

# TURKEY

## MEDIA LANDSCAPE

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- ▶ Total ad & media investment: 253.6 Billion TL (+78.9% year-on-year)
- ▶ Digital leads at 74.2% of spend, Turkey is Europe's fastest-growing digital market (4 yrs running)
- ▶ OOH: fastest-growing channel +115.2% | Radio doubled +100% | TV +56.1%
- ▶ Turkey: #1 growth market among the global top 20

# In a Nutshell

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**84M+**

Population: 7th largest consumer market in Europe

**65%**

Of the population is under 35, youthful, digital-native consumer base

**88.3%**

Internet penetration: one of Europe's most digitally active populations

**0.5%**

Media/GDP ratio, far below global avg, massive growth headroom

**+40%**

Turkey's media growth in USD terms. #1 in top 20 globally

**4 yrs**

Running as Europe's fastest-growing digital advertising market

# 01 · Market Overview

Total investment, growth trajectory & global benchmarks

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# Turkey Media Market at a Glance, 2025

**253.6B TL**

Total Ad & Media Investment

**+78.9%**

Year-on-Year Growth

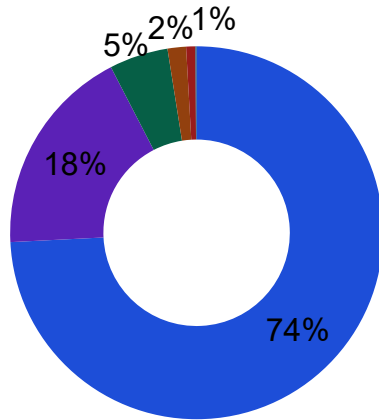
**213.0B TL**

Total Media Investment

**40.6B TL**

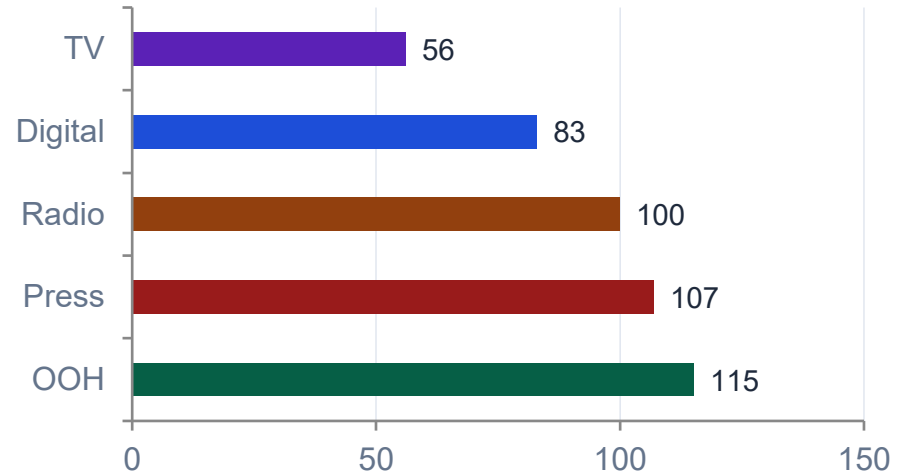
Creative & Production Spend

2025 Media Channel Mix (%)



■ Digital ■ Television ■ OOH ■ Radio ■ Press ■ Cinema

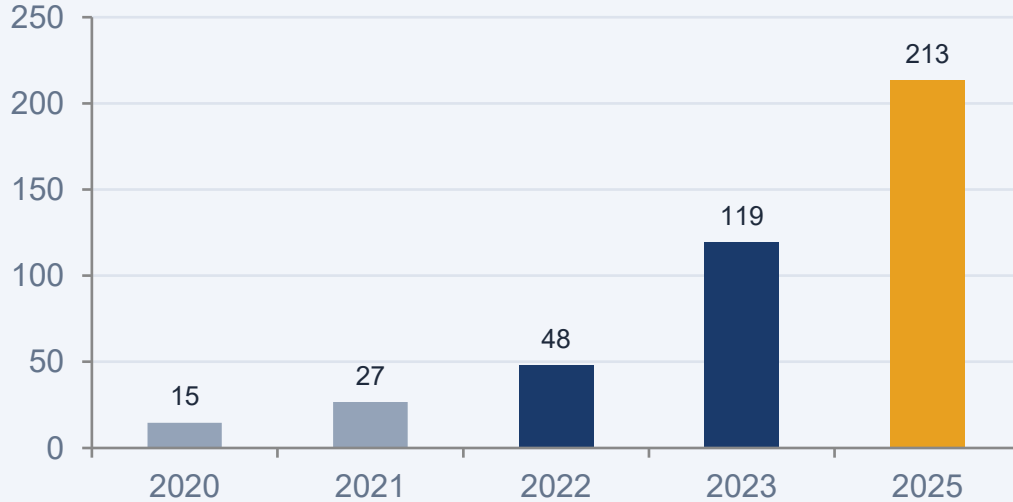
YoY Investment Growth by Channel (%)



■ Market average growth: +78.9% — OOH, Press, Radio & Digital all outperformed the market; TV grew below average.

# Ad Investment Growth Trend & Global Benchmarks

Turkey Total Media Investment (Billion TL)



## GLOBAL CONTEXT

**+8.1%**

**Global media market growth**

vs Turkey +78.9%

**+40%**

**Turkey's growth in USD terms**

#1 in top 20 globally

**0.5%**

**Turkey media spend as % of GDP**

Global avg: ~0.8–1.2%

## The Opportunity

Turkey is the fastest-growing media market in the global top 20, yet media spend as a share of GDP is just 0.5%, well below the global average. The market is still early in its maturation curve. Brands that establish strong presence now will benefit from compounding share-of-voice as the market grows.

# 02 · Digital Media

74.2% of all media investment, Europe's fastest-growing digital market for 4 consecutive years

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# Digital Media: Investment Overview & Format Breakdown

**158.0B TL**

Total Digital Investment

**+83%**

Year-on-Year Growth

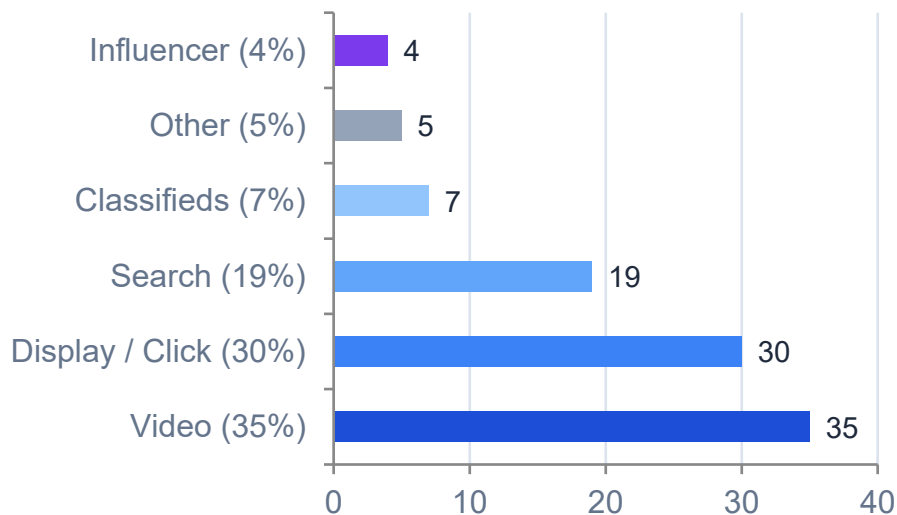
**74.2%**

Share of Total Media

**79.4%**

Mobile Share of Digital Spend

Digital Spend by Format (%)



## KEY DIGITAL METRICS

**70.5%**

Programmatic buying share

**47%**

Social media share of digital

**91%**

Influencer marketing growth YoY

**6.7B TL**

Total influencer ad investment

**5.39%**

Native advertising share

# Digital Platforms — Social Media & Audience Behaviour

Where Turkish audiences spend their digital time — and how they behave

## LEADING DIGITAL PLATFORMS IN TURKEY

### Google / YouTube

67M+ users. #1 search & video platform. Pre-roll is the dominant digital video format. Reaches all demographics across every product category.

67M+ users

### Instagram & Facebook

Combined Meta reach 55M+. Instagram Reels & Stories drive brand awareness across lifestyle, fashion, FMCG, retail, tech and travel sectors.

55M+ users

### TikTok

30M+ active users. Fastest-growing platform in Turkey. Short-form video drives product discovery among 18–35 urban consumers.

30M+ users

### X (Twitter)

13M+ users. High engagement around news, sports, entertainment and trending topics. Effective for real-time campaign activation.

13M+ users

### LinkedIn

11M Turkish users. Decision-makers, professionals and B2B audiences. Ideal for corporate brand positioning and employer branding.

11M users

## KEY DIGITAL AUDIENCE BEHAVIOURS IN TURKEY

79.4%

### Mobile-first

of all digital ads are consumed on mobile devices

92%

### Connected

of Turkey's population has a mobile connection

2.5 hrs

### Daily screen

average daily social media use per person

70.5%

### Programmatic

of digital spend bought programmatically

47%

### Social share

of all digital ad investment goes to social media

# Podcasts in Turkey

A rapidly growing, high-attention content format with a premium, urban audience

20,000+

Turkish-language podcast channels

400,000+

Episodes published to date

5.2×

Per-device downloads growth in 2020

## Video-First Podcast Evolution

Turkish podcasts are increasingly consumed via YouTube rather than audio-only platforms. Long-form interview and conversation formats dominate, with creators repurposing clips to Instagram Reels, TikTok and YouTube Shorts for discovery.

## High-Attention, Long-Form Format

Podcasts generate significantly longer average consumption times than short-form social content. Audiences form deep parasocial connections with hosts — making host-read brand integrations and sponsorships exceptionally trusted.

## +175% Growth in Audio Ad Investment

According to Deloitte, digital audio investment (including podcasts) reached £1.1 billion in the first half of 2024 alone — a 175% increase on the same period in 2023. Brands are rapidly entering the space.

## AUDIENCE PROFILE

### ► Gen Z & Millennials

Primary listener base — urban, educated, digitally native

### ► White-collar professionals

High disposable income, engaged with business & self-dev content

### ► Entrepreneurs & students

Aspirational, growth-oriented — receptive to brand messaging

### ► Finance & tech audiences

High-trust relationship with specialist podcast hosts

## TOP CONTENT CATEGORIES

Entertainment & Comedy

Culture & Commentary

Entrepreneurship & Finance

Self-Development

Relationships & Lifestyle

# YouTube in Turkey

One of Turkey's most-used digital platforms — massive reach, deep engagement, multi-generational audiences

67M+

YouTube users in Türkiye

Top 3

Most-used platform in Turkey (all ages)

EMEA #1

Among strongest YouTube viewing cultures

2 in 1

Shorts + Long-form both strongly consumed

## Massive Daily Consumption — All Age Groups

YouTube is one of the most-used digital platforms in Türkiye across all demographics. Long-form video consumption grows alongside the rapid rise of Shorts, making the platform uniquely dual-format in Turkish viewing habits.

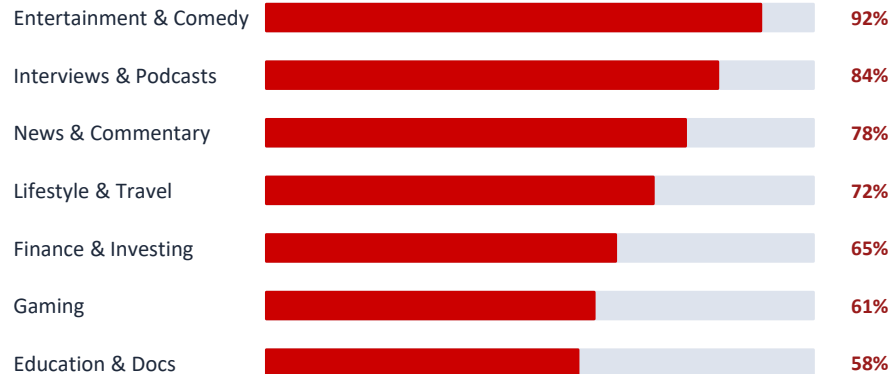
## High Trust & Extended Watch Time

Long-form YouTube creators generate higher audience trust and attention than traditional display ads. Viewers often watch 10–45 minutes of content in a single session — creating a premium environment for brand integrations and pre-roll.

## Video-First Podcast Hub

Podcasts in Türkiye are increasingly consumed via YouTube rather than audio-only platforms. Interview and commentary formats dominate cultural conversation. Creator clips frequently spread to Reels, TikTok and X, multiplying organic reach.

## MOST VIEWED CONTENT CATEGORIES



## HIGH ENGAGEMENT ENVIRONMENT

► Comments & Live Chat

► Clip Reposts on TikTok

► Instagram Shares

► YouTube Shorts spin-offs

# Digital Trends Shaping Turkey's Ad Market in 2025

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## Programmatic — 70.5% of digital

Over 70% of all digital spend is now traded programmatically. Real-time bidding, DSPs and DMPs enable precise audience targeting. Programmatic DOOH is also emerging fast.

## AI-Powered Marketing

92% of Turkish marketing leaders believe AI improves outcomes. AI cuts content production time by 50% and multiplies output 4x. Programmatic AI optimisation improved marketing effectiveness by 68%.

## Influencer Marketing — 91% growth

Investment hit 6.7B TL in 2025. Instagram and TikTok dominate. Shift toward mid-tier and nano-influencers for authenticity and compliance with new IAB Turkey influencer guidelines.

## Retail Media — The Next Big Channel

74% of Turkish brands are already allocating new budgets specifically to retail media. Sahibinden, Trendyol and Hepsiburada are building ad ecosystems. Globally retail media reaches \$166B by 2025.

## Mobile First — 79.4% of digital

Four in five digital ad impressions are served on mobile. Turkey has 80.7M mobile connections. Mobile video and social are dominant formats by spend. Brands must optimise for vertical, short-form content.

## Social Commerce is accelerating

Social media claimed 47% of all digital spend. Instagram Shopping, TikTok Shop and YouTube Commerce blur the line between content and conversion. Influencer-led social commerce is the fastest-growing sub-category.

# 03 · Television

Highest-reach medium — 98% household penetration in Turkey

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# Television — At a Glance

**38.86B TL**

TV Ad Investment 2025

**+56.1%**

Year-on-Year Growth

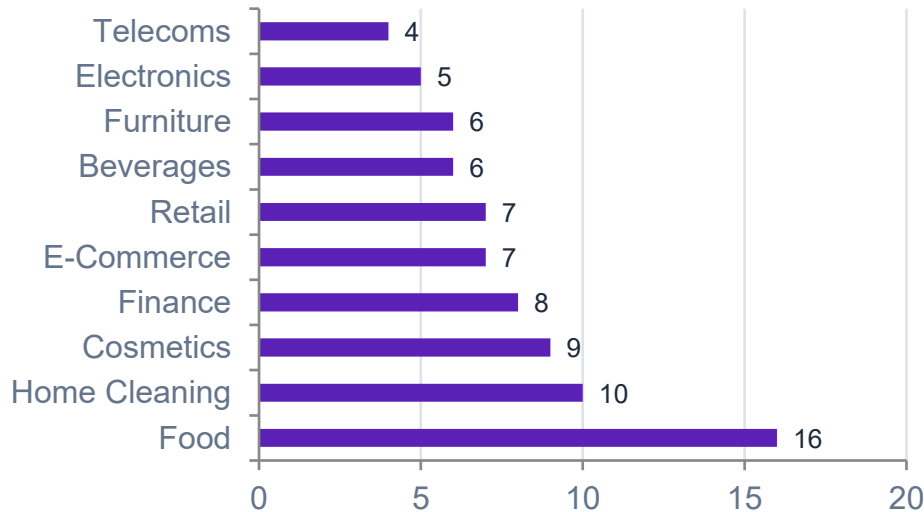
**18.2%**

Share of Total Media

**98%**

Household Penetration Rate

Top TV Advertiser Sectors — Share of Voice (%)



TV MARKET FACTS

**82,683**

Total GRPxCsec broadcast 2025

**1,524**

Active TV advertisers

**91%**

Measured-channel revenue share

# TV Channel Landscape — Key Channels by Tier & Profile

## TIER 1 — MASS REACH / ENTERTAINMENT CHANNELS

### ATV — Entertainment

Premium dramas and variety shows. Key access prime-time and weekend audience. Strong F25-54 profile.

### TV8 - Entertainment

Turkey's leading reality and entertainment network with dominating prime-time ratings.

### Show TV — Entertainment

Major drama and entertainment network. Second highest commercial ratings. Strong 18–49 female demographic skew.

### NOW — Entertainment

Known for long-running hit dramas. Strong urban, female-skewed, 25–49 demographic. Premium drama context.

## TIER 2 — NEWS, BUSINESS & THEMATIC CHANNELS · RECOMMENDED FOR AB+ AUDIENCES

### Bloomberg HT

Turkey's only dedicated financial news TV. Finance sector SOV 23%. Prime targeting vehicle for investors and HNW audiences. Simulcast with radio.

### NTV

News and lifestyle hybrid. AB+ dominance. Trusted editorial environment. Premium daytime and prime-time slots.

### Habertürk

Second-largest news brand. Broad economic coverage. Accessible CPMs with quality news editorial context.

### CNN Türk

Largest news network. Premium urban, educated viewer profile. Strong economic programming. Ideal for brand credibility and reach in the AB+ segment.

### CNBC-e

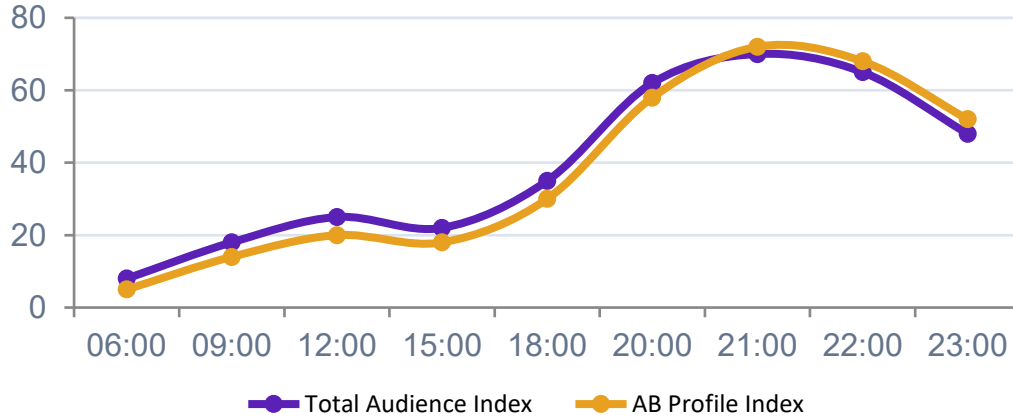
English-language business channel. Cosmopolitan, bilingual, high-income viewers. Ideal for international brands targeting Turkey's global-minded consumer.

### TRT Haber

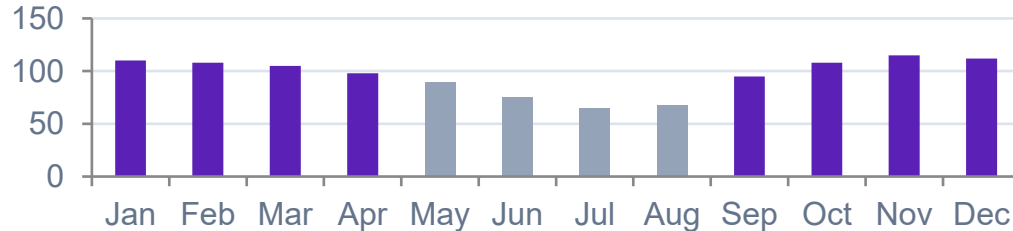
Public news channel. High trust, institutional context. National coverage. Effective for credibility in government & regulatory circles.

# TV — Demographics, Seasonality & Why We Recommend TV

## TV Viewing Index by Time of Day



## TV Seasonality Index (High = Peak Viewing)



## WHY WE RECOMMEND TV

### Unmatched national reach

98% household penetration. 17M homes. No other medium delivers this scale of simultaneous national coverage.

### Competitive CPMs vs Europe

Turkish TV CPMs are 40–60% below comparable European markets — high-reach, high-quality, cost-effective.

### Turkish soaps — global reach

Turkey exports dramas to 100+ countries. Ads inside top-rated series carry an aspirational, international halo.

### Collective viewing culture

Turkey has the highest 'watching TV together' rate globally. Ads reach the entire household simultaneously.

### Emotional brand-building

Academic studies confirm TV uniquely transfers emotional brand messages. Best medium for trust and brand equity.

# 04 · Out-of-Home (OOH)

Turkey's fastest-growing traditional channel — +115.2% year-on-year

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# OOH — Market Overview & Format Breakdown

10.94B TL

OOH Investment 2025

+115.2%

YoY Growth — fastest channel

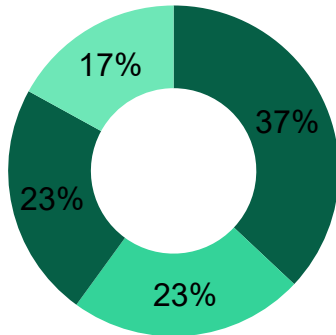
5.1%

Share of Total Media

23%

Digital OOH Share

## OOH Format Breakdown (%)



- Billboard & Ad Units (37%)
- Large Format (23%)
- Sports Arenas (23%)
- Digital OOH (17%)

## OOH FORMAT GUIDE

### Billboards & Megalights

CLP, billboard, megalight, megaboard, banner. Key arterial roads, motorways, city entries. Highest reach at lowest CPM in OOH.

### Large Format

Walls, giantboard, parapet, glass surfaces. Iconic urban landmarks. High dwell time in premium city zones.

### Digital OOH (DOOH)

LED screens, mall/airport/POS digital displays. Programmatic buying available. Dynamic content by time, weather, audience segment.

### Sports Arenas

Pitch-side LED boards at Galatasaray, Fenerbahçe, Beşiktaş stadiums. National broadcast exposure plus live stadium audience.

### Metro & Transit

Metro stations, inside metro cars, bus shelters, metrobus. Istanbul metro: 1.6M+ daily passengers — captive high-frequency audience.

### Shopping Malls

450+ malls in Turkey. Indoor digital screens, static panels, experiential zones. Premium AB+ footfall, extended dwell times.

# OOH — Top Locations by City & Why We Recommend OOH

## Istanbul

Bağdat Caddesi, Beşiktaş, Şişli, Etiler, Levent, TEM & E5 motorways, Istanbul Airport (85M pax/yr), Metrobus (800K+ daily)

*Premium AB+ corridors. Istanbul Airport is the world's 4th busiest. Unparalleled gateway to Turkey's wealthiest consumers.*

## Ankara

Kızılay, Çankaya, Tunali Hilmi Caddesi, Eskişehir Road, Esenboğa Airport, Ankaray & Metro

*Government, academic and professional-class audience. Turkey's most educated city by demographic profile.*

## İzmir

Kordon waterfront, Alsancak, Bornova, Adnan Menderes Airport, IZBAN suburban rail network

*Turkey's 3rd city. Liberal, export-oriented business community. High real estate demand and investment appetite.*

## Other Cities

Bursa, Gaziantep, Antalya, Adana — growing regional OOH inventory with increasing digital screen penetration

*Regional campaigns complement Istanbul at a fraction of the cost per GRP. Gaziantep is Turkey's business capital.*

## WHY WE RECOMMEND OOH

Thousands of new vehicles join Istanbul traffic daily — home-work-home cycle grows longer every year

No zapping. No ad-blocking. No option to skip. Full-format brand exposure, every single time.

450+ shopping malls means more time spent out-of-home — growing OOH dwell time for advertisers

Digital OOH enables programmatic, real-time, audience-targeted buying — precision at scale

Sports arena LED boards give brands national broadcast exposure beyond the 50,000 in the stadium

# 05 · Radio

Investment doubled for the third consecutive year — +100% YoY

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# Radio — Market Overview, Listening Habits & Key Stations

3.30B TL

Radio Ad Investment 2025

+100%

Year-on-Year Growth

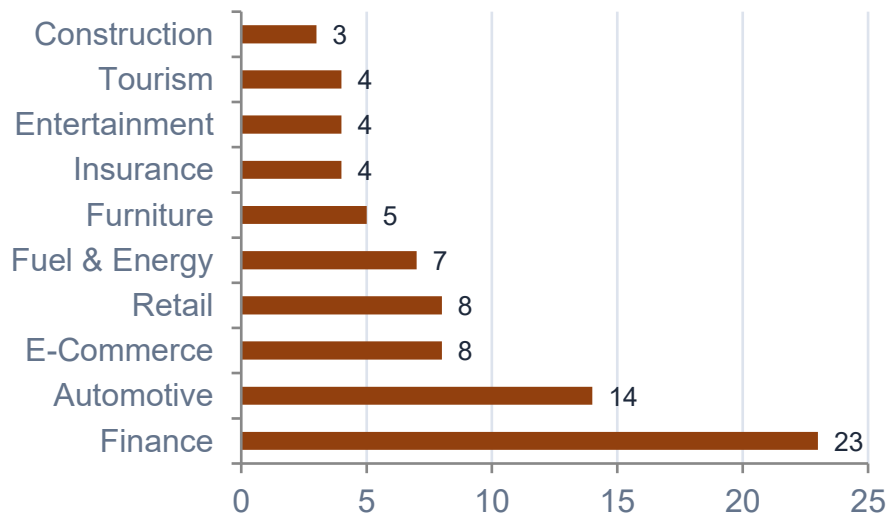
1.6%

Share of Total Media

2026

Electronic Ratings Launch (RİAK)

## Top Radio Advertiser Sectors — SOV (%)



## KEY RADIO STATIONS

### Kral FM · Turkish Pop / Arabesque

#1 most-listened station in Turkey by reach. Owned by Doğuş Group. Broadest demographic appeal across all ages and regions.

### Power FM · International Pop

Highest national reach in music format. AB+ 25-45. Commuter-focused. Effective frequency builder for campaigns.

### Bloomberg HT Radio · Business News

Simulcast of Bloomberg HT TV. Drive-time business briefings. Leading choice for finance, automotive and premium brands.

### NTV Radyo · News / Talk

Leading news radio. Strong current affairs content. Morning & evening drive-time dominance in AB+ segment.

### Metro FM · International Pop

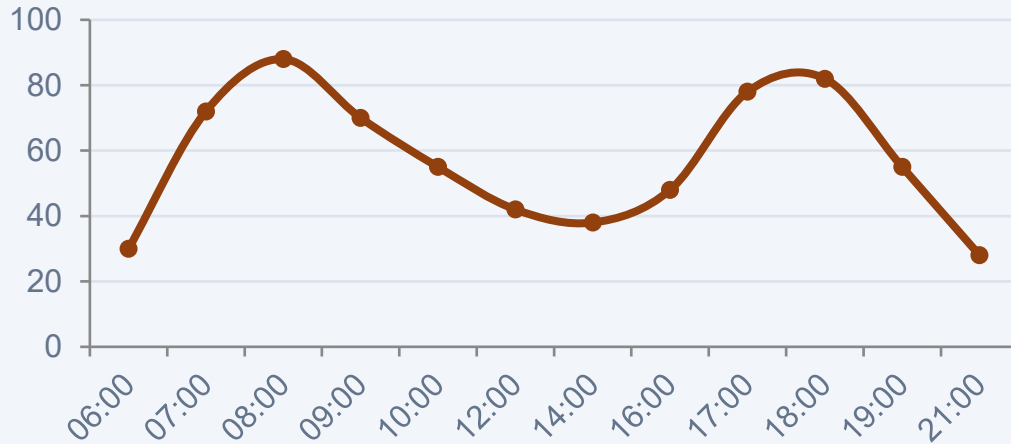
Strong Istanbul & Ankara young urban profile. Premium music format, low ad clutter.

### Number One FM · Turkish Pop

National reach. 18–35 audience. Cost-effective for frequency campaigns targeting young urban consumers.

# Radio — Listening Habits, Demographics & Why Radio

Radio Listening Intensity by Hour (Index)



**42%**

**In-Car**

Drive-time is the dominant radio touchpoint

**38%**

**At Home**

Morning and evening at-home listening

**16%**

**At Work**

Background listening in offices and retail

**4%**

**Other**

Mobile apps, digital streams, commuting

## WHY WE RECOMMEND RADIO

### Drive-time intensity

Istanbul commutes average 55 minutes each way. Radio dominates the car environment — no screen competition.

### High reach, high frequency

Radio builds rapid frequency at very low CPM. Ideal as a cost-effective complement to TV campaigns.

### DJ endorsements work

Turkish radio DJs command strong personal loyalty. Branded content and DJ reads outperform standard spot ads.

### Low production budgets

Audio production is fast and cheap. Allows test-and-learn, seasonal and tactical adaptation at low cost.

### Flexible and agile

Last-minute booking possible. Short lead times enable reactive campaigns tied to news, market events or property launches.

# 06 · Press & Print

Editorial authority, credibility and deep-read engagement

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# Press & Print — Newspapers & Reader Profiles

1.64B TL

Press Ad Investment 2025

+107%

YoY Growth (price-driven)

0.8%

Share of Total Media

21%

Finance Sector SOV in Newspapers

## TOP NATIONAL NEWSPAPERS

**Sabah**

191K

AB+, 35+ · Highest circulation. Broad demographic. Premium sections for real estate, economy.

**Hürriyet**

186K

AB, 25-50 · Flagship quality daily. Real estate & business inserts. Strong brand trust.

**Sözcü**

175K

20-40 Male · Fast-growing. Cost-effective. Liberal urban readership.

**Milliyet**

118K

ABC1, 35+ · Quality broadsheet. Business and culture sections. Premium positioning.

**Habertürk**

70K

AB, 25-35 · Finance-oriented editorial. Premium context for B2B and financial brands.

**Daily Sabah**

Intl

Expat / HNW · English-language. Distributed on international flights. Turkish & expat investor reach.

# 07 · Brand Examples & Media Mix

How leading brands across sectors activate Turkish media

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# How Leading Brands Approach Turkish Media — Cross-Sector Examples

*Illustrative media activation patterns across different industries*

## FMCG / Consumer Goods

Typical heavy TV + digital mix

### Typical Channels:

- Prime-time TV (ATV, Kanal D, Show TV)
- Digital video (YouTube, Instagram Reels)
- OOH — supermarket proximity & transit
- Radio for frequency building
- Retail media (Trendyol, Migros)

### Audience Focus:

Mass market, all demographics. Focus on household reach, purchase frequency and brand loyalty. TV is the primary awareness engine.

## Retail / E-Commerce

Digital-first with strong OOH

### Typical Channels:

- Performance digital (Google, Meta)
- TikTok & Instagram for discovery
- OOH — shopping malls & city centres
- TV sponsorship during peak seasons
- SMS & push notification retargeting

### Audience Focus:

18–45 urban shoppers. Mobile-first purchase behaviour. Focus on conversion, basket size and retention. Strong seasonal bursts.

## Automotive / Travel / Finance

Multi-channel premium mix

### Typical Channels:

- Bloomberg HT & CNN Türk TV
- Press (Sabah, Hürriyet, Forbes Türkiye)
- Premium OOH — airports & key corridors
- Radio drive-time (Bloomberg HT, NTV)
- LinkedIn & programmatic digital

### Audience Focus:

AB+ 30–55, decision-makers and professionals. Focus on brand trust, quality perception and considered purchase. Long sales cycles.

THANK YOU

Scarlet Media