COVID – 19
IN TURKEY
HUMANKIND IS NOW FACING A GLOBAL CRISIS. PERHAPS THE BIGGEST CRISIS OF OUR GENERATION. THE DECISIONS PEOPLE AND GOVERNMENTS TAKE IN THE NEXT FEW WