

COVID – 19 EFFECTS AND IMPLICATIONS PHASE-3

DAS I ISTANBUL

AUGUST, 2020



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1. COVID-19 STATUS

MAJOR TOPICS THAT WE BELIEVE WILL BE WITH US FOR THE NEXT MONTHS AND MAYBE EVEN LONGER...

Uncertainty about the
Economy and Spending

Uncertainty about
Health and Hygiene

Uncertainty about Social
Life & Gatherings

CORONAVIRUS IS CONTINUING ITS SPREAD ACROSS THE WORLD, ^{groupm} WITH OVER 18 MILLION CONFIRMED CASES IN 188 COUNTRIES. MORE THAN 700,000 PEOPLE HAVE LOST THEIR LIVES.

The WHO says Latin America is the epicentre of the pandemic. Brazil has the second highest number of cases in the world and has recorded almost 96,000 deaths, while Mexico, the second-most affected country in the region, has recorded almost 49,000 deaths. Cases are also increasing rapidly in Colombia, Peru, Argentina and Bolivia.

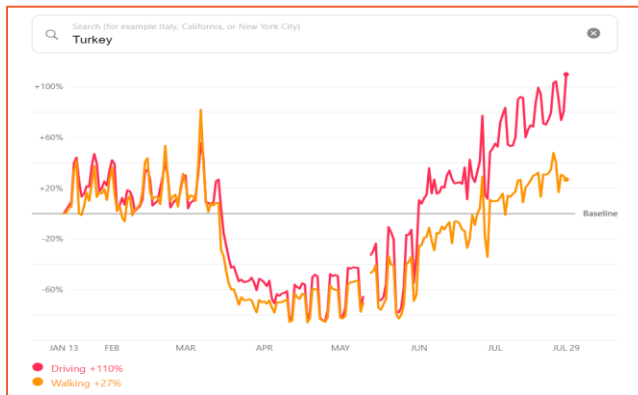


The World Health Organization's (WHO) special envoy David Nabarro told the BBC that the virus is capable of "surging back really quickly" and is "returning all the time".

DECREASING CASE TREND IN TURKEY STARTED TO RISE AGAIN AFTER HOLIDAYS IN THE LAST TWO WEEKS.

In Turkey there are 261.194 cases and 6.163 deaths and 239.797 recovered patient.

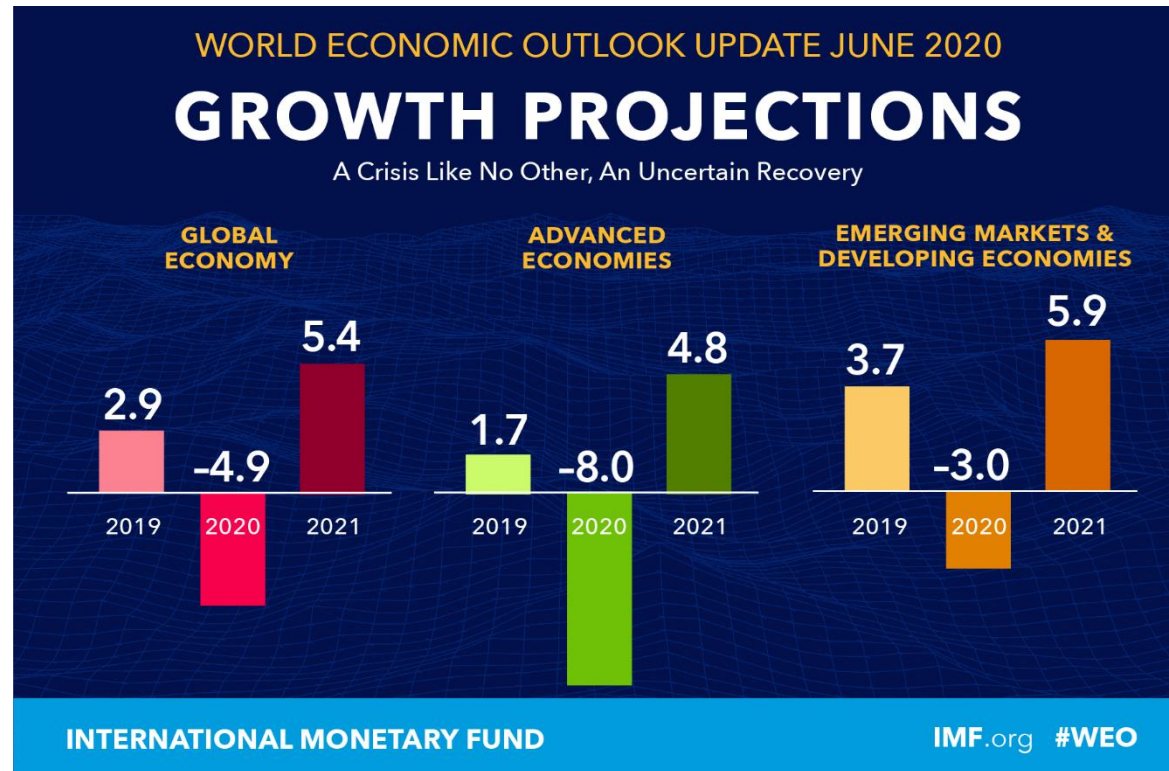
After Social isolation restrictions were lifted, the number of cases have increased. Increasing trend was observed starting from 4th of June to 17th of June. During the mid of summer the downtrend has started again. However, holidays have had negative impact on cases.



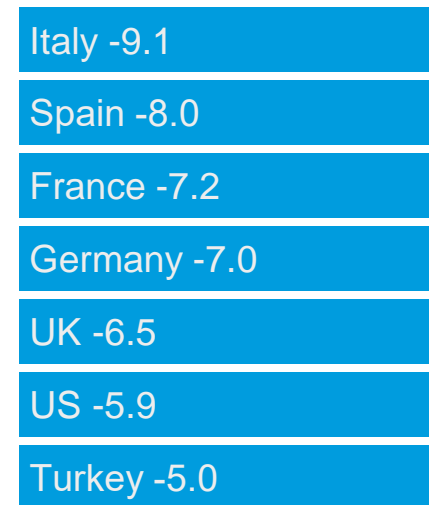
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ECONOMIC UNCERTAINTY IS PREDICTED TO CONTINUE GLOBALLY ^{groupm}

Global growth is projected at -4.9 percent in 2020, 1.9 percentage points below the April 2020 World Economic Outlook (WEO) forecast. The COVID-19 pandemic has had a more negative impact on activity in the first half of 2020 than anticipated, and the recovery is projected to be more gradual than previously forecast. In 2021 global growth is projected at 5.4 percent. Overall, this would leave 2021 GDP some 6½ percentage points lower than in the pre-COVID-19 projections of January 2020.

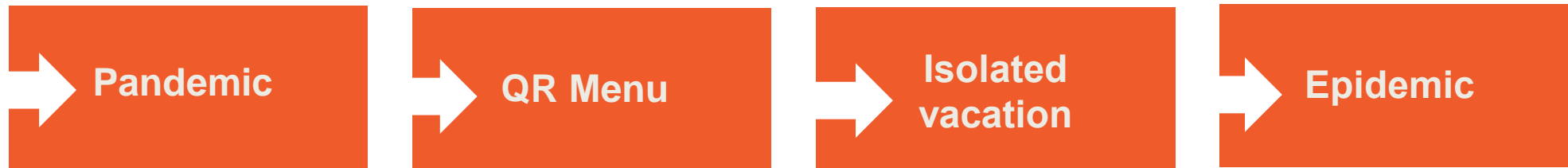
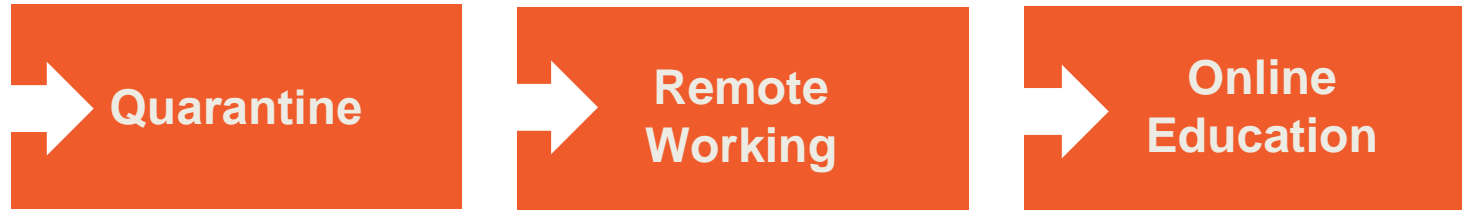


Real GDP growth
Annual percent change 2020 Projections



NEW WORDS & CONCEPTS TAKING PART IN OUR LIFE

«Wear Your Mask»



WHAT WE HAVE BEEN THROUGH AND STILL GOING THROUGH.

Acute Outbreak

Adapting to New Normal

11 March

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

12 March

Schools were vacationed due to the corona virus.

15 March

Umrah passengers (10K passenger) quarantined in Ankara.

16 March

Entertainment places and cafes have been temporarily closed. Restrictions were applied to mosques, as well.

18 March

First person, 86 years old man died because of Covid-19.

21 March

Lockdown was declared on people over the age of 65.

25 March

Schools were vacationed until April 30.

27 March

Intercity transportation is restricted.

29 March

Total death number passed 100 people.

3 April

Covid-19 city breakdowns were announced. 8.852 people were confirmed as Covid-19 positive in Istanbul.

6 April

President Recep Tayyip Erdoğan banned sales of masks, government would give free masks to everyone for support.

10 April

Lockdown was declared for the weekend for the first time.

12 April

Süleyman Soylu resigned after the reactions to the management of the lockdown but resignation wasn't accepted by President Erdoğan.

16 April

Layoffs were banned for 3 months. Government support for workers taking unpaid leave.

20 April

4 days of lockdown was declared. 23th to 26th of April were curfewed. This is the longest lockdown of Covid-19.

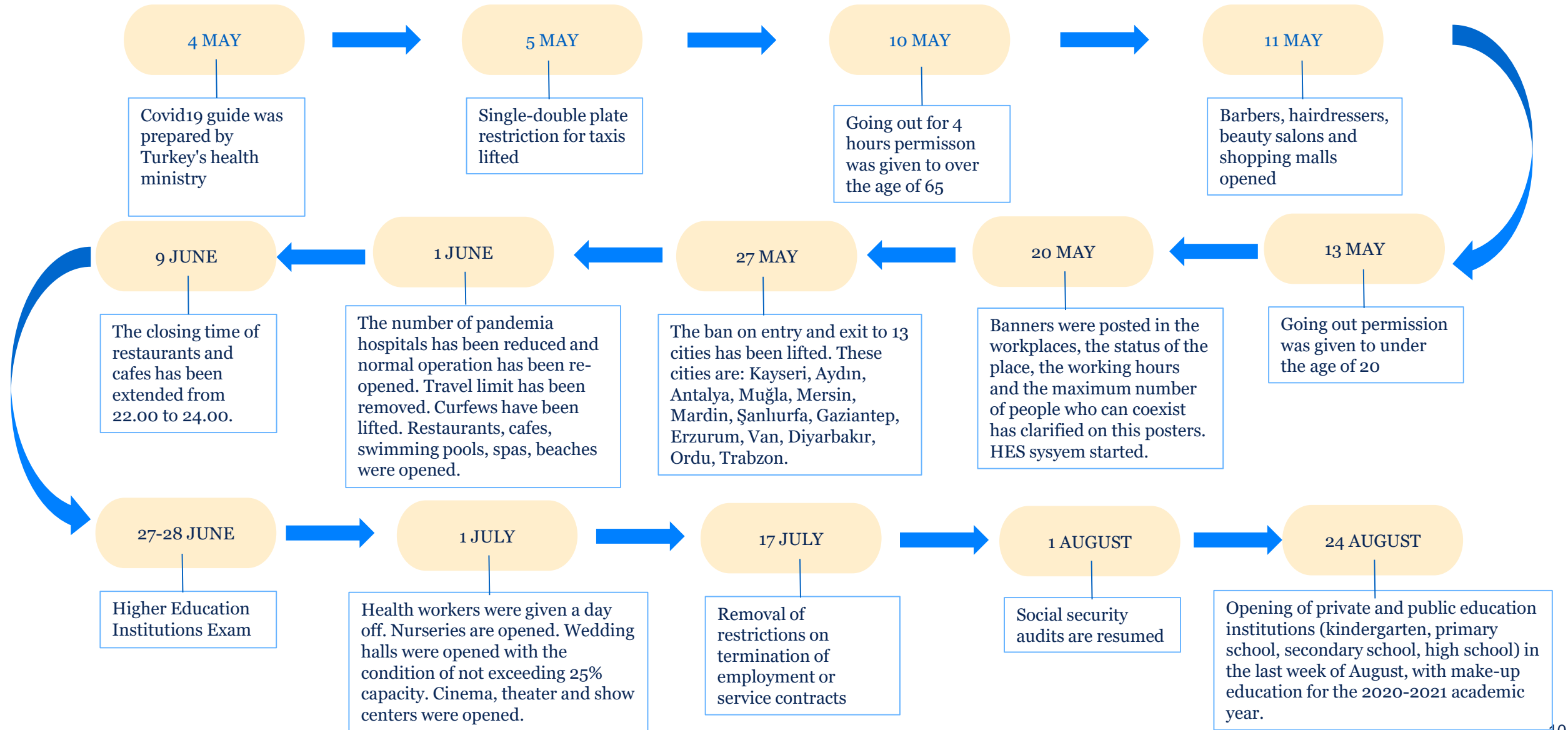
29 April

Ziya Selçuk announced that remote education is extended until 31 May.

3 May

For the first time, number of healed patients exceeded the number of existing Covid-19 patients.

AT SOME POINT, NEW NORMAL HAS ARRIVED.



WITH THE COMING OF NEW NORMAL, PEOPLE SEARCHED FOR A SAFER OUTDOOR ACTIVITY.

spor salonları açıld...
Arama terimi

kafeler açıldı mı
Arama terimi

dişçiler açıldı mı
Arama terimi

halı sahalar açıldı mı
Arama terimi

piknik alanları açıld...
Arama terimi

Türkiye

1.03.2020 - 9.07.2020

Tüm kategoriler

Google Web Arama

Zaman içinde gösterilen ilgi



PEAKED DURING THE ACUTE OUTBREAK, THE CONVERSATION STARTED TO DECREASE.

Mentions which are related directly with «coronavirus or covid-19» are decreasing while we're entering the recovery phase.



During the normalisation period, even though the conversation started to decrease, most prominent topics is the number of cases.

SOURCE: Brandwatch

COVID-19, MOSTLY HAS OCCUPIED OUR TWITTER AGENDA AT THE BEGINNING. AFTER PEOPLE STARTED ADAPTING TO NEW NORMAL, SOCIAL PROBLEMS AND ENTERTAINMENT TOPICS RETURNED TO OUR AGENDA.

Acute Outbreak

Trending Topic	TT Start Date	TT End Date	# Best Position	# TT Duration ↓
BeklentimizKOCAMAN	Mar 11 03:51	Mar 12 02:59	4	1.388
Covid2019TR	Mar 20 04:39	Mar 21 01:53	1	1.273
evdekaliyorum	Mar 22 03:00	Mar 22 22:49	2	1.189
Covid19Out	Mar 25 04:01	Mar 25 23:32	1	1.171
SaglikcilariniAlkisla	Mar 20 07:38	Mar 21 02:57	1	1.159
koronavirüs	Mar 10 05:45	Mar 11 00:10	1	1.105
Aytaç Yalman	Mar 19 03:41	Mar 19 21:18	6	1.057
Kanal İstanbul	Mar 26 03:02	Mar 26 19:31	2	989
SokağaÇıkmaTürkiye	Mar 22 08:50	Mar 23 01:17	1	987
EvdeKalDemesiKolay	Mar 26 03:02	Mar 26 19:17	1	975
MAALESEFPOZİTİF	Mar 15 03:30	Mar 15 19:42	2	972
cumartesi	Mar 28 03:00	Mar 28 19:03	1	962
coronaturkiye	Mar 13 03:20	Mar 13 19:19	1	958
evdekalevdekal	Mar 29 08:53	Mar 30 00:45	1	953

Adapting New Normal

Trending Topic	TT Start Date	TT End Date	# Best Position	# TT Duration ↓
sercanisa	Apr 17 03:02	Apr 18 02:59	1	1.437
Boris Johnson	Apr 06 03:01	Apr 07 02:57	6	1.436
survivo2020	Apr 28 03:03	Apr 29 02:59	1	1.436
Gizem	Apr 21 03:02	Apr 22 02:55	3	1.433
Yasin	Apr 20 03:02	Apr 21 02:01	2	1.379
survior2020	May 25 03:00	May 26 01:28	1	1.347
Barismuratyağcı	Apr 19 03:56	Apr 20 02:13	3	1.337
SoyludanRazyız	Apr 12 03:03	Apr 13 00:29	1	1.286
Sahur	Apr 24 03:02	Apr 25 00:26	1	1.284
Yaşasin24Nisan	Apr 24 03:23	Apr 25 00:26	5	1.263
ArmenianGenocide	Apr 24 03:43	Apr 25 00:26	3	1.243
Hayırlı Cumalar	Apr 24 04:00	Apr 25 00:26	6	1.225
100YillikEgemenlik	Apr 22 03:00	Apr 22 23:24	2	1.225

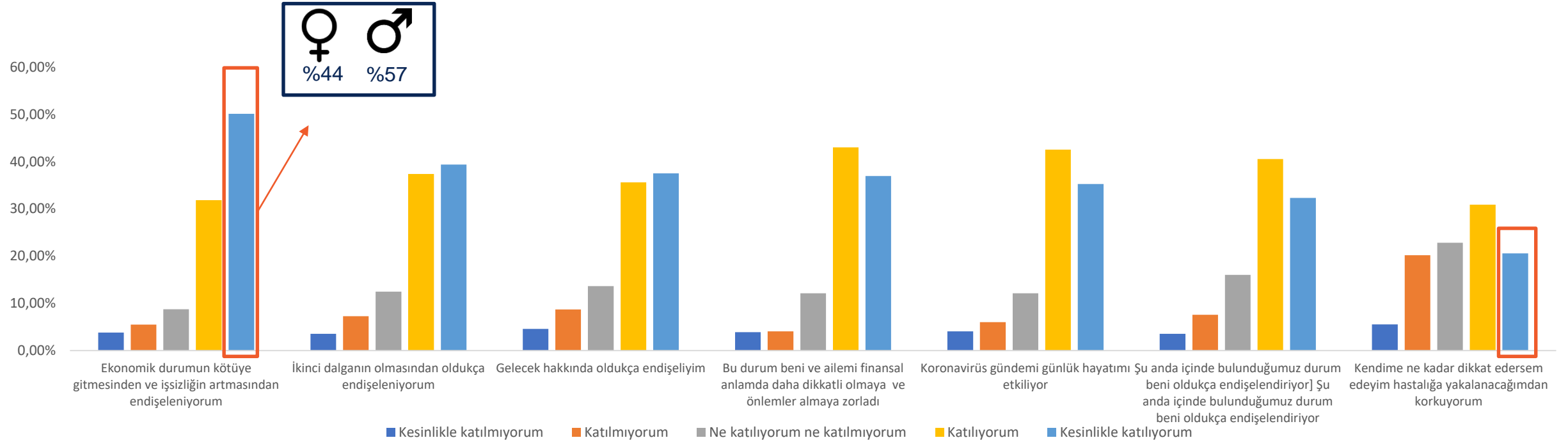
Normalisation

Trending Topic	TT Start Date	TT End Date	# Best Position	# TT Duration ↓
Erol Bulut	Jul 29 03:02	Jul 30 02:59	6	1.437
picemiyeti	Jul 24 03:03	Jul 25 02:58	2	1.435
survior2020	Jun 18 03:01	Jun 19 02:55	1	1.434
yks2020aciklansin	Jul 26 04:01	Jul 27 02:57	1	1.376
survivor2020	Jun 30 03:01	Jul 01 00:40	1	1.299
Sercan	Jun 30 05:50	Jul 01 02:57	7	1.267
yks2020	Jul 27 03:02	Jul 27 21:41	1	1.119
NetflixTürkiye	Jul 19 03:01	Jul 19 21:26	1	1.105
gamzeyesesol	Jul 29 03:50	Jul 29 21:59	1	1.089
iyikivarsinEren	Jun 25 03:00	Jun 25 20:56	1	1.075
hasankeyf	Jul 07 03:05	Jul 07 20:29	1	1.044
15Temmuz	Jul 15 03:02	Jul 15 20:26	1	1.043
Kadem	Aug 01 09:59	Aug 02 02:59	8	1.020
BabalarGünü	Jun 21 03:02	Jun 21 20:00	1	1.018

Eventhough case numbers worried Twitter users, people continued to share social and entertainment contents more.

2. CONSUMER REACTION TO OUTBREAK

CONCERN TOPICS: THE WORSENING OF THE ECONOMIC SITUATION CREATES MORE ANXIETY THAN THE POSSIBILITY OF THE SECOND WAVE



The main reason for the increasing anxiety for the future is financial uncertainty

Although people are afraid of financial uncertainty and the deterioration of the economy, they rely on themselves when it comes to hygiene and self protection. Those who pay attention to their personal hygiene are less afraid of getting sick.

«The current situation we are in worries me a lot»

%70

1. Wave

%85

2. Wave

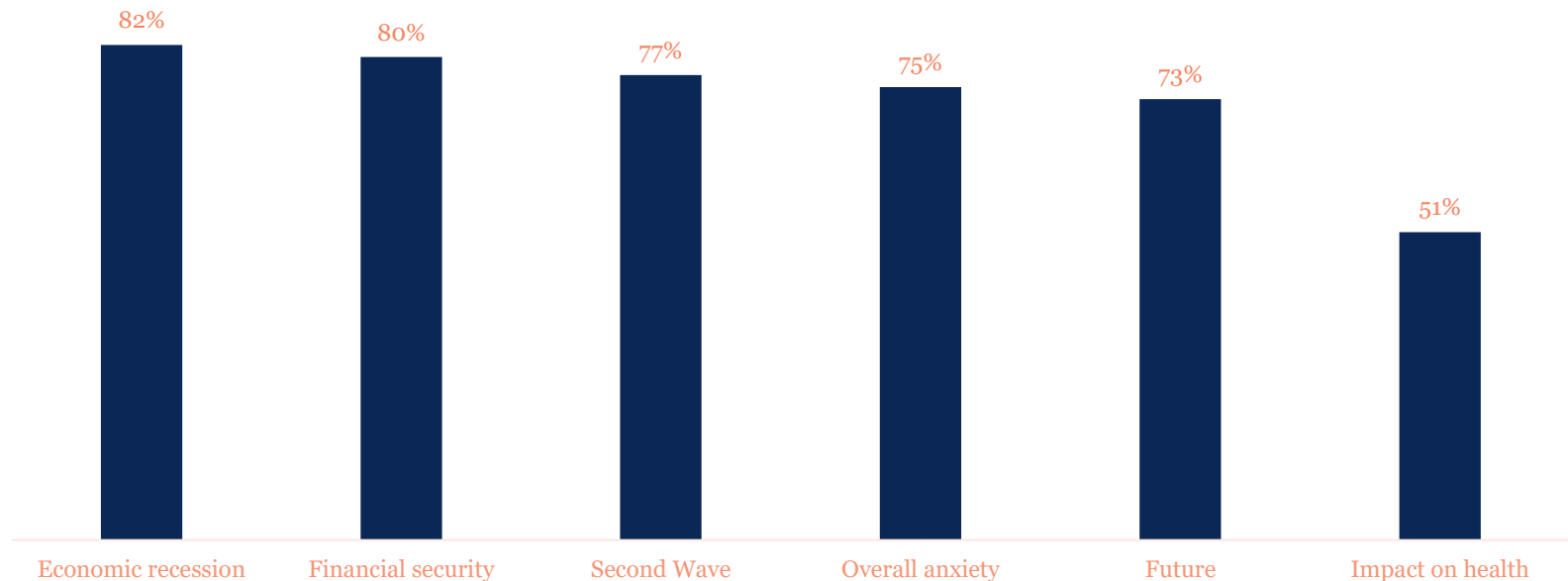
%73

3. Wave

CONSUMERS MOSTLY HAVE ANXIETY ABOUT ECONOMICAL SITUATIONS. AND THERE IS ONE IMPORTANT QUESTION IN MINDS: **HOW WILL THE PERSONAL FINANCE SITUATION BE AFFECTED WHEN ALL THE WORLD GET THROUGH THE PANDEMIC PERIOD?**

Economical recession is the key point (%82) that worries consumers. %80 is also worrying for financial security.

Fearing for **second wave** (%77) is the **third anxiety** reason which sums up the situation best for us. The pandemic hasn't over yet and more than half of consumers forecasting it will be continuing at least 5 months, despite every normalization and distant socializing rules we're expecting for second wave.



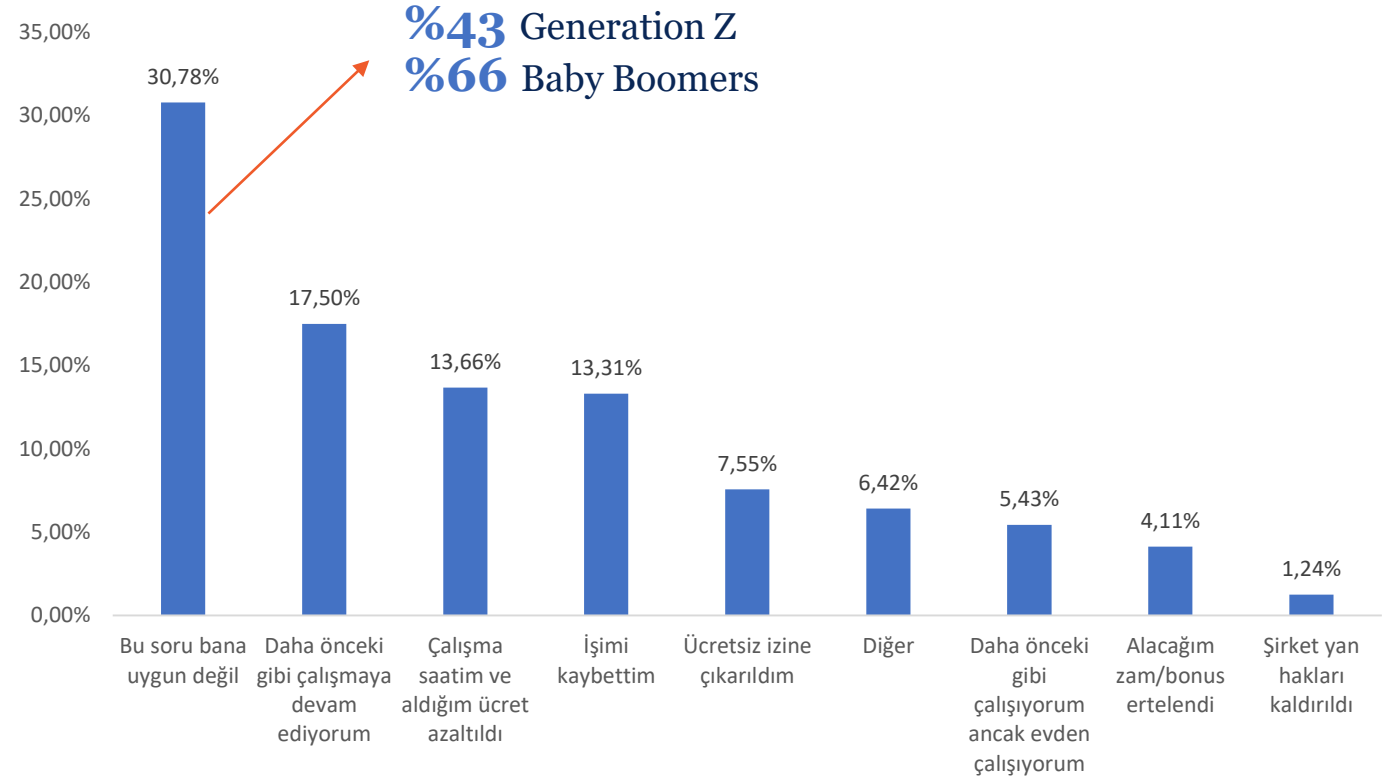
MONETARY SIDE OF PROBLEMS

%57 The epidemic affected my income.

%27 The epidemic did not affect my income right now, but I expect it to affect in the future.

%13 I don't think the outbreak will have an impact on my income.

%3 I have no idea

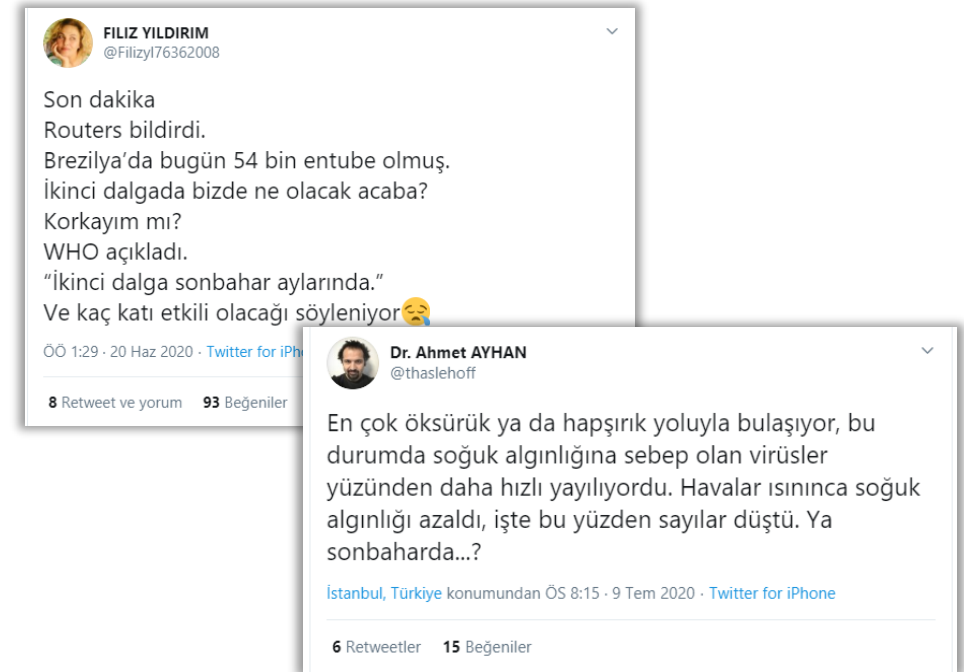
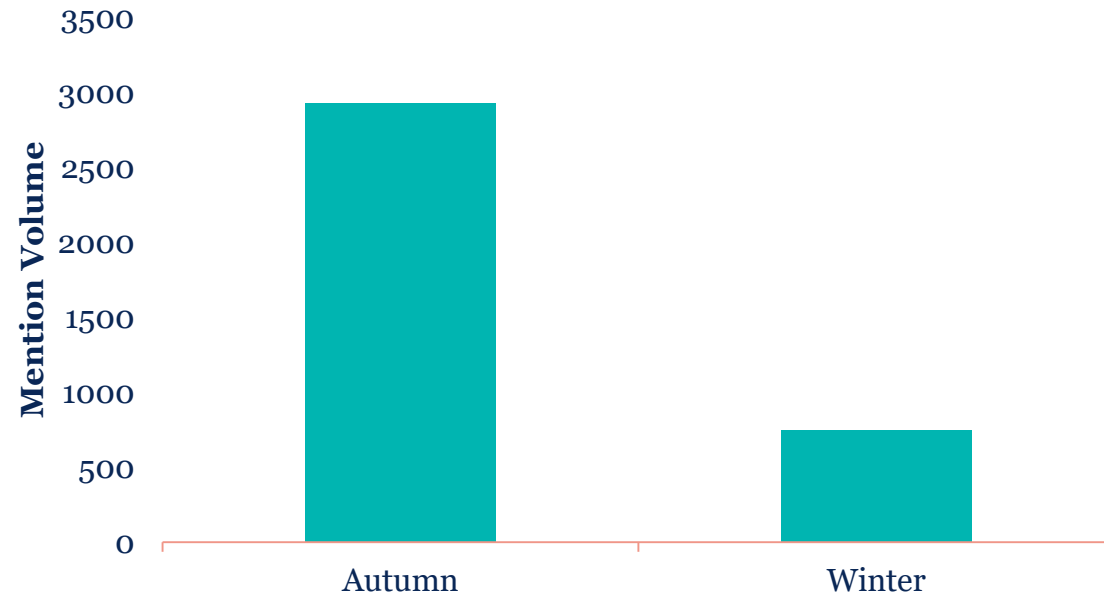


The pace of work has not decreased, but customers have.

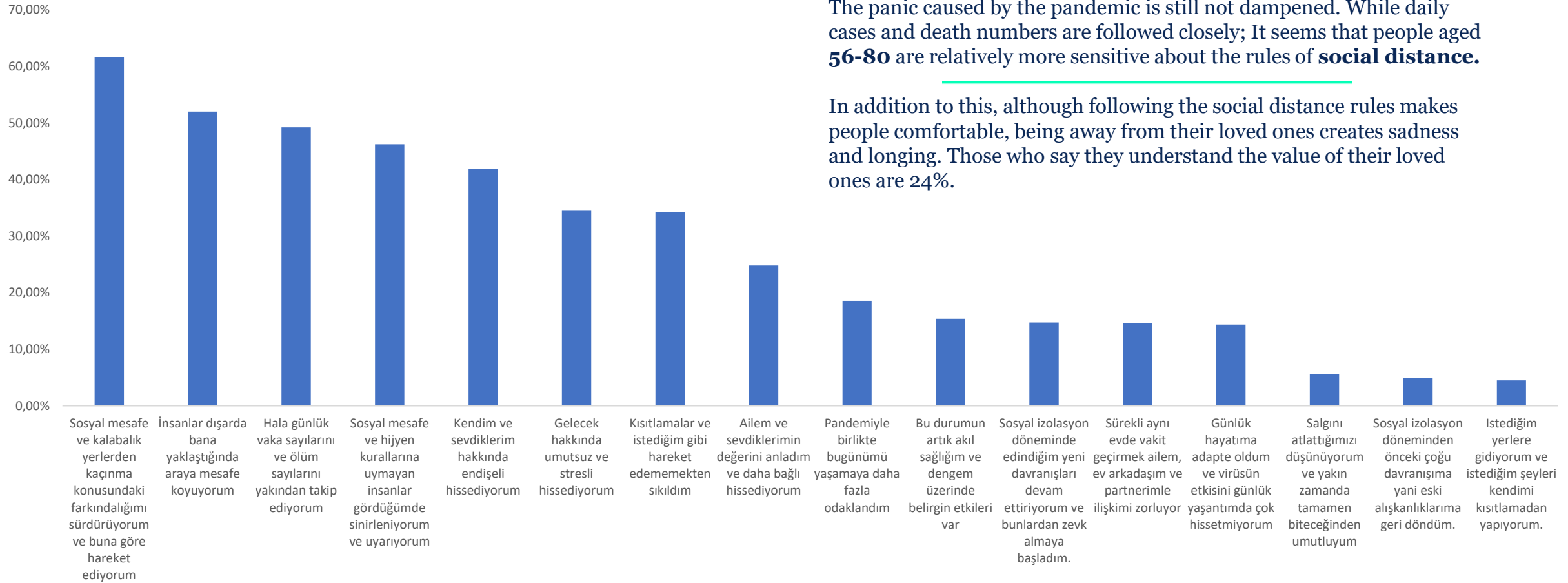
57% said that their income was affected due to the outbreak, while 17% said that they continued to work as before to make money in the worsening economic conditions. In addition to financial deterioration, this situation leads to a decrease in living standards and a decrease in trust in the work.

WHEN IT COMES TO THE SECOND WAVE THE MOST FREQUENTLY ASKED QUESTION IS WHEN IT WILL BE?

Consumers think that Autumn will be very dangerous for Covid-19. It is thought that The Second Wave will be encountered during the Autumn. It can be say that consumers will be more anxious during the Autumn. **It is important to give supportive messages. Especially supporting messages with solid informations.**



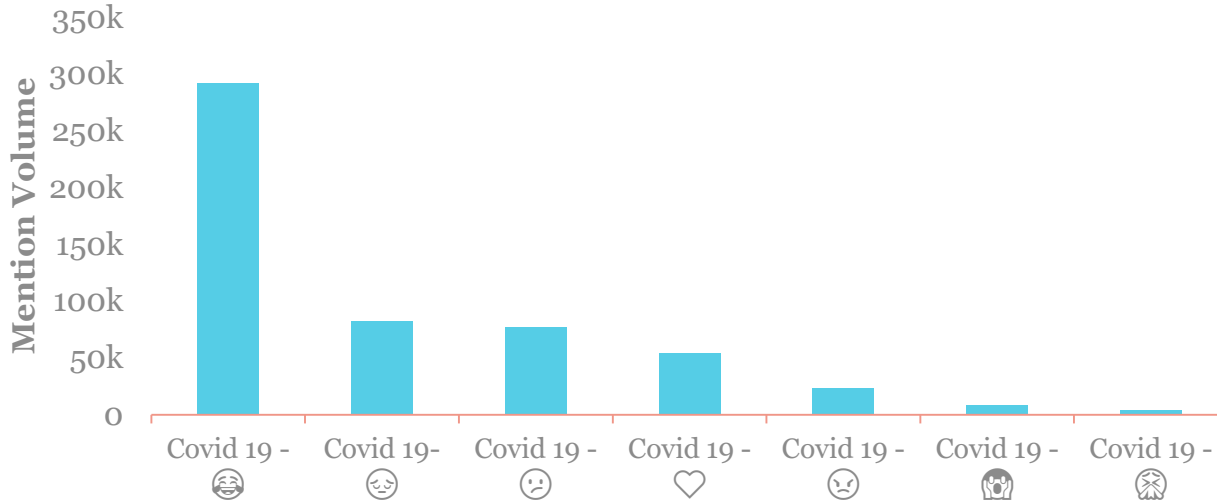
KEEPING THE SOCIAL DISTANCE IS THE KEY



The panic caused by the pandemic is still not dampened. While daily cases and death numbers are followed closely; It seems that people aged **56-80** are relatively more sensitive about the rules of **social distance**.

In addition to this, although following the social distance rules makes people comfortable, being away from their loved ones creates sadness and longing. Those who say they understand the value of their loved ones are 24%.

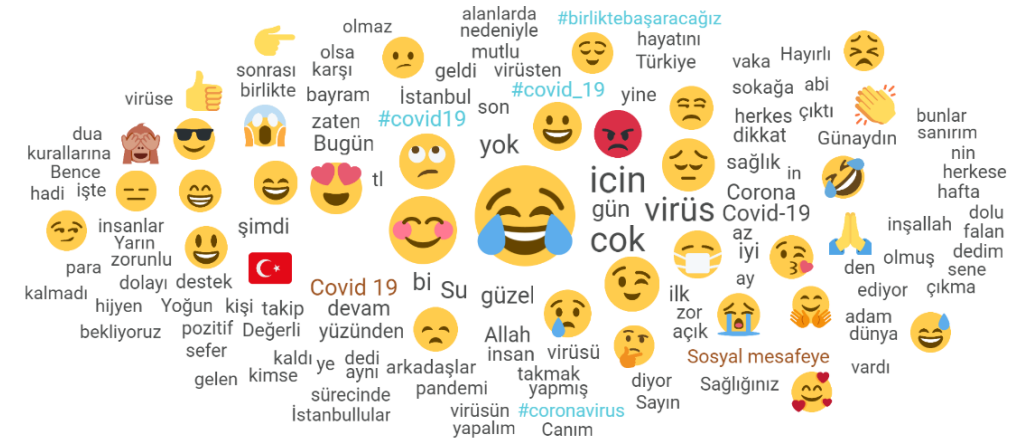
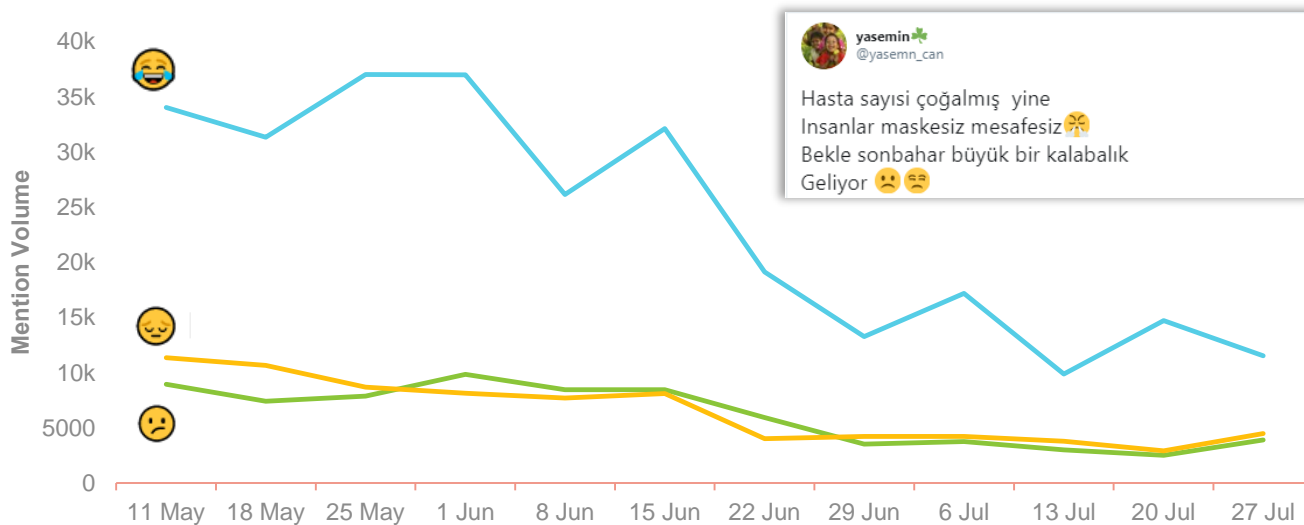
IN THE MIDST OF THE NORMALIZATION PROCESS, ANXIOUS EXPRESSIONS DECREASED. HOWEVER, IT HAS INCREASED AGAIN WITH THE RISE OF CASE NUMBERS DUE TO HOLIDAYS AND NEGLIGENCE OF PRECAUTIONS



During the normalization period; mostly happy, smiling laughing emojis have been used. Happiness of re-socialising again and humorous contents are the reason behind it.

However;

At the begging, consumers have some concerns as well. With the Bairam greetings and crowded holiday places have caused increasing in concerns.



SOCIAL DISTANCE AND HYGIENE ARE THE PRIORITY AMONG THE MEASURES THAT CAN BE TAKEN AGAINST THE VIRUS, THE FIRST METHOD THAT COMES TO MIND AND THE MOST APPLIED ONE IS HAND DISINFECTION



The anticipation of how long the pandemic will last causes anxiety

«When will the COVID-19 epidemic be over?»

%49 more than 5 months

%23 I don't think it will end

%12 in 4-5 month

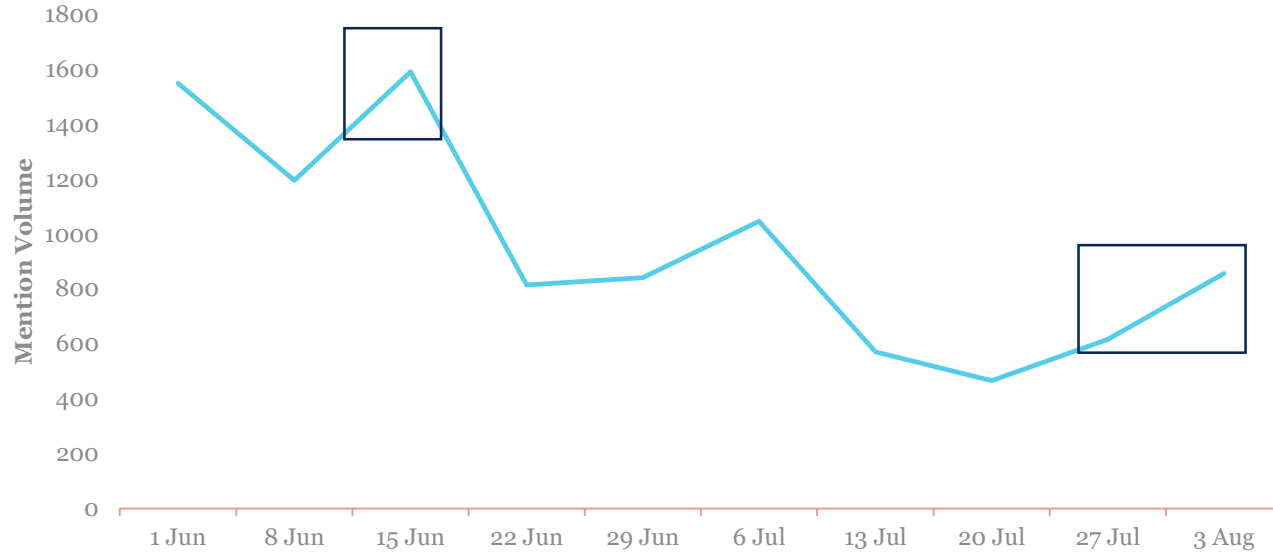
%9 I've no idea

%6 in 2-3 months

%1 in 3-4 weeks

%1 in 1-2weeks

WHEN THE NUMBER OF CASES INCREASE, PEOPLE'S BELIEFS THAT THE OUTBREAK WILL END DECREASE



Cicek
@Cicek00579827

Bu yaz herkes disarda dolaşti bayramda da ayni kimsede maske yok şimdide vakalar artı diyorlar neden acaba arttı kimlerin yüzünden bu serbestlik oldu bizim ne günahımız vardı evde durduk pistik kimseyle görüşmedik evlatlarımızla görüştük o kadar şimdi nolacak salgın bitmeyecek

Istanbul, Türkiye k

Yiğit Furkan
@yigitfurkan1903

Ülkemin insanı vaka sayısı 1000' in altına düşünce virüs bitti zannediyor herhalde yok abi bitmez bu virüs

#COVID19

ÖÖ 12:22 · 5 Ağu 2020 · Twitter for Android

1 Beğen



Consumer's despair and anxiety are correlated with the number of cases. It is important to touch these feelings to be able to communicate more sincerely. Also, it is crucial to reach the consumer in real-time especially in times where there's no hope.

3 ay

Salgın bitmezse devam edecek virüs bitmezse salgın bitmeyecek virüs asla bitmez

gecesini gündüzüne korona bitmez vaka sayısı ortak karar alınacak

BAKANIM BU VİRÜS BİTMEYECEK BENÇE EVDE HAYAT FALAN YOK hiçbir zaman bitmeyecek virüs biter bitmez

devam ederse ikinci dalga mutlaka gelecektir Sayın bakanım Bilim Kurulu Üyesi

Hiçbir salgın pik ile bitmez toplantıları yapıyoruz

Çocuklar için en iyi asla bitmeyecek virüsten ölüm

3. DAILY LIFE & CHANGING BEHAVIOURS

NOW THAT IT'S SAFER TO GO OUT, MEETING WITH FRIENDS OUTDOOR IS INCREASING AS THIS WAS THE MOST MISSED ACTIVITY

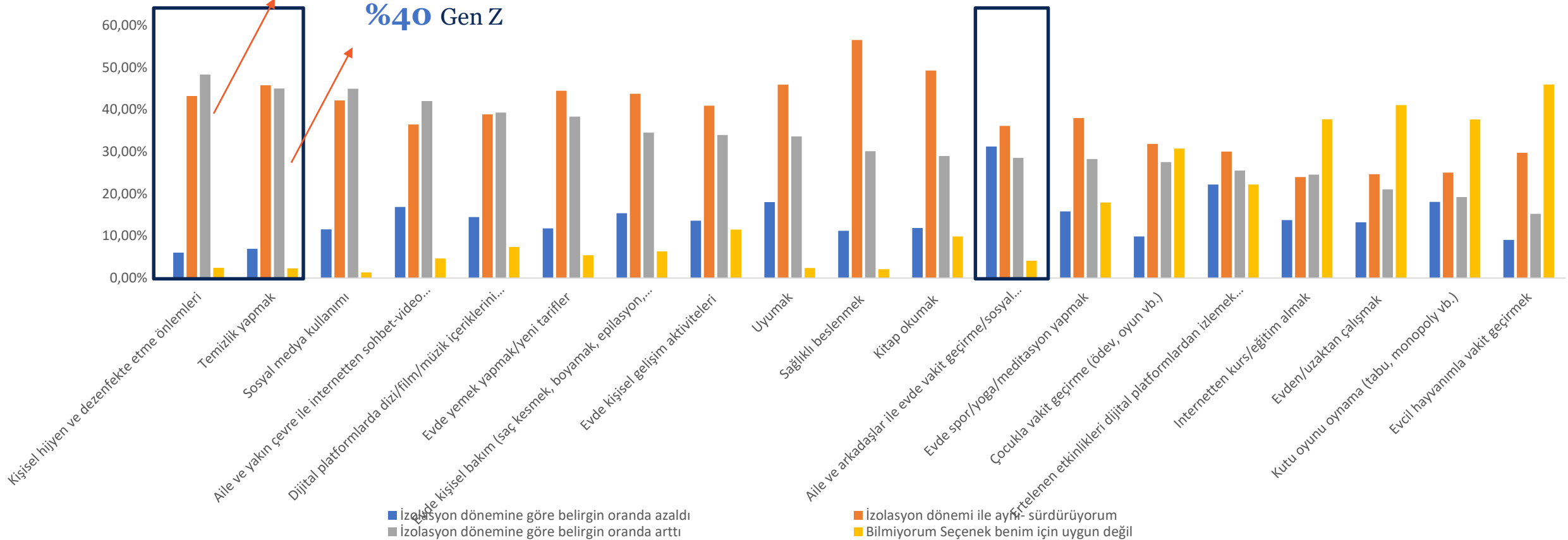
It is observed that activities such as online theater, online concerts, and digital museums, which increased during the isolation period, started to decrease after the isolation.

As a result, after the isolation period, fears did not end, and personal hygiene and cleanliness also increased.

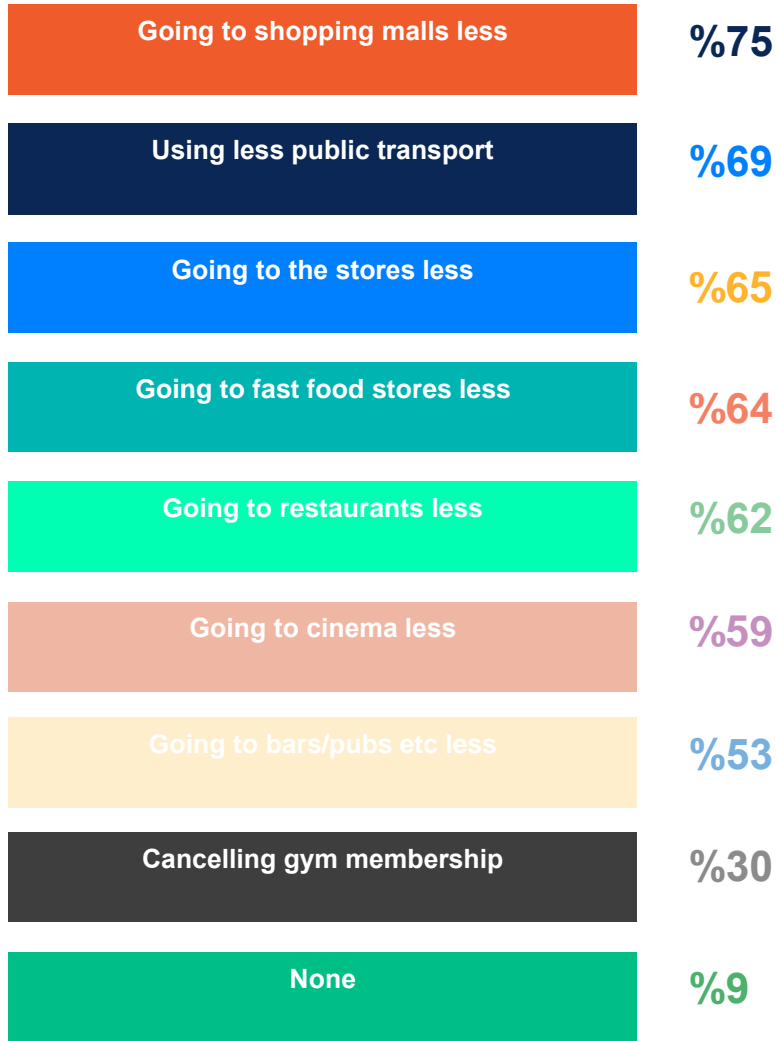
The use of social media continues to increase after the quarantine as in the pandemic process with 44%.

%55 Gen Z

%40 Gen Z



EVEN IF WE'RE FREE TO GO, WE'RE HOLDING ON SOME «OLD» HABITS



Less is more

While the distribution of women and men is equal in those who say that they will go to shopping centers less, the majority is in women who say they will go to stores less. **%64 of attendees** stated that they prefer online and mobile shopping because of pandemic.

Although it is not as crowded as the shopping center, shops are also not preferred for all types of products as before.

While those between the ages of 58-80 are in the risk group, they say that they will not use public transportation as much as before.

Gym memberships do not encounter cancellations as much as expected.

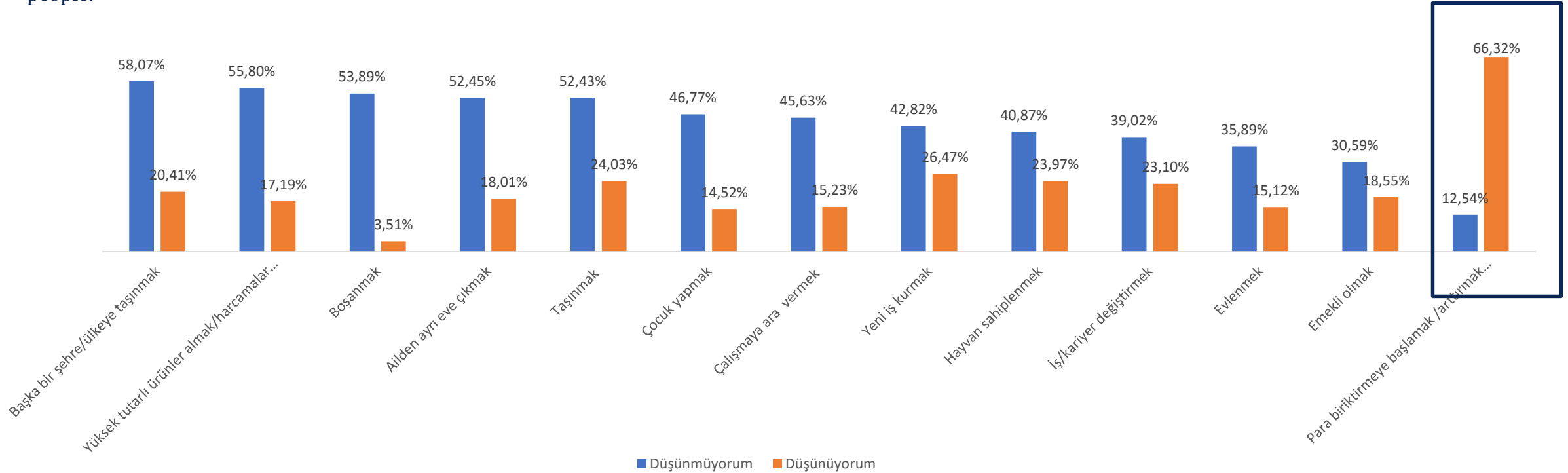
IT'S 2020, WE ARE AVOIDING RISKS AND SAVING MONEY NOW

In the normalization process after the pandemic, it is seen that people try to **avoid risks** as much as possible, as well as their need for a sense of **unity and solidarity**. It is thought that they were caught off guard, and **66%** said they would start **saving** after the pandemic.

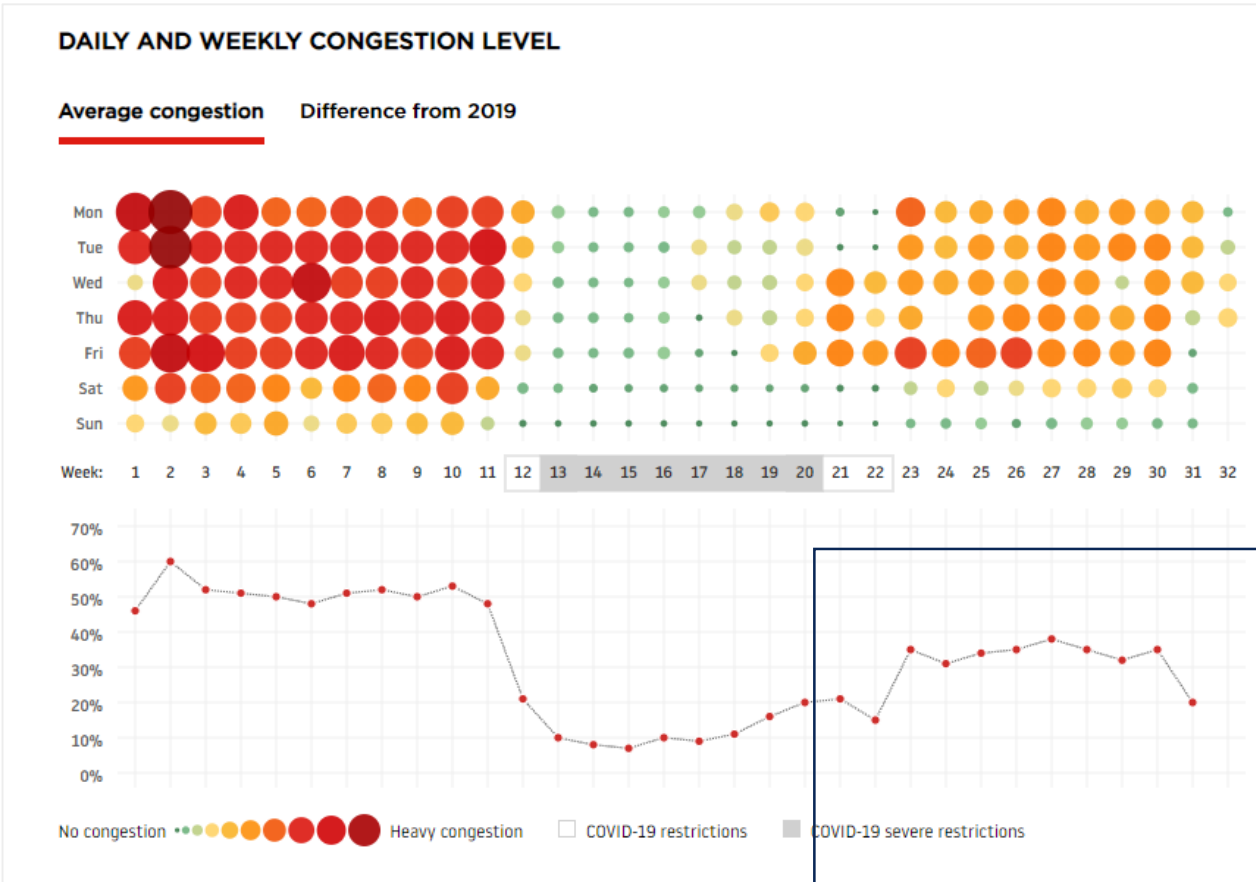
58% of those who do not intend to leave the country after the pandemic because we are one of the countries that are relatively less affected.

Concepts such as moving out alone and leaving the family are avoided. A few reasons for this are **economic uncertainties, longing for affection** and such.

Due to **economic uncertainties**, serious steps such as taking a career break, bringing children to the world, changing careers are intimidating people.



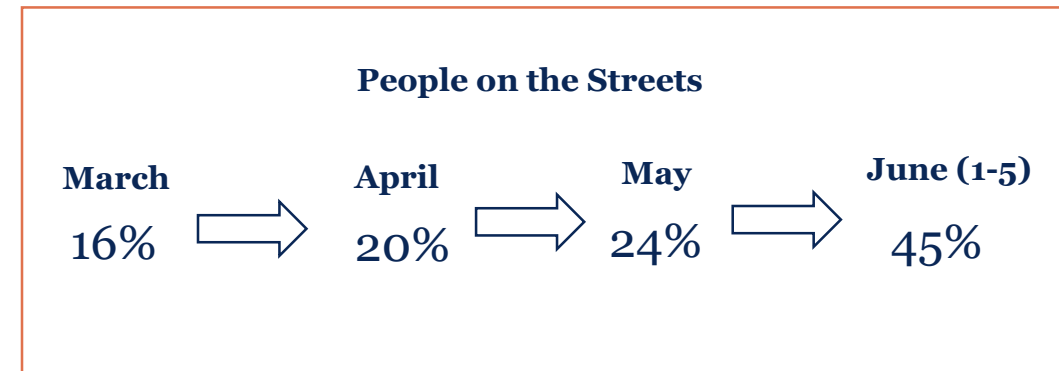
TRAFFIC RATES ARE INCREASING DAY BY DAY WITH THE TOTAL NUMBER OF VEHICLES AND POPULATION ON THE ROAD



According to TÜİK in May, **52 thousand 80 vehicles** were registered to traffic.

At the same time, it is observed that the crowd of people on the streets is increasing day by day with the data received from the UYM.

34.4% of the daily average population (5.343.61 people) went out on the streets in Istanbul between June 1-5.



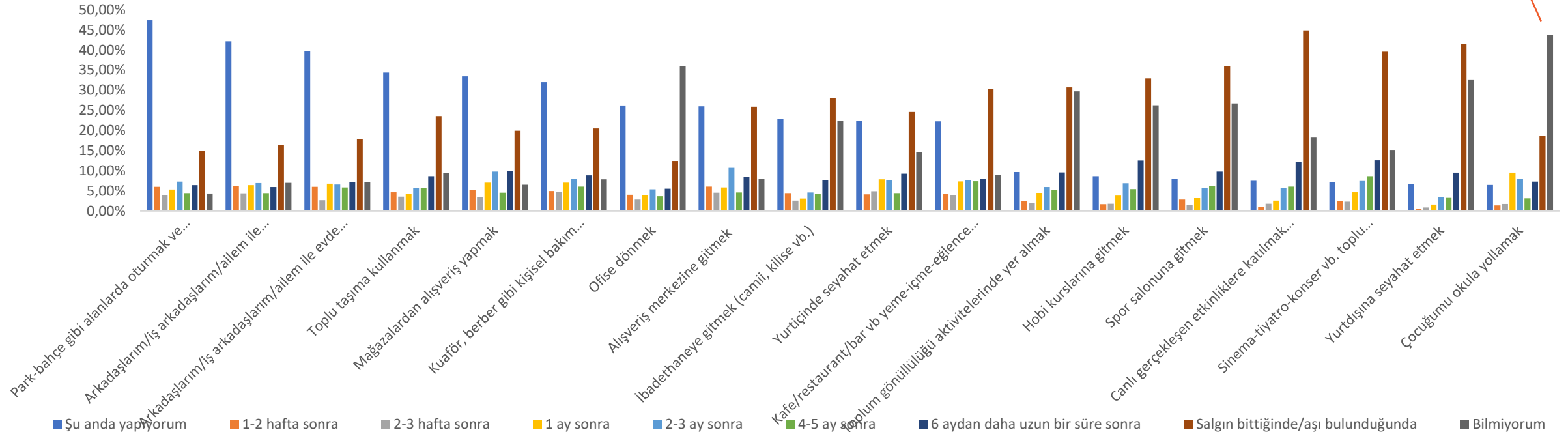
THE FIRST CONDITION FOR SOCIALIZING: TO STAY AWAY FROM CROWDED AREAS

In the normalization process, **top 3 occasions that people feel comfortable** in the current situation are;

- Socializing in areas such as parks (47%),
- Meeting with friends / family face-to-face (42%),
- Meeting with friends / family at home (39%)

However, crowded environments continue to be a cause for concern. It is said that especially international travels, gyms, concerts, events, etc. **will not be preferred before the epidemic ends.**

Although people think that they can protect themselves, their anxiety for loved ones continues. Those who **don't have an idea about when they can easily send their children back to school** are 43%.

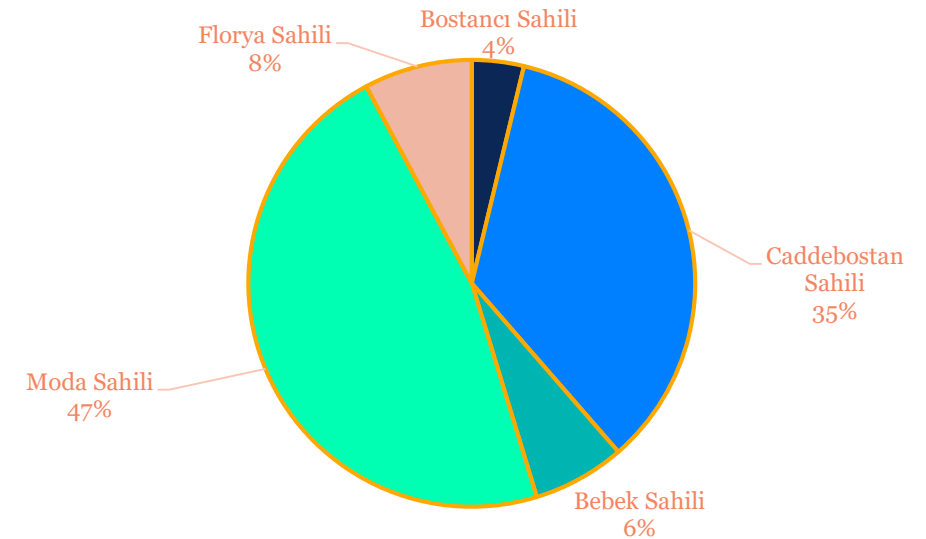
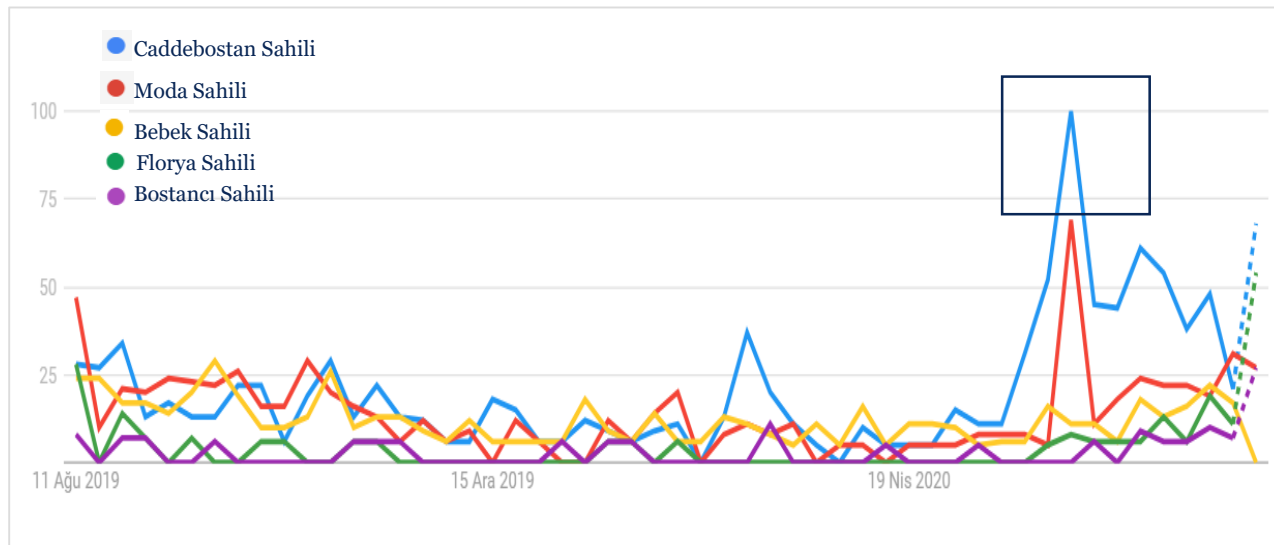


SOURCE: GroupM Turkey Covid-19 Survey – Wave 3 (Q12- When will you feel comfortable doing the following activities in this period where social isolation and restrictions are gradually decreasing?)

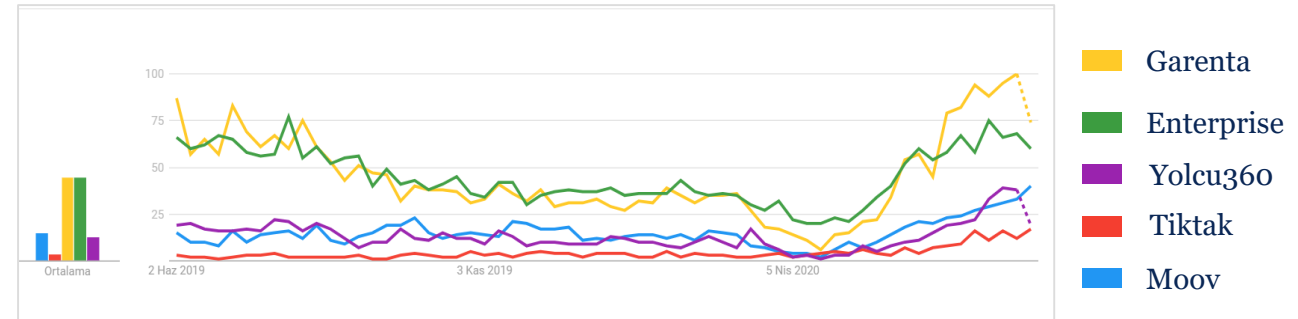
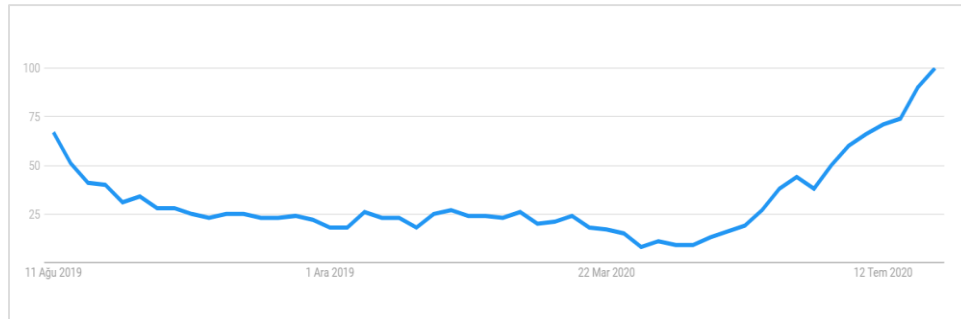
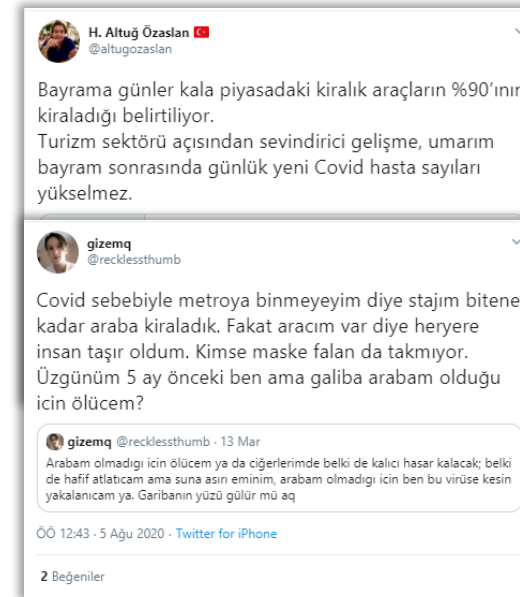
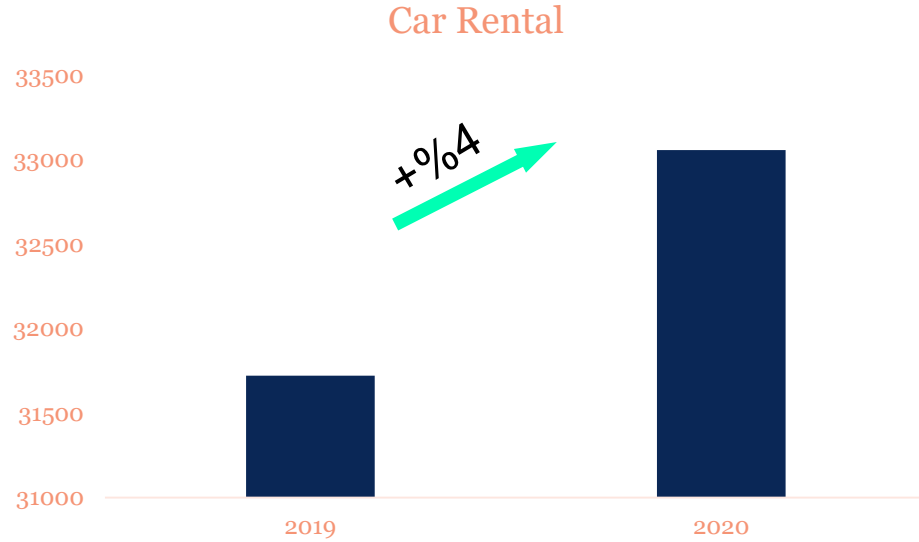
THE CONSUMER WHO STAYED AT HOME FOR A LONG TIME HAVE PREFERRED TO GO TO THE SEA SIDES AND PARKS AFTER THE BANS WERE LIFTED



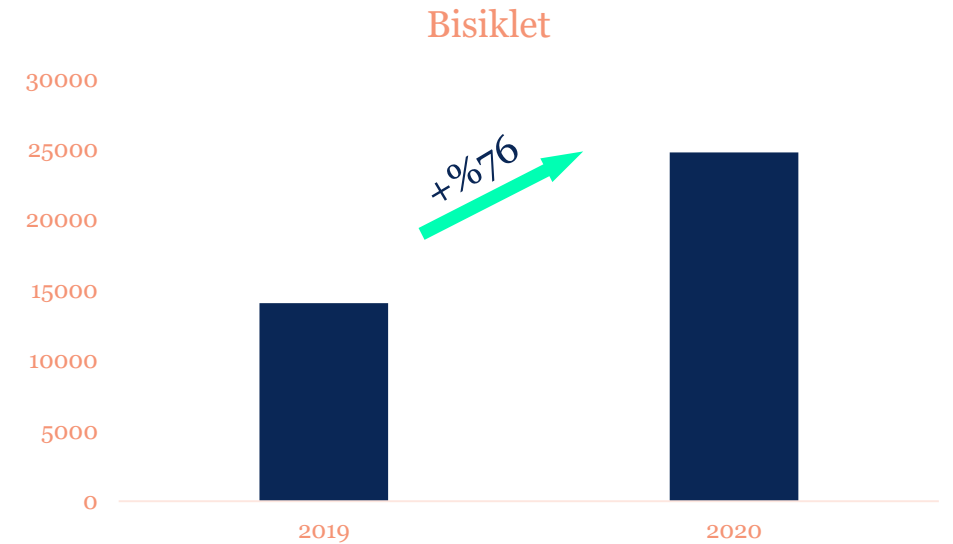
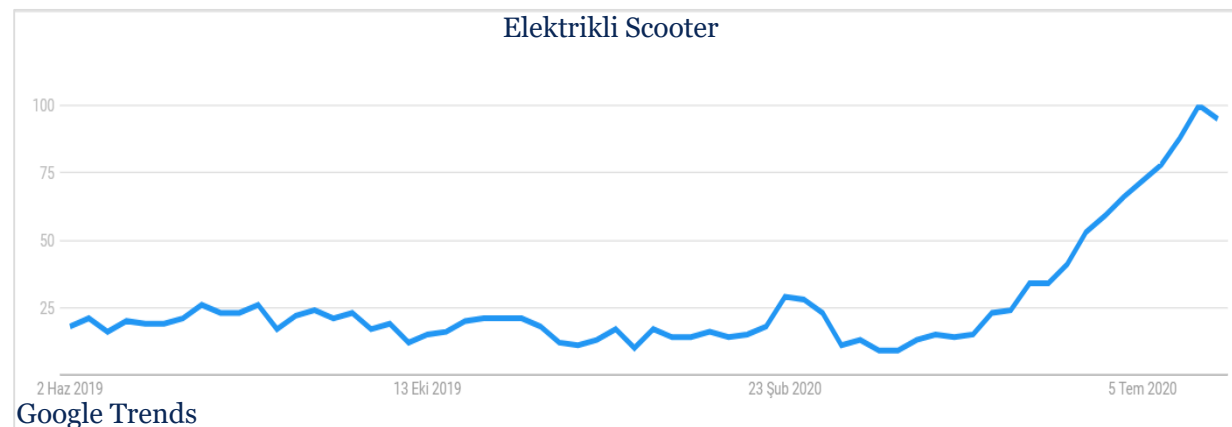
Both Google searches and Web mentions peaked in the first week of June. *Moda sahili, Caddebostan Sahili* the most mentioned ones. *After the ban was lifted, the crowd in these places drew attention.*



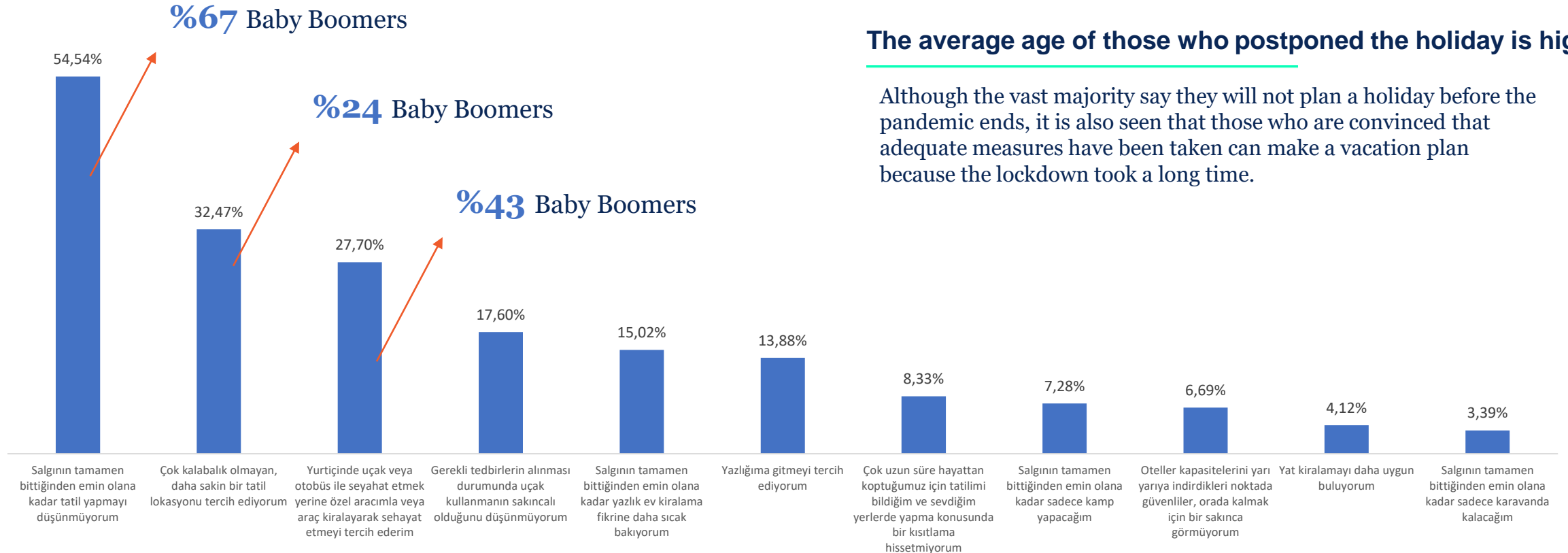
WHEN IT COMES TO TRAVELLING BY CAR, CAR RENTAL MENTIONS HAVE INCREASED COMPARE TO LAST YEAR. IT CAN BE INTERPRITED AS THOSE WHO CAN'T AFFORD A CAR AND DO NOT PREFER TAKE PLANE OR BUSES TEND TO RENT A CAR



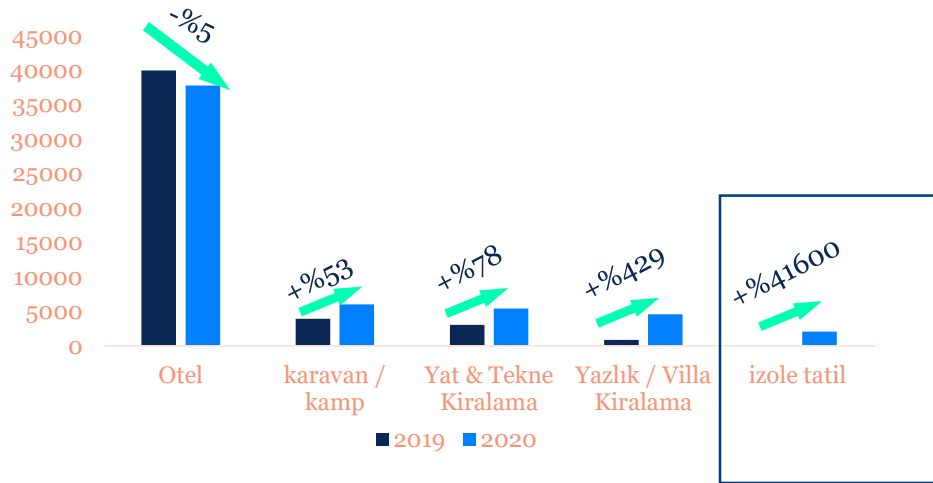
ALTERNATIVE TRANSPORTATION METHODS ARE ON THE RISE. BICYCLE MENTIONS INCREASED %76 COMPARE TO LAST YEAR



STAYING AWAY FROM CROWDED PLACES IS THE MAIN MOTIVATION REGARDING TO CONSUMERS' HOLIDAY PREFERENCES. ISOLATED PLACES ARE THE TREND DESTINATIONS. PERSONAL VEHICLE USAGE IS THEIR SAVIOUR!

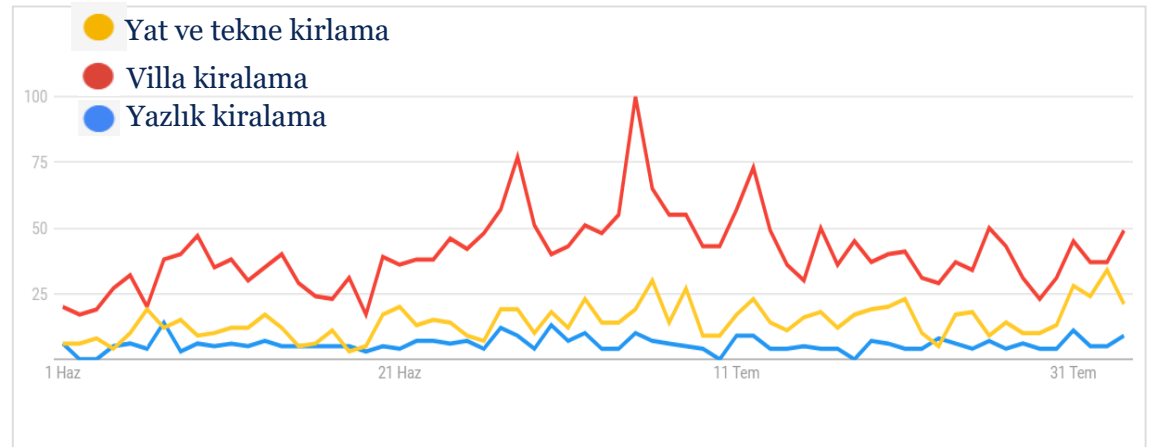
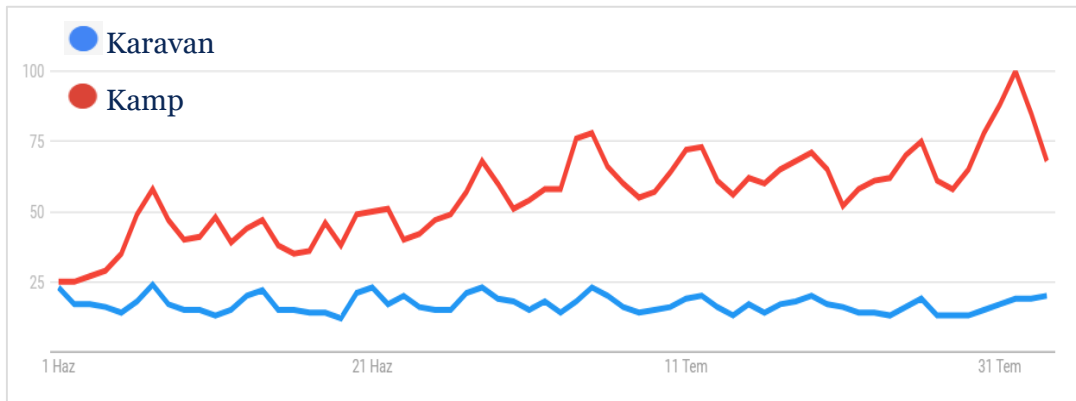


ALTHOUGH HOTELS ARE STILL DOMINANT AMONG THE HOLIDAY OPTIONS, THE DECLINE COMPARED TO LAST YEAR IS REMARKABLE. ON THE OTHER HAND, THERE IS AN INCREASE IN THE MENTIONS OF CARAVAN-CAMP, YACHT RENTAL, VILLA RENTAL



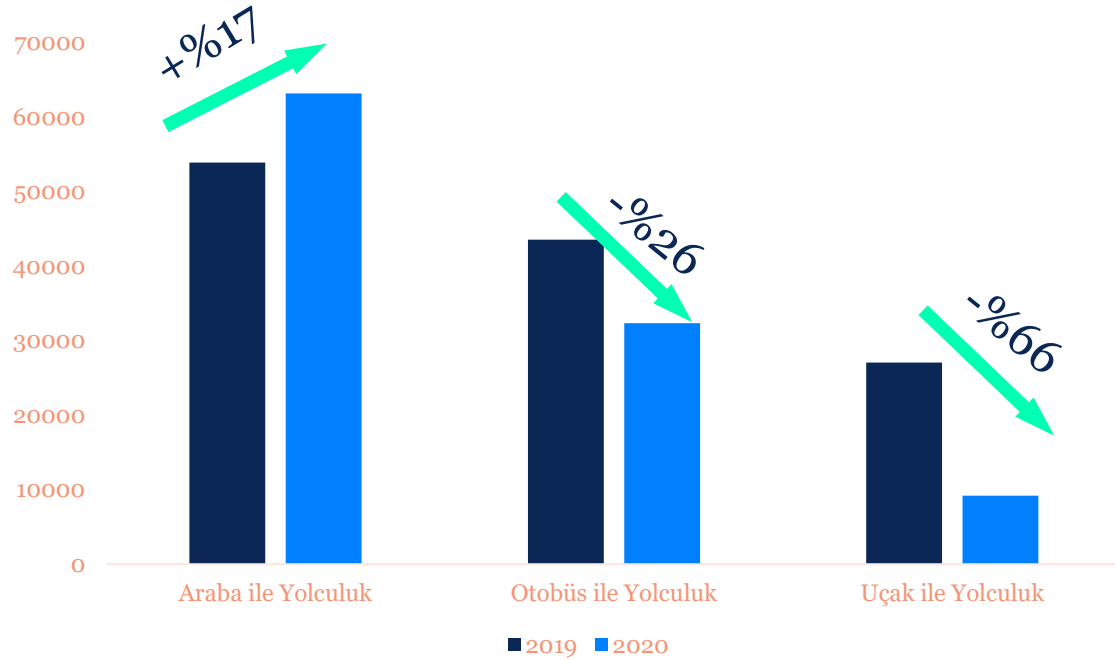
At the beginning of the summer, increasing in searching of caravan-camping, yacht rental and villa rental come to the fore.

It can be said that with this normalization period, the concept of «isolated holiday» concept has entered our lives. There is a conspicuous increasing in isolated vacation mentions.

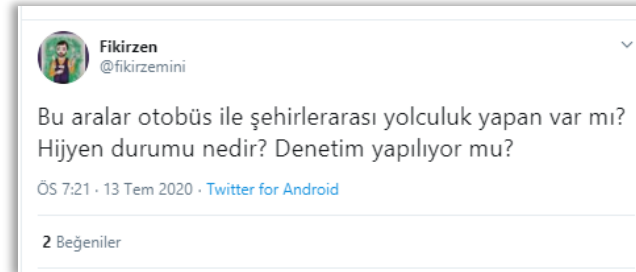


Source: Brandwatch

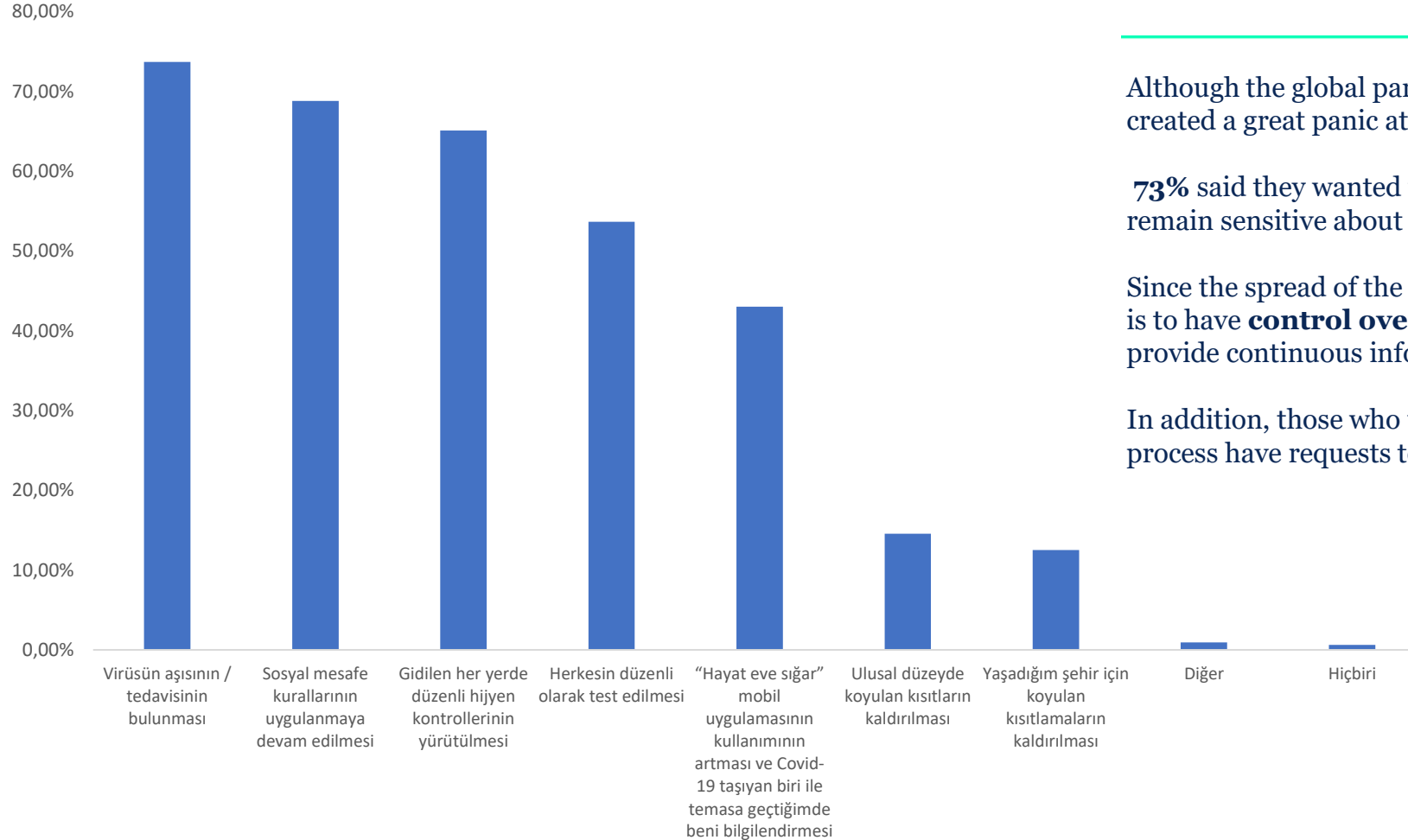
WHEN WE ANALYSE THE TRAVEL TRANSPORTATION PREFERENCES, IT IS SEEN THAT THE TRAVEL BY CAR HAS INCREASED COMPARED TO 2019. TRAVELING BY BUS AND TRAVELING BY PLANE MENTIONS DECREASED COMPARED TO 2019



Hygiene and safeness concerns are two important reasons behind this.



«WHILE THERE IS LIFE, THERE IS HOPE» -STEPHEN HAWKING



Having control over something makes people feel safe

Although the global pandemic has influenced the whole world and has created a great panic atmosphere, people's hopes are not exhausted.

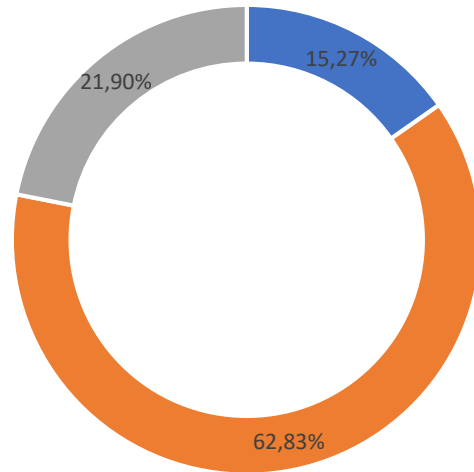
73% said they wanted the vaccine to be found in order to feel safe; **68%** remain sensitive about following social distance rules.

Since the spread of the virus cannot be controlled, people's main motivation is to have **control over something**. For this reason, the state is asked to provide continuous information about the current situation.

In addition, those who want to start socializing during the normalization process have requests to make sure that their places are regularly disinfected.

4. COVID-19'S IMPACT ON PURCHASE PATTERNS

DUE TO CHANGING AND INCREASINGLY UNCERTAIN ECONOMIC CONDITIONS, IT IS SEEN THAT PEOPLE'S FUTURE ANXIETY INCREASES AND THEY TEND TO SAVE MONEY MORE THAN BEFORE

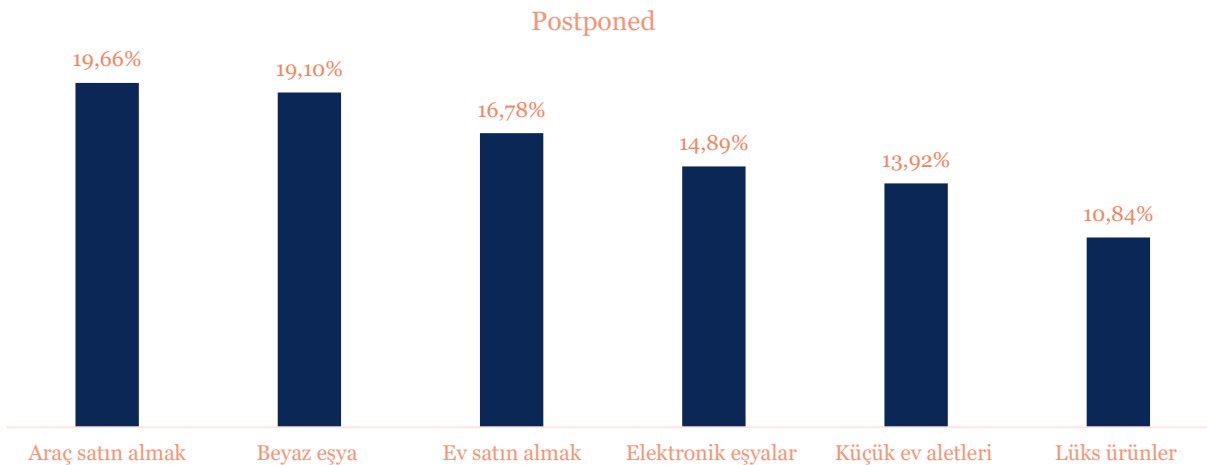
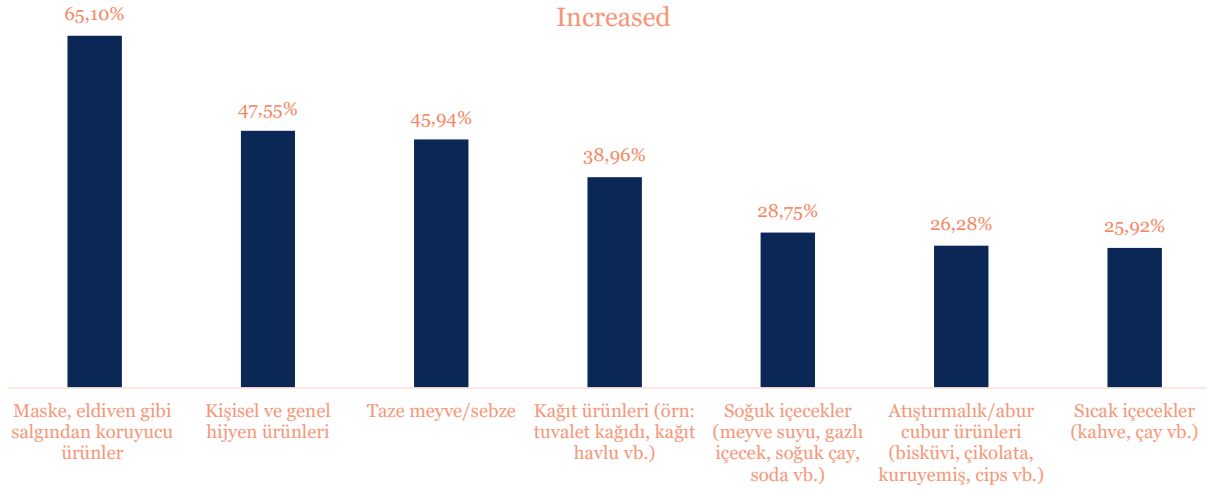


- Gelecek hakkında düşünmek yerine paramı harcamaya daha meyilliyim, çünkü gelecek oldukça belirsiz
- Hem paramın bir kısmını harcayarak hem de geleceği düşünerek hareket ederek şu anda bir denge oturtmaya çalışıyorum
- Para biriktirerek ve kendimi olabildiğince kısıtlayarak geleceğe yönelik hareket ediyorum, kendimi güvence altına almaya çalışıyorum

🔍 Regarding home economy, women's sensitivity comes to the fore in investing in the future without reducing their living standards. **(67%)**

While people want to save money due to changing economic orders and try not to affect their living standards, the age group who is willing to make the most concessions is the **Y generation**.

BIG PURCHASES ARE STILL BEING POSTPONED, CONSUMERS WANT TO SEE THE LIGHT BEFORE GOING FOR BOLD DECISIONS.

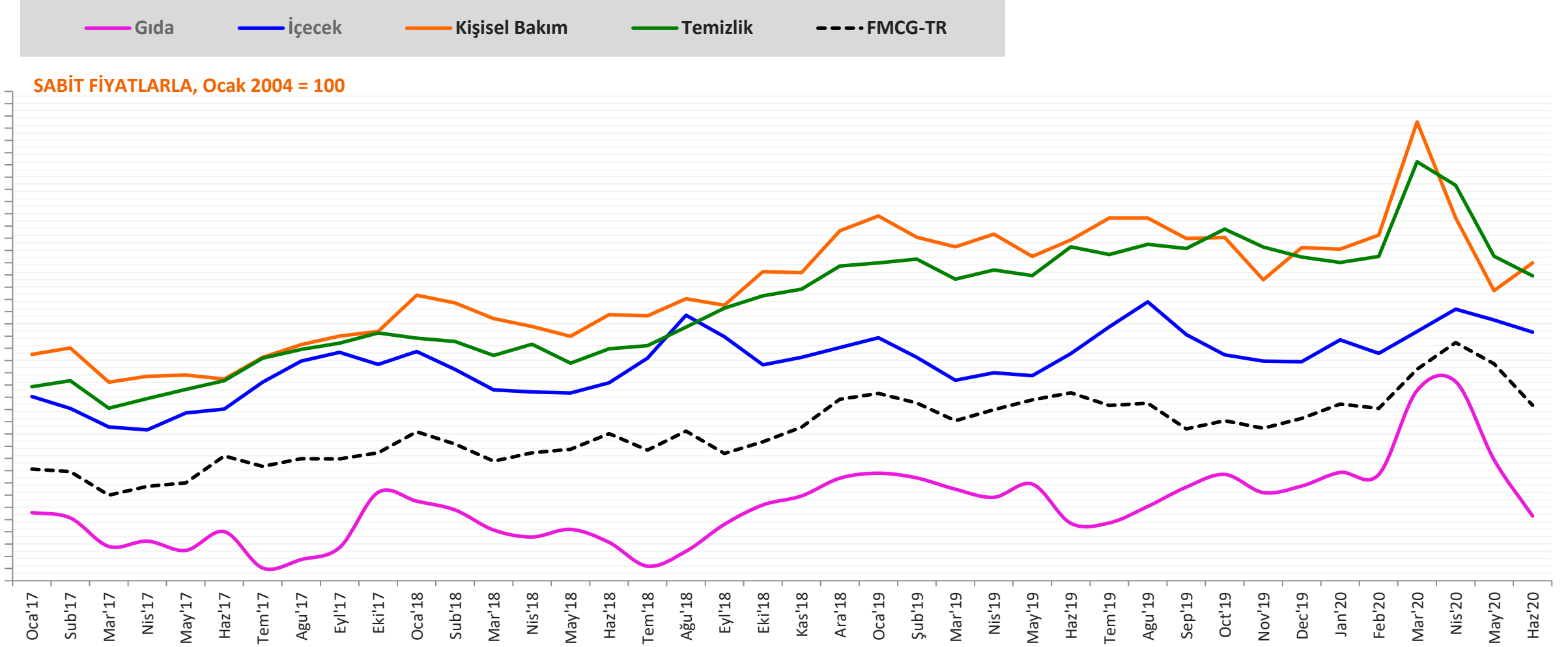


Essentials, snacking and personal & general hygiene categories are still on top. With the arrival of new normal and socialising, consumption of masks remains.

Hygiene is now a part of our daily life.

Most decreased category is clothing which may indicate the trend of «less is more» is settled down. (%31).

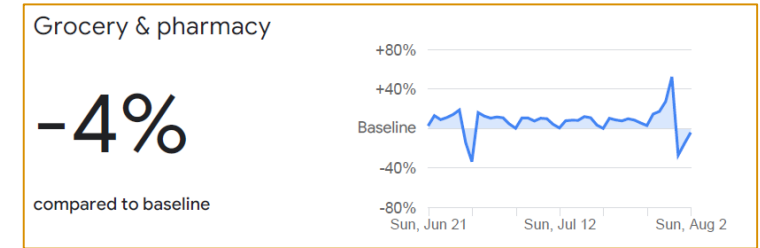
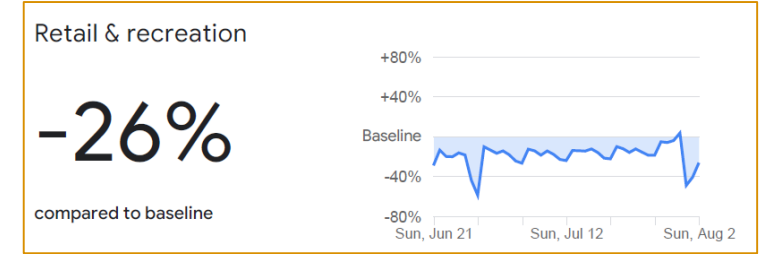
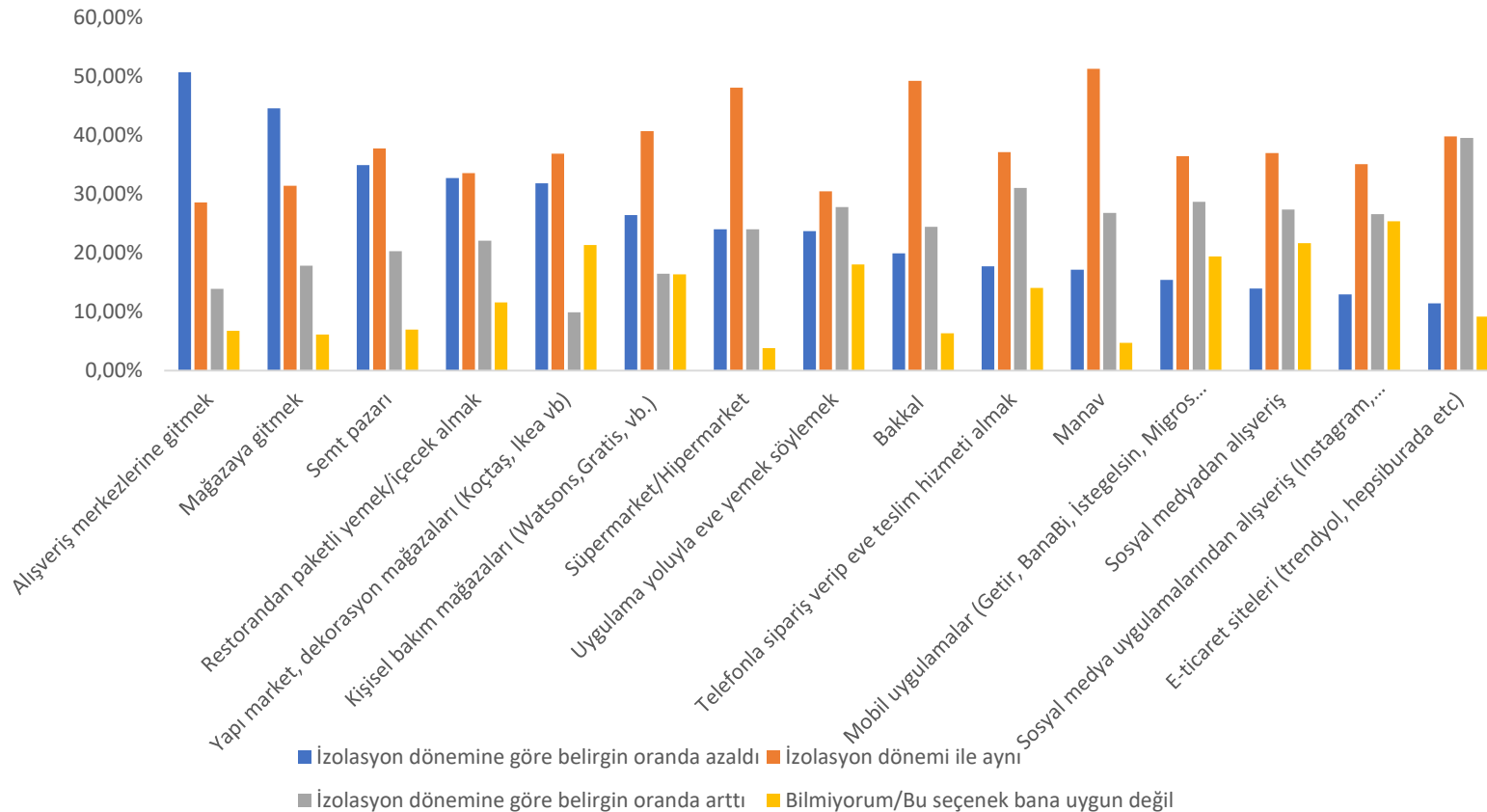
MAIN CATEGORIES HOUSEHOLD INDEX MONTHLY



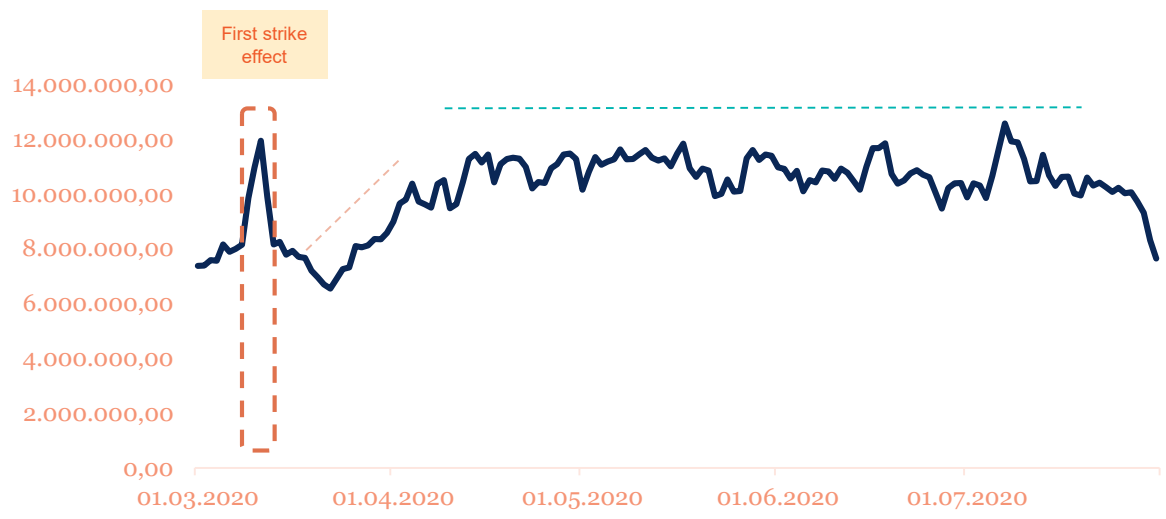
E-COMMERCE SITES ARE ON THE RISE

Those who realized the usefulness of the online world during the isolation period continue to prefer it after the isolation.

While going to shopping centers decreased by 50%, going to shops decreased by 44%; Ordering food through apps increased by 27%, and preferring e-commerce sites increased by 40%.

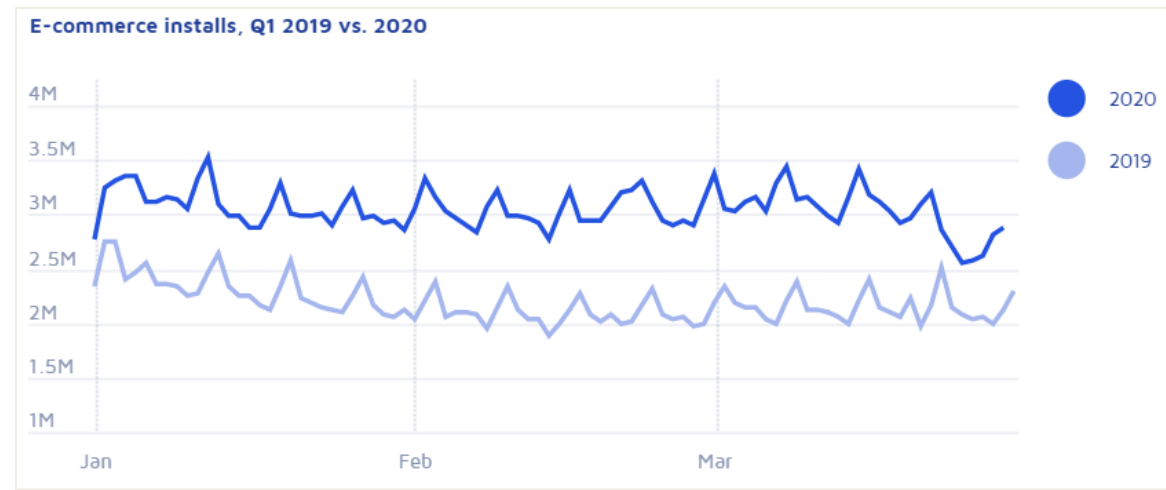


E-COMMERCE SITE VISITS, WHICH INCREASED WITH THE PANDEMIC PROCESS, CONTINUED IN THE SAME WAY IN THE QUARANTINE AND THE NEW NORMAL PERIOD.



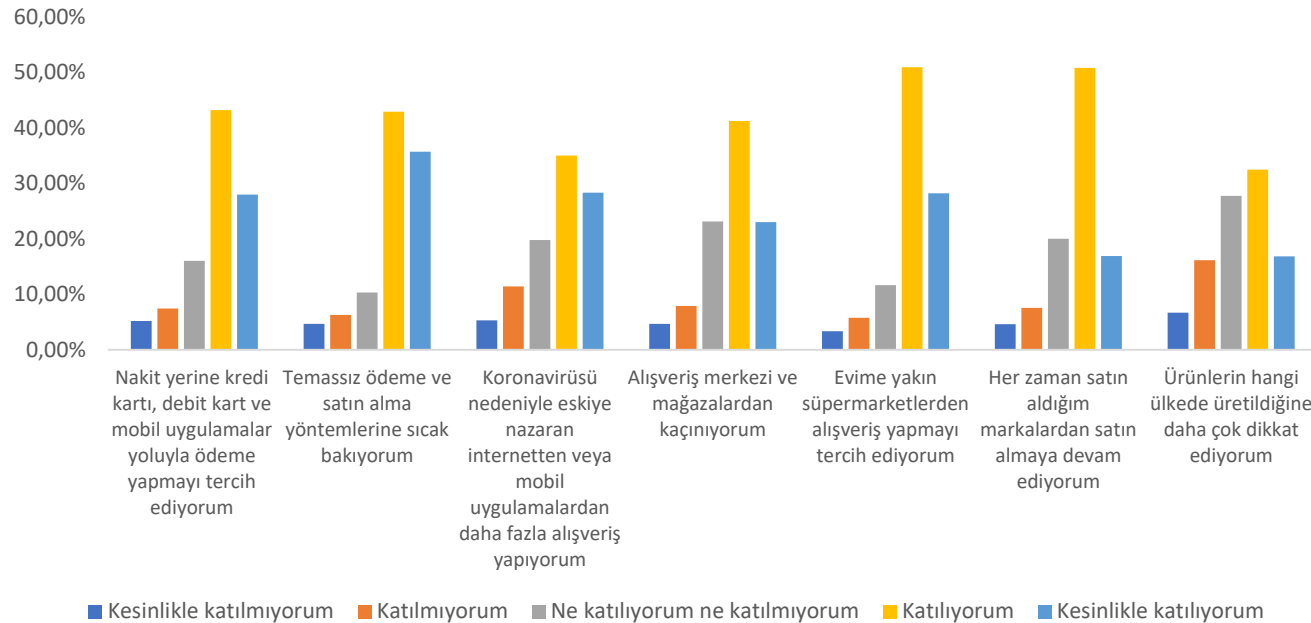
Installs have been trending below the established baseline for 2020, down 12% week-on-week.

With people at home and longer wait times for online orders becoming more prevalent, users may be turning to other pastimes to keep themselves busy and have less need to shop.



SOURCE: Similarweb
SOURCE: Adjust – App Trends 2020 Report

ADDITION TO E-COMMERCE, CONTACTLESS PAYMENT METHODS ARE SUPPORTED AS WELL



Would the online appointment system change the minds of those who avoid shopping malls?

%39 Would greatly change

%36 It would change to a certain extent.

%17 It wouldn't change my mind.

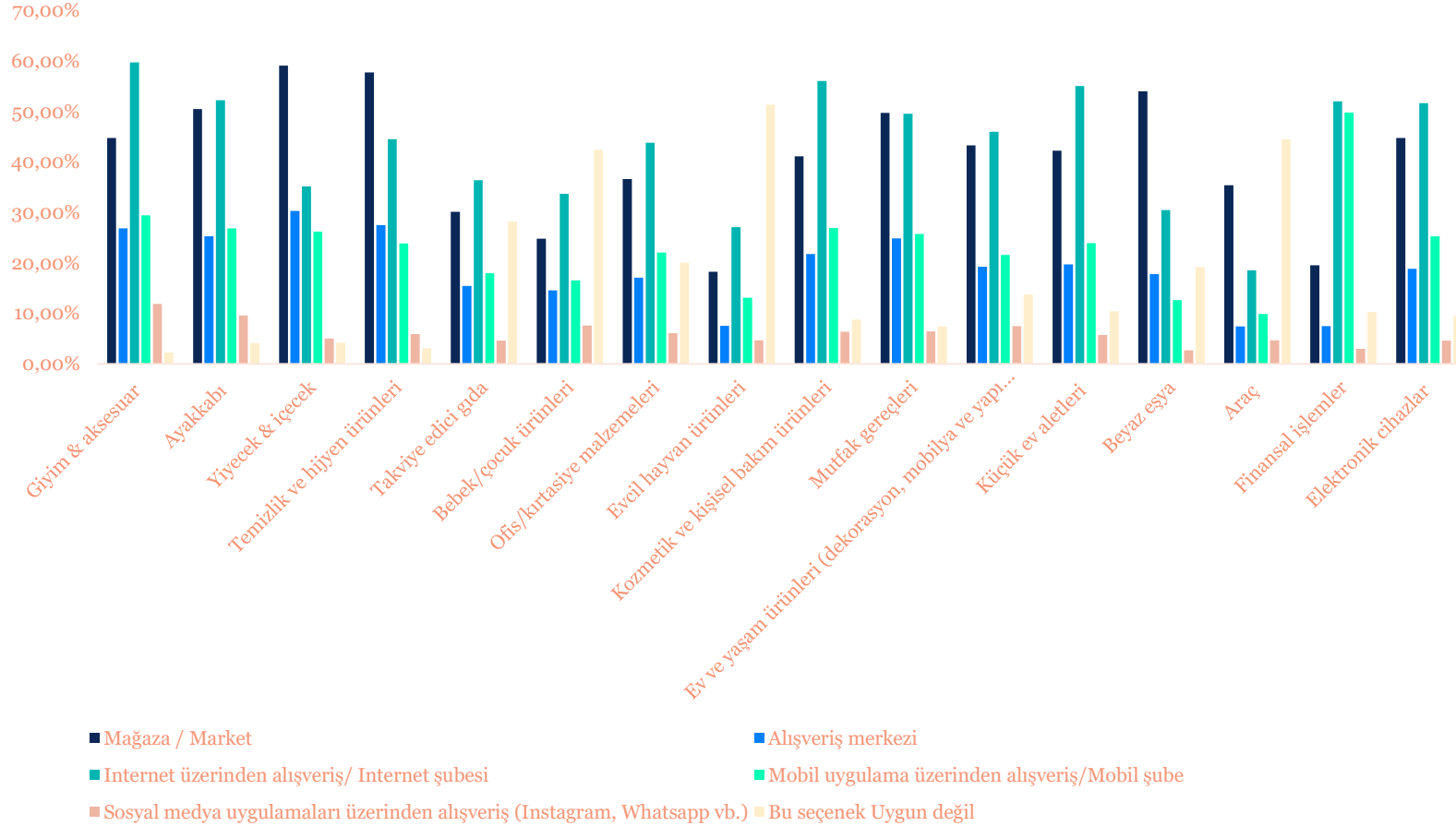
%9 I have no idea.

Not spending is a priority, and measures should be taken if necessary

Due to changing and increasingly uncertain economic conditions, it is seen that people's future anxiety increases and they tend to save money more than before.

However, decreasing social contact is a priority in purchases made for needs. Therefore, the perspective of e-commerce sites and contactless payment methods changes positively.

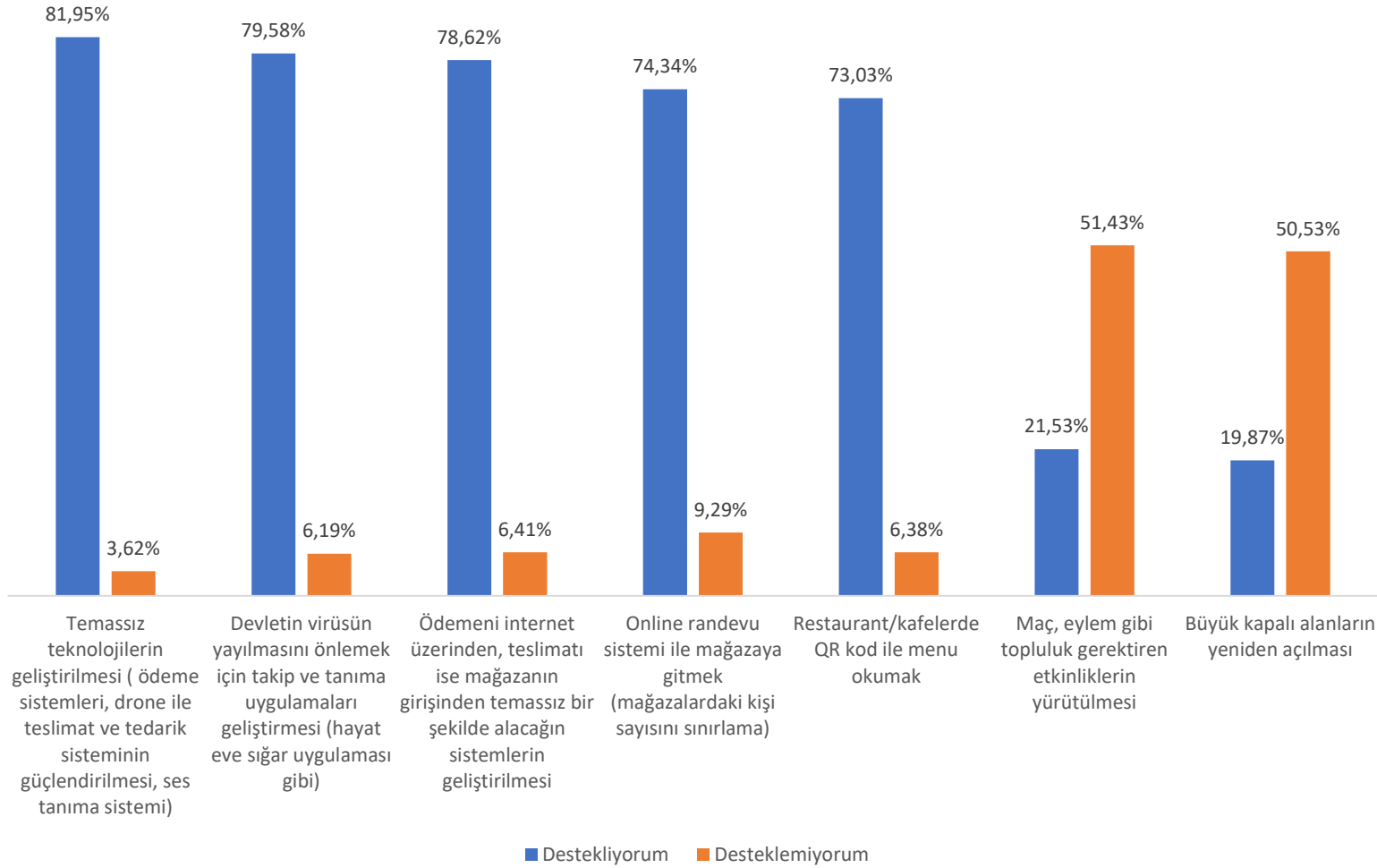
IF E-COMMERCE IS AVAILABLE, STORES ARE NOT PREFERRED



During the quarantine period, when the needs can be obtained from e-commerce sites, this situation has created a habit and the preference of e-commerce sites has increased.

However, products that need to be tried in order to buy them, such as large household items, cars, continue to be purchased from stores rather than e-commerce sites.

NEW NORMAL, NEW WAYS



With the **implementation of new technologies**, such unprepared situations are expected to be better managed.

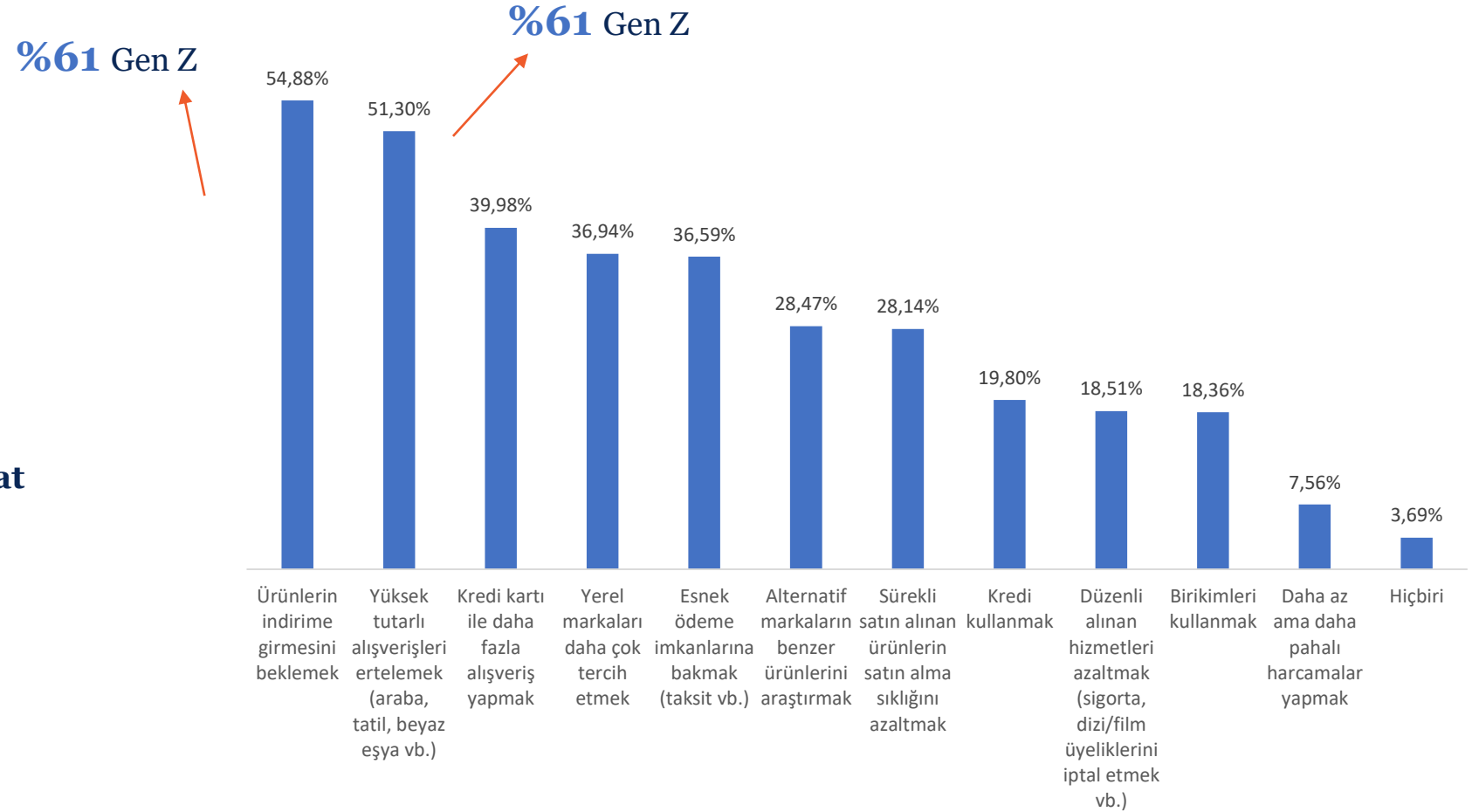
For example, in the case of a disease that can be transmitted through one-to-one contact, **contactless / delivery and payment methods** are one of the options that will **not reduce the frequency of consumption** but will give more confidence.

While 80% supports the development of contactless delivery options and their adaptation to more life, %50 doesn't support the opening of closed areas.

ECONOMIC UNCERTAINTY AND ANXIETY AFFECTED THE Z GENERATION AS WELL. PRIORITIZATIONS HAVE BEEN CHANGED AND IT CAN BE SAID THAT THE TENDENCY TO BE SMART SHOPPERS HAS INCREASED.

With the economic uncertainty brought about by the pandemic, those who want to save and regulate their spending are waiting for discounts by determining their needs rather than collective shopping and delaying high-value shopping.

This situation requires taking financial responsibility. We see that the Z generation emerged consciously from this period and 61% of them did more planned shopping.

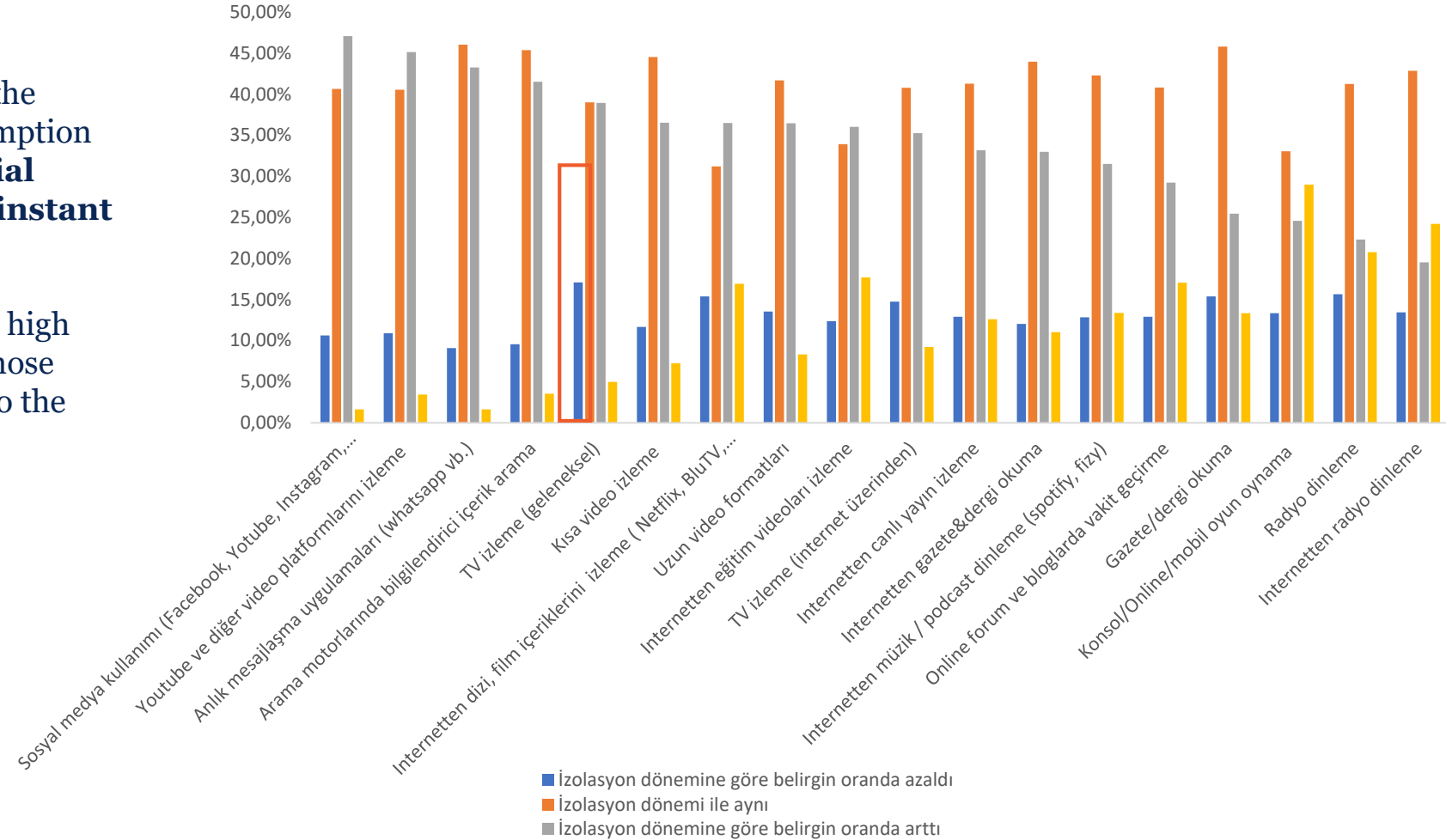


5. MEDIA & CONTENT

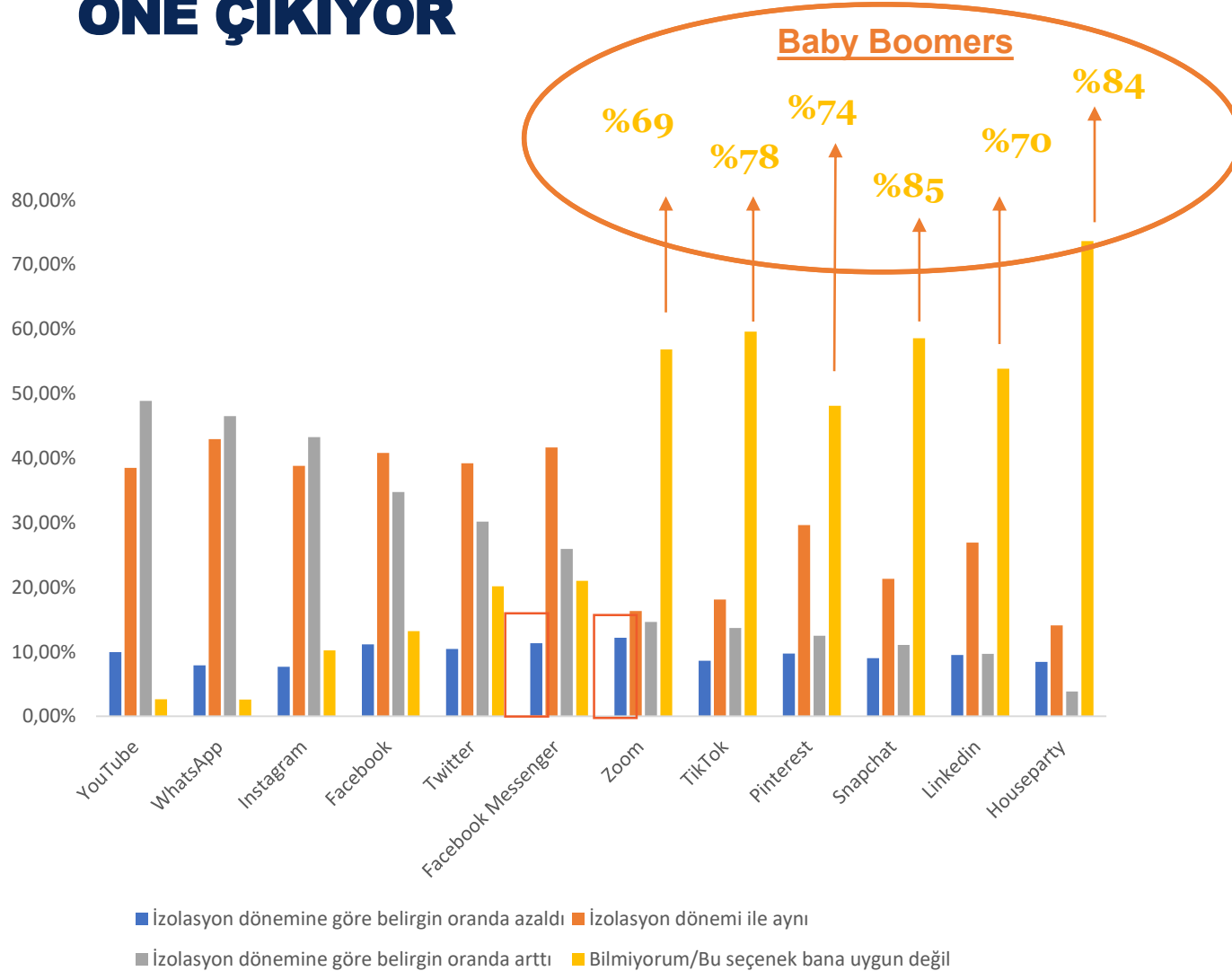
SOCIAL MEDIA CONSUMPTION CONTINUES WITHOUT SLOWING DOWN

In gradual socialization, the channels with the highest increase in the rate of media consumption compared to the previous period were: **social media (47%)**, **video platforms (45%)**, **instant messaging applications (43%)**.

Since the content consumption rate is quite high during the isolation period, there are also those who say that there is no change compared to the isolation period.



SOSYAL MECRALAR KARANTINA DÖNEMİNDEKİ İSTIKRARINI KORUMAKLA BİRLİKTE, YOUTUBE EN FAZLA ARTAN MECRA OLARAK ÖNE ÇIKIYOR



When the channels are examined specifically, the most increase occurred in **Youtube. (48%)**.

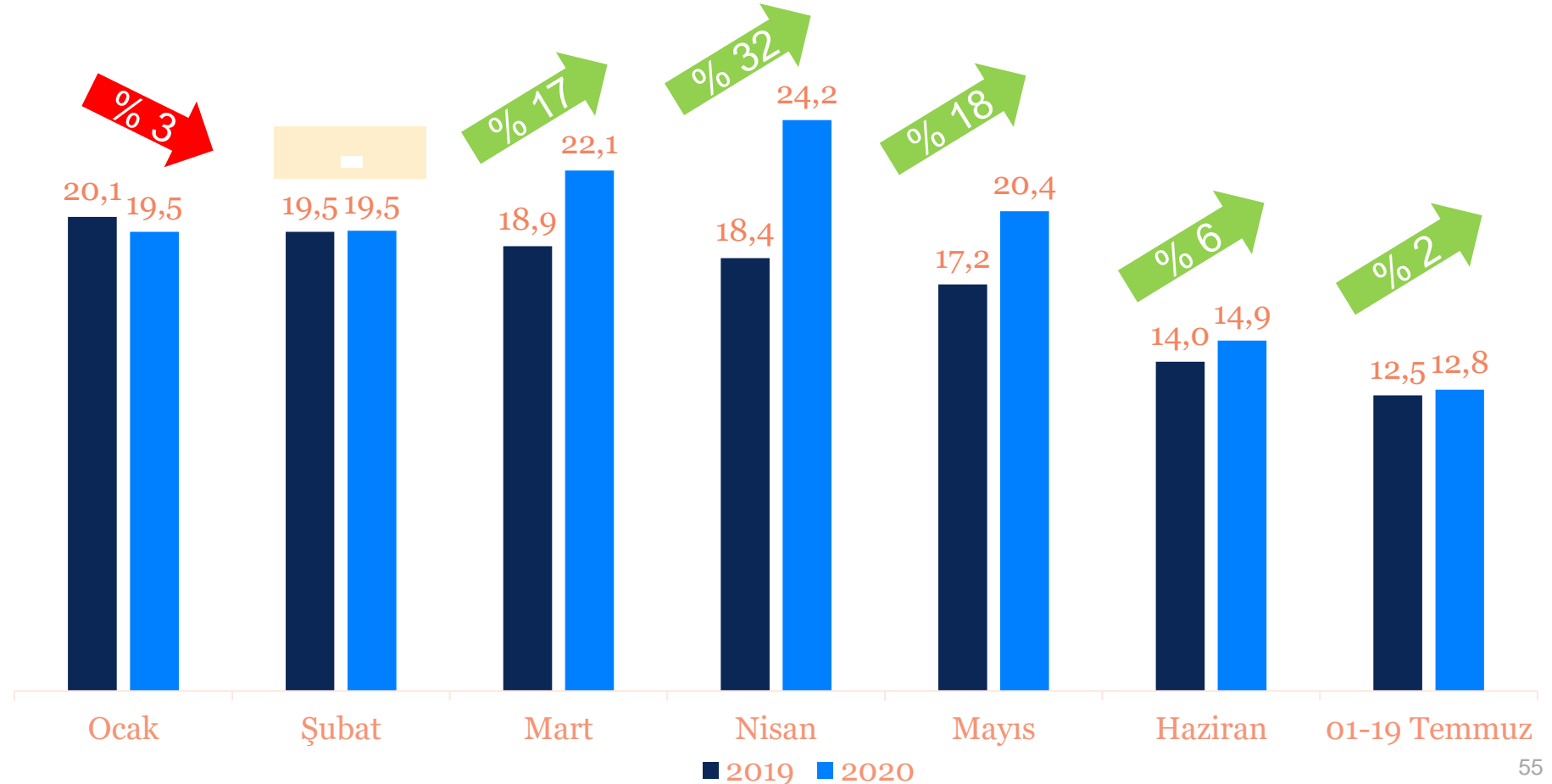
It is seen that the consumption of **Facebook** of Baby Boomers increased by 42%.

Zoom is used by young audiences as it is used a lot for academic reasons and meetings.

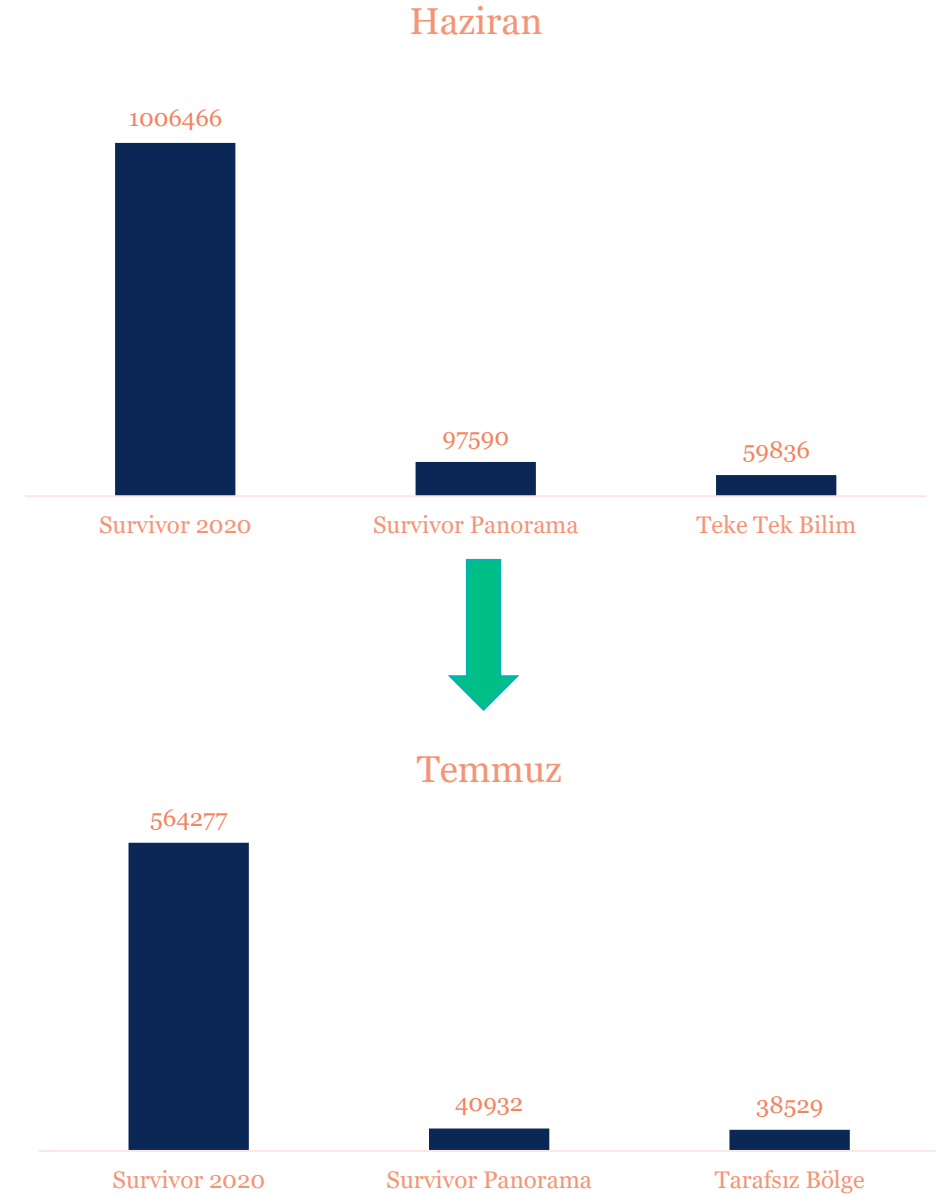
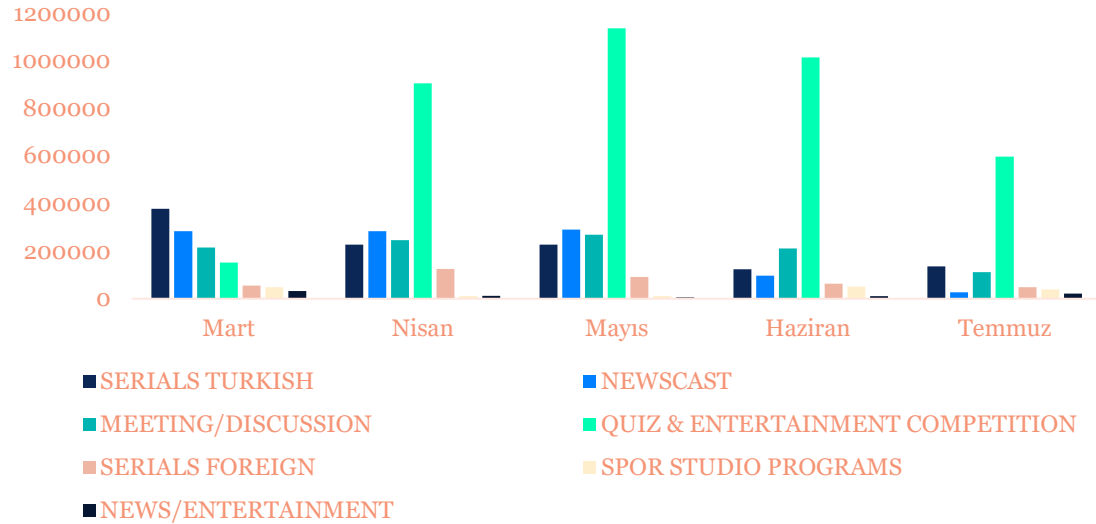
EVEN THERE'S A DECREASE WITH THE SEASONAL EFFECT, TV VIEWING IS STILL HIGHER COMPARED TO LAST YEAR.

TVR

Average daily TV viewing time is 5 hours.

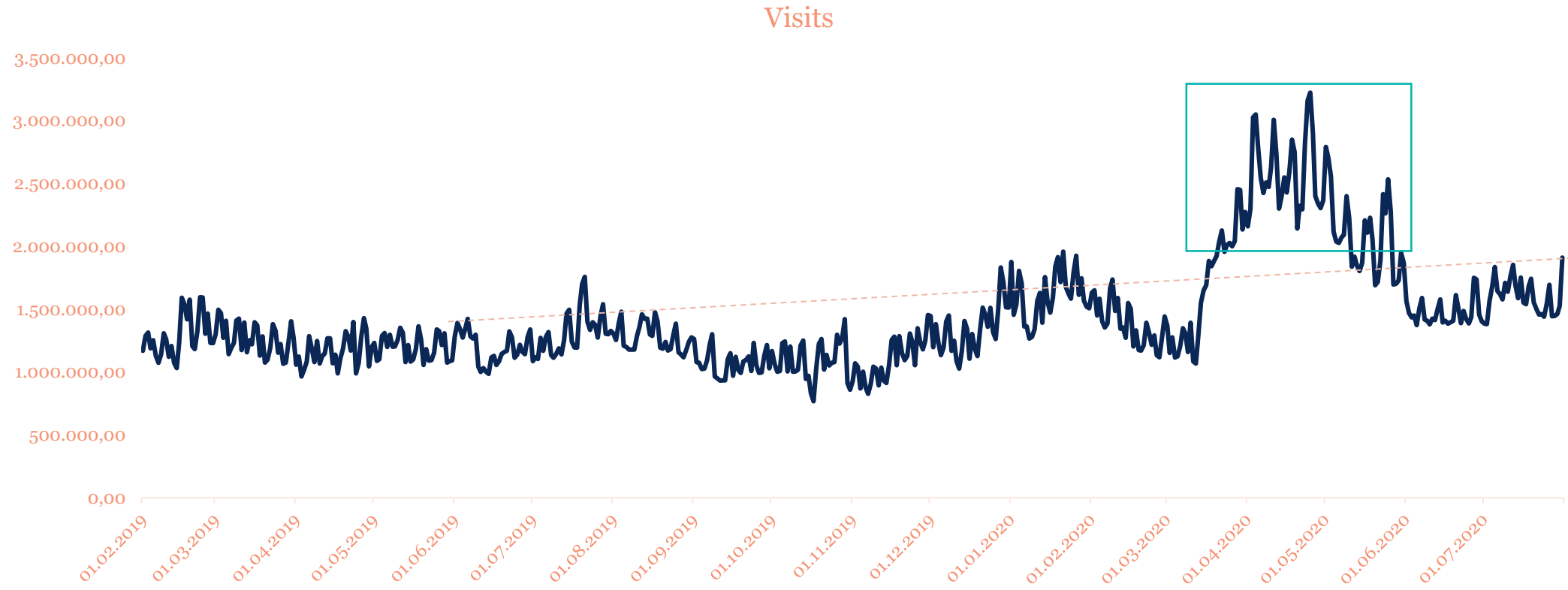


QUIZ AND ENTERTAINMENT COMPETITIONS ARE STILL MOST MENTIONED PROGRAMMES



Source: InstarSocial

THE SAME SITUATION IS SEEN ON VOD PLATFORMS AS WELL. THERE IS A DECREASE COMPARED TO LAST YEAR.



Source: Similarweb (Netflix, PuhuTV, BluTV)

TURKEY TOP 20 APPS IN AUGUST

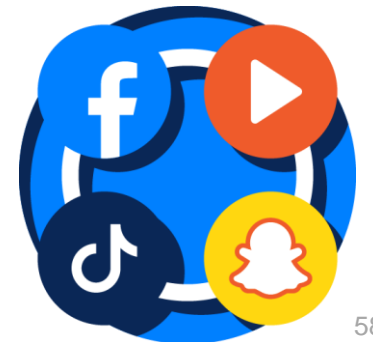
1	Hayat Eve Sığar
2	WhatsApp Messenger
3	Instagram
4	YouTube: Watch, Listen, Stream
5	Algida ile Kazan
6	TikTok - Make Your Day
7	Facebook
8	Google Maps - Transit & Food
9	Trendyol - Alışveriş & Moda
10	e-Nabız
11	Messenger
12	sahibinden.com: Al,Sat,Kirala
13	e-Devlet
14	Followers+ for Instagram App
15	Dijital Operatör
16	Twitter
17	Türk Telekom Online İşlemler
18	MARTI
19	letgo: Sell & Buy Used Stuff
20	Snapchat































Looking at the app ranking numbers in August «Hayat Eve Sığar» app has the highest rank.

After quarantine period especially in summertime with vacationing, consumers need to use HES app for travel

After HES, for socializing and communication need social media apps coming.



TOP APPS WORLDWIDE DOWNLOADS

Overall Downloads	App Store Downloads	Google Play Downloads
1  TikTok	1  ZOOM	1  TikTok
2  ZOOM	2  TikTok	2  WhatsApp
3  WhatsApp	3  YouTube	3  ZOOM
4  Facebook	4  Facebook	4  Facebook
5  Messenger	5  Google Meet	5  Messenger
6  Instagram	6  Instagram	6  Instagram
7  Google Meet	7  Messenger	7  Aarogya Setu
8  Aarogya Setu	8  WhatsApp	8  Google Meet
9  YouTube	9  Gmail	9  Snapchat
10  Snapchat	10  Microsoft Teams	10  SHAREit

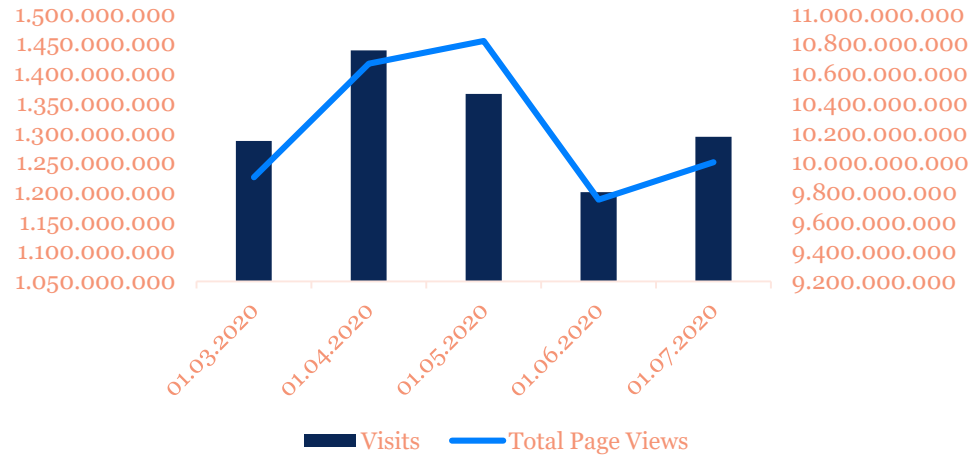
TikTok was the most downloaded non-gaming app worldwide for July 2020 with more than 65.2 million installs, which represented a 21.4 percent increase from July 2019. The countries with the most installs of the app during this period were the United States at 9.7 percent of its total downloads and Indonesia at 8.5 percent. The full top 10 ranking of non-gaming apps worldwide by downloads for July 2020 is above. App download estimates are from Sensor Tower's Store Intelligence platform.

Facebook was the second most installed non-gaming app worldwide last month with more than 53.6 million installs. The countries with the largest number of Facebook installs were India at 23.1 percent, followed by Indonesia at 9.1 percent. ZOOM, Instagram, and WhatsApp rounded out the top five most installed non-gaming apps worldwide for the month.

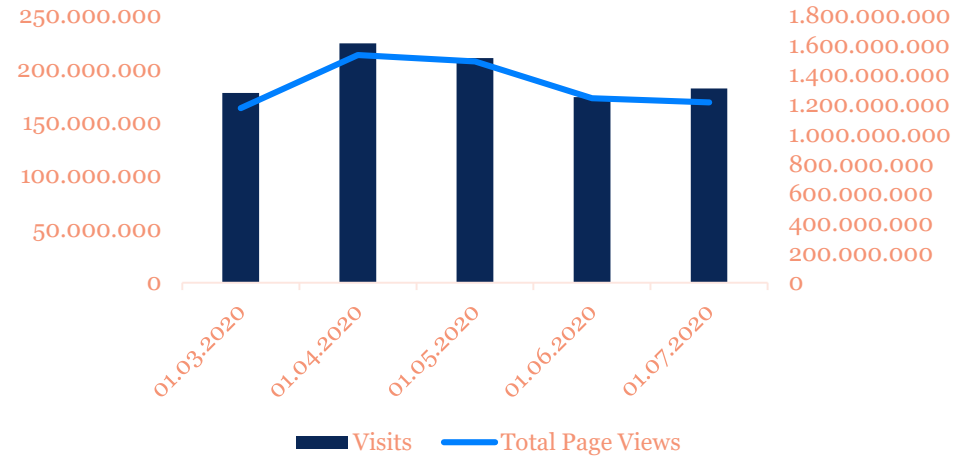
Following TikTok's ban from India's App Store and Google Play on June 29, Snack Video climbed to the top 10 non-gaming apps for the first time ever, ranking No. 8 above fellow video-sharing app Likee. Snack Video generated about 28.8 million installs in July, over 3.5 times the 7.8 million it saw the month before.

IN NEW NORMAL WHILE VISITS FALL IN ARTS & ENTERTAINMENT AND HOBBIES & LEISURE CATEGORIES, GAMES AND HOME & GARDEN CATEGORY VISITS INCREASING

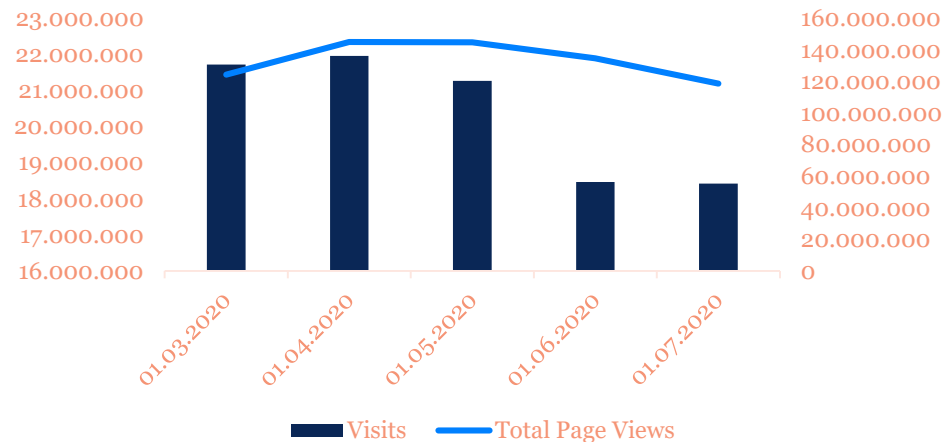
Arts & Entertainment Category



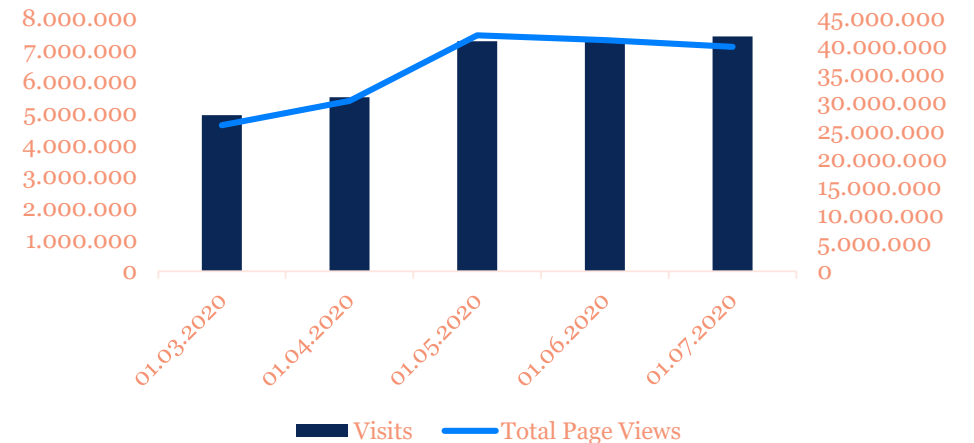
Games



Hobbies & Leisure

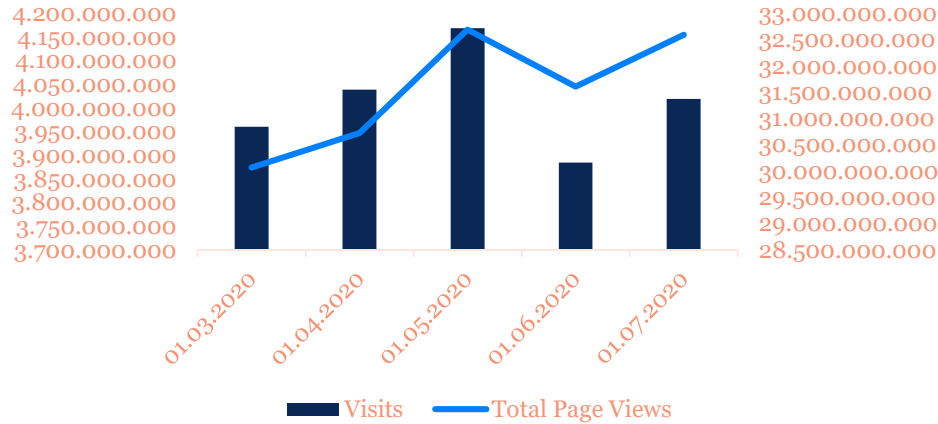


Home & Garden

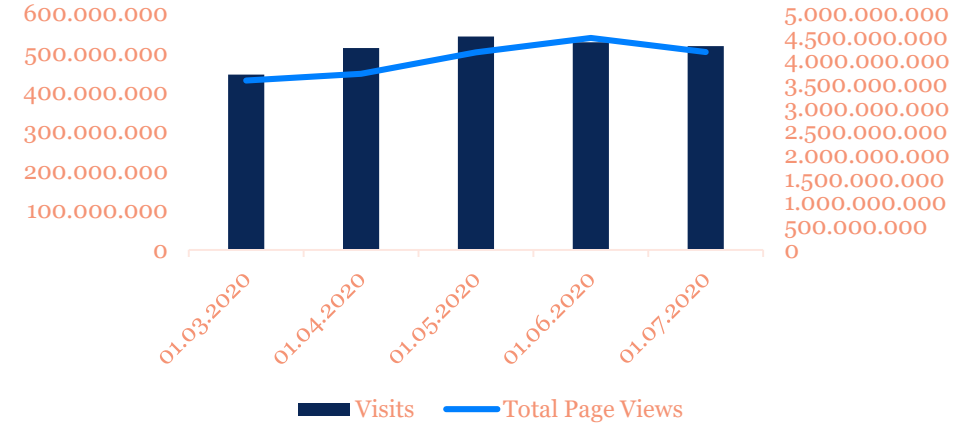


CONSUMER VISITS TO FINANCE AND FOOD & DRINK ARE INCREASING WHILE TECHNOLOGY DECREASES. E-COM STAYS EVEN WITH MINOR FLUCTUATION

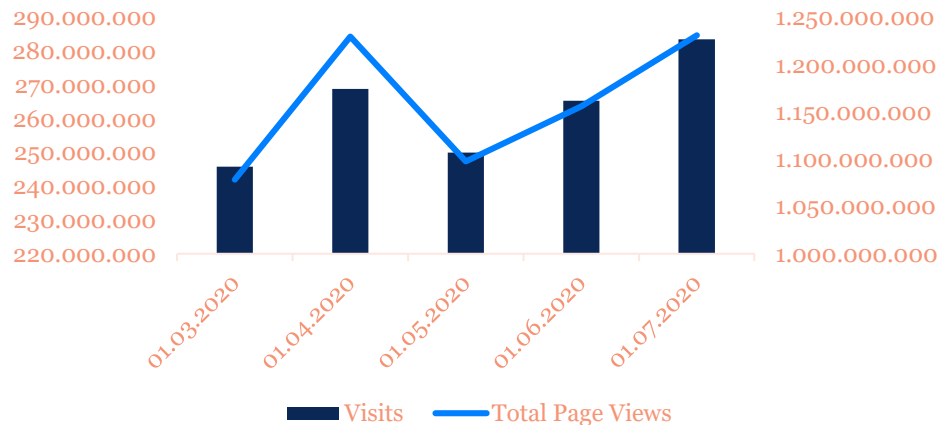
Technology



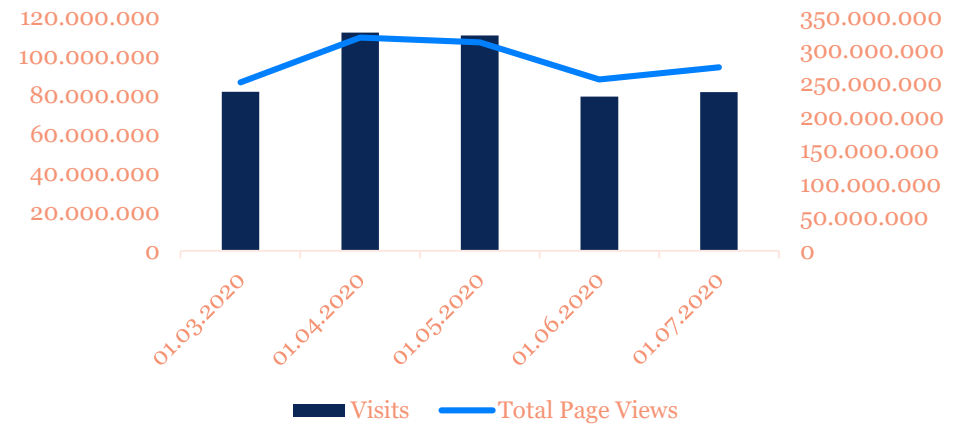
E-commerce & Shopping



Finance

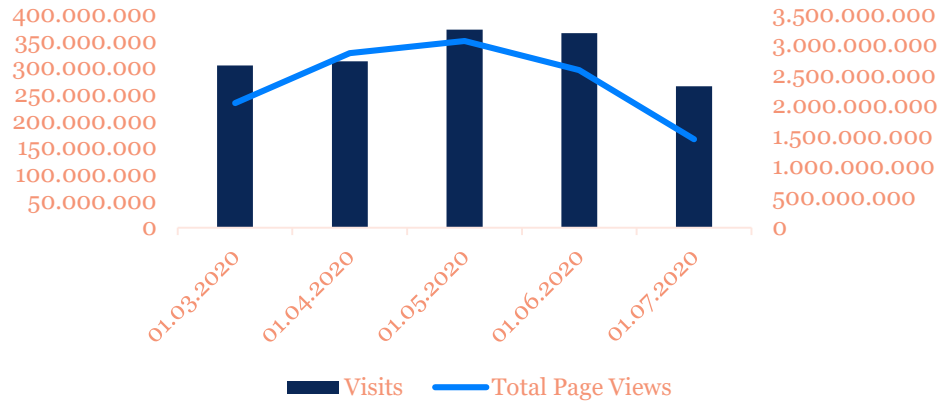


Food & Drink

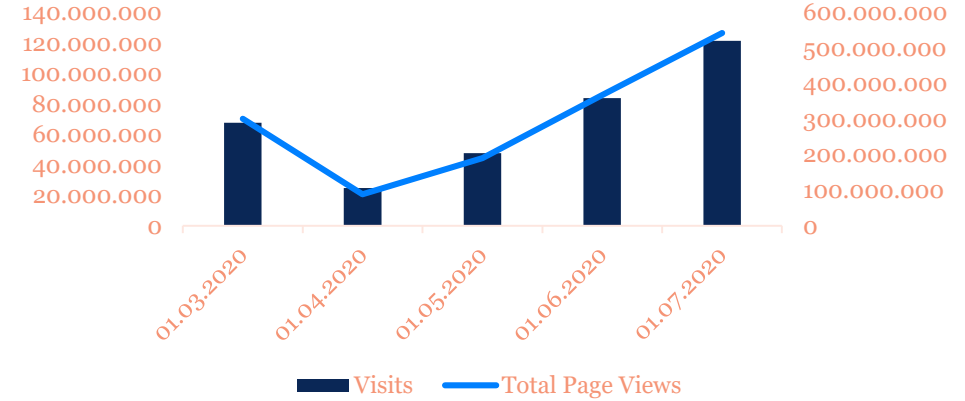


AFTER SCHOOLS HAS CLOSED EDUCATION CATEGORY VISITS START TO DECREASE WHILE SPORTS AND TRAVEL CATEGORY VISITS INCREASING. AS AUTOMOTIVE CONTINUES STABLE

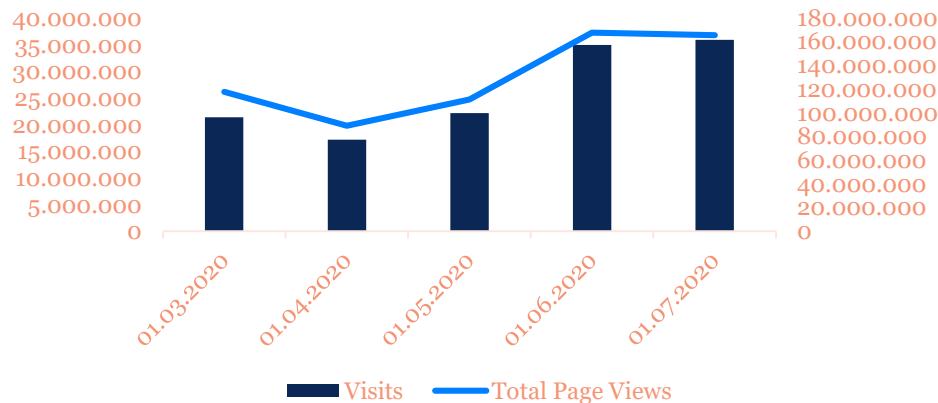
Science & Education



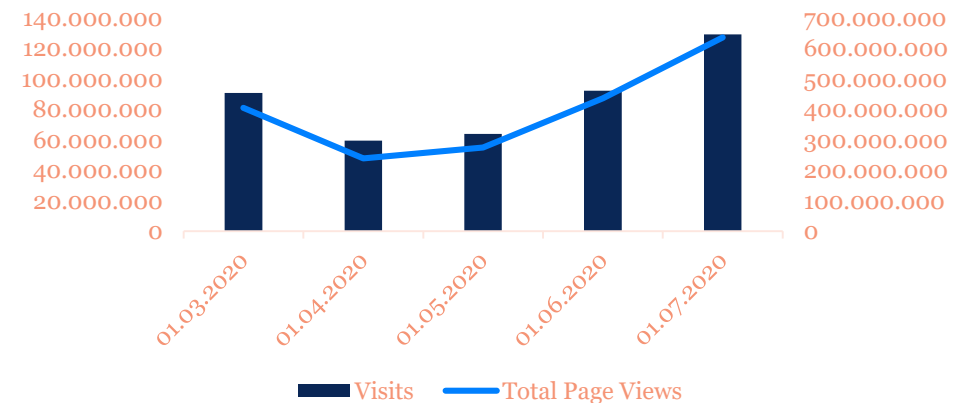
Travel & Tourism



Vehicles / Automotive



Sports



CONSUMERS ARE MORE LIKELY TO WATCH AT HOME RATHER THAN A THEATER

Beyond any doubt cinema industry is one the sectors negatively affected. Not just because consumers have still doubts on going theatres and watch a movie but also consumers get used to comfort and like it.

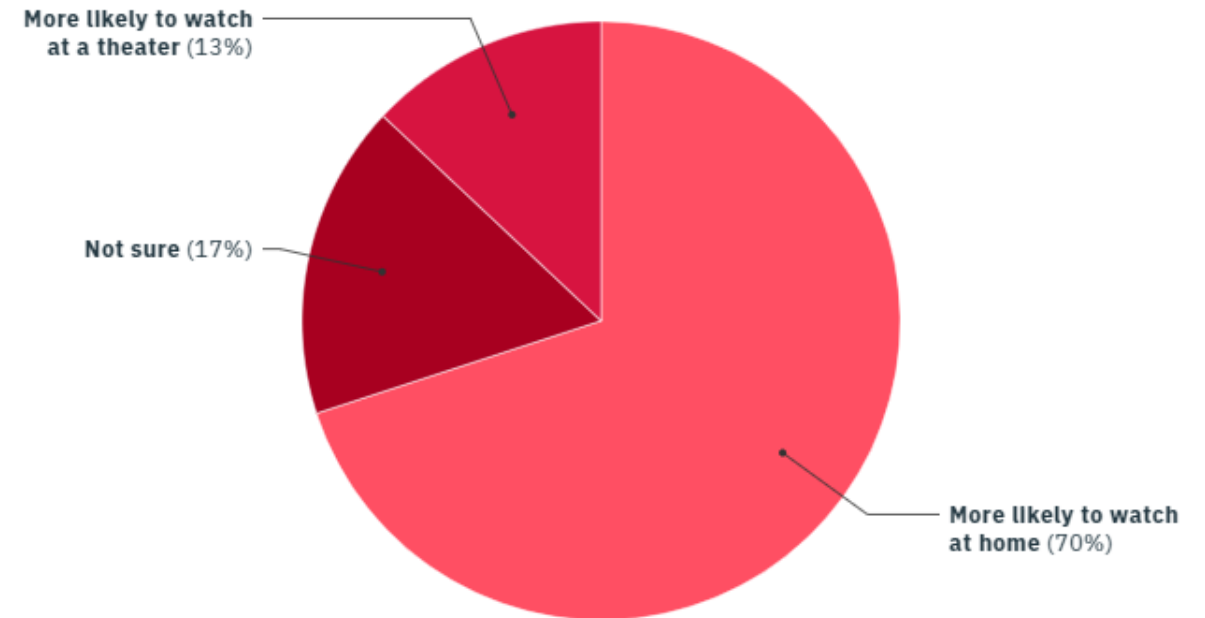
In America, a survey conducted by Performance Research showed that **%70 of people** are more likely to watch at home.

This situation affects the producers as well. Christopher Nolan who insisted on releasing «**Tenet**» on July had to cancel 2 times.

Cinema Hall Investors Association president İrfan Demirkol stated that 100-150 cinema hall can be shot down.

In Turkey, **Box Office Turkey** stated that **normalisation** can take **more than 6 months**.

If costs are roughly the same, would you prefer to see a firstrun movie you're excited about as a digital rental at home or in a movie theater – if both were available at the same time?

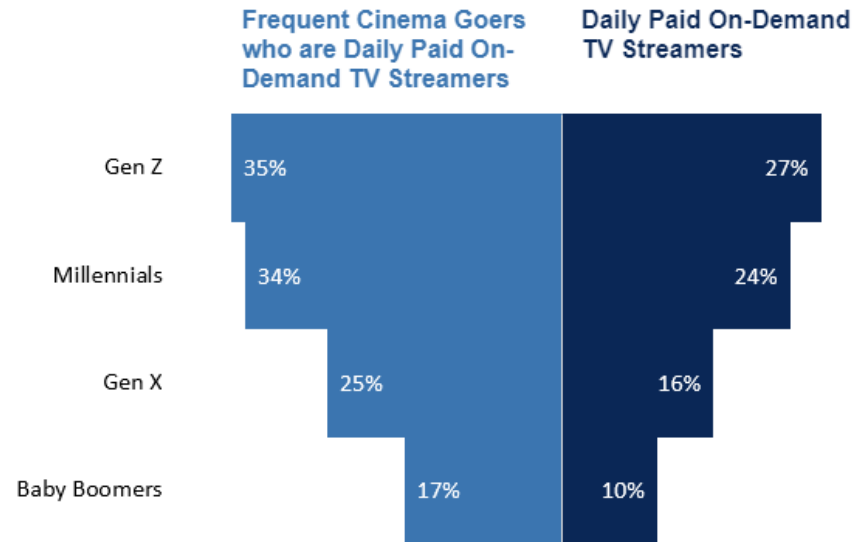


FOR MORE DATA, VISIT [VIP+](#)

CINEMA GOERS (+11 TIMES PER YEAR) WERE MORE LIKELY TO BE DAILY USERS OF ON DEMAND FILM AND TV SERVICES

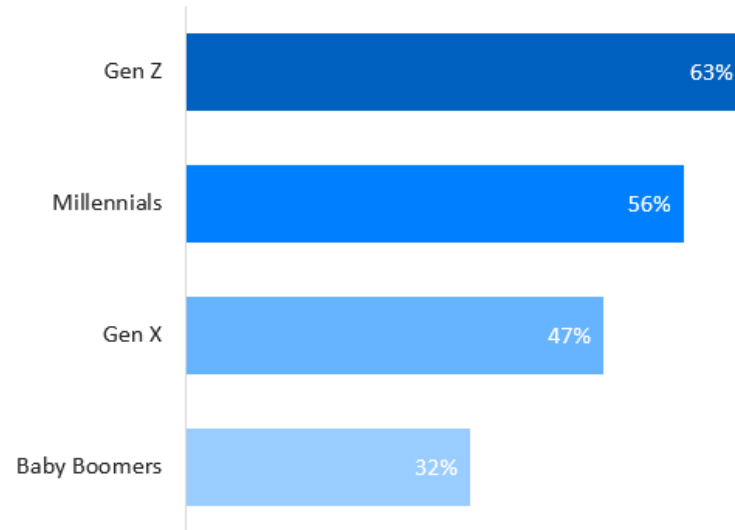
Pre-COVID-19

Daily on-demand streamers



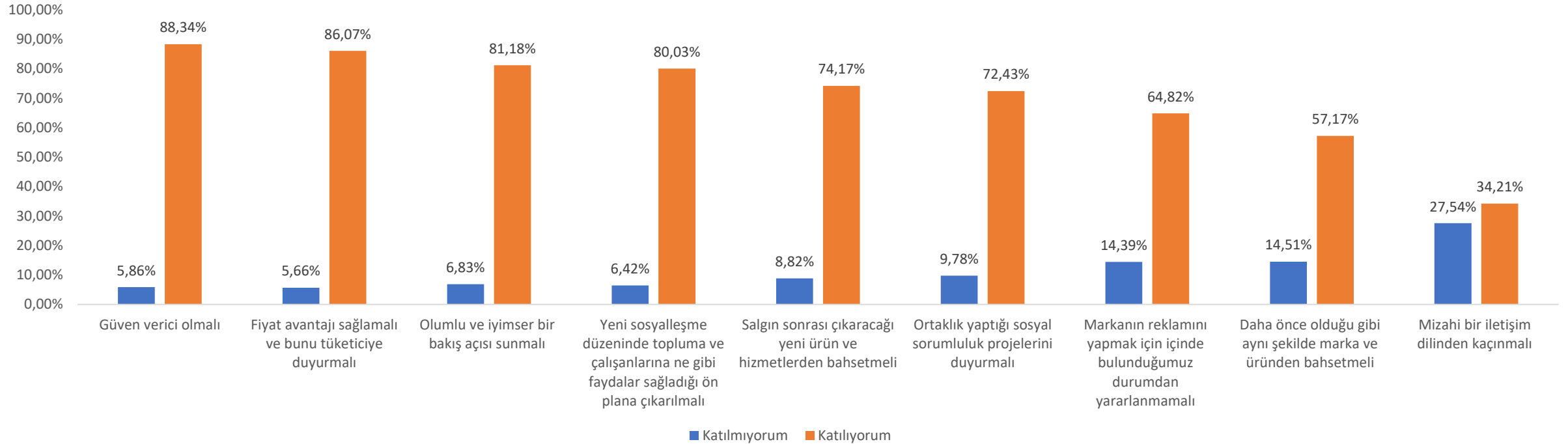
Post-COVID-19

Watching more shows / films on streaming services because of coronavirus



6. THE ROLE OF BRAND & KEY TOPICS

OPTIMISM AT IT'S BEST



In the new normal, brands are expected to use a more reassuring communication language. At the same time, with the distrust brought by the changing economic conditions, discounts and campaigns to be made by brands to their customers are also expected.

As a psychologically hurtful period is over, the optimistic and humorous campaigns of the brands are welcomed positively by people.

IMPORTANT THEMES FOR CONSUMERS AND BRANDS

Consumer behaviors are settling into a new normal, as people everywhere learn to live with the reality of COVID-19 and as more countries reopen parts of their economies. Although the pandemic's impact has varied across regions, five themes have become evident among consumers across the globe:

Shift to value and essentials

Flight to digital and omnichannel

Shock to loyalty

Health and “caring” economy

Homebody economy

THANK YOU

