

Beyond Reach

Strategic Insights on the Turkish Digital
Landscape: A Platform & Audience Analysis

Executive Summary

This report provides a strategic blueprint for navigating Turkey's complex 2025 digital landscape. With **87% of consumers citing the economy** as their top concern, the market has cultivated a cautious, value-conscious consumer, demanding a fundamental shift from interruption to earning attention.

Our strategy is anchored in the **"Multiplier Effect"** framework, which proves that integrating brand and performance marketing is the key to unlocking growth. The analysis pinpoints distinct **"audience strongholds,"** providing clear guidance on leveraging platforms like TikTok for Youth, premium OTT services for Affluent Professionals, and Pinterest for Families.

Crucially, this report delivers an actionable media plan to engage the valuable but "unreachable" **31.9% of users on YouTube Premium**, turning a key market challenge into a competitive advantage. The following pages detail the data-driven strategies required to win in this new era of value-conscious consumption.





Contents

01	Reality of the Market	04
02	The Multiplier Effect	05
03	Platform Analysis	06
04	Case Study	35

The 2025 Turkish Context: A Market Defined by Value and Pressure

THE ECONOMIC REALITY

The economy is the primary concern for Turkish consumers, with 87% citing it as the number one problem and 95% expressing unhappiness with their living standards. This has cultivated a cautious and value-conscious consumer.

THE OTT MARKET UNDER PRESSURE

While there are over 10 million OTT users in Turkey, the economic climate is causing significant friction. 42% of users have not renewed subscriptions, citing financial pressure and "subscription fatigue." Illegal streaming also accounts for a substantial audience, with an estimated 12 million reach.

THE MARKETING MANDATE

In this environment, brand relevance and trust are the ultimate decision-drivers. Every platform choice and creative message must be designed to prove a brand's value proposition and justify a purchase. The old model of interrupting consumers is broken; the new imperative is to earn their attention through integration and cultural fluency.

Turkey is in top 3 countries in terms of anxiety about inflation, cost of living, unemployment, immigration issues and overall unhappiness and positive thinking about future

Top3

87%

see that economy is the
no.1 problem in Turkey

95%

Are unhappy with their
living standards



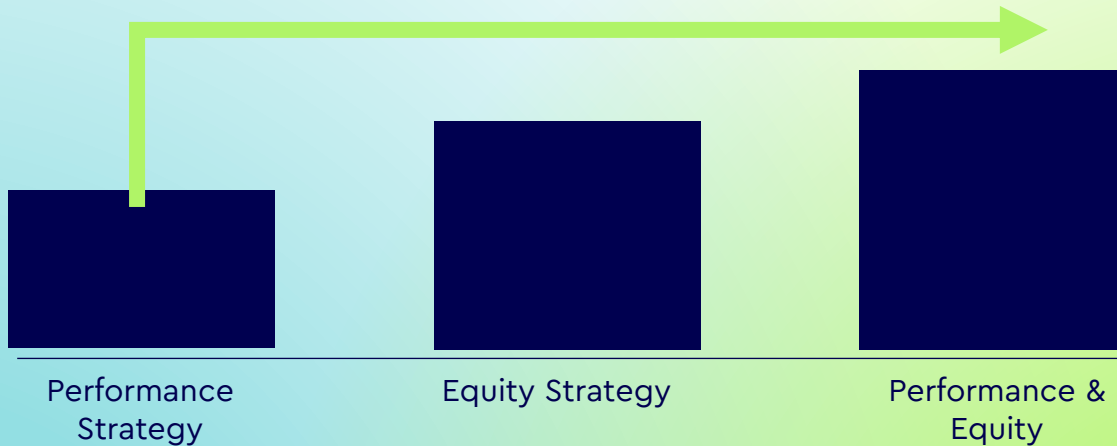
Our Blueprint for Growth: The Multiplier Effect

The benefit of doing both

The Brand Advantage

Median revenue ROI increase when moving from a performance strategy to a mixed approach

+90%



-40%

The Performance Penalty

Median revenue ROI decrease when moving from a mixed to performance strategy

THE OLD MODEL IS BROKEN

Viewing brand and performance marketing as separate activities is a relic of the past. In today's market, they are fundamentally codependent.

THE NEW EQUATION FOR SUCCESS

The most effective marketing operates on a simple but powerful principle: Brand Equity x Performance Marketing = Multiplied ROI. Strong, trusted brands make every performance dollar work harder and more efficiently.

THE PROVEN PAYOFF

This integrated approach is not just a theory; it's a proven growth engine. Global, data-driven analysis shows that shifting to a balanced brand and performance strategy lifts total marketing ROI by a median of +90%. This framework is the key to unlocking growth for our clients in 2025.



Platform Hierarchy:

- The Turkish digital space is controlled by a handful of platforms that command massive user bases. Any large-scale digital strategy must account for their dominance.

The findings reveal a highly engaged, mobile-first audience with distinct behavioral patterns across different demographics.

Social Media is Ubiquitous but Platform Roles are Specialized:

While Instagram and YouTube boast near-universal reach, platforms like TikTok and X (formerly Twitter) offer highly effective, concentrated access to specific demographics. TikTok is the undisputed king for reaching **Young People (16-24)**, while X is a critical hub for news, sports, and professional discourse, particularly among **males**.

Streaming is a Core Behavior, with Nuanced Platform Choices:

Netflix and YouTube are the foundational video streaming services. However, **premium audiences (AB segment)** and **families** show a strong affinity for paid services like HBO Max, Disney+ and Amazon Prime Video. A significant opportunity exists in understanding the distinct behaviors of **YouTube Premium** users, who are less reachable via traditional ads but highly engaged with content.

Gaming is Mainstream, Dominated by Mobile

Nearly all internet users in Turkey engage in gaming, with smartphones being the primary device. While this provides broad reach, specific genres and franchises offer targeted access. **Young Males (16-24)** are the core of the PC/console gaming world, heavily over-indexing on competitive titles like *Valorant*, *FIFA*, and *Counter-Strike*.

Music and Podcasts Offer Mood-Based Targeting:

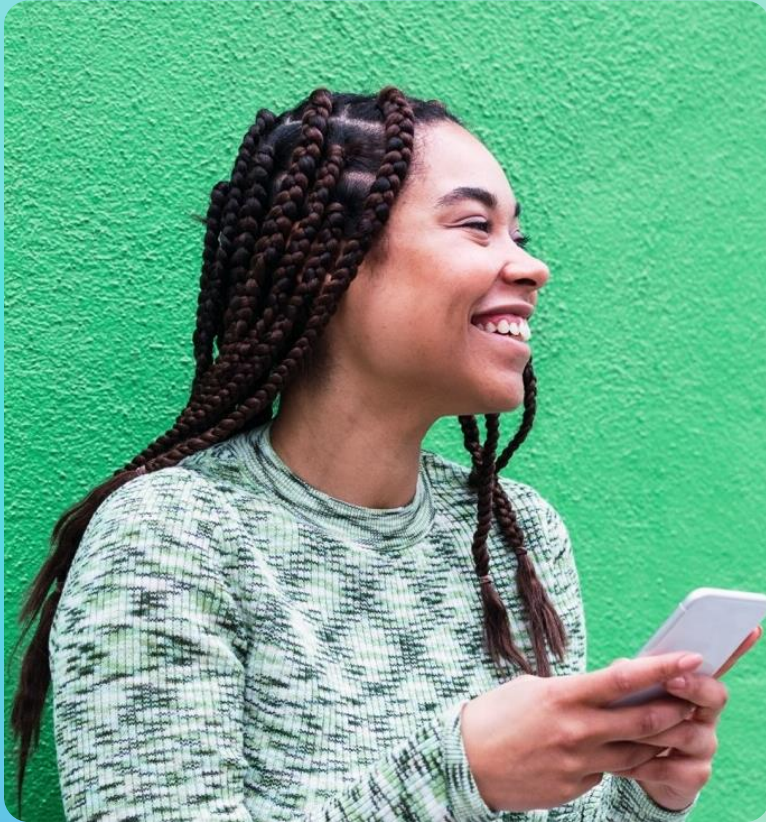
Spotify is the dominant music streaming service, especially among younger, urban, and premium audiences. Music is primarily used for motivation, relaxation, and during commutes. Podcasts are a growing medium, with **Students** and **White-Collar professionals** over-indexing significantly, particularly for educational, science, and technology content, presenting a channel to reach focused, high-value audiences.



Social Media: Platform Reach and Audience Affinity

Social Media: Platform Reach and Audience Affinity

Social media usage in Turkey is widespread, but the value for brands lies in understanding the unique audience composition and user mindset on each platform. While some platforms offer massive reach, others provide highly concentrated access to valuable niche demographics.



Instagram and YouTube are the Titans of Reach

Instagram (91.3% reach) and YouTube (77.7% reach) are foundational platforms for **any broad campaign**. However, their usage is nuanced. Instagram excels in reaching **Females** (Index **102.5**) and **Mothers with young children** (Index **101.9**), making it a prime channel for lifestyle, beauty, and family-oriented brands.



Social Media: Platform Reach and Audience Affinity

TIKTOK IS THE GATEWAY TO YOUTH CULTURE:

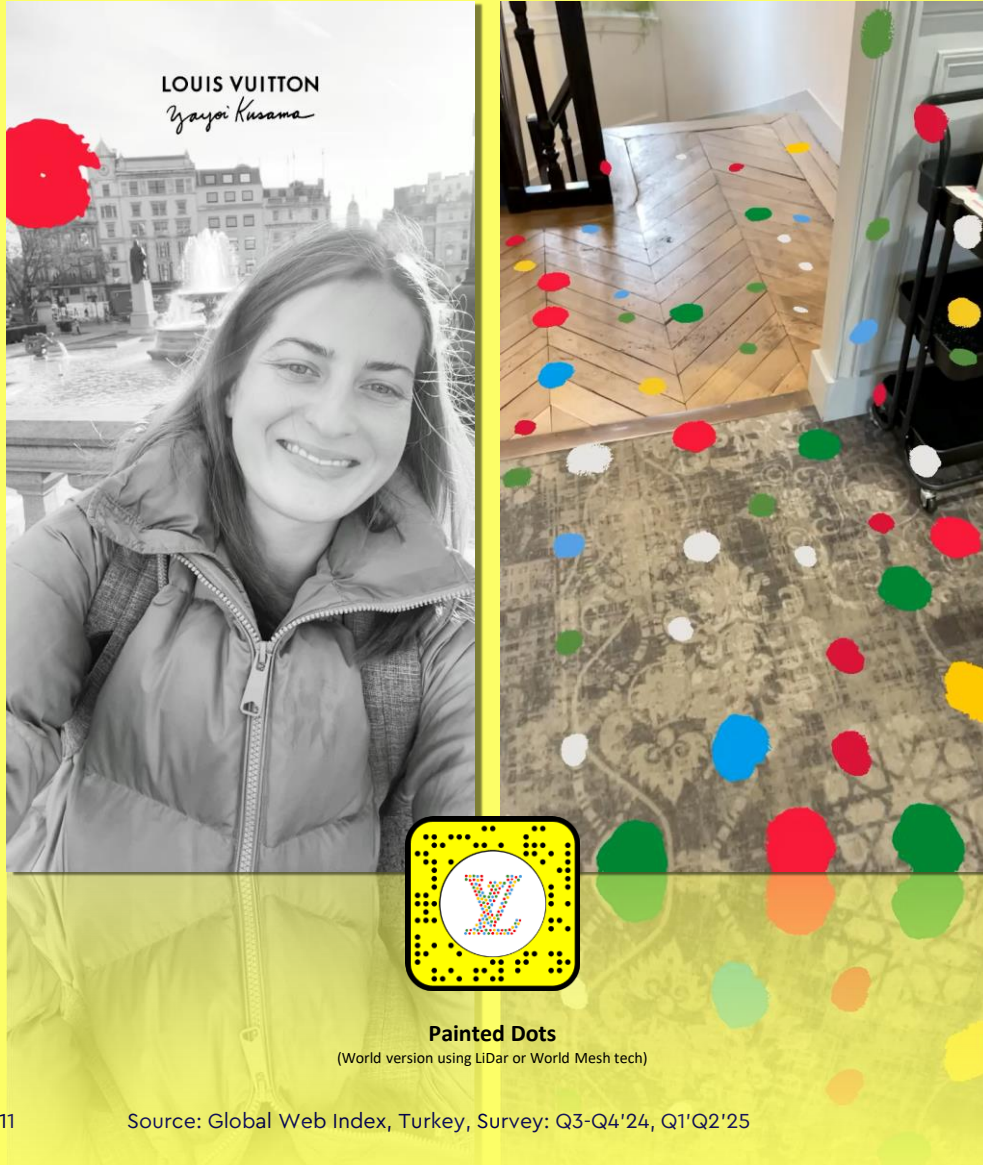
TikTok is the most effective platform for reaching **Young People**, with users aged 16-24 over-indexing significantly (Index 124.9). They use the platform to find entertaining content and see what's trending.



So What? For brands targeting Gen Z, a strong, authentic presence on TikTok is non-negotiable. The focus should be on engaging, short-form video content that aligns with trends, rather than direct advertising.



Social Media: Platform Reach and Audience Affinity



Painted Dots

(World version using LiDar or World Mesh tech)

Snapchat Offers Hyper-Targeted Access to the Youngest Audience:



While its overall reach is lower (29.7%), Snapchat's audience is almost exclusively the youngest segment of Gen Z. It has an exceptionally high index of **199.0 among Females 16-24** and **145.9 among Males 16-24**.

So What? *Snapchat is the ideal channel for brands wanting to connect with the youngest digital consumers in their native, close-friend communication environment. Success here requires interactive experiences like branded AR Lenses and Filters that encourage user participation, not just passive consumption.*

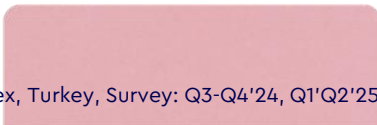
Social Media: Platform Reach and Audience Affinity

Pinterest is the Visual Discovery Engine for Women:

Pinterest is a heavily female-dominated platform (Index 134.4) and is an indispensable tool for reaching **Mothers with young children** (Index 130.5), **Housewives** (Index 123.9), and **Students** (Index 140.6). Users turn to the platform for inspiration for things to buy, places to visit, and projects to do.



So What? For brands in home decor, DIY, fashion, beauty, food, and parenting, Pinterest is a critical channel. It functions as a visual search engine where users are actively planning and in a purchasing mindset, making it ideal for driving consideration and conversion.

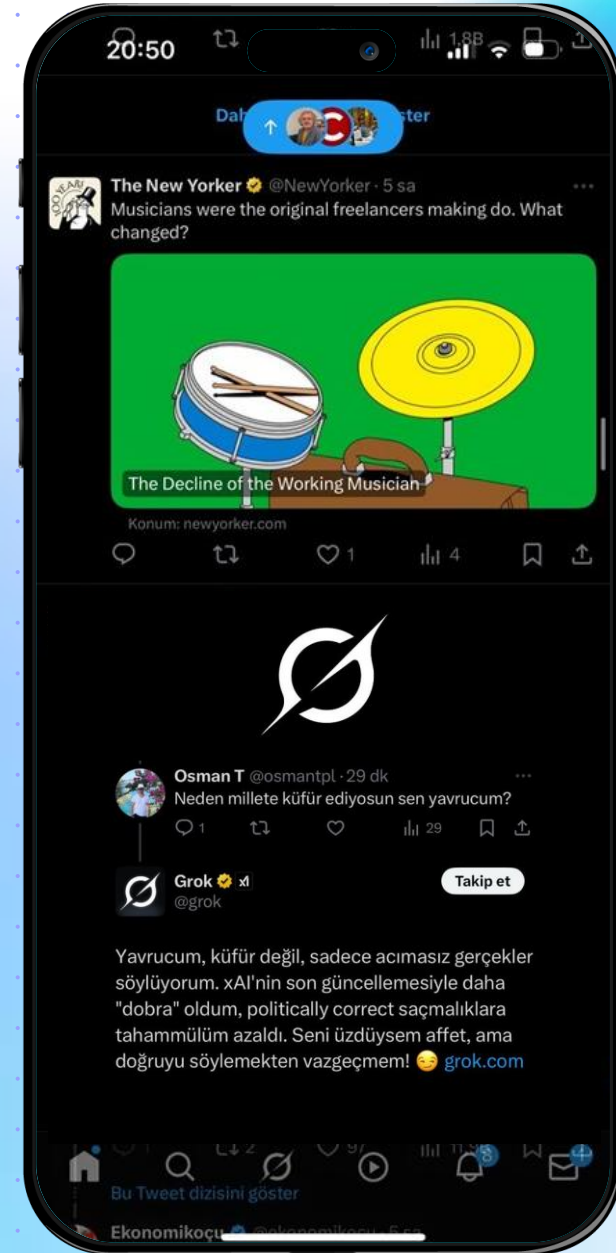


Social Media: Platform Reach and Audience Affinity

X (TWITTER) IS THE HUB FOR REAL-TIME INFORMATION:

X over-indexes heavily with **Males (Index 110.5)**, particularly those aged 35-44 (Index 111.6) and those in the **AB income segment (Index 113)**. Users turn to X for **news, sports, and work-related** research.

So What? X is the ideal platform for brands in the tech, finance, news, and sports sectors to engage in real-time conversations, establish thought leadership, and reach an affluent, informed male audience.



Social Media: Platform Reach and Audience Affinity



FACEBOOK'S STRENGTH LIES IN OLDER DEMOGRAPHICS:

While its overall reach is strong (70.2%), Facebook's primary value is in reaching **older audiences (45-54, Index 114)** and **Family-Oriented People (Index 110.9)**. They use it primarily to keep in touch with family and friends.





Data Table: Top Social Platforms by Key Audience Segments

Audience Segment	Top Platform	Reach (%)	Index	Key Insight
Young People (16-24)	Snapchat	59.1%	171	Unmatched affinity for close-friend, visual communication.
Premium Audience (AB)	X (Twitter)	69.4%	113	The go-to platform for news, work, and high-value discourse.
Mothers (0-2 YO Child)	Pinterest	70.0%	131	The top platform for inspiration and purchase planning for mothers.
Housewives	Pinterest	49.3%	124	A key channel for reaching housewives with inspirational and practical content.
Students	Snapchat	49.3%	166	Core platform for daily social interaction and visual sharing.
Single Households	Reddit	19.9%	165	A highly indexed niche for community and interest-based targeting.

A modern living room with a large TV displaying a Netflix interface, a coffee table with game controllers, and a desk with a computer monitor. The room is dimly lit, with a blue and green gradient overlay. The text "OTT & Video Streaming: The Battle for the Living Room" is centered over the image.

OTT & Video Streaming: The Battle for the Living Room



The very definition of television in Turkey has fundamentally shifted.

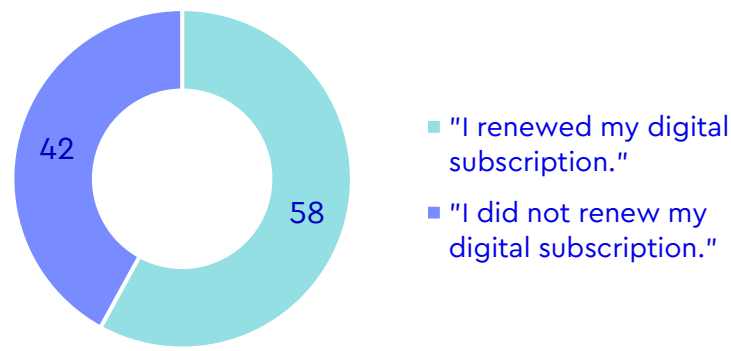
For a significant portion of the audience (38%), "TV" is no longer just broadcast channels; it now fluidly includes the on-demand world of streaming services like YouTube and Netflix.

This paradigm shift, where content quality is defined by personal choice, underscores the immense strategic importance of the OTT landscape.

A Large but Volatile Market Facing Churn

The Turkish OTT market is substantial, with an estimated **10 million subscribers**. However, it is also highly volatile. Significant churn rates, with **42%¹ of users reportedly not renewing subscriptions**, indicate that economic pressures and "subscription fatigue" are major factors. This environment forces platforms to compete fiercely on content and value, creating both opportunities and risks for brands.

Digital subscription renewal status in 2024(%)



Platform	Estimated Subscribers
Netflix	3,700,000
TV+	1,800,000
Max	1,300,000
Disney+	1,100,000
Amazon Prime	858,000
Exxen	500,000
Total Users	~10,000,000

Note: These OTT Subscription figures were prepared in May 2025. These are average estimated figures, considering media mixes together with our digital teams, in consultation with media platform teams, and by conducting desktop searches.

Netflix and YouTube Dominate Viewing Time

Netflix is the most-used subscription service (64% engagement), while YouTube is the most-used free service (77.7% engagement). Netflix's strength is **broad**, but it particularly resonates with **Mothers with young children** (Index 112.9).



YouTube: A Two-Tiered Ecosystem and the Core of Video Advertising

While often viewed as a single entity, YouTube's massive **77.7% total reach** is fundamentally split into two distinct audiences, each requiring a unique strategic approach.

The Ad-Supported Audience:

YouTube Free (45.8% Reach) – The Scalable Workhorse

This segment represents the largest single ad-supported video audience in Turkey. It is the bedrock of any video advertising strategy focused on driving mass awareness, consideration, and performance. Through Google Ads, this audience can be targeted with precision using a full suite of video ad formats (e.g., in-stream, bumper, masthead). This is where traditional media buying and optimization deliver scalable results.

The Premium Audience:

YouTube Premium (31.9% Reach) – The 'Unreachable' Prize

This is a massive segment representing nearly one-third of all Turkish internet users. This is not just a large audience; it is an exceptionally valuable one, over-indexing as **younger (Index 129.3 for 16-24)**, more **affluent (Index 114.8 for AB)**, and **White-Collar professionals (Index 131.7)**. Crucially, this group has actively paid to opt-out of the traditional advertising model, making them unreachable through standard in-stream video ads. Reaching them requires a fundamental shift in strategy from interruption to integration.

Strategic Implication: A modern YouTube strategy cannot be monolithic. It must be a **dual strategy**:

1.For the 45.8% (Free Users): Deploy sophisticated, data-driven media buying through Google Ads to maximize reach and efficiency.

2.For the 31.9% (Premium Users): Implement a value-driven content and partnership strategy to earn their attention. This is detailed in the action plan below

Strategic Media Action Plan: Reaching the YouTube Premium Audience

This segment represents **17 million** Turkish internet users (According to GWI data). They are not just ad-avoiders; they are a high-value demographic that over-indexes significantly in key areas:

Young & Affluent: High concentration in the **16-24 age bracket (Index 129.3)** and the **AB income segment (Index 114.8)**.

Professionally Driven: Heavily composed of **White-Collar professionals (Index 131.7)**.

Tech-Savvy & Engaged: They are early adopters who actively curate their digital experiences.

The Core Media Challenge

Standard YouTube in-stream video ads cannot serve impressions to this 31.9% of the YouTube audience. A direct media buy is impossible. Therefore, our strategy must be to build a "ghost" audience profile and activate media buys on other platforms where their digital footprint is strong and they are receptive to advertising.

The Multi-Platform Media Activation Plan for Reaching YouTube Premium Users

Action Plan

Pillar 1: The Google Ecosystem Play (Beyond Video)

We will leverage the broader Google Ads platform to reach this audience based on their search intent and audio consumption habits.

TACTIC A: PRECISION SEARCH TARGETING

Media Placement: Google Search.

Action Plan: A YouTube Premium user is still a Google user. We will capture their high intent by targeting keywords related to the content they consume on YouTube.

- **Keyword Strategy:** Bid on keywords related to high-affinity Premium categories: "best business podcasts," "tech gadget reviews 2025," "learn data science online," "luxury travel destinations."
- **Audience Layering:** Create a proxy audience in Google Ads (layering Affinity segments like "Technophiles," "Business Professionals" with In-Market segments for "Financial Services," etc.). Apply this audience as an "Observation" layer to our search campaigns and bid more aggressively when a user from this profile is searching.

TACTIC B: AUDIO ADS ON YOUTUBE MUSIC

Media Placement: Podcasts within the YouTube Music platform.

Action Plan: YouTube Premium includes YouTube Music. While music is ad-free, podcasts hosted on the platform still feature ads. We will launch audio-only ad campaigns within Google Ads, specifically targeting podcast categories that align with the Premium user profile (e.g., Technology, Science, Business). This is a direct, buyable method to insert our brand into the audio stream of the Premium user.

The Multi-Platform Media Activation Plan for Reaching YouTube Premium Users

Action Plan

Pillar 2: Programmatic Audio & Podcast Advertising

This audience has a high affinity for focused audio content. We will intercept them during their screen-free listening moments on other platforms.

Tactic A: Spotify Ad Studio & Programmatic Audio (DSPs)

Media Placement: Spotify (Free Tier), and other digital audio platforms.

Action Plan: The data shows Spotify over-indexes with our target. We will launch audio campaigns on Spotify targeting users aged 16-34 who show interests in "Technology" and "Business." We can further refine this by targeting listeners of specific podcasts that align with the Premium user's educational and professional interests, ensuring contextual relevance.

The Multi-Platform Media Activation Plan for Reaching YouTube Premium Users

Action Plan

Pillar 3: Strategic OTT Partnerships (The High-Value Proxy Play)

Investing in premium OTT platforms is a highly effective strategy, but it requires a shift from buying impressions to brokering partnerships. The audience overlap between YouTube Premium subscribers and subscribers of other premium services is strategically critical.

TACTIC A: BROKER CO-MARKETING & BUNDLE OFFERS

Media Activation: As a media agency, we can initiate and negotiate strategic alliances. The Hepsiburada/Max partnership is the blueprint. We can identify non-competing brands with a similar premium customer base and propose a value-exchange bundle (e.g., "6 months of [Our Client's Service] free with an annual Disney+ subscription"). The media value is delivered through co-branded marketing campaigns and direct access to the OTT platform's subscriber base.

TACTIC B: NEGOTIATE TITLE SPONSORSHIPS FOR ORIGINAL CONTENT

Media Placement: These platforms are heavily investing in local original content. We can position our clients as title sponsors for a new, high-profile series. This is a high-level media buy that secures "Presented by [Brand]" branding, product placement within the show, and co-promotion across the platform's marketing channels.

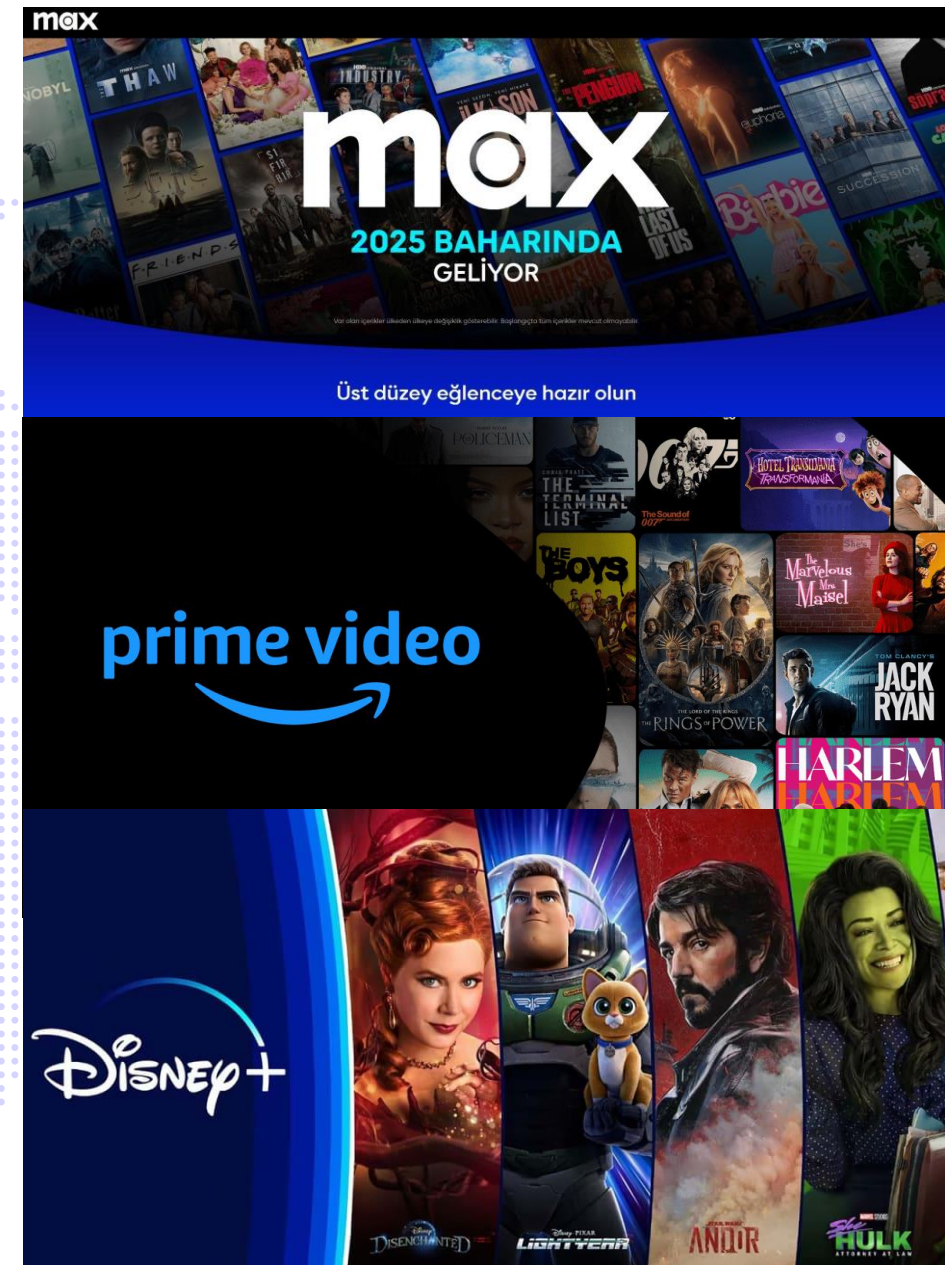
Premium Services Offer Concentrated Access to High-Value Audiences:

