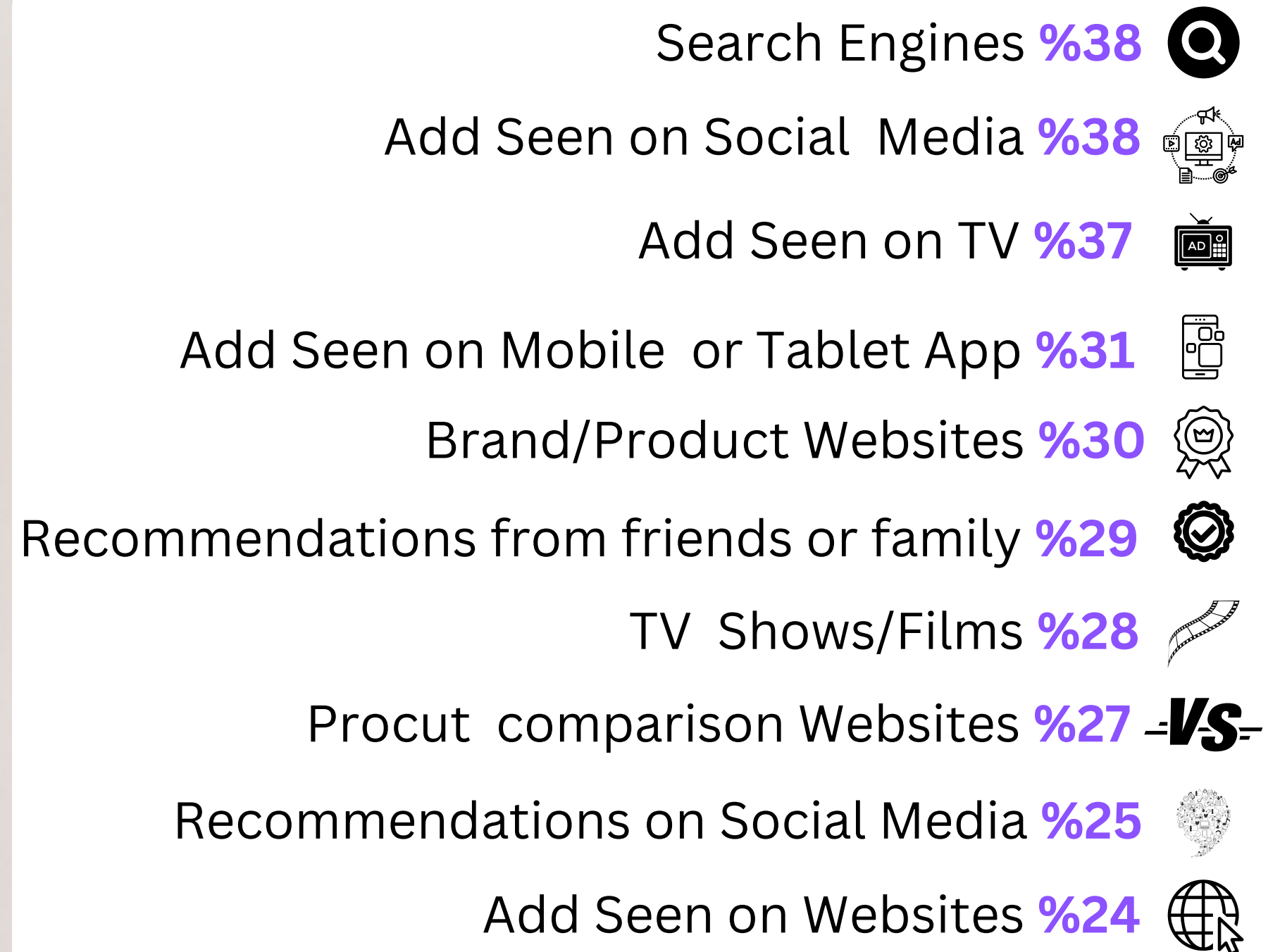


Contributors to Brand Loyalty (%)

1	High Quality Products	54	48
2	Brand Love	48	33
3	Rewards (Gift, Coupon)	41	39

The Meeting Point for Brands and Consumers

Social media and search engines are now ahead of TV advertisements in brands' interactions with consumers.



Sectoral Perspective

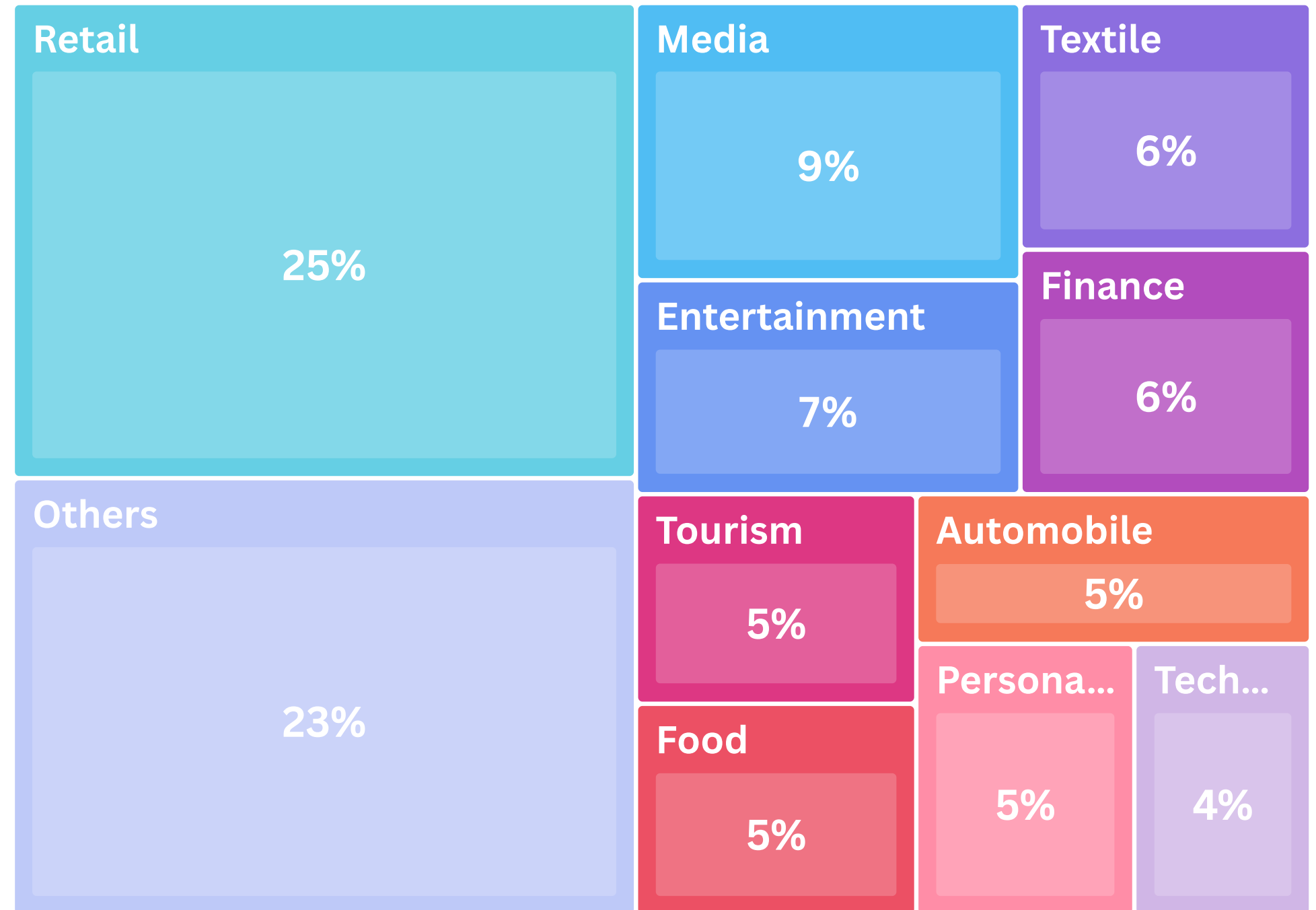
The Retail Sector is Clearly in the Lead

Digital SOV (%)

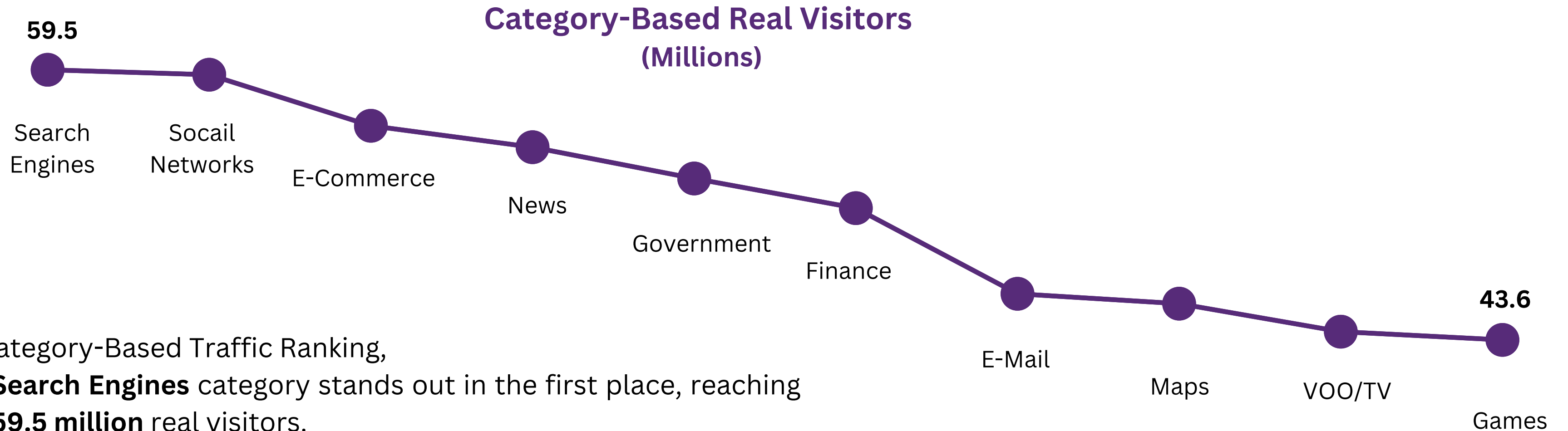
When considering digital ad purchases in 2023, it's observed that the top 10 sectors with the highest volume consumed 77% of the impressions

- It can be observed that the **retail sector** is leading by a margin of **25%**
- The **Media** and **Entertainment** sectors follow the Retail sector.

Compared to 2022, shares in the Retail and Media sectors have decreased, while other sectors have increased their share.



Visitors Are Browsing Through Search Engines

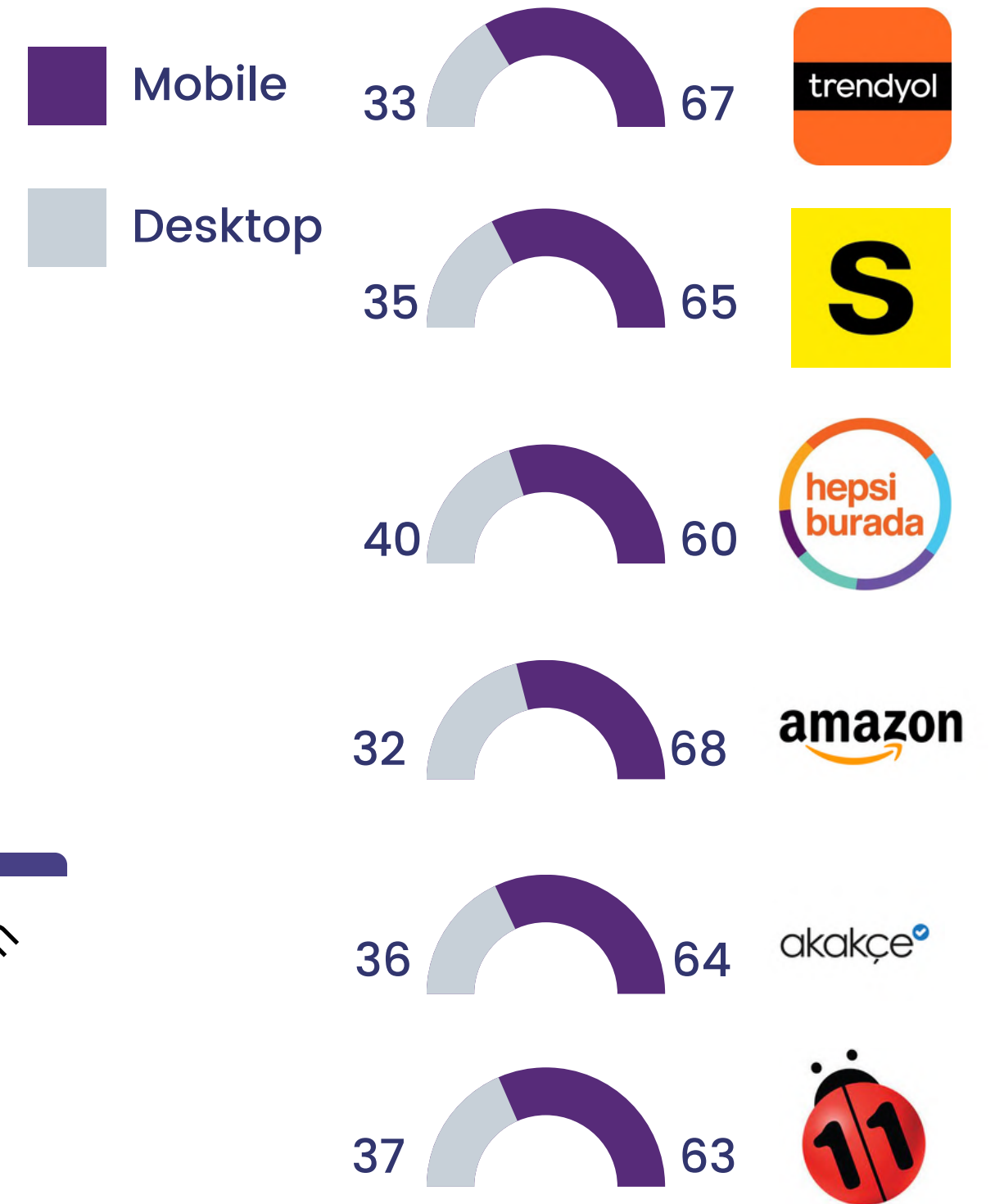


In Category-Based Traffic Ranking,

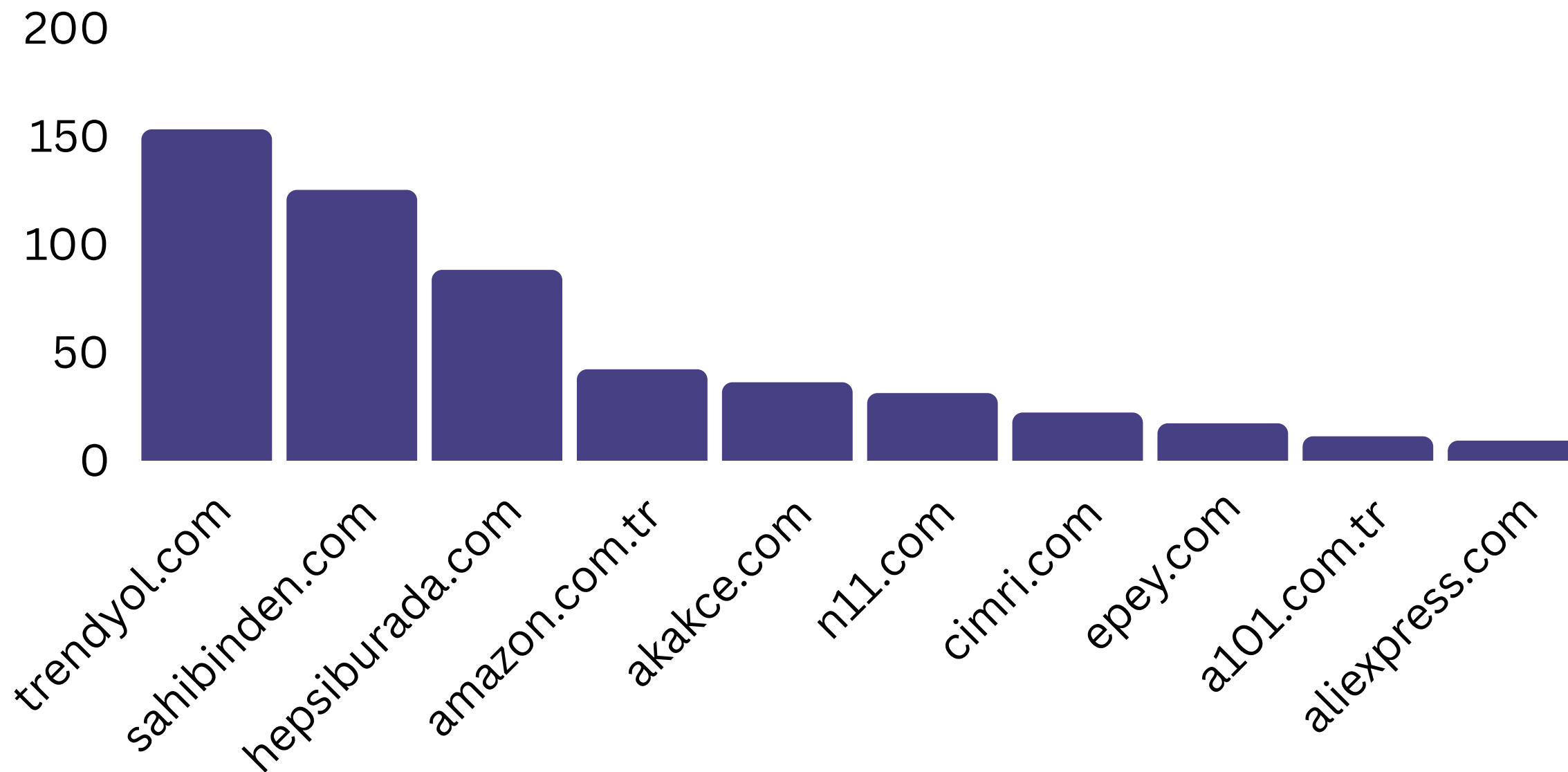
- **Search Engines** category stands out in the first place, reaching **59.5 million** real visitors.
- **Social networks** follow closely in second place with **59.2 million**
- **E-commerce** category also performed well, reaching around **55 million**.

Trendyol Maintains Its Position at the Top in E-Commerce

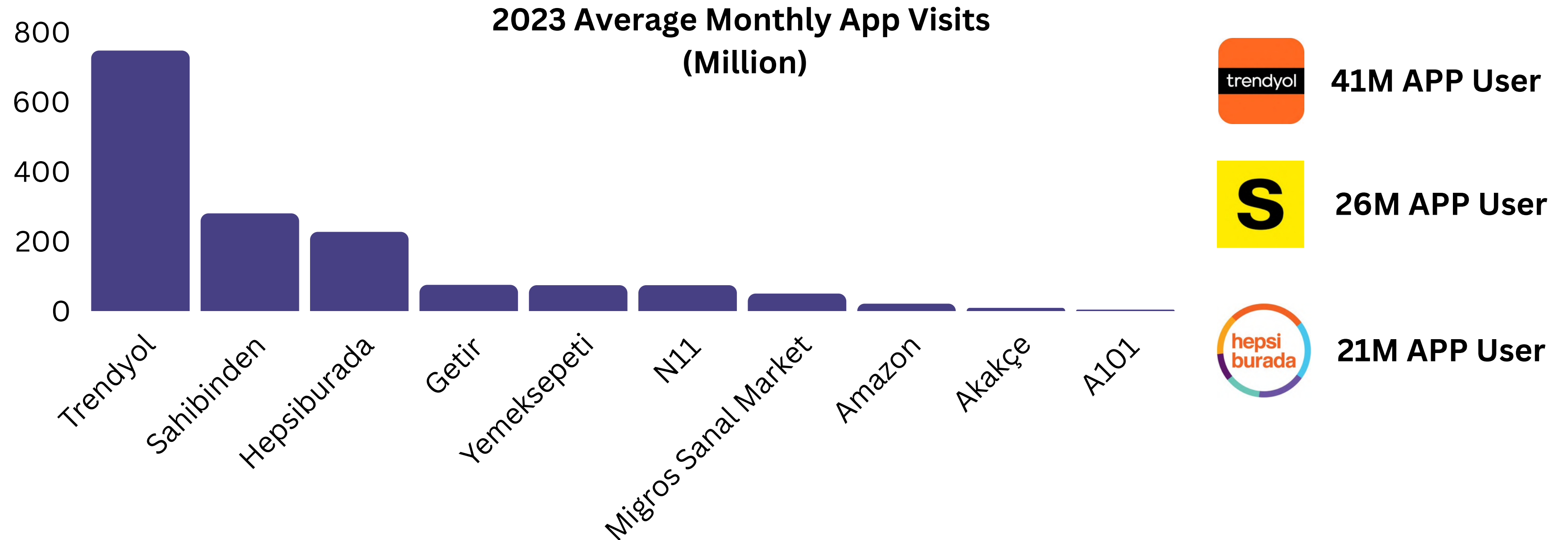
Desktop vs Mobile (%)



2023 Average Monthly Website Traffic (Million, Mobile+Desktop)



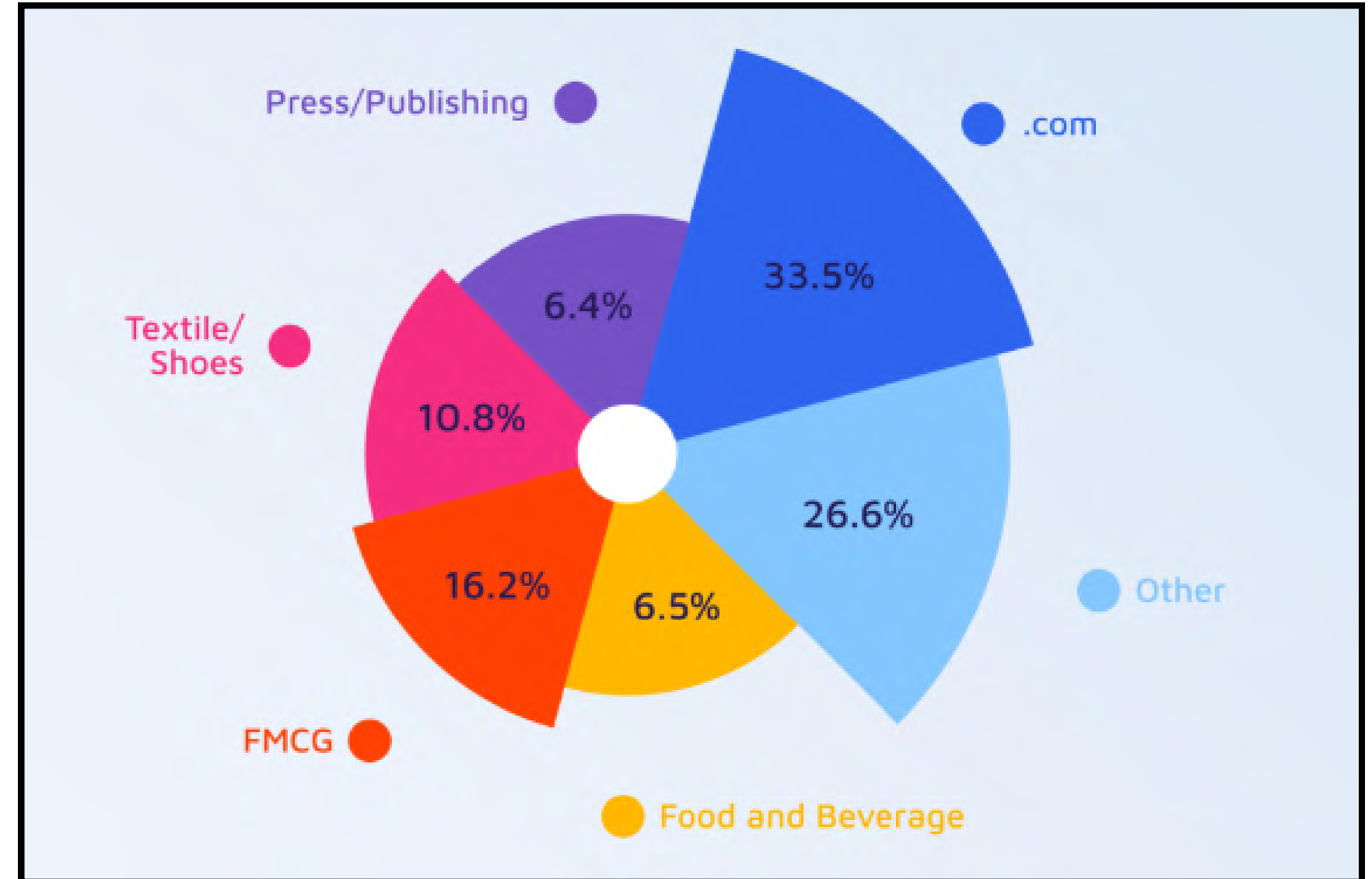
Trendyol, in the app world, has almost as many visits as the combined total of its competitors.



Influencer Marketing is Highly Popular in Turkey!

In the ever-evolving world of digital marketing, influencers have become one of the most crucial components. They have started to appear on numerous platforms, including **Instagram**, **TikTok**, **YouTube**, and more. They seem to be quite successful in mobilizing their audience through the topics they discuss, which in turn brings competition among brands.

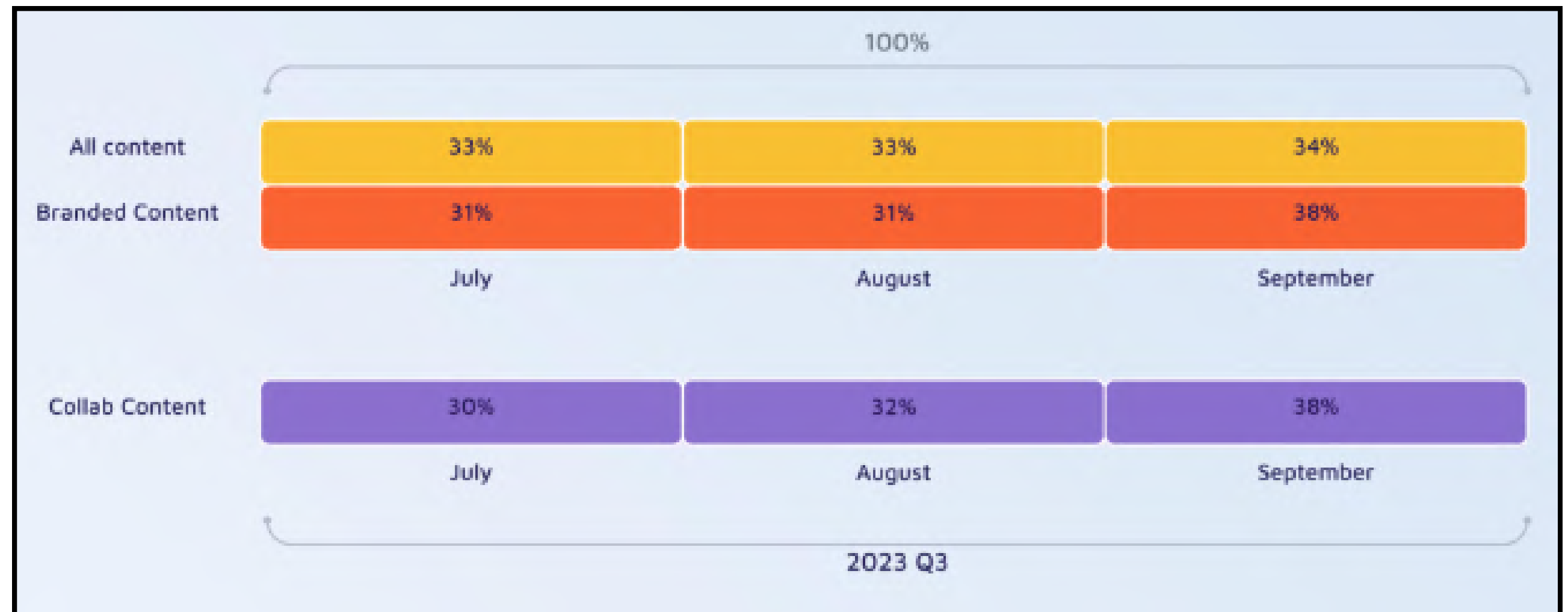
E-commerce ranks first with **26.5%**, followed by **FMCG** at approximately **15%**, and **Textile** at around **12%**.



Branded Content during Earthquakes and Influencer Collaborations Reached Their Peak in November

February was the month when **branded content** was most intensely observed. In February, many individuals and organizations used social media to better understand the needs of communities affected by earthquakes, disseminate information, and mobilize support for relief efforts.

It was observed that **collaborative content** reached its highest levels in **November** and December. Especially November, which hosts some of the biggest shopping days of the year, such as the **11.11 discount** and **Black Friday**, was quite active in **influencer communications**.



Digital Service Sales Wars Continue!



Paid for the following digital services last month %

GENX	34%	16%	17%	13%	12%	8%	6%	7%	7%	7%	4%	4%	4%	4%	3%	3%
GENY	33%	24%	24%	20%	18%	12%	9%	9%	9%	8%	8%	7%	6%	6%	4%	4%
GENZ	29%	33%	19%	18%	21%	10%	9%	8%	9%	8%	6%	7%	6%	6%	4%	6%
BABY BOOMER	24%	12%	11%	9%	5%	5%	4%	5%	2%	5%	2%	5%	2%	3%	4%	2%
	▲	▲	▲	▲	▲	▲	▲	▲	▲	▲	▲	▲	▲	▲	▲	▲
	Movie or TV streaming service	Music streaming service	Mobile app	Mobile game	Music download	Movie or TV download	In-app purchases	Digital movies	Study programs / learning materials	News service	Premium web service	Software package	Digital gifts	Subscription to an online magazine		

Thank You!

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