COVID – 19
IN TURKEY

DAS I ISTANBUL

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"HUMANKIND IS NOW FACING A GLOBAL CRISIS. PERHAPS THE BIGGEST CRISIS OF OUR GENERATION. THE DECISIONS PEOPLE AND GOVERNMENTS TAKE IN THE NEXT FEW WEEKS WILL PROBABLY SHAPE THE WORLD FOR YEARS TO COME. THEY WILL SHAPE NOT JUST OUR HEALTHCARE SYSTEMS BUT ALSO OUR ECONOMY, POLITICS AND CULTURE. WE MUST ACT QUICKLY AND DECISIVELY. WE SHOULD ALSO TAKE INTO ACCOUNT THE LONG-TERM CONSEQUENCES OF OUR ACTIONS. WHEN CHOOSING BETWEEN ALTERNATIVES, WE SHOULD ASK OURSELVES NOT ONLY HOW TO OVERCOME THE IMMEDIATE THREAT, BUT ALSO WHAT KIND OF WORLD WE WILL INHABIT ONCE THE STORM PASSES. YES, THE STORM WILL PASS, HUMANKIND WILL SURVIVE, MOST OF US WILL STILL BE ALIVE — BUT WE WILL INHABIT A DIFFERENT WORLD."

YUVAL NOAH HARARI

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SUMMARY OF THE CURRENT SITUATION

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CORONAVIRUS HAS BEEN SPREADING RAPIDLY ACROSS THE WORLD, AFFECTING MORE THAN 177 COUNTRIES AND CLAIMING MORE THAN 30,800 LIVES.

There are more than 669,000 confirmed cases worldwide, with the US recording more than any other country, including China. Europe has also seen a surge in cases.

Coronavirus cases, recoveries and deaths

From a total 669,000 confirmed coronavirus cases, there are

496,000 active cases, 142,000 recoveries and 30,800 deaths

Source: Johns Hopkins University, updated: 29 Mar 11:00 BST   BBC

The US overtook China in terms of confirmed cases on Thursday, according to figures collated by Johns Hopkins University.

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THE POSSIBILITY OF A RECESSION IS REALISTIC FOR MANY COUNTRIES, AT LEAST ON A SHORT-TERM BASIS

OECD Interim Economic Outlook Forecasts, 2 March 2020
Real GDP growth
Year-on-year % change

	2019	2020		2021	
		Interim EO projections	Difference from November EO	Interim EO projections	Difference from November EO
World[1]	2.9	2.4	-0.5	3.3	0.3
G20[1,2]	3.1	2.7	-0.5	3.5	0.2
Australia	1.7	1.8	-0.5	2.6	0.3
Canada	1.6	1.3	-0.3	1.9	0.2
Euro area	1.2	0.8	-0.3	1.2	0.0
Germany	0.6	0.3	-0.1	0.9	0.0
France	1.3	0.9	-0.3	1.4	0.2
Italy	0.2	0.0	-0.4	0.5	0.0
Japan	0.7	0.2	-0.4	0.7	0.0
Korea	2.0	2.0	-0.3	2.3	0.0
Mexico	-0.1	0.7	-0.5	1.4	-0.2
Turkey	0.9	2.7	-0.3	3.3	0.1
United Kingdom	1.4	0.8	-0.2	0.8	-0.4
United States	2.3	1.9	-0.1	2.1	0.1
Argentina	-2.7	-2.0	-0.3	0.7	0.0
Brazil	1.1	1.7	0.0	1.8	0.0
China	6.1	4.9	-0.8	6.4	0.9
India[3]	4.9	5.1	-1.1	5.6	-0.8
Indonesia	5.0	4.8	-0.2	5.1	0.0
Russia	1.0	1.2	-0.4	1.3	-0.1
Saudi Arabia	0.0	1.4	0.0	1.9	0.5
South Africa	0.3	0.6	-0.6	1.0	-0.3

Note: Projection based on information available up to February 28. Difference from November 2019 Economic Outlook in percentage points, based on rounded figures.
1. Aggregate using moving nominal GDP weights at purchasing power parities.
2. The European Union is a full member of the G20, but the G20 aggregate only includes countries that are also members in their own right.
3. Fiscal years, starting in April.

Global growth is set to weaken this year and recover gradually in 2021 Growth prospects are very uncertain.

The projections are based on the assumption that the epidemic peaks in China in the first quarter of 2020, with a gradual recovery through the second quarter aided by significant domestic policy easing.

Together with the recent marked deterioration in global financial conditions and heightened uncertainty, this will depress global GDP growth in the early part of the year, possibly even pushing it below zero in the first quarter of 2020. Even if the COVID-19 effects fade gradually through 2020, as assumed, illustrative simulations suggest that global growth could be lowered by up to ½ percentage point this year. New cases of the virus in other countries are also assumed to prove sporadic and contained, but if this is not the case, global growth will be substantially weaker.
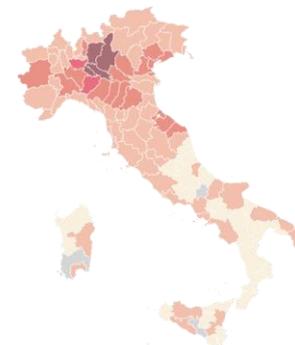
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SOURCE: : OECD

POTENTIAL IMPACT OF COVID-19 OUTBREAK ON 2020 GDP GROWTH

GDP Growth		
Before Outbreak	**Before Outbreak**	**Before Outbreak**
2,5	5,9	0,2
After Outbreak	**After Outbreak**	**After Outbreak**
Quick Recovery Scenario 2	4,68	0
Global Slow Down Scenario 1-1,5	3,8	-0,8

6

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SOURCE: McKinsey COVID-19 Facts & Insight Report

POTENTIAL IMPACT OF COVID-19 OUTBREAK ON 2020 GDP GROWTH

MENA REGION
(MIDDLE EAST & NORTH AFRICA REGION)

Africa

GDP Growth

Before Outbreak	**Before Outbreak**	**Before Outbreak**
1,84	2,09	3,97
After Outbreak	**After Outbreak**	**After Outbreak**
Quick Recovery Scenario — 1,68	1,15	3,94
Global Slow Down Scenario — 0,75	0,55	3,18

SOURCE: McKinsey COVID-19 Facts & Insight Report

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NEXT FORECAST

COUNTRIES IN THE MIDDLE OF ACCUTE PERIOD

Italy
Spain (6.5 days behind Italy)
France (8.5 days behind Italy)
Germany (9 days behind Italy)
UK (14 days behind Italy)
Netherlands (16 days behind Italy)
35% daily increase
22% daily increase

Confirmed SARS-CoV-2 cases

100000
10000
1000
100

-20   -15   -10   -5   0
Days (from March 15th 2020)

Professor Mark Handley, at University College London, compared the rate of coronavirus infection in Italy, which is in crisis, to that in the UK, Germany, France, Spain, the US and Switzerland and found they're growing at the same rate
@MarkJHandley

MARKETING IN THE MIDDLE OF ACCUTE PERIOD

«With luck, governments and societies who have not already done so will quickly identify and embrace best practices for managing the crisis. This will include aggressive moves to encourage or mandate appropriate social distancing and preparing medical infrastructure that anticipates worst-case scenarios for the crisis. Where this occurs, countries and markets may face only weeks rather than months of significant societal disruptions, with casualties minimized. Either way, normalcy will eventually return, and if the choices marketers make during this period resonate, they and the world will hopefully come through all of this better positioned to thrive in the future.»
Brian Weiser, GroupM Intelligence
Coronavirus Update - March 16, 2020

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EARLY IMPLICATIONS FROM TURKEY

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COVID-19 TIMELINE IN TURKEY

Corona speeches start with the ambassador's declaration

Turkish airlines stopped flight to Wuhan

Turkish closed border with Iran

Italy declared state of emergency because of Corona

Schools were vacationed due to the corona virus.

Umrah passengers (10K passanger) quarantined in Ankara

29 new covid- 19 case was announced by Fahrettin Koca. Total number is 47

A 61-year-old man died. The number of patients increased to 191..

31 January

19 February

22 February

11 March

13 March

16 March

18 March

21 January

31 January

20 February

25 February

12 March

16 March

19 March

World Health Organization has declared an emergency situation about Corona.

2 people identified with the corona virus in iran died

Passengers who came from Iran caused panic

The Minister of Health announced the first case of corona virus.

The Minister of Heath announced the second case of corona virus. Person was one of relative of the first patient.

Entertainment places and cafes have been temporarily closed. Restrictions were imposed on prayer in the mosque.

Health minister announced 86 years old man died because of Covis-19

The number of those killed by the Corona virus has increased to 9

The Minister of Health explained that a drug (Favipiravir), which is said to be good for the virus, was brought from China and started to be applied to patients in intensive care.

intercity transportation is restricted

21 March

25 March

20 March

23 March

27 March

Curfew were declared on people over the age of 65.

schools were vacationed until April 30.

10

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# YOUNG PEOPLE, EDUCATED PEOPLE AND WOMEN ARE THE MOST WORRIED GROUPS ABOUT CORONAVIRUS

- 2 out of every 3 people are afraid of corona, 67% of people are very afraid that the virus will pass to their family.
- 69% think that the Ministry of Health manages the virus outbreak well and they're trusting in ministry.
- 3 out of 4 people interviewed say they are ready to give up their travel and similar rights if they will prevent the spread of the virus. The rate of those who say that in high school and above educated people is over %80.
- 64% of people think that we will be better off in the next month of the epidemic.
- 69% state that they took action for the virus. Measures taken; first is washing hands more often. Less going out is second, using hand disinfectant is third, personal contact is fourth, wearing a mask is fifth, and using cologne is sixth.
- 43% suspect that there is an unknown force behind the spread of the virus so quickly. The first name that comes to mind is America with 24%, second %10 China, third %5 Israel.

SOURCE: Barem Research 2020

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- Government set up Coronavirus Science Board to take actions with experts. Minister of Health in his statement «people who return from abroad, shouldn't engage with crowd and stay isolated for 14 days at least. Ministry of Health has prepared a COVID-19 guide and prepared a comprehensive guide that explains how to take precautions against the epidemic.
- With serious measures taken at the airports and border gates, more than 10 thousan people went through health checks, including Umrah. Entries and exits from abroad via the air and land were completely closed.
- Since the beginning of March, IBB has increased the level and frequency of disinfection of public transportation.
- So far there are **7.402 cases and 108 losses** in Turkey. They're isolated and being quarantined. Health minister states that they're doing everything for the virus not to be spread.
- Tests were started in 25 hospitals determined for Coronavirus control. The Coronavirus hotline started to operate on "ALO 184".
- Many cultural events have been canceled. Football, basketball, volleyball and handball matches are decided to play without audience. All the socializing areas like cafes, malls are closed.Market's working hours are limited. Shopping malls working hours are shortened.
- Government has given leave permit to all schools temporarily and switched to the distance education system.
- Intercity trips are now devoted to the approval of the governorsip. Rare seating arrangement will be applied in public transportation vehicles. International flights are completely closed.
- As in the public sector, flexible working system will be implemented with minimum personnel in the private sector.
- Socialization areas will be closed on weekends, people will not be able to go collectively on weekdays. Sports on the coast side is prohibited.
- In all provinces, a pandemic board will be established under the chairmanship of the governors, and the measures taken will be monitored and additional measures specific to that city will be taken when necessary.
- The decision to apply these measures meticulously in all 30 metropolitan cities such as Istanbul, Ankara, Izmir and Kocaeli has been implemented.

PRECAUTIONS & ACTIONS THAT GOVERNMENT TAKE FOR COVID – 19

SOURCE: Mediacat & Hürriyet

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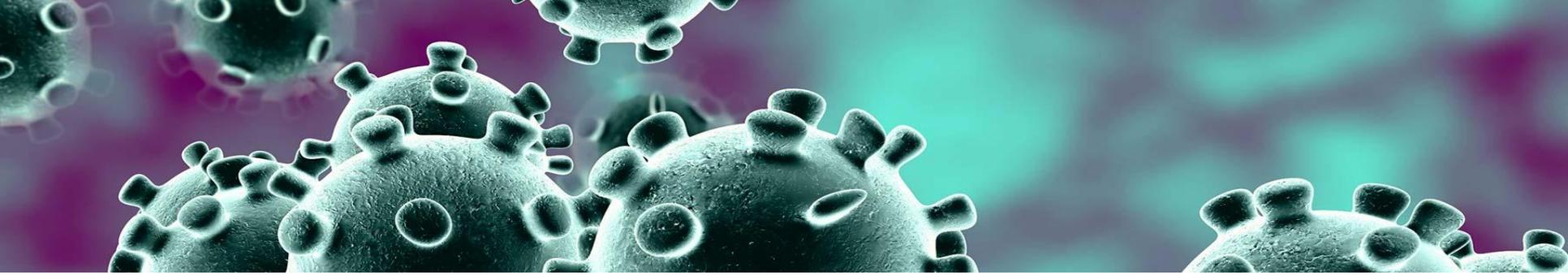
CONSUMER INCREASED THE DEMAND FOR PREVENTIVE MASKS, DISINFECTANTS AND COLOGNE TO PROTECT AGAINST CORONAVIRUS
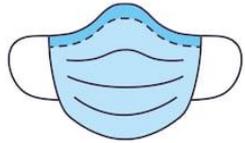
Turkey is experiencing an increase in demand for masks and disinfectant to protect against coronavirus together with the world and especially in the last two weeks.

While mask sales increase locally, mask shipments are made abroad. Product sellers explain that they sell products in one week that normally they sell within one year. It is observed that there is an intense desire for hand sanitizer over time.

On March 11, from the moment government announced the first coronavirus cases in Turkey, consumers has increased the level of measures they took. With the mask, disinfectants, there was an explosion in sales of 80 degrees cologne.

Experts state that fine-textured white masks don't have much effect, but thick 2 or 3 filter masks like N95 should be bought from pharmacies or medical stores. The main concern of the consumer is the price that increases with the demand. With the increasing number of cases after the first case, since consumers wanted to stock, cologne, masks and disinfectants were sold out in many sales channels.

At the point where demand for products increases and stocks decrease, some brands increase prices, but this doesn't stop the consumer for shopping.

Experts highley recommend consumers to carry masks, disinfectants and cologne with them.

SOURCE: Hürriyet

COLOGNE, MASK, DISINFECTANTS, CORONAVIRUS AND GLOVE SEARCHS ON WEB STARTED TO INCREASE ON MARCH AND PEAKED ON MARCH 11

● Maske   ● Koronavirüs   ● Eldiven   ● Kolonya   ● Dezenfektan

Last 30 days

Last 7 days

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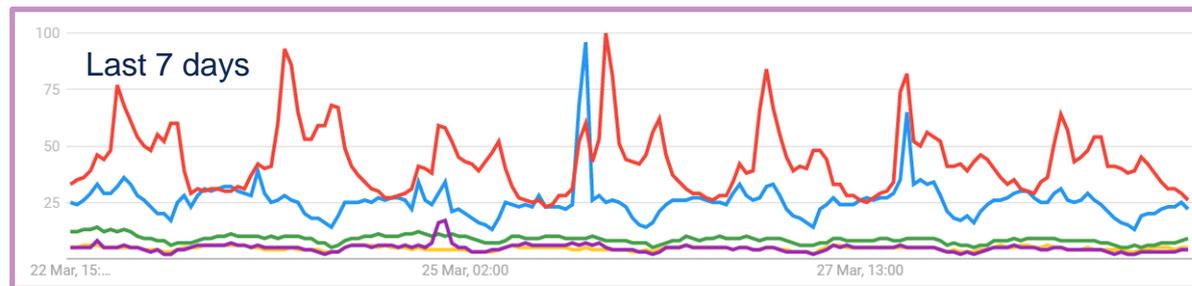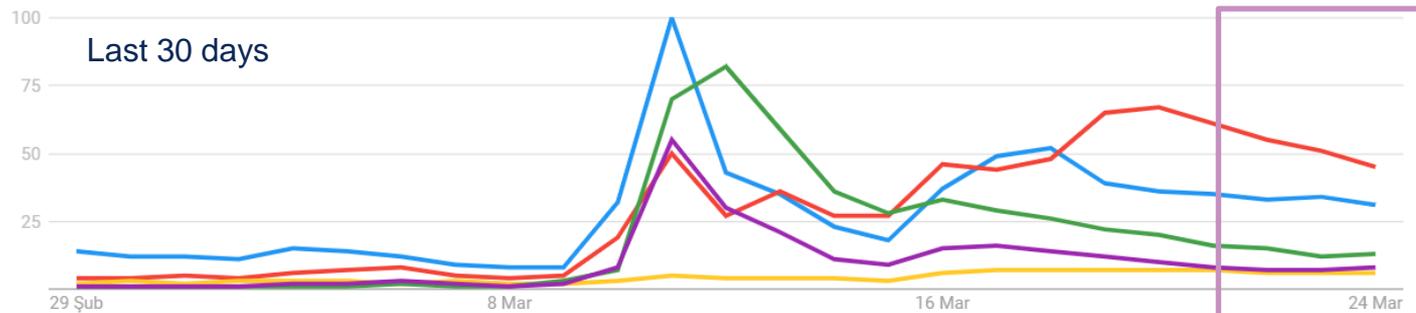
# THE SITUATION IS GETTING SERIOUS WITH THE INCREASE OF DEATH CASES
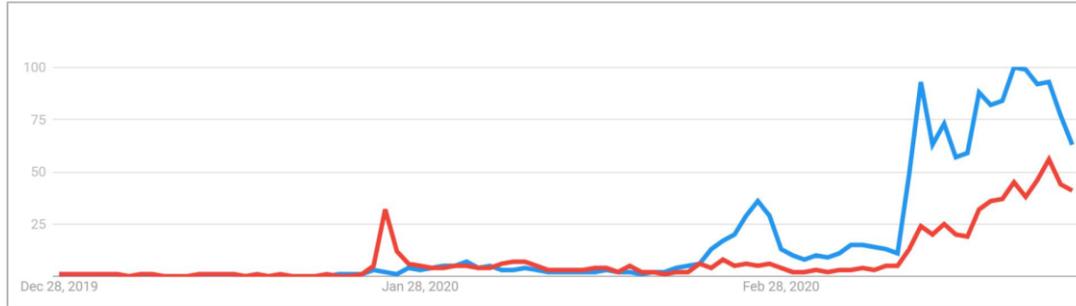
When we analyse the relationship between covid-19 searched and death cases, there seems to be a postive correlation betwen the two. Consumers start to take it more seriously with the increase of death cases. Increasing Evdekal searches also shows us that the self-isolation trend is rising.
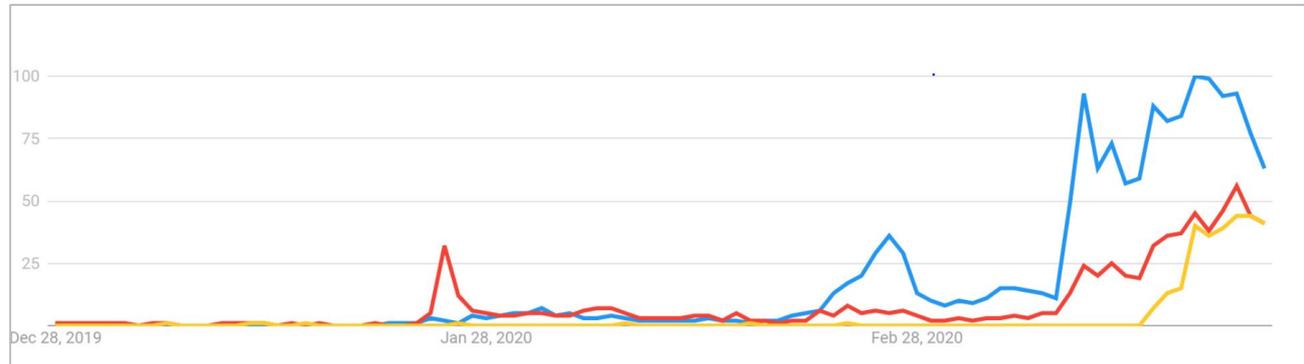
● Koronavirüsü

● Death Cases

● Evdekal

15   *SOURCE: Google Trends*

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TOP ACTIONS

The usage of masks to protect from corona is the most common method. Washing hands, hygiene and cleaning comes after usage of masks. *It is seen that «cleaning comes from faith» remark stands out among hygiene mentions. So, religious perspective comes to the fore as well.*
After the announcement of first case and other cases; consumers have increased sharing contents about precaution methods. 0% cologne speech increased to 7%.

10 Dec 2019 - 9 March 2020

- El Yıkama / Hijyen — 21%
- Eldiven — 4%
- Evden Çalışma — 1%
- Karantina — 0%
- Kolonya — 1%
- Maske — 49%
- Seyahat / Uçuş İptalı — 5%
- Termal Kamera — 10%
- Toplu Taşıma Aracı — 9%

10 – 18 March

- El Yıkama / Hijyen — 36%
- Eldiven — 3%
- Evden Çalışma — 1%
- Karantina — 0%
- Kolonya — 27%
- Maske — 24%
- Seyahat / Uçuş İptalı — 7%
- Termal Kamera — 1%
- Toplu Taşıma Aracı — 1%

SOURCE: Brandwatch

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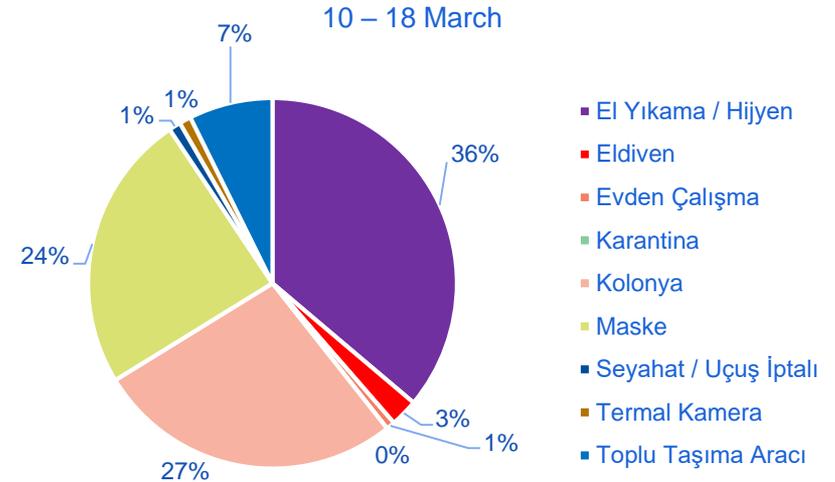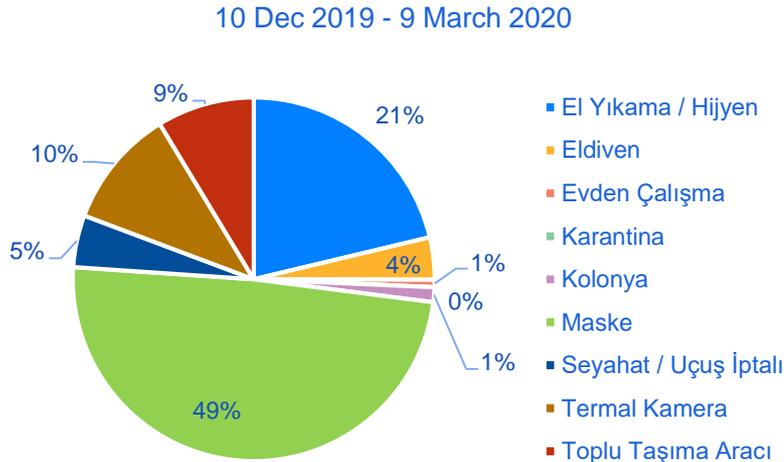
COVID-19 CONCERN ALSO AFFECTED THE USAGE OF TRANSPORTATION IN ISTANBUL WITH %60 DECREASE.

18 Mart'a Göre Ulaşım Verileri Trendi

Geçiş Adedi — Değişim Oranı
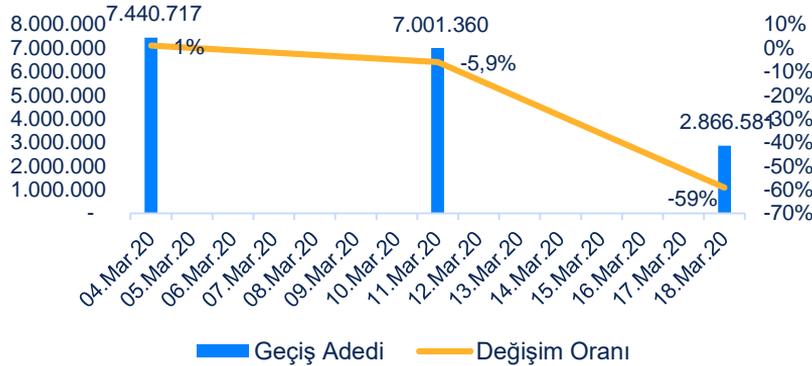
In Istanbul, on 4th and 11th of March, 7 million people used public transportation. After the announcement confirmed cases, this number decreased to 2.8 million.

-60%

Pazar Günü İçin Ulaşım Verileri Trendi

Adet — Değişim oranı

SOURCE: IBB

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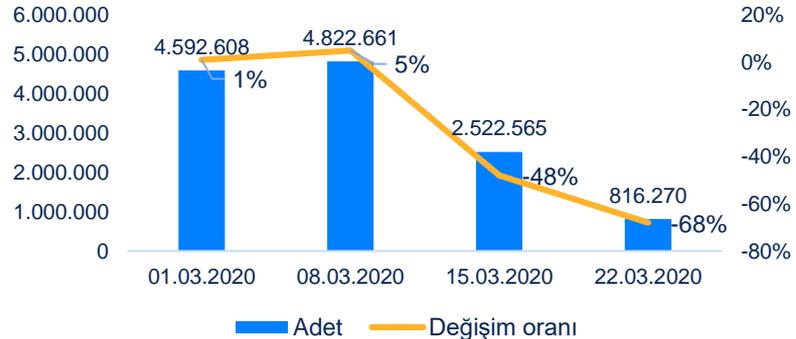
# CHINA'S AIR POLLUTION HAS DROPPED DURING THE CORONAVIRUS OUTBREAK

Millions of people in China remain on lockdown as the nation tries to contain the spread of the novel coronavirus. The resulting factory closures and fall in motor traffic has meant a sustained drop in noxious nitrogen dioxide, NASA stated on Saturday.

There's often a decline in air pollution in parts of China around this time thanks to Lunar New Year. But NASA said this year there was more of a decrease than usual.

*Fei Liu, an air quality researcher at NASA, said: "This is the first time I have seen such a dramatic drop-off over such a wide area for a specific event.«China's lockdown in order to curtail the spread of the novel coronavirus has had one unexpected side-effect — **a sustained drop in air pollution.***

As consumers are we able to both protect ourselves, nation and earth. Do we really have the power to do that? Looking at the picture that Nasa captured, it seems so.

January 1-20, 2020 — February 10-25, 2020

Mean Tropospheric NO$_2$ Density (μmol/m^2)
0 — 125 — 250 — 375 — ≥500

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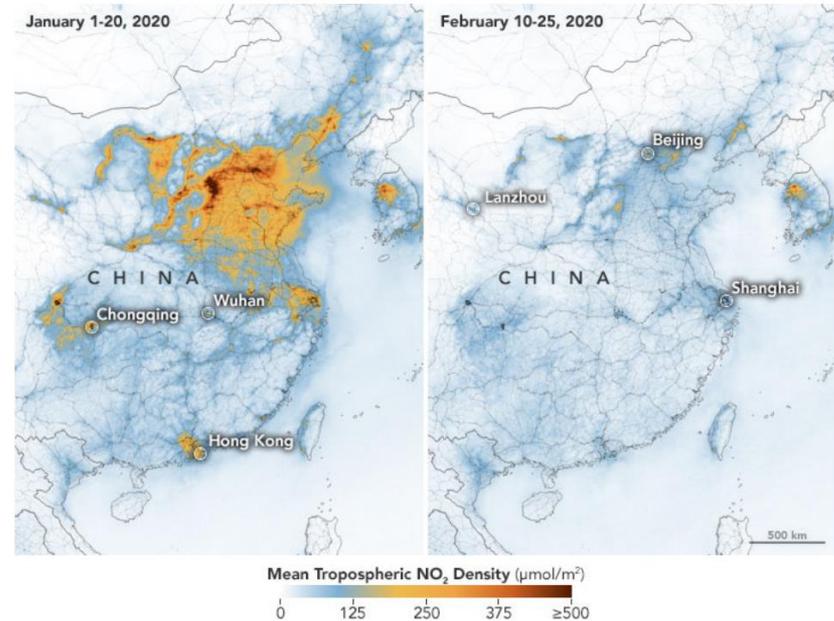
IN JUST 2 WEEK TURKEY'S AIR POLLUTION HAS BEEN NOTICEABLY CLEANED COMPARING TO PREVIOUS PERIOD

Its observed that strict quarantine measures taken by the governments clears the air pollution. Turkish consumer has just started to isolate or quarantine themselves neverthless with less nitrogen dioxide, we can see the air purification clearly. Althought there is only 2 weeks between these 2 «air pollution» maps, we can see that how Turkish people take the necessary measures.

March 03, 2020 Turkey

March 17, 2020 Turkey

| İyi 0 - 50 | Orta 50 - 100 | Hassas 100 - 150 | Sağlıksız 150 - 200 | Kötü 200 - 300 | Tehlikeli 300 - 500 |

SOURCE: https://www.havaizleme.gov.tr/

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EARLY EFFECTS ON SHOPPING & MEDIA CONSUMPTION BEHAVIOURS IN TURKEY

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BETWEEN 11-17 MARCH, THE NUMBER OF HOUSEHOLD CONSUMPTION REGISTRATIONS INCREASED BY %21 COMPARED TO THE PREVIOUS WEEK.

With the confirmation of the first case, it seems like the household comsumption has increased. And the increasing categories are cologne, vinegar, pasta and legumes.

Besides, the most purchased categories during this period are biscuits, pasta, milk, legumes, chocolate coated products, cheese and household hygiene products.

Kayıt Sayısı En Çok Artış Gösteren Kategoriler

Kolonya	Sirke	Makarna	Bakliyat	Un	Maya	Islak mendil	Hazır çorba	Tuz	Salça
256	161	132	111	98	80	77	71	69	63

Korona virüsü açıklaması öncesi 1 hafta ve sonrası 1 haftaya kıyasla (4-10 mart/11-17 Mart)

SOURCE: Ipsos Household Consumption Panel

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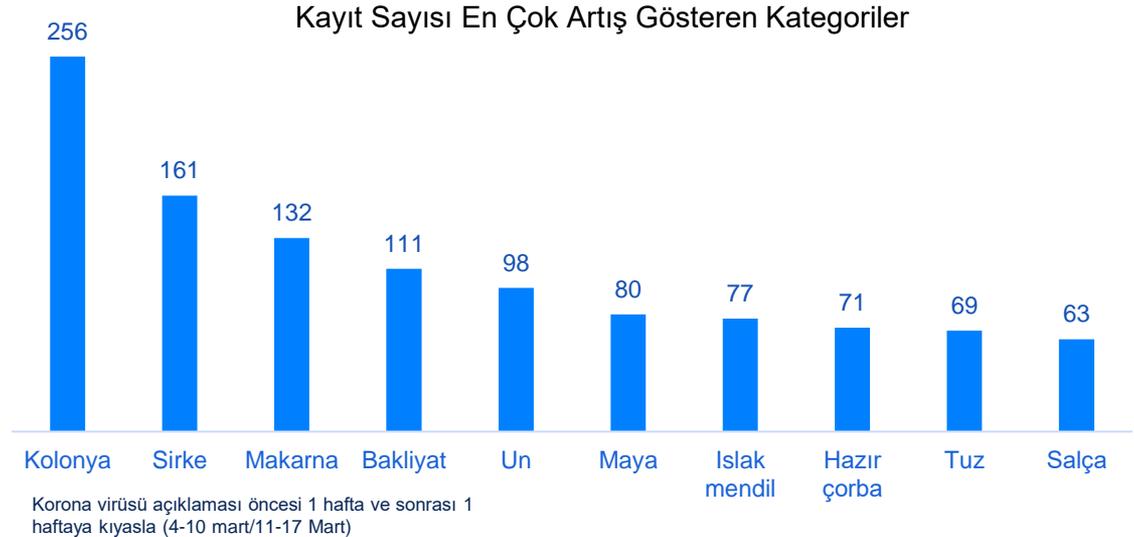
THE OUTBREAK EFFECT ON E-COMMERCE

- After the announcement of COVID-19 in Turkey;
- Marketplace (hepsiburada, trendyol, n11, gittigidiyor, morhipo, lidyana) visits increased by 30% both in mobile & desktop.
- In the personal Care & Retail categories visits increased by 22%. We forsee there will be more increase in the upcomigg days.
- Textile & automotive visits decreased as expected.
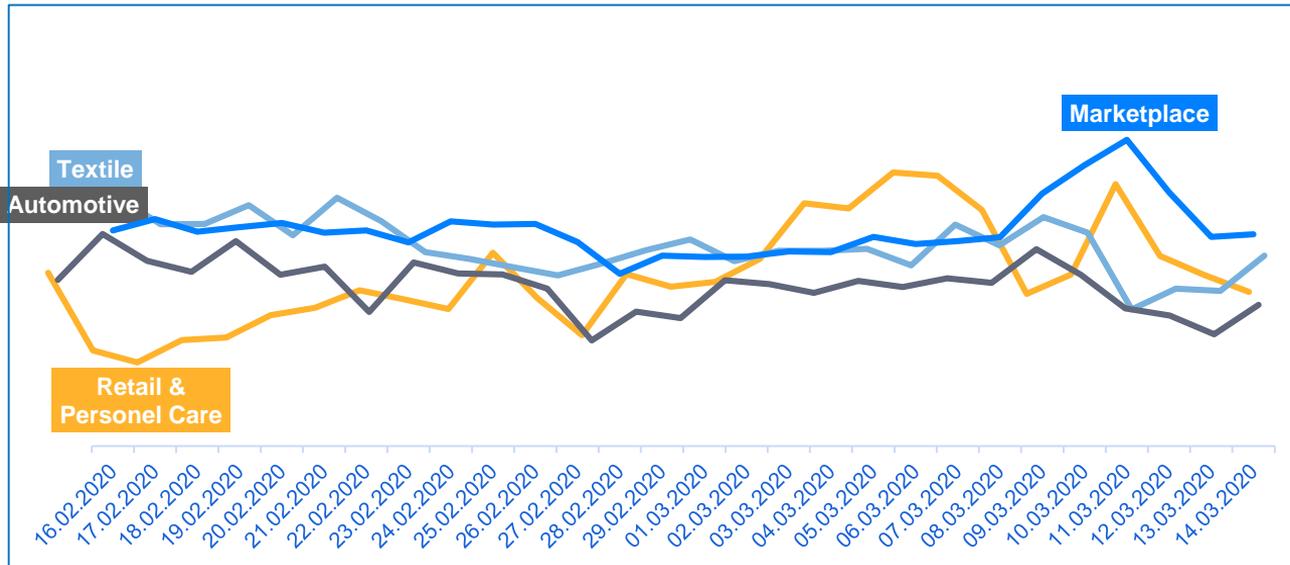
WHILE TRAVEL CATEGORY IS DECREASING, MEDIA & PUBLISHING IS INCREASING IN ONLINE PLATFORMS

We are seeing higher decrease in sessions (from January to February) on 2020 by 24% compared to 2019. CR also decreased by 17%, although it increased by 6% on the last year.

Travel
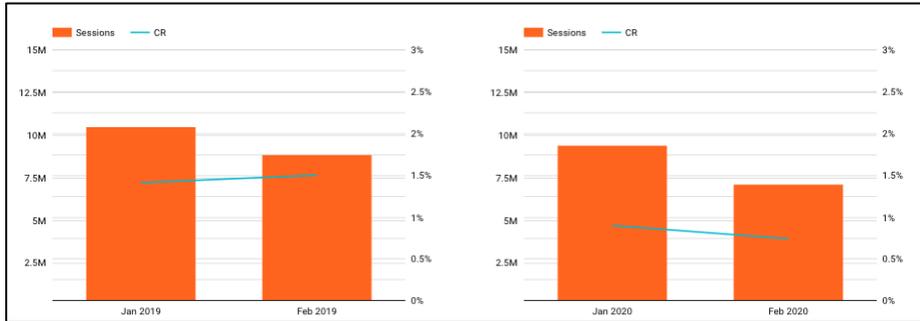
Although sessions are decreased by 10% on the last year, it is increased by 8% on 2020.

Media and Publishing

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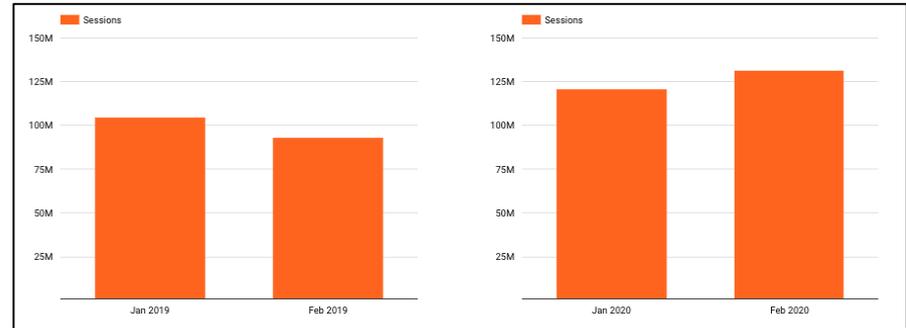
EARLY EFFECTS ON MEDIA CONSUMPTION

TVR
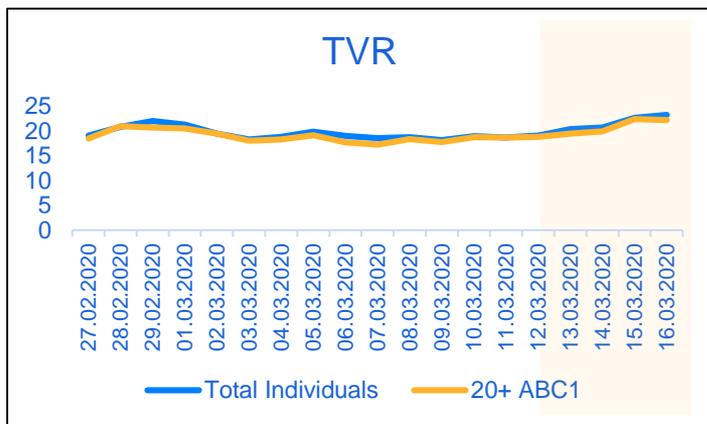
Total TVR increased;

8% compared to 13-14-15-16 March 2019

18% compared to 7-8-9 March

ATS
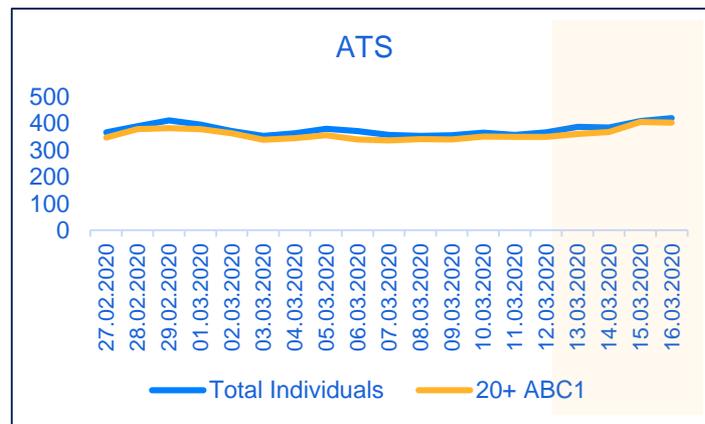
Total ATS increased;

6% compared to 13-14-15-16 March 2019

13% compared to 7-8-9 March

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EARLY EFFECTS ON MEDIA CONSUMPTION

News Content;

45% increase by 16 Mar, Mon av. daily reach (vs prev week)

Toplam Gerçek Kullanıcı
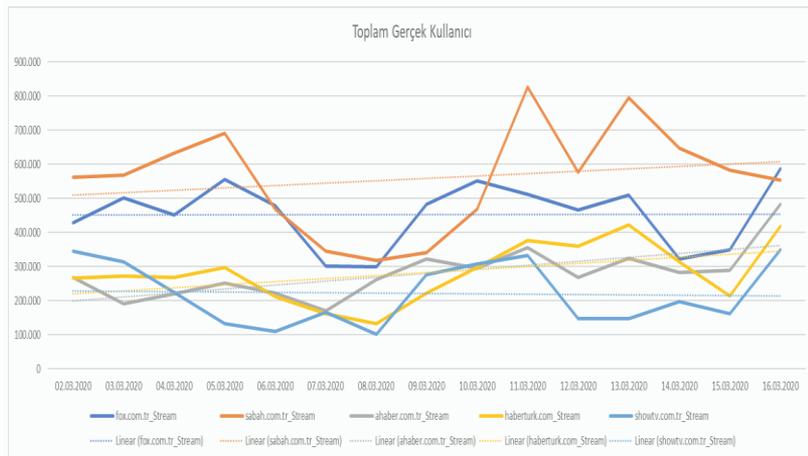
Netflix;

30% increase by 14-16 March av. daily reach (vs prev week)

16 Mar, Monvs prev week +56% ; vs prev 2 weeks +50%

Only PC
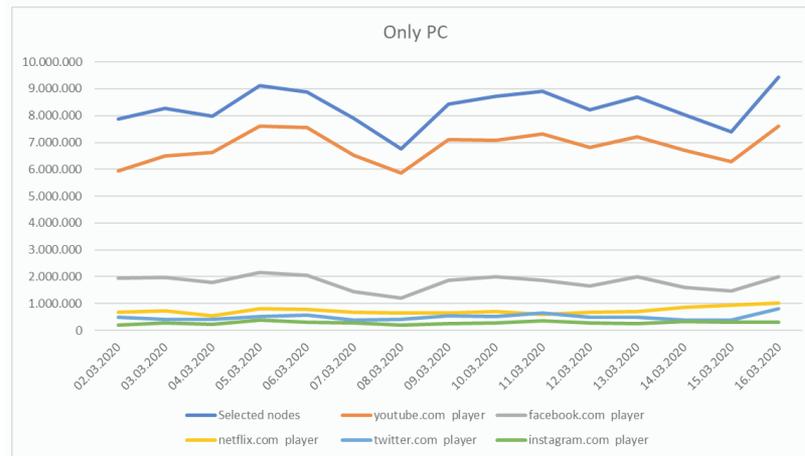
Puhu;
- 17% unique user increased compare to Feb.
- 25% watch time increased during 14-15 Mar compare to 7-8 Mar

Star TV
- News & sport content unique user increased by 47%

Mynet;
- page/session increased 12% on mobile, 8% on desktop compare to previous week
- Session/user increased 20% on mobile, 5% on desktop

SOURCE: Gemius & Media Platforms

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EARLY EFFECT ON CONTENT CONSUMPTION

13-14-15 March vs 7-8-9 March;

News typology **doubled**

Health typology increased by **33%**

Childeren typology **doubled.**

NEWS

2,0																		
1,0	1,5	1,7	1,7	1,6	1,5	1,5	1,6	1,2	1,1	0,7	0,7	1,0	1,1	0,9	0,9	1,7	1,5	1,7

HEALTH

0,2																		
0,1	0,08	0,09	0,07	0,09	0,08	0,08	0,08	0,1	0,07	0,05	0,12	0,12	0,09	0,1	0,1	0,1	0,09	0,13
0																		

CHİLDREN

1,0																		
0,5	0,4	0,5	0,2	0,3	0,5	0,5	0,5	0,5	0,1	0,1	0,2	0,1	0,1	0,1	0,1	0,2	0,2	0,3

27.Şub	28.Şub	29.Şub	1.Mar	2.Mar	3.Mar	4.Mar	5.Mar	6.Mar	7.Mar	8.Mar	9.Mar	10.Mar	11.Mar	12.Mar	13.Mar	14.Mar	15.Mar

SOURCE: Kantar

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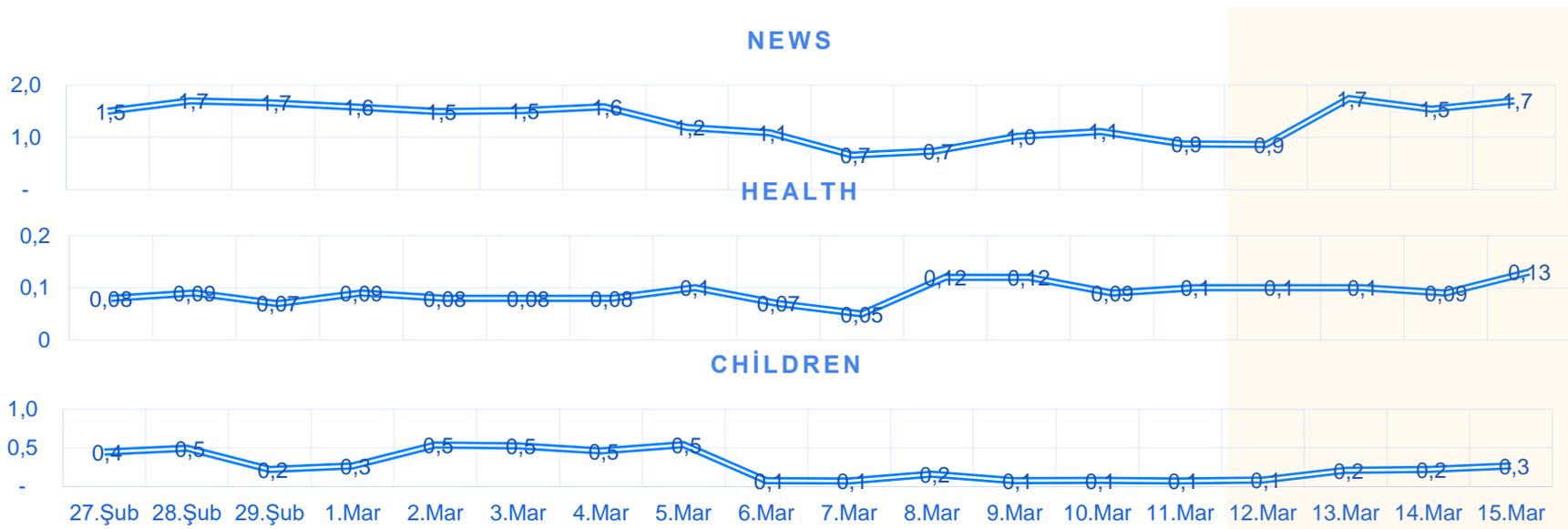
EARLY IMPLICATIONS ON SOCIAL MEDIA

KEY INSIGHTS

Total Mentions

11M

▲190K%
Previous Period: 5792

Unique Authors

2M

▲51K%
Previous Period: 3963

Top News Stories

1. Muslera'dan liglerin ertelenmemesine Koronavirüs zirvesi fotoğrafıyla tepki: Rakibimizi böyle mi savunacağız?
2. FIFA 2021 Dünya Kulüpler Kupası ileri bir tarihe ertelendi
3. Corona virüsü tehdidi tenis takvimini 7 Haziran'a uzattı

In Turkey, 9M mentions were shared about Corona since December 2019. These 11M mentions were shared by 2M unique users.

8M mention of these total mentions were shared after the announcement of first case.

Trending Topics

1. KoronayaKarşı AcilTahliye | 2. söylediklerimizi söylüyor | 3. Koronavirüs Riskinden

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DEMOGRAPHICS

%64 of the users are male while %36 of the users are female. Among Twitter users, family&parenting is the top interest.

Gender split

36%
130598 authors

64%
235944 authors

Gender split trend

Top Interests

Family & Parenting
Science
Sports
Politics
Beauty/Health &...

0%   5%   10%   15%

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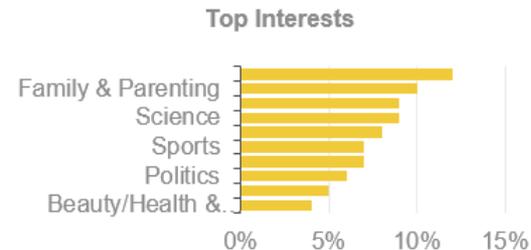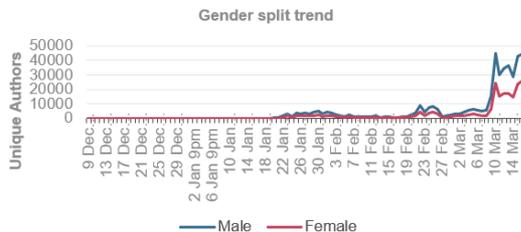
VOLUME OVER TIME - CHINA

It is observed peaks on 31th of January, 24th of February and 8th of March.

Unlike European countries, Chine's corona speeches are decreasing.

The number of cases and the number of mentions are correlated.

groupm
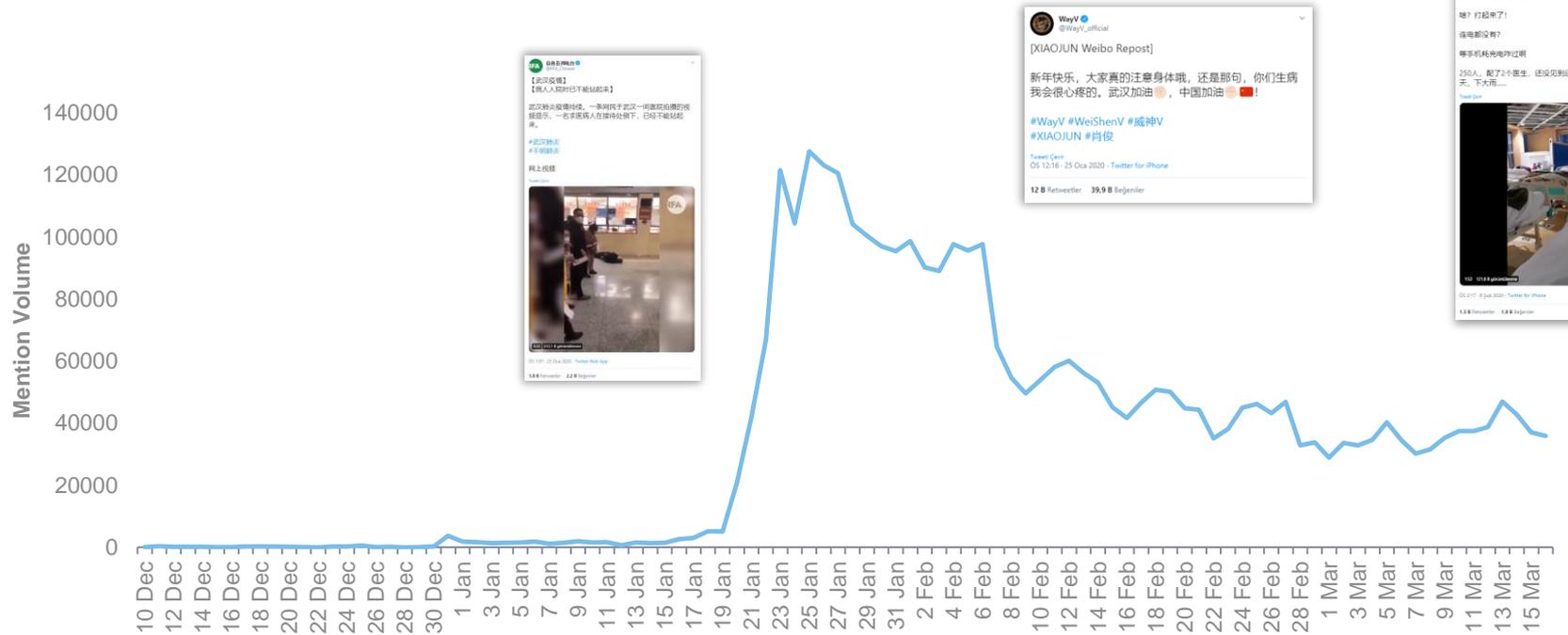
VOLUME OVER TIME - ITALY

It is observed peaks on 31th of January, 24th of February and 8th of March.

SOURCE: Brandwatch
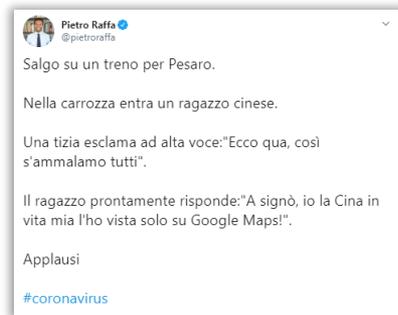
groupm

CONSUMERS' AGENDA SHIFTED TO COVID-19 AND ACCELERATED IN TIME AS OF 31 JAN

On Feb, search volume of keywords related with COVID-19 have been doubled which is expected to increase more in March.

COVID-19 Search Volume

Social Media Buzz Volume
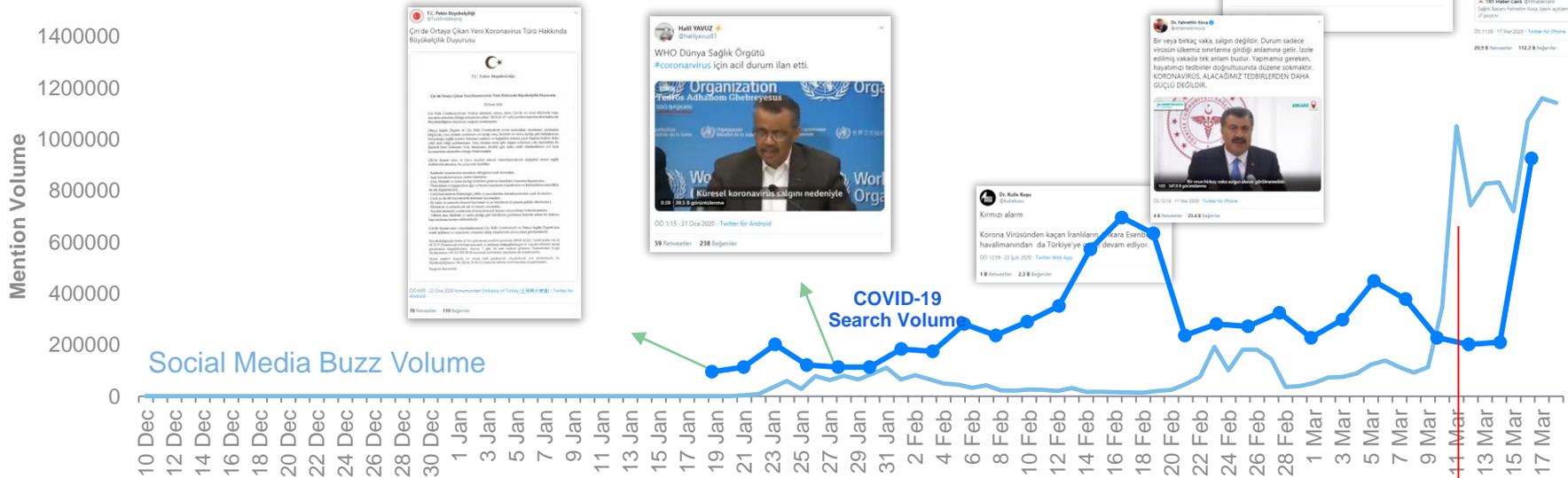
First COVID-19 Case in Turkey

SOURCE: Brandwatch & Google Trends

CONTENT SOURCE BREAKDOWN

Unlike brand conversations, Twitter is the most effective source when it comes to Corona. We normally observe the effect of Facebook & Instagram in the brand conversations.
News web sites follow Twitter. They are already getting more important in Italy & China and it seems likely the same could happen with Turkey in the following days.

Recep Tayyip Erdoğan
@RTErdogan

Zirvede Koronavirüs ile mücadeleden İdlib'de yaşanan insani durum başta olmak üzere Suriye krizinin çözüm yollarına, sığınmacı meselesinden Türkiye-AB ilişkilerine kadar pek çok konuda kapsamlı değerlendirmeler yapma imkanı bulduk.

ÖS 7:28 · 17 Mar 2020 · TweetDeck

4,2 B Retweetler   18,2 B Beğeniler

Dr. Fahrettin Koca ✔
@drfahrettinkoca

TESPİT EDİLEN HER VAKA TOPLUM İÇİN RİSK OLMAKTAN ÇIKMIŞTIR. Her yeni tanı üzücü fakat sizin için bir güvencedir. Salgınlarda olaylar panikle kontrolden çıkar. Tedbir ve panik, birbirinin zıttıdır. Tedbirleri SIKI tutalım. Virüsle temas ihtimalini SIFIRLAYALIM.

ÖÖ 1:04 · 17 Mar 2020 · Twitter for iPhone

39,8 B Retweetler   240,4 B Beğeniler

Before outbreak, most re-shared contents were the humorous ones. However, after the outbreak mentions got serious. Fahrettin Koca's announcements on Twitter, in the evenings, increase the mention volume on social media.

Mention Volume (y-axis: 0, 2000000, 4000000, 6000000, 8000000, 10000000, 12000000)

x-axis: Twitter, News, Forums, Tumblr, YouTube, Blogs, Facebook, Instagram

SOURCE: Brandwatch

groupm

AFTER FIRST CORONA CASE WAS ANNOUNCED CORONA MENTIONS HAVE DRAMATICALLY INCREASED

Football is one of the topics that continued to be discussed besides Corona. While football still is talked on social media, we have seen that topics which are related to magazine and Turkish TV series have been decreased.

7 – 11 March 2020

9%

91%

- Total TT List Mention Volume
- Corona Mention Volume

12 – 18 March

28%

72%

- Total TT List Mention Volume
- Corona Mention Volume

groupm

WORD CLOUD

With the increasing number of covid-19 cases, the precautions were the most discussed. It is seen that The "14 rules", supported by the Ministry of Health has spreaded.

Another topic which comes to the fore is «school break»

People who came from Umrah caused lots of discussions in Turkey. By now, 3 people, who came from Umrah diagnosed as Covid – 19

People support quarantina by sharing #stayinhomeTurkey hashtags.

EMOJI CLOUD

1-9 March 2020

10-19 March 2020

Although the issues get serious after March 9, humor takes an important place in social media.

However, after 9th of March, sad emojis has increased.

Users who found the health minister successful used applause emoji

SOURCE: Brandwatch

groupm

IMAGE ANALYSIS

Pfizer and Nurofen: The French Ministry of Health warned against drugs that have an active ingredient ibuprofen, due to the risk of triggering a corona virus.
Twitter: Twitter let its staff work from home,
Adidas: Since Juventus jerseys sponored by Adidas, adidas comes to the fore after news «Coronavirus detected in 3 players in Juventus»
Netflix: Due to quarantina restriction, social media users shared their Netflix lists to watch while they are at home
Spotify: Spotify podcasts about corona virus and last updates come to the fore

groupm
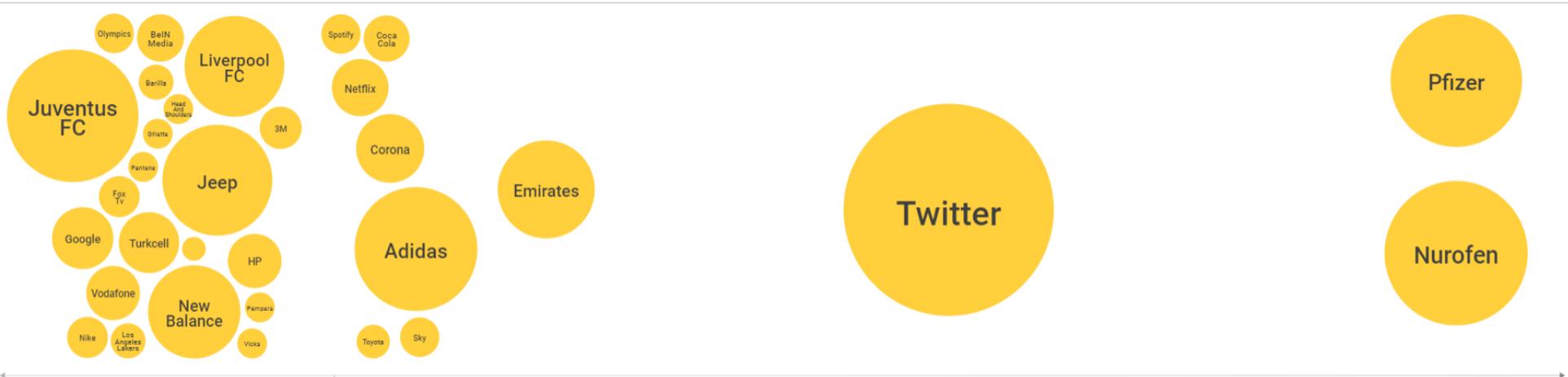
EARLY RESEARCH FINDINGS

groupm

THE OUTBREAK CHANGED PEOPLE'S LIFESTYLE

RE-DISCOVERING SELF

BEING STUCK AT HOME GAVE PEOPLE TIME TO THINK ABOUT WHAT THEY EXPECT OUT OF LIFE AND RE-EVALUATE PRIORITIES

VALUE SHIFT

PEOPLE WILL TREASURE THINGS THAT MONEY CANNOT BUY, SUCH AS "SPENDING MORE TIME WITH FAMILY AND FRIENDS", "BEING & STAYING HEALTHY", "BECOMING A BETTER SELF", SO WILL THE BUYING PRIORITIES CHANGE

SOCIAL SENSITIVITY

PEOPLE WILL "PAY MORE TO BUY FROM SOCIALLY RESPONSIBLE BRANDS", "PAY MORE FOR CLEANER ENVIRONMENT AND SERVICES", "PAY MORE ATTENTION TO ENVIRONMENTAL PROTECTION AND SUSTAINABILITY"

CLOUD LIVING

EMERGING ONLINE CONTENT HELPS CONSUMERS TO BUILD CLOUD LIFE AT HOME. CLOUD FITNESS, CLOUD COOKING, CLOUD STUDY, CLOUD PARTY. WORK – LIFE CONVERGENCE.

groupm

COVID-19 IS TAKEN VERY SERIOUSLY BY CONSUMERS, %38 ARE QUITE WORRIED ABOUT THE OUTBREAK, TO AVIOD THE EPIDEMIC LOTS OF HYGIENE AND HEALTH PRECAUTIONS ARE TAKEN

It is seen that women's concern level is higher than man.