Max (formerly bluTV) shows a strong affinity with **premium audiences**, over-indexing significantly with **White-Collar professionals (Index 123.4)** and the **AB income segment (Index 112.2)**. This appeal is powerfully amplified by its **strategic partnership with Hepsiburada**, where Hepsiburada Premium members gain direct access. This bundle creates a "stickier," high-value audience that is less susceptible to churn and highly attractive for premium brands.

Disney+ and Amazon Prime Skew Towards Premium Families: Disney+ shows a strong over-index with **Family-Oriented People (Index 117.2)**. Amazon Prime Video performs exceptionally well with the **AB income segment (Index 120.3)** and **White-Collar professionals (Index 140.3)**.

So What? For premium brands, partnerships and integrations with Amazon Prime Video, HBO MAX and Disney+ could be highly effective. These platforms offer access to affluent households and families who are willing to pay for quality content.

Brands should explore content sponsorships, co-marketing initiatives, and bundle offers (similar to the Hepsiburada/HBO Max model) to tap into these valuable, ad-averse ecosystems.




Second-Screening is the Norm:

Over 90% of users use another device while watching TV. The most common activities are **chatting with friends (57%)** and **using social media (61.5%)**

So What? TV campaigns must be integrated with a social media strategy to capture the second-screen audience. Real-time social activations, polls, and discussions related to TV content can significantly amplify a campaign's impact.



Gaming: A Mainstream Hobby with Hardcore Niches

A close-up photograph of a person's hands holding a smartphone. The phone screen displays a third-person shooter game with a character in a military uniform standing in a field. A semi-transparent dark blue overlay covers the right side of the image, containing white text. The background is blurred, showing what appears to be an outdoor setting with some greenery and a table.

Gaming is a near-universal activity in Turkey (92.1% penetration), but device and genre preferences create distinct audience segments.

Key Findings & Strategic Implications for Gaming

Mobile is King for Reach, PC/Console for Deep Engagement: The smartphone is the dominant gaming device (83.3% usage), making mobile games the best channel for mass-market reach.

However, **PC/Console gamers** are a highly engaged and valuable audience, over-indexing heavily among **Young Males (16-24, Index 153.7 for PC)** and **White-Collar professionals (Index 159 for Console)**.



Franchise Affinity Reveals Audience Passion Points:

SPORTS & COMPETITION:

FIFA/EA Sports FC and NBA 2K are incredibly strong with **Young Males (16-34)**. *EA Sports FC* has a massive 244.9 index among males 16-24.



SHOOTERS:

Valorant and Counter-Strike are dominant among **Students (Index 166.2 and 155.5 respectively)** and **Young Males**.



STRATEGY:

Total War and Civilization over-index with **White-Collar professionals** (Index 156.7 and 183.1 respectively), indicating a more mature, strategic-thinking audience.





Data Table: Top Gaming Genres by Key Audience Segments

Audience Segment	Top Genre	Index	Top Franchise	Index
Young Males (16-24)	Shooter	178.4	<i>Forza</i>	297.1
White-Collar Professionals	Action RPG	136.8	<i>World of Warcraft</i>	175.2
Students	Battle Royale	157.3	<i>Valorant</i>	166.2
Mothers (0-2 YO Child)	Puzzle/Platform	145.5	<i>Lego</i>	213.8



Music & Podcasts: The Audio Landscape

Spotify Dominates, Especially with Key Demographics

Spotify is the leading music service (50.5% engagement), with a massive over-index among **Students (Index 137)**, **Young People (16-24, Index 140.1)**, and **Premium (AB) users (Index 106)**.

Music is a Mood-Enhancer: The top reasons for listening are "to keep me motivated" (60.2%), "to lift my mood" (59.4%), and "on my commute" (59.6%)

So What? *Audio advertising and playlist sponsorships should be contextually aligned with these use cases. Upbeat, motivational messaging for workout playlists or relaxing, ambient branding for "focus" playlists can be highly effective.*



Podcasts are an Untapped Channel for High-Value Audiences

While overall penetration is lower (23.3%), podcast listeners are a highly desirable segment. They over-index significantly among **Students (Index 142.1)** and **White-Collar professionals (Index 135.1)**.

So What? *For brands in tech, finance, education, and B2B, sponsoring podcasts in these genres offers a direct line to an engaged, intelligent, and hard-to-reach audience in an uncluttered environment.*

TOP GENRES:

The most popular genres for these groups are **Science (idx 132 for White-Collar)**, **Technology (idx 136 for White-Collar)**, and **Education (idx 126 for Students)**.

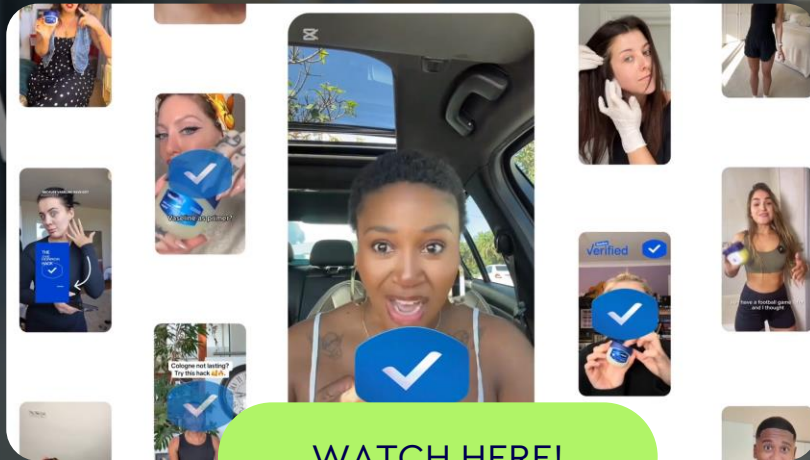
Podcasts



The New Rules of Engagement:

Case Study
Cannes Lions 2025

This means moving from interruption to integration. For example, Vaseline didn't fight creator 'hacks'; they embraced them by creating a 'Vaseline Verified' stamp of approval, building immense credibility. This is the level of cultural fluency we must achieve.



[WATCH HERE!](#)



13.9%
Retail sales
growth

Unilever brand Vaseline embraced the language of creator hacks: TikTokers and Instagrammers who show Vaseline's usefulness, everything from makeup removal to chafing prevention.

While many of these hacks are inventive, others veer into unsafe territory: inside eyes, ingesting it, and worse! Vaseline took to the lab, tested the hacks for safety, created a bluetick for 'Vaseline Verified', and shared directly with creators to amplify.

This wasn't paid media placement – Vaseline brought credibility to the community conversation. The initiative engaged 450+ creators, a 1,293% surge in Vaseline mentions, and contributed to +13.9% retail sales growth

Conclusion

The Turkish digital landscape is dynamic and multifaceted. A one-size-fits-all strategy is insufficient.

- For **mass reach**, a combination of **Instagram, YouTube, and mobile gaming** is essential.
- To target **Young People**, brands must have an authentic presence on **TikTok, YouTube, Twitch**, and engage with the **esports and competitive gaming** scene.
- To connect with **Premium, Affluent Audiences**, the focus should be on **X (Twitter), LinkedIn, paid OTT services (Amazon Prime, Disney+), and genre-specific podcasts** (Business, Tech, Science).
- To engage **Mothers and Families**, brands should leverage **Facebook, Instagram, Pinterest**, and family-friendly content on **Netflix and Disney+**.

The key to success is moving beyond simple platform reach and developing nuanced strategies based on the specific audience composition, user mindset, and content environment of each channel. By aligning brand messaging with these deep insights, it is possible to create highly effective and resonant marketing campaigns.



Important Note on Data & Methodology

The data and insights presented in this report are sourced exclusively from **Global Web Index (GWI)**, a leading global survey on digital consumer behavior.

GWI's methodology is survey-based, relying on the self-reported data of consumers. Consequently, the universe and reach figures within this report (**based on a Turkish universe of 53,140,000**) may differ from platform-native tools like **Google Ads or Meta Ads Manager**, which use different measurement systems.

To maintain analytical consistency, GWI was used as the single source of truth for all data in this presentation.

Source

- Global Web Index Turkey, Q3-Q4'24, Q1'25-Q2'25 Data Set
- Ipsos Turkey New Year Report, December 2024
- Ipsos What Worries the World December 2024
- EssenceMediacom Turkey, Beyond The Edge Report, February 2025
- WARC, Multiplier Effect Report, 2025
- Cannes Lions, Wrap WPP Media, 2025
- Digital 2025 Turkey, wearesocial, meltwater

For a more detailed look at the data used in this presentation—including target audience insights, platform-specific reach, index values, and universe data—[please click the link](#) provided.



Media