



## MMA Industry Report

### General Digital Marketing POV

-Social distancing and working from home are the new normal, at least until the Coronavirus pandemic continues. Many marketers are working remotely and learning new things day-by-day about themselves, their brands, and their customers. Changes in personal habits, such as staying in for dinner are likely driving all of us to spend more time online.

-Ecommerce may see an **uptick in sales**, more **ads** are being **engaged with due to increased screen time**, and what those ads look like are changing to accommodate social distancing guidelines.

-Despite the uncertainty in the world and rapid changes in behavior, **data is still being collected and analyzed**. A marketer's job is to anticipate **what a consumer needs before they need it**.

#### How has consumer behavior changed post Coronavirus?

-For most people, we're spending more time than ever online, using social media to communicate with one another and online shopping to treat and comfort ourselves.

-A recent AI study examined creative performance for **Facebook ads** during the Coronavirus outbreak. The AI has seen drops in imagery depicting **"travel" and "human connection,"** as well as spikes in ads showing **sick emojis and using the terms "rest" and "sleep" in the ad copy**.

-This is true no matter the brand. While **grocery stores and cleaning products** are seeing a surge in popularity even without increased marketing, other brands have made major pivots away from previously scheduled campaigns.

---

### Retail & FMCG

-Forrester has predicted that the **global loss in the retail sector** will likely hit **\$2.1 trillion** in 2020 and will take four years to **overtake the levels of growth seen before the pandemic**.

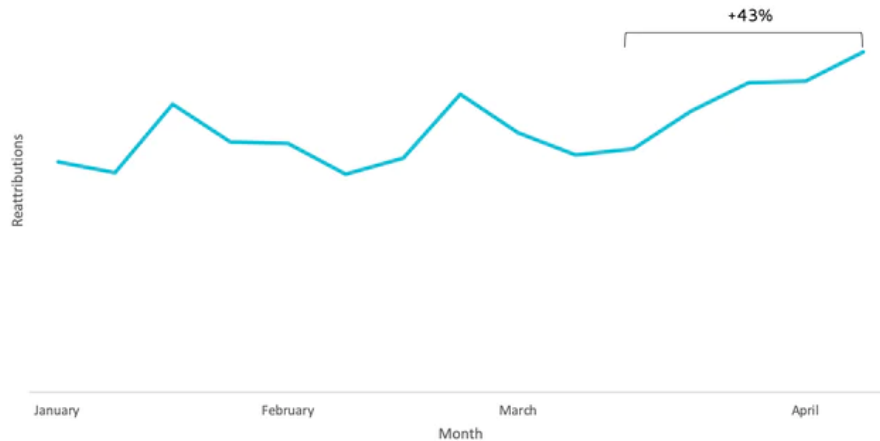
-Although the impact will likely vary across different regions, it is thought that **non-grocery offline sales** will see a **20% decline in growth** overall, while **e-commerce growth will remain mostly neutral**.

-Meanwhile, a total of **€260 billion falls (-10.4% in 2019)** is anticipated across the EU-5 – UK, France, Spain, Germany, and Italy – with some of these countries faring better than

others. France, for example, could experience a **loss of €56 billion, a decline of 9.5% year-on-year, while the UK may see up to an 11.4% decline compared to the same period (a comparable loss of -£56 billion).**

-China is forecast to be worst affected in APAC's retail predictions, which could **lose \$192 billion out of a total of \$767 billion for the region.**

The number of users being successfully re-engaged is higher than ever  
Global reattributions of shopping apps, Jan - April 2020



-Global reattributions of **shopping apps** (where a user has returned to an app due to a retargeting campaign) **increased by 43% month-on-month in April**, data from Adjust confirms.

-As brands pulled back their spending on acquiring new users during March – the beginning of the coronavirus crisis for most of Europe and the US – there was a noticeable drop in shopping app installs and sessions

**-US consumers turn to name-brand products despite the financial strain**

-Data from Survata shows that, despite **64% of US consumers claiming they are rethinking spending**, many are choosing **name-brands** over generics when it comes to the products they are purchasing.

-This is particularly the case for cleaning products. **61% of respondents** said that they were 'likely' or 'very likely' to choose brand-name varieties when shopping during the pandemic, compared to 39% who said they either 'didn't care' or actively chose own-brand varieties.

**Average global sales revenue for online fashion stores in April was 21% higher year-on-year**

-Despite a severe **30% drop** in global fashion e-commerce revenue **in March**, new findings from Nosto suggest that revenue in **April** has bounced back and is on average **21% higher** than it was in April 2019. **Australia/New Zealand, Germany, and the UK** have seen a particularly strong sales results, while other countries like Sweden continued to experience a rapid decline.

-Visits to **fashion e-commerce websites** are up by an average of **9% globally**, while **orders increased by 30%**, and the **conversion rate lifted by 12%**.

-However, the **average order value remains negative** across the board at -3% compared to last year.

### UK auto sales fall by 97.3% year-on-year in April

-Coronavirus has had a dramatic effect on the auto industry in the UK, with The Society of Motor Manufacturers and Traders (SMMT) revealing that sales fell by 97.3% year-on-year during April.



### Amazon year-on-year sales up by 26% in Q1 2020

Global sales on Amazon increased by **26% in Q1 2020**, reaching **\$75.5bn** compared to sales of **\$59.7bn in Q1 2019**, data from its 30th April Q1 2020 results shows.

-The company has **hired an additional 175,000 new warehouse and distribution staff** throughout **March and April**, as well as implementing **pay rises of around \$2 for its hourly workforce**. Ensuring safety measures meet the correct standards during the pandemic, such as protection for employees and new operational processes, is an additional cost on top of the day-to-day running of the business.

### Nearly half of global consumers say they will not return to shops for 'some time' or 'a long time' after lockdowns ease

-GlobalWebIndex's ninth release of its coronavirus research has revealed that nearly **half of global consumers** do not expect to **resume shopping in brick-and-mortar shops** for 'some time' or 'a long time' once lockdowns ease.

-Just **9% of shoppers, on average, expect that they will return to stores ‘immediately’** once they are allowed to. However, those in the UK, Ireland, and Germany are more likely to do so (14%) than those in Japan (5%) or China (6%).

-There is yet more reluctance towards **outdoor public venues**, such as **stadiums and music festivals**, with 60% of consumers anticipating that they will wait for ‘some time’ or ‘a long time’ before attending events there.

-The retail industry, in general, will **bounce back post-coronavirus**. It seems that shoppers will continue to be concerned about **the risks involved in interacting with wider society**, and will, therefore, be hesitant to return to busy public places too soon.

## Advertising

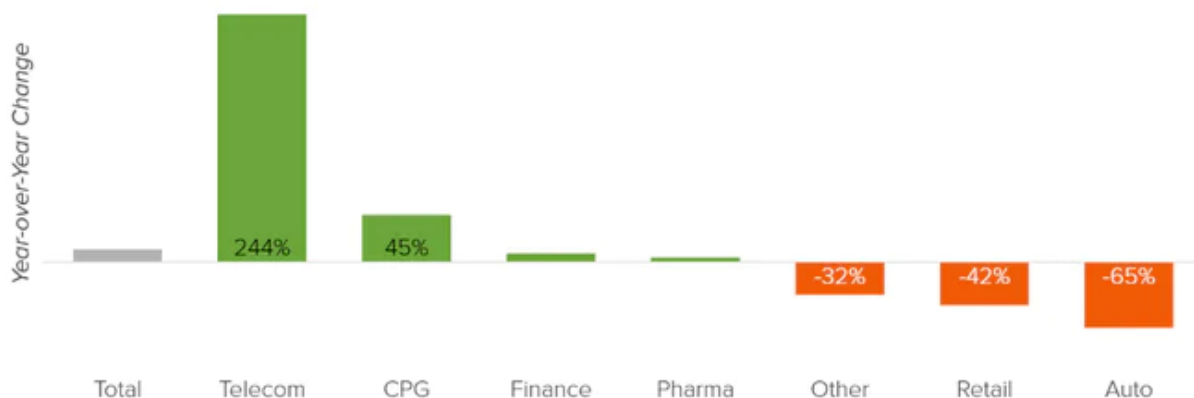
**-89% of large multinational businesses have paused their advertising campaigns**

-Eighty-nine percent of large multinational businesses have deferred their planned advertising campaigns due to the pandemic, up from 81% in March, says the World Federation of Advertisers (WFA).

**Connected TV video ad impression volume grows 69% year-on-year**

-Global video ad impression volume for connected TV has grown by 69% year-on-year for the week 3rd-9th May, claims Innovid iQ, a platform that serves 1 in every 3 video ad impressions in the US.

-Meanwhile, video ad impression volume for broadcast **publishers, social and digital publishers** saw gains of 33%, 6%, and 5% respectively.



Year-on-year change in global video ad impression volume by vertical (3rd-9th May). Chart via Innovid iQ.

**The imagery of human interaction declines by 27.4% in social ads**

-A new study by Pattern89, published on 24th March, has noted a shift in the type of imagery brands are using in social media ads since the start of the coronavirus pandemic.

-Analyzing more than 1,100 brands and advertisers active on Facebook and Instagram, Pattern89 found that there are **27.4% fewer** images and video ads of models **displaying human interaction** (such as hugging or shaking hands).

-Since 12th March, imagery featuring people washing hands or faces, and images and videos that **display water splashing or cleaning** has risen at six times the normal rate.

## Social media

### Facebook Daily Active Users increase by 11% year-on-year

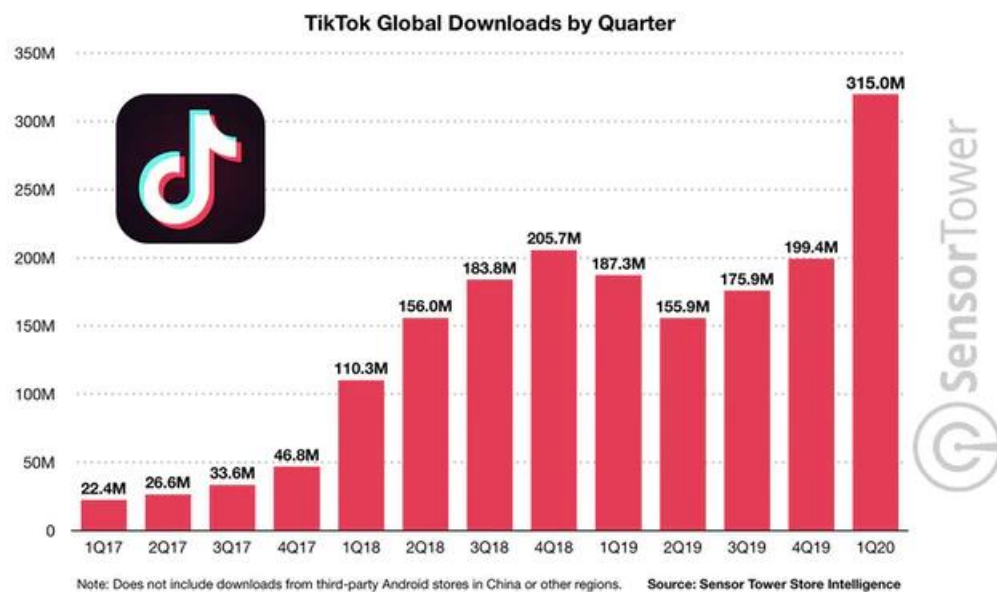
-Facebook's Q1 2020 results have shown an increase in its Daily Active Users (DAUs) of 11% year-on-year (1.7 billion), driven by an uplift in social media engagement from stay-at-home orders in place.

-Facebook stated that **voice and video calling** across **Messenger** and **WhatsApp** has **more than doubled** in areas hardest hit by the coronavirus, and that total messaging across all of its owned apps has **increased more than 50%**.

### TikTok downloads surge in Q1 2020, surpassing 2bn lifetime downloads

-Downloads of video-sharing app TikTok **surged by 315m in Q1 2020**, making it the most downloaded app ever in any three-month time period, according to analysis from SensorTower.

-While it is common knowledge that **media consumption** has greatly **increased** for consumers across the globe as they **stay at home**, social media engagement has soared. TikTok has evidently become a progressively popular source of entertainment, as well as an outlet for creativity, for consumers at this trying time.



## 74% of Gen Z want social media platforms to provide fact-checked content about Covid-19

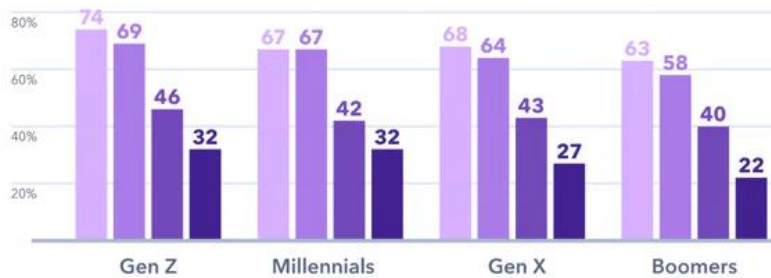
-Globally, **74%** of **Gen Z** believe the role of social media companies during the pandemic is to provide **fact-checked content** about the virus, according to a 23rd March survey from GlobalWebIndex.

-The screening of **fake news** by social media companies is the **second most popular change** users would like to see – across all ages – as conspiracy theories and mass sharing become a more prominent issue.

### The role of social media companies

% who want the following from social media companies

- Providing fact-checked content to help people cope with the outbreak
- Screening "fake news"
- Helping neighbors and local communities to connect with each other
- Provide live-streams of events



Question: What do you think social media companies should be doing during the coronavirus / COVID-19 outbreak? Source: GlobalWebIndex March 16-20 2020 Base: 12,845 internet users aged 16-64

## Covid-19 business impact

### 82% of large enterprises globally have cut hiring budgets

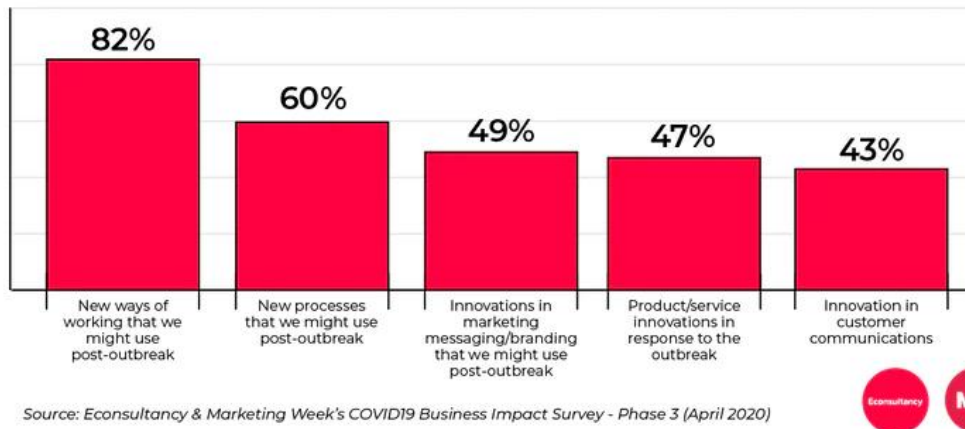
A massive 82% of large enterprises (those with annual revenue above £50m) have cut hiring budgets, phase three of Econsultancy and Marketing Week's Business Impact Survey has found.

-However almost a quarter did believe that marketing departments had been 'significantly' impacted on an efficiency level due to the reduction of staff, thereby compromising their ability to achieve current goals.

### 60% of large global organizations have identified new processes that they might use post-outbreak

-Sixty percent of large global organizations (with annual revenues >£50m) have identified **new processes** that could be used **beyond the outbreak**, according to the phase three results of Econsultancy and Marketing Week's Covid-19 Business Impact Survey.

Have you observed any of the following at your organization in the last several weeks? - Global orgs over £50m annual revenue



-A surge in **innovation** could be seen as one of the few positive outcomes marketers have experienced since coronavirus spread throughout the world, and it is encouraging to see so many organizations have found **new ways of working** that improve on their **current processes**. As a result, it is possible that the coronavirus pandemic could become a primary trigger for major fast-tracked changes in the ways large enterprises operate in the future.

## Entertainment

### Half a billion Chinese consumers now live stream content

-Official figures have revealed that **over half a billion Chinese consumers** are live-streaming content as of March this year, a **rise of 163 million users** since the end of 2018. The numbers are thought to have been intensified by the lockdown imposed on the region earlier this year and represent **62% of all internet users in China**.

### -Netflix gains almost 16 million new subscribers in Q1 2020

-Netflix has gained 15.8m new subscribers during **Q1 2020**, more than double its original 7m target for the period, according to the Financial Times. Almost **7m** of these subscriptions originated from the **EMEA region**, while **3.6m** came from **Asia**.

-A **delay in spending** caused by the inability to film its latest series and films is also thought to have skewed Netflix's first-quarter financials, with the results displaying a \$162m positive cash flow. It now expects to spend \$1bn over the course of the rest of 2020, significantly lower than its initial estimated spend of \$2.5bn.

## Employment & recruitment

### -92% of US & UK marketers rate their organisations as being 'pretty well' or 'very well' equipped for remote working

-**The marketing, advertising, and PR industries** in the US and UK are the **'most ready'** for **remote working**, suggests results from the seventh phase of GlobalWebIndex's coronavirus research.

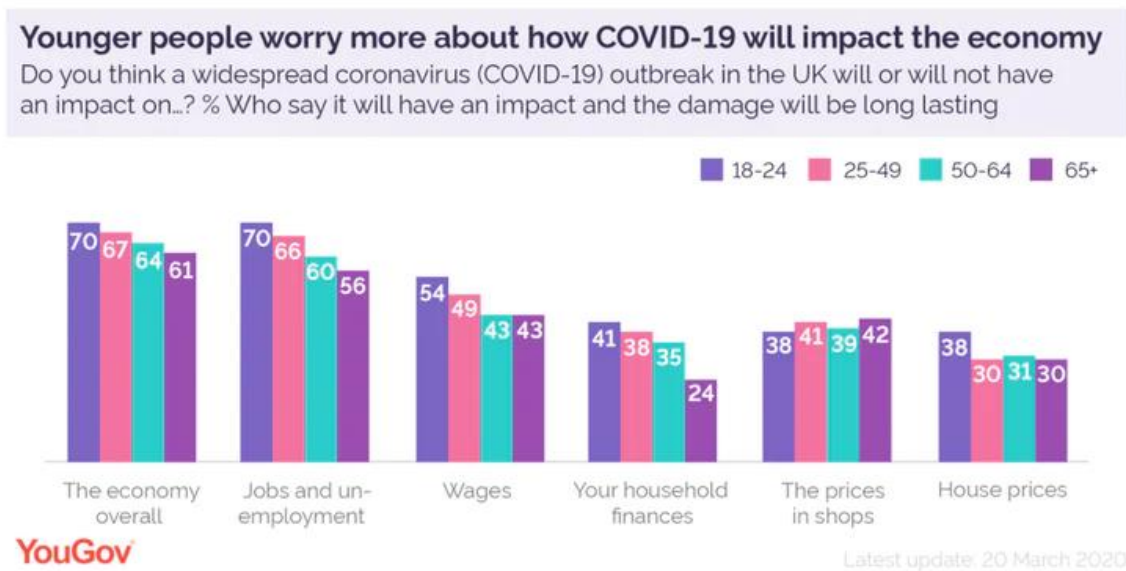
-On the contrary, sectors that rely on the presence of staff in physical settings such as **retail** and **healthcare** scored worst on their readiness.

-It also appears that **larger organizations** are **less prepared** for remote working than **smaller ones**. Companies that employ between 250-2000 workers are most ready according to their employees (67%), but those with over 2000 workers are the least equipped (29%).

### -Young people in the UK most worried about the impact of coronavirus on jobs and wages

-A new study by YouGov has revealed that people **aged 18 to 24** are more **worried** than any other age group about the impact coronavirus will have on the job market in the **long-term**.

-The survey also found that 54% of 18 to 24-year-olds believe that coronavirus **will affect wages in the long-term**, compared with 43% aged 50 and over.



[-https://econsultancy.com/stats-roundup-coronavirus-impact-on-marketing-ecommerce-advertising/](https://econsultancy.com/stats-roundup-coronavirus-impact-on-marketing-ecommerce-advertising/)

[-https://www.clickz.com/marketing-strategies-during-and-after-coronavirus/261155/](https://www.clickz.com/marketing-strategies-during-and-after-coronavirus/261155/)



## RADYO

11-29 Şubat ile 11-29 Mart tarih aralıklarına ait sosyal medya kullanımını, Kantar Social içerisinde takip edilen radyocular hakkındaki Twitter konuşmaları üzerinden karşılaştırdık.

11-29 Mart  
128.583



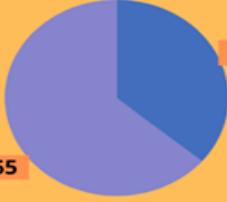
11-29 Şubat  
68.835

## Tweet

11-29 Şubat tarih aralığında takip ettiğimiz 10 radyocu hakkında 68.835 tweet atılırken, 11-29 Mart tarih aralığında 128.583 tweet atılmıştır.



11-29 Mart  
78.552.555



11-29 Şubat  
44.469.647

## İmpressions

Hem radyocular hakkında atılan tweetler hem de radyocuların attığı tweetlerin toplam impressions değerleri karşılaştırılan tarih aralığında %57 artmıştır.



11-29 Mart  
549.667



11-29 Şubat  
278.405

## Likes

Atılan tweetlerin beğenilme sayıları, 11-29 Şubat tarih aralığında 278.405 iken, 11-29 Mart aralığında 549.667'ye çıkmıştır.



## Takip edilen Radyocular;

Afrıklı Ali  
Cem Arslan  
Cezayir Doğan  
Geveze  
Mesut Sene  
Nihat Sındar  
Pascal Kadir  
Serdar Gökçelip  
Yasemin Şelik  
Zekirdek

Kaynak:Kantar Social

## Türkiye Verileri

10 Radyo programı yapan ismi takip ederek 11-29 Şubat ve 11-29 Mart tarih aralıklarında Twitter'da yapılan konuşmaları ve yaşanan değişimi inceledik.

KANTAR



## SOSYAL MEDYADA COVID-19 ETKİSİ

1 NISAN - 20 NISAN 2019  
1 NISAN - 20 NISAN 2020



### Yerli Diziler

520.478 Tweet  
166.022.002 impressions  
2.610.787 Likes



### Yerli Diziler

127.753 Tweet  
56.958.449 impressions  
828.166 Likes

### Tartışma Programları

46.264 Tweet  
12.025.493 impressions  
63.455 Likes

### Tartışma Programları

136.972 Tweet  
35.781.948 impressions  
214.898 Likes

### Haber Programları

136.435 Tweet  
91.517.873 impressions  
827.791 Likes

### Haber Programları

203.607 Tweet  
90.910.484 impressions  
821.412 Likes

### Yarışma Programları

97.491 Tweet  
30.878.487 impressions  
342.577 Likes

### Yarışma Programları

512.036 Tweet  
252.441.085 impressions  
3.100.968 Likes

### Yabancı Diziler

81.085 Tweet  
33.747.998 impressions  
330.368 Likes

### Yabancı Diziler

93.631 Tweet  
28.866.741 impressions  
454.547 Likes

Kaynak: Kantar Social

## RAMAZAN



Ramazan hakkında Twitter'da neler konuşuldu? 23 Nisan-4 Mayıs tarih aralığında Ramazan, İftar ve Sahur hakkında yapılan konuşmaları inceledik.

### #RAMAZAN

#RAMAZAN ve #HAYIRLIRAMAZANLAR hashtagleri ile ilgili 161.551 Tweet atıldı. Atılan Tweetler 38.9M impressions yarattı.



### MARKA YAKINLIK

THY  
LUPPO  
NETFLIX  
ARÇELİK  
VODAFONE

### #RAMAZAN

Ramazan başlığı ile ilgili tweet atan kullanıcılar, son 1 ay içerisinde yanda yer alan markalar hakkında tweet attı.

### #SAHUR VE #IFTAR

Sahur ve İftar ile ilgili 261.118 tweet atıldı. En çok tweet, 10.454 tweet ile 24 Nisan saat 04:00'da atıldı.



### MARKA YAKINLIK

NETFLIX  
LUPPO  
THY  
SPOTIFY  
TÜRK TELEKOM

### #SAHUR VE #IFTAR

Sahur ve İftar başlığı ile ilgili tweet atan kullanıcılar, son 1 ay içerisinde yanda yer alan markalar hakkında tweet attı.

### CINSİYET DAĞILIMI

Ramazan ile ilgili tweet atanların %73.4'ü erkek, %26.6'sı kadın kullanıcılarıdır. Sahur ve İftar ile ilgili tweet atanların ise %68.9'u erkek, %31.1'i ise Kadın kullanıcıları olmuştur.



KANTAR

# # ANNELERGÜNÜ



## TWEET

179.264

## TEKİL KULLANICI

88.672



## IMPRESSIONS



49.190.128



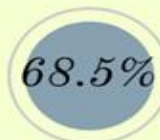
## BEGENİ



1.259.559



## CINSİYET DAĞILIMI



## MARKA YAKINLIK

MARKA

AFFINITY  
INDEX

İstikbal

741

Arçelik

600

Le Waikiki

556

Defacto

540

Koç Üniversitesi

507

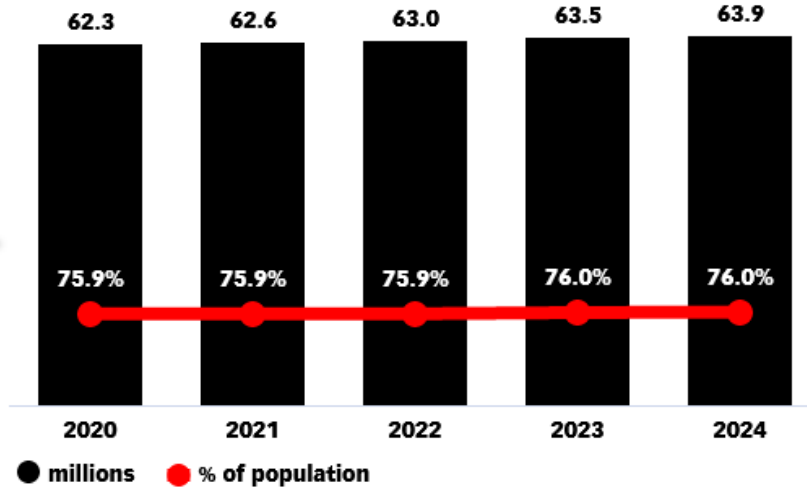
#annelergünü ile ilgili tweet atan kullanıcılar, son 1 ay içerisinde bu markalar ile ilgili de tweet atmıştır.

Kaynak: Kantar Social

Toplam Mobile Penetrasyon Verisi. Aynı zamanda Türkiye Dünyadaki Mobile Kullanıcıların %1.3'ünü kapsamakta.

## Mobile Phone Users

Turkey, 2020-2024



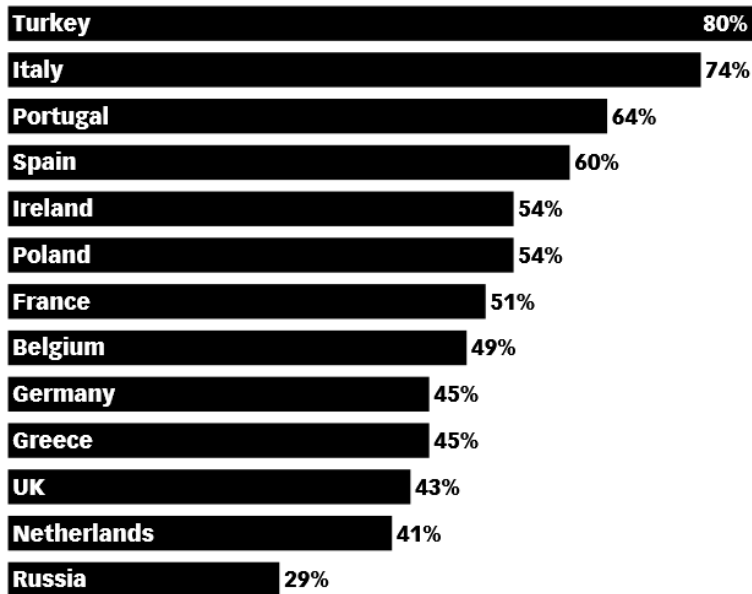
Source: eMarketer, April 2020 (see below for notes and methodologies).

www.eMarketer.com

Grafikte belirtilen Nielsen raporuna göre, Türkiye %80 ile tüm ülkeler arasında birinci durumda Karantinede daha çok yemek yediğini belirterek.

## Adults in Europe Who Eat at Home More During the Coronavirus Pandemic, by Country, March 2020

% of respondents in each group



Note: ages 18+

Source: Nielsen "COVID-19: Where consumers are heading?" as cited in company blog, April 8, 2020

254597

www.eMarketer.com

Belirtilen Nielsen raporuna göre, Türkiye'nin Koronavirüsünün ne kadar daha süreceğine ilişkin tahminleri

### **Length of Time that Adults in Europe Think the Coronavirus Pandemic Will Impact Europe, by Country, March 2020**

*% of respondents in each group*

	<b>&lt;3 months</b>	<b>4-12 months</b>	<b>Over 1 year</b>
Belgium	20%	65%	15%
France	32%	60%	9%
Germany	18%	51%	31%
Greece	47%	47%	6%
Ireland	19%	61%	21%
Italy	13%	73%	14%
Netherlands	17%	57%	26%
Poland	23%	60%	17%
Portugal	24%	61%	15%
Russia	38%	53%	9%
Spain	29%	61%	10%
Turkey	25%	54%	21%
UK	23%	56%	21%

*Note: ages 18+; numbers may not add up to 100% due to rounding*

*Source: Nielsen "COVID-19: Where consumers are heading?" as cited in company blog, April 8, 2020*

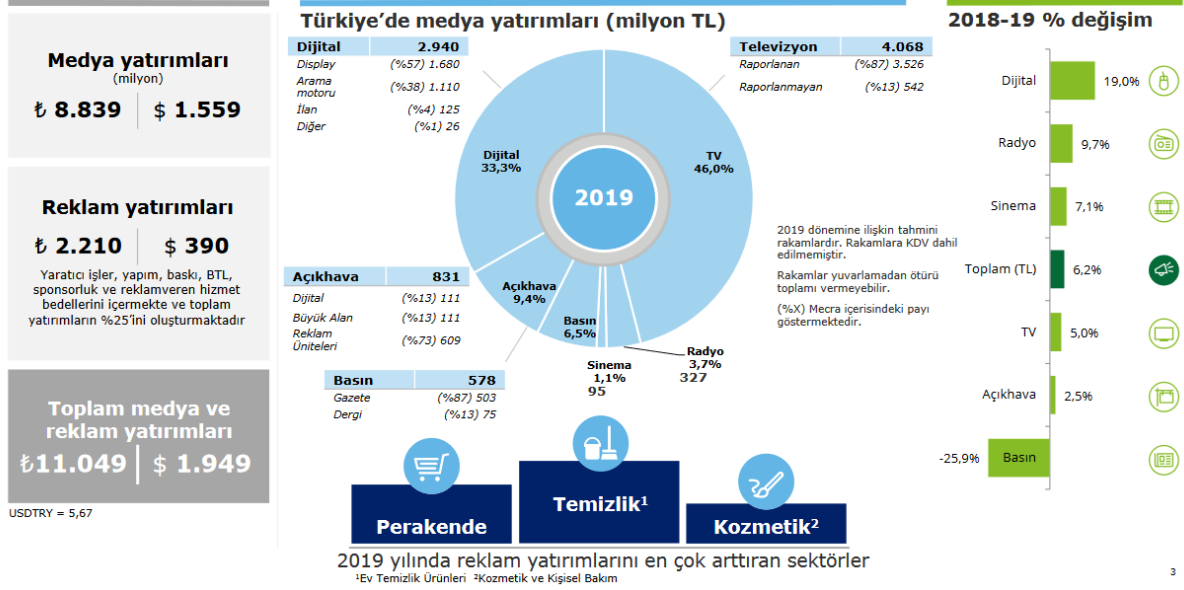
254596

www.eMarketer.com

UNITE.AD Tarafından oluşturulan ve gençlere yönelik veriler barındıran Türkiye İncfluencer Pazarlama Raporu: <https://unite.ad/blog/covid-19-surecinde-influencer-marketing/>

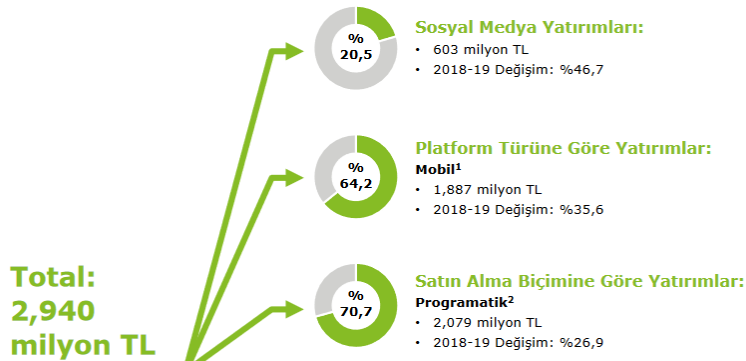
# RD, RVD, IAB, ARVAK, RYAD ve MMA'in katkıları ile bir araya getirilen Türkiye'de Tahmini Medya ve Reklam Yatırımları 2019 Yılı Sonu Raporu

## Yönetici özeti: Türkiye'de tahmini medya ve reklam yatırımları, 2019



## Türkiye'de medya yatırımları Dijital (3/3)

### Türkiye'de dijital medya yatırımları, milyon TL



Kaynak: Reklamcılar Derneği, IAB, MMA  
Sosyal medya, mobil ve programatik toplam dijital reklam yatırımları içerisinde yer almaktadır, ayrıca toplama eklenmemektedir.

1. Platform türüne göre yatırımlar mobil ve PC (masaüstü) olarak ele alınmaktadır.  
2. Satın alma biçimine göre yatırımlar programatik ve klasik olarak ele alınmaktadır.

Katılımcılar format bazlı yatırım tahminlerini ilgili kalemler için mobil/PC<sup>1</sup> ve/veya programatik/klasik<sup>2</sup> kırılımı ile bildirmektedir. Ayrıca, katılımcılar toplam dijital medya yatırımları içerisinde sosyal medya yatırımlarının payını tahminlemektedir.

Programatik Satın Alma: Ödeme ve iş süreçlerinin otomatik olarak çalıştığı bilişim mekanizmaları aracılığıyla yaratılan reklam yatırımlarını kapsamaktadır. Bu mekanizmalar "ad-tech" isimli, kurullar ve algoritmalara dayalı bilişim altyapılarıyla entegre şekilde çalışmaktadır. Programatik altında yapılan faaliyetler IAB tarafından 4 ana grup altında toplanmaktadır:

1. Otomatik garantili
2. Rezervasyonsuz sabit fiyat
3. Davet usulü teklif verme
4. Açık teklif verme

Bu şekilde işlem gören tüm reklam yatırımları envanter bir aracı kuruma programatik olmayan yöntemlerle satılmış olsa dahi son alıcıya programatik olarak ulaştıysa işlem programatik sayılmaktadır. Envanter sahiplerinin doğrudan veya bir aracı kurumla çalışması, durumda değişikliğe yol açmamaktadır.

2018-2019 yılı büyüme oranının değerlendirilebilmesi amacıyla IAB tarafından yayınlanan 2018 rakamları baz alınmıştır.

Raporu detaylı incelemek için: <https://www.mmatrkey.org/dokumanlar>