♀ %44   ♂ %32
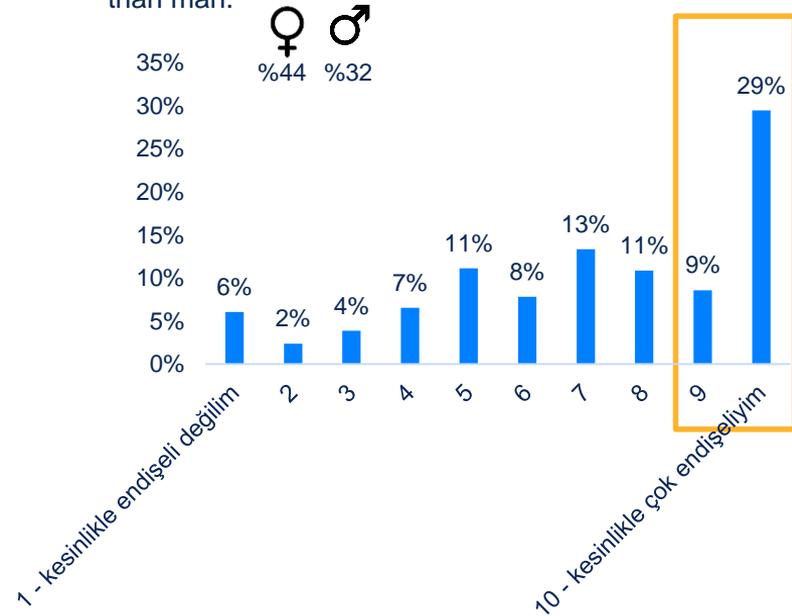
Personal and home hygiene are the top priorities. Comparing to the beginning of the epidemic period, the severity increases, hand disinfectant usage and stocking in the home increases as the time passes by.

groupm
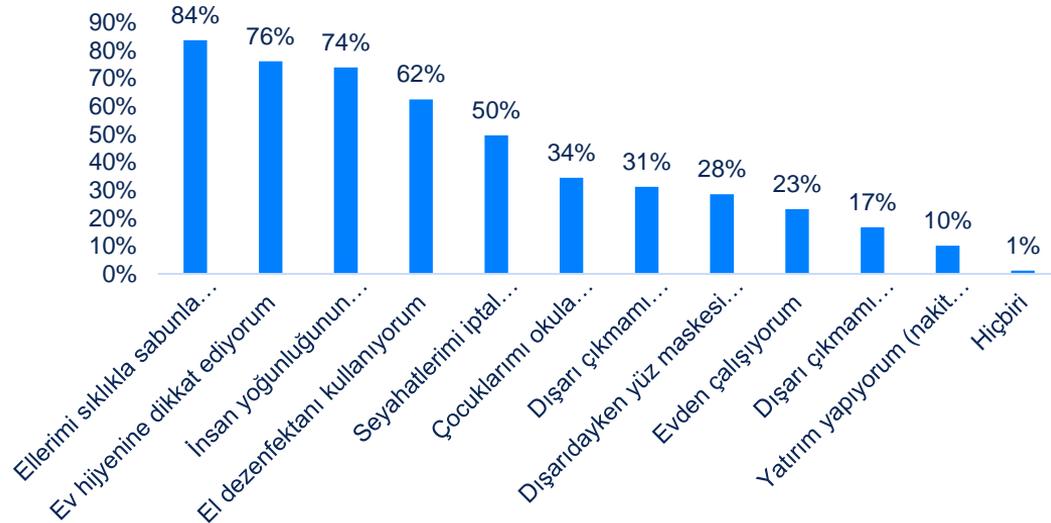
THERE ARE SOME MAJOR CHANGES IN CONSUMER BEHAVIOUR. TIME SPENT AT HOME INCREASES DRAMATICALLY, CREATING NEW WAYS OF INDOOR ACTIVITIES.

How these feelings reflect on consumer behaviour?

Going to a shopping mall which is one of the primary activities of Turkish people seems to have a drastic decrease after the outbreak. Whereas %90 of consumers started to spend more time in houses.

%72 of consumers avoids going to the malls
%65 doesn't go to restaurants anymore

%63 doesn't go to areas where Coronavirus is dense

%66 stopped going to cinema

%62 stopped going to touristic places

Bar chart values: 72%, 66%, 65%, 63%, 62%, 58%, 57%, 55%, 48%, 47%, 21%, 4%

Categories: Alışveriş merkezlerine gitmek, Sinemaya gitmek, Restaurantlara gitmek, Koronavirüsünün yoğun olduğu..., Turistik yerlerde gezmek, Mağazalarda ürünlere dokunmaktan..., Mağazalarda ürünleri denemekten..., Ülke dışından ürün siparişi vermek, Eve dışarıdan yemek söylemek, Büyük süpermarketlere gitmek, İş nedeniyle ofise gitmek, Hiçbiri

groupm

CONSUMERS STRIVE TO KEEP THE ENVIRONMENT THAT THEY'RE LIVING CLEAN. BASIC NEED IS THEY WANT TO FEEL SAFE FOR THEMSELVES AND THEIR LOVED ONES.

Consumers turn to activities that would keep themselves safe, that's why spending time at home increases. Cleaning and healthy dieting and cooking are the most increasing activities. Home workout is also an opportunity area. Consumers started to depend on online shopping and it seems that online shopping will have a bigger impact over time.

Brands need to prepare themselves to a consumer group that integrated with their home more than ever.

Legend: ■ Yapmayı bıraktım ■ Daha az yapıyorum ■ Aynı ■ Daha çok yapıyorum ■ Yapmaya başladım

SOURCE: GroupM Turkey Covid-19 Survey – Wave 1

groupm
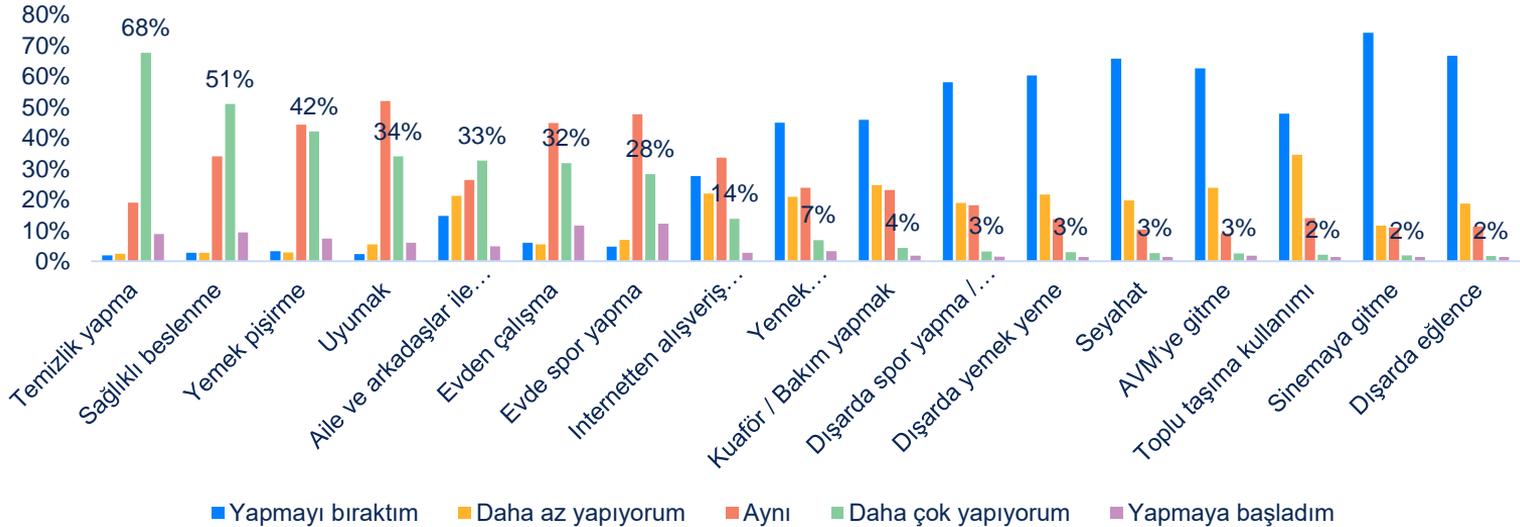
CHANGES IN MEDIA CONSUMPTION

SOURCE: GroupM Turkey Covid-19 Survey – Wave 1

groupm

DURING EPIDEMIC, DIGITAL BECOMES THE SAVIOR OF CONSUMERS. THEY STARTED TO SPEND MORE TIME ONLINE TO FOLLOW THE NEWS FROM UNLIMITED SOURCES.

Health and hygiene related contents are more important than entertaining contents because of its vital importance. Users constantly search for informative content about the epidemic, increasing content need can be an opportunity area for brands.

Legend: ■ Daha az tüketiyorum ■ Aynı ■ Daha fazla tüketiyorum

Categories (x-axis): Online haber platformları, TV ve dijital platformlardaki…, Arama motorlarında…, Sosyal medyada vakit…, TV izleme, Video izleme, Anlık mesajlaşma…, Online gazete&dergi okuma, Online/mobil oyun oynama, Online forum ve bloglarda…, Gazete/dergi okuma, TV ve dijital platformlardaki…, Paralı içerik tüketim…, Radyo dinleme, Online radyo dinleme, Podcast

Data labels ("Daha fazla tüketiyorum"): 63%, 59%, 59%, 59%, 57%, 51%, 46%, 45%, 35%, 33%, 32%, 34%, 28%, 20%, 20%, 14%

SOURCE: GroupM Turkey Covid-19 Survey – Wave 1

groupm

IN A PERIOD WHERE TRUST IS VERY IMPORTANT, TURKISH PEOPLE MOSTLY RELY ON GOVERNMENT ADMINISTRATION. GOVERNMENT OFFICIALS ARE AHEAD OF THE HEALTHCARE PROFESSIONALS.

(!) TV is the main information source for following the news about Covid-19. They follow government authorities and health experts through TV.

Category	Percentage
Televizyon programları ve…	70%
Devlet yetkililerinin…	66%
Uzmanların konuyla ilgili…	58%
Sağlık uzmanlarının…	58%
Haber sitelerindeki…	55%
İnternette konuyla ilgili…	54%
Yazılı basından takip ediyorum	37%
Konuyla ilgili paylaşım yapan…	37%
Ailem, arkadaşlarım veya…	37%
Salgın ile ilgili grafik, trendler…	35%
Youtube üzerinden…	34%
Whatsapp gruplarından bilgi…	30%
Radyodaki bilgilendirici…	14%
Herhangi bir şey yapmıyorum	4%
Diğer	2%

groupm

CHANGES IN SHOPPING BEHAVIOUR

groupm

PRIORITIES ARE CHANGING & BASIC NEEDS ARE BECOMING MORE IMPORTANT

Positive Impact

Consumers increase purchase frequency of house cleaning products %52, pandemic products %46, food & beverage products %37 and supplements %30.

Postponing the purchase

Electronic products %18, small home appliances %17, white goods %16 and luxury products %15 are the postponed products in this time.

Negative Impact

%39 stopped consuming luxury products, automotive %22, home fitness products %21 after the outbreak. We're going through a period that where people choose to live more simple and safe.

Chart data labels: 52%, 46%, 37%, 30%, 24%, 18%, 11%, 11%, 9%, 7%, 7%, 5%, 4%, 4%, 4%, 3%, 3%, 3%

Categories: Ev temizlik ürünleri, Salgın önleyici ürünler (maske,..., Yiyecek ve içecek ürünleri, Takviye edici gıdalar (prebiyotik..., İlaç, Derece (ateş ölçer), Sağlık/hayat sigortası, Kişisel bakım ürünleri (makyaj,..., Ev fitness ürünleri, Tansiyon aleti, Yatırım hizmetleri (altın hesabı,..., Sigara, Elektronik eşyalar, Küçük ev aletleri, İçki tüketmek, Beyaz eşya, Lüks ürünler, Otomobil

Legend:
- ■ Vazgeçtim/Bıraktım
- ■ Satın alma kararımı erteledim
- ■ Satın alma adetlerini / sıklığını azalttım
- ■ Değişmedi

groupm

«THE CLOSER THE BETTER» SHOPPING CHANNELS ARE NEEDED TO BE EITHER NEARBY OR WELL KNOWN & TRUSTABLE

Shopping channels are also being reshaped in this period because we are going through a very volatile period. But the important thing in shopping channels is to understand consumers' different needs and integrate them into the channel which drives the sales. They either choose their neighborhood grocer for being near and well-known or they choose the high way with digital channels to avoid going out. *In the long run, consumers will choose channels that are clean & safe with 7/24 quick acces.*

Legend:
- ■ Alışveriş yapmaya başladım
- ■ Alışveriş yapmayı bıraktım
- ■ Alışveriş yapmayı azalttım
- ■ Alışveriş yapmayı arttırdım

groupm
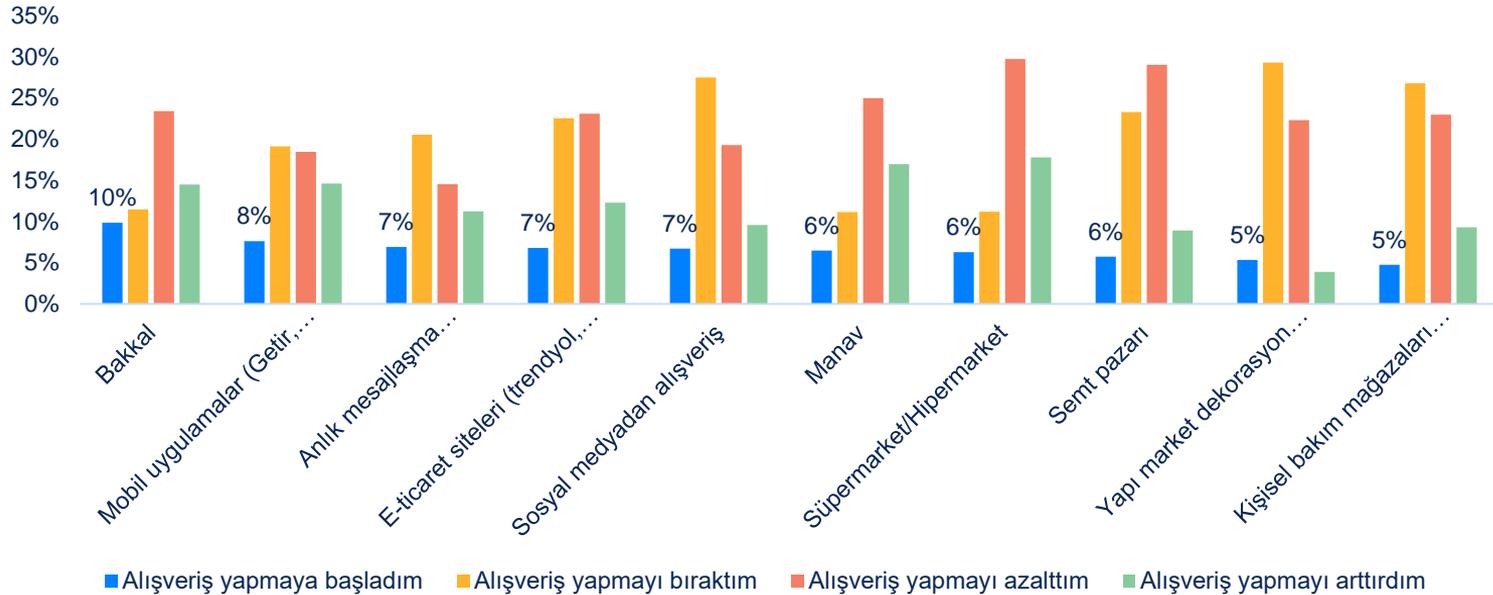
CONSUMER EXPECTATIONS

groupm

DURING COVID-19 EPIDEMIC, WE NEED TO RECONSIDER CONSUMERS' EXPECTATIONS FROM BRANDS AND THE GOVERNMENT

While the expectations vary according to the institutions, the basic need is always the same, reliability and support both in functional and emotional way. They especially seek for support related to hygiene and health topics.

Expectations from brands

- **%65** wants products to be extra hygienically,

- **%64** wants hygiene control in cargo deliveries,

- **%64** wants to be informed about store and areas that they're using,

- **%63** wants face mask for every worker and

- **%58** demands supply of health equipment.

Expectations from government

- **%79** thinks all people should be tested enters who enters Turkey from affected areas by the virus,

- **%75** supports same people should be also quarantined,

- **%73** says anyone entering the county should be quarantined,

- **%72** thinks schools must be closed and continue education from home,

- **%71** of consumers says travel should be banned for a limited time.

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TURKEY VS. GLOBAL
COMPARING BETWEEN DIFFERENT GENERATIONS

groupm

ONE OF THE BIGGEST DIFFERENCE IS AGE, WHILE YOUNG PEOPLE ARE THE MOST AFRAID ONES IN TURKEY, OLD PEOPLE ARE THE MOST AFRAID ONES IN UK & USA

Consumers are mostly concern for speed of the virus spreading US%54 – UK %45. Their second concern is if their relatives cathes the virus US %52 – UK %56. *Thirdly elderly people are afraid of the virus US %47 – UK %56 and this is the opposite in Turkey. Older ones amongts Turkish people are generaly not concerned about Coronavirus youth is scared for their future.*

Consumer think that virus can spread on any age US%72 – UK%80. *For precaution they're mostly believe on frequently handwashing and using hand sanitizer US%69 – UK%84. Handwashing ratio is higher with %84 in Turkish people.*

	All	U.S.	UK	Gen Z	Gen Y	Gen X	Boomers	Lower Inc	Higher Inc
The virus can spread to people of any age	73	72	80	65	69	79	79	71	70
Washing your hands frequently / using hand sanitizer is a recommended precaution to keep healthy	72	69	84	61	64	79	84	69	72
People of any race / ethnicity can catch the virus	71	69	78	58	67	77	81	68	67
Avoiding touching your eyes, nose, and mouth with unwashed hands is a recommended precaution to keep healthy	70	69	76	63	65	75	79	66	70
The new coronavirus causes symptoms similar to the cold and flu e.g. high fever, cough	68	66	80	59	65	73	76	62	68
It's possible to catch the infection from someone who doesn't feel unwell	54	53	59	42	56	57	58	52	59
The new coronavirus is more dangerous than the winter flu	43	44	38	34	45	46	44	41	48
Most people recover from the disease without needing special treatment	37	32	63	22	41	39	38	29	38
Taking traditional herbal medicines are not effective against the virus	27	26	29	30	26	27	23	23	37
The virus can be caught from packages / parcels*	16	17	14	14	20	14	18	14	16
Thoroughly cooking meat and eggs is recommended to prevent infection spread	14	14	9	14	20	10	6	10	13
Spraying alcohol or chlorine on your body can kill the new coronavirus*	11	10	11	6	16	8	10	7	10

SOURCE: GWI 2020

groupm

CONSUMERS THINK THAT THEY HAVE ENOUGH INFORMATION ABOUT THE RECOMMENDED PRECAUTIONS TO TAKE TO STAY HEALTHY

	All	U.S.	UK	Gen Z	Gen Y	Gen X	Boomers	Lower Inc	Higher Inc
Yes, I have enough information	50	48	60	41	52	52	56	41	65
No, I don't have enough information	29	30	22	41	31	23	22	33	23
I'm not sure	21	22	17	18	17	26	22	26	12

In total 50% believe they do have information, 29% believe they need more, and 21% aren't sure. *This rate in Turkey is 7 out of 10, comparing UK and USA, Turkish consumers think that they have higher level of knowledge about Coronavirus Precautions.*

Younger age groups, particularly Gen Zs, believe they don't currently have enough and that they need more, whereas older groups are much more likely to believe they have enough information.

UK consumers (60%) are notably more confident than those in the U.S. (48%) to believe they have enough information on the topic.

groupm

A MAJOR CONCERN IN BOTH THE UK AND U.S. IS AROUND INACCURATE INFORMATION ABOUT THE VIRUS 40% SAY THEY'RE CONCERNED ABOUT THIS

There are strong levels of trust in the reported figures shared so far about infection / mortality rates overall. Almost half in the UK and U.S. do trust these reported figures.

The rate of those who say they do not trust the reported figures is significantly lower (at 15% in both countries). For the most part, many are unsure rather than lacking in trust.

In Turkey, 69% of consumers trusts the government and Ministry of Health for taking care of Coronavirus epidemic.

	All	U.S.	UK	Gen Z	Gen Y	Gen X	Boomers	Lower Inc	Higher Inc
Do trust	45	46	42	36	58	41	37	34	62
Do not trust	12	12	15	8	10	17	14	12	10
Unsure	39	39	40	53	29	39	46	49	28
Haven't seen figures	3	4	3	4	3	4	3	5	1

SOURCE: GWI 2020

groupm

CONSUMERS BEHAVIOURAL CHANGES IN DAY TO DAY ROUTINES

For two matter of what is chaged after COVID-19 is same in every country regardless of culture. Washing hands more frequently and read more news to kepp up to date are the key behaviour of the consumer after Coronavirus. Consumers for frequently hand washing USA %58 – UK%57.
Turkish consumers has a higher rate for hand washing %84. According to this they increase their hygiene shopping.

Behaviour Comparison Between Countries
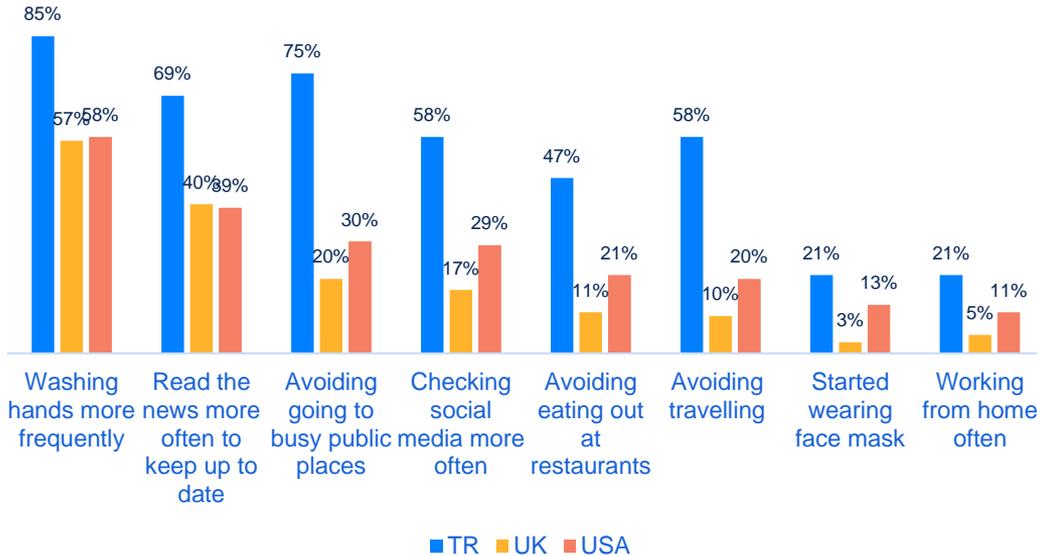
	All	U.S.	UK	Gen Z	Gen Y	Gen X	Boomers	Lower Inc	Higher Inc
Washing my hands more frequently	58	58	57	60	49	64	59	58	63
Read the news more often to keep up-to-date	40	39	40	40	37	44	32	34	46
Trying not to touch my face	36	37	31	42	29	37	41	34	33
Not directly touching public surfaces (e.g. door knobs, elevator buttons)	29	30	24	25	26	35	30	27	34
Avoided / reduced going to busy public places e.g. cinema	29	30	20	22	31	31	24	27	22
Checked social media more often to keep up-to-date	27	29	17	27	30	29	15	27	35
Washing my towels more frequently	21	22	13	25	25	21	13	23	16
Avoided / reduced eating out at restaurants	20	21	11	15	23	20	19	16	17
Changed my daily routines to avoid crowds / rush hour	18	19	11	10	20	21	16	17	15
Avoided / reduced travel to other destinations in my own country	18	20	10	12	22	19	13	15	13
I'm no longer considering booking trips to other countries	17	17	18	14	18	20	11	17	15
I've cancelled trips to other countries that I've already booked	14	16	7	5	21	17	2	9	24
Started wearing a face mask	11	13	3	15	13	12	0	11	21
Working from home more often	10	11	5	5	13	9	9	6	11
Changed the way I commute to work (e.g. avoided busy trains)	7	8	4	5	6	2	5	8	5
Other	5	5	2	3	4	5	6	3	
I've not made any changes as a result of COVID-19 / coronavirus	18	16	25	12	15	20	25	21	9

groupm

TONE OF VOICE & EMERGING CONTENT TYPES

groupm

1 **If there is life, there is hope:** With the rapid spread of the epidemic disease and deaths, some people are hopeless and anxious. As a brand that cares about people, it is important to give hope and to advise them to manage stress.

Ayça
@minisceyn

Kimseyle gorusup tokalasamam nolur benden uzak durun coronadan cok korkuyorum

ÖÖ 1:55 · 11 Mar 2020 · Twitter for iPhone

3 Beğeniler

Gülsu Çetin
@GulsuC

Corona virüsü olmasa da bulaşma korkusu yüzünden panik atak geçirip gideceğiz

ÖÖ 1:41 · 16 Mar 2020 · Twitter for iPhone

3 Beğeniler

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destina
@destinasuskizim

corona yuzunden panik atak oldum trendyol hala indirimin son saatleri diye bildirim gonderiyor bak isine kardesim

ÖS 8:35 · 16 Mar 2020 · Twitter for iPhone

4 Beğeniler

B.
@bsraball

Panik atak hastaları benim gibi çarpıntılarıyla başbaşa demi şuan #Corona

ÖÖ 2:34 · 11 Mar 2020 · Twitter for Android

1 Retweetle   5 Beğeniler

DeLiHa
@TKrbg

Corona virüsünün ülkemizdeki ilk gün bilançosu:
*1 corona virüs hastası
*45 milyon panik atak hastası.

ÖÖ 8:37 · 13 Mar 2020 · Twitter for Android

1 Beğen

groupm

2 With the Covid-19 virus, the consumer is confused about what to do, especially in the precautions part. After the first cases have been announced, consumers' contents have become serious. Suggestions about what people can do to protect from virus have increased. It is important for brands to meet this need and that the brand acts as an informative source even if the corona subject is not directly related to the brand or product.

Ömür Gedik ✓
@omurgedik

Corona korkumdan telefonumu yıkadım... Bozuldu tabii... Tüm gün telefonsuzdum... Tamirine de dünya para verdim... Bu virüs daha gelmeden bozdu keyfimi...

ÖS 8:25 · 4 Mar 2020 · Twitter for iPhone

859 Retweetler   15,6 B Beğeniler

Cemile Taşdemir
@tasdemir_cemile

-Elimizi yıkıyoruz
-Tokalaşmıyoruz
-Yurtdışına çıkmıyoruz
-Kolonya kullanıyoruz
-Hapşırırken kolumuza hapşırıyoruz
-Bağışıklığımızı güçlendiriyoruz
-Tuzlu suyla gargara yapıyoruz
-Evimizde havlu, çarşaf vb gibi eşyalarımızı sık sık temizliyoruz
#Corona

ÖÖ 9:22 · 11 Mar 2020 · Twitter for iPhone

212 Retweetler   1 B Beğeniler

Hüseyin Çalışkaner
@caliskanerh

Corona virüsüne dair hazırlanmış en iyi video.
Nasıl korunmamız gerektiğini de çok net anlatmış.
Bizi bu virüsten kelle paça değil ancak bilim koruyabilir.
#Coronvirus

2:18 115,2 B görüntülenme

ÖS 4:05 · 5 Mar 2020 · Twitter for Android

920 Retweetler   2,8 B Beğeniler

hakan demir ✓
@suyorumcusu

Koronavirüs tedbirleri kapsamında şu holding TV'leri de bir süre kapatılsın bari. Yok kelle paça virüsü temizliyor, yok Türk geni koronavirüsten korur mu, yok virüsten ölürsek şehit sayılırız mıyız falan. Toplum sağlığını tehdit eden bir çöplük resmen.

ÖÖ 9:52 · 11 Mar 2020 · Twitter Web App

309 Retweetler   2,4 B Beğeniler

groupm

SOURCE: Brandwatch

3 With the support of social isolation, people are sharing about how to spend time at home. At this point, it is important to give spare time activity suggestions to the consumer like their friends. However, it is also important to remember this is a serious topic. So, be their friend but do it in a convenient way.

Serkan BALBAL
@SerkanBALBAL

Corona virüsü nedeni ile ev karantina süresi artarsa, bu millet netflix i de yağmalar...
Bir iki dizi ayıralım biz şimdiden..:))

ÖS 7:59 · 13 Mar 2020 · Twitter for iPhone

9 Beğen

NAYN.CO
@Nayn_Co

Koronavirüs Netflix hisselerine yarayabilir

Koronavirüs Netflix hisselerine yarayabilir – NAYN.CO
Netflix'in hisse değeri bu hafta yüzde 0.8 artarken piyasa analistleri sürmekte olan yeni, tıp Koronavirüs (Kovid-19) salgınının şirkete yarar sağlayabileceğini öne ...
nayn.co

ÖS 4:40 · 1 Mar 2020 · NaynCo

Hazal Erkul
@erkulhazall

Koronavirüs nedeniyle evde vakit geçirirken gezinebileceğiz 12 sanal müze

Koronavirüs nedeniyle evde vakit geçirirken gezinebileceğiz 1...
Bilim insanlarının koronavirüs salgınına karşı uyarılarına kulak verip evden mümkün olduğunca çıkmamak en iyi tedbirlerden...
birgun.net

ÖS 4:36 · 14 Mar 2020 · Twitter for Android

2 Retweetler   27 Beğeniler

emre_erdem Retweetledi

Mustafa Varank ✔
@varank

RT @varank: Koronavirüs tehlikesine karşı tedbirlerimizi almalı kalabalıklardan uzak durmalıyız.

Bu vesileyle evde vakit geçirecek başta ç...

ÖÖ 10:28 · 16 Mar 2020 · Twitter for iPhone

14 B Retweetler   46,7 B Beğeniler

Mobeyz Haber
@mobeyzhaber

TÜBİTAK evde vakit geçiren çocuklar için tüm dergilerini ücretsiz yaptı.
#vaka18 #evindekaltuerkiye #coronavirus #Corona #evindekal

ÖS 9:27 · 16 Mar 2020 · Twitter for Android

1 Beğen

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1 INFORMATIVE CONTENTS

SOURCE: Brandwatch

groupm

ADVICE CONTENTS

SOURCE: Brandwatch

groupm

3 DIRECT ACTIONS

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A TIME TO LEAD WITH PURPOSE AND HUMANITY

groupm

# PURPOSE TRANSFORMATION FOR BRANDS: ENVIRONMENTAL & PERSONAL HEALTH; CONSUMERS ARE CALLING FOR HELP

«Healthy living» and «enviroment» have been on our agenda for a while. But now it is time to reconsider it within the crisis we are going through. Consumers seek for transparency more than ever. Hygienically safe environment and products are getting more and more importance everyday.

Consumer Expectation from Brands

Category	%
Ekstra hijyenik ürünler	65%
Yapılan kargo teslimatlarının hijyen kontrolünden geçmesi	64%
Mağaza ve alan temizliği hakkında bilgilendirme	64%
Her çalışan için yüz maskesinin temin edilmesi	63%
Sağlık ekipmanları tedariği	58%
Kapıya teslimat	46%
7/24 servis	33%
İndirim	33%
Stoğa ürün gelince bilgilendirme	31%
Tüketici ihtiyacı için uzun saatler açık kalacak mağaza hizmeti	30%
Hiçbiri	3%

SOURCE: GroupM Coronavirus Survey 2020

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BRAND PURPOSE: TODAY IT IS MORE IMPORTANT TO GENERATE RELATIONS THAN TO SELL

WELL BEING / HEALTHY LIFESTYLE

HYGIENE

FAMILY RELATIONSHIP

MENTAL HEALTH

EDUCATION

ENVIRONMENTAL HYGIENE

PERSONAL HYGIENE

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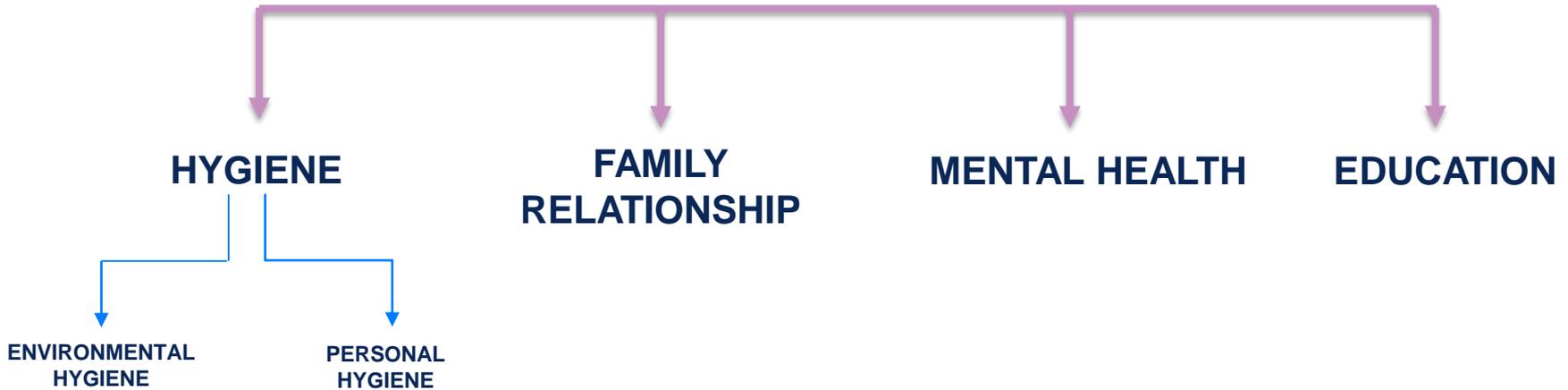
TOP 5 TOPICS TO GENERATE VALUE FOR CONSUMERS

KEY OUTPUTS FOR BRANDS

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5 IMPLICATIONS ON BRANDS MEDIA VISIBILITY DURING PHASE1

Demonstrate Purpose
It is time ask ourselves 'How can we support customers during this time?'.
It is better to design campaigns to support the
management of the outbreak, such as
making donations to the healthcare
authorities.
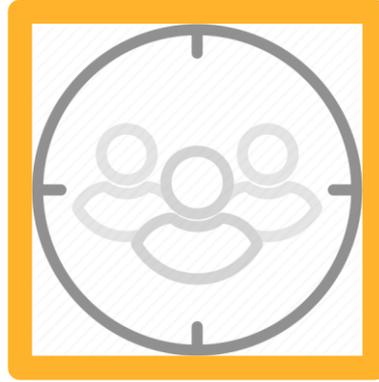
Precise Targeting
Use data allow to intercept new audiences and build closer relationship with the right content, right audience and right creative

DMP
DCO
Addressable TV

Increase Online Content Effort
With many people confined at home under quarantine, gaming and video apps have hit new download volumes.
Specific industries such as the health and fitness can create relevant content to engage customers.

Ensure Brand Safety
Contextual targeting, powered by the change in privacy regulations, is having a resurgence. It is all about putting ads in the right context, and during this sensitive time, you need to pay more attention than ever to where your ads are seen. Placing travel ads in China right now, for example, might be viewed inappropriate considering the government' strict travel restrictions.

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THANK YOU

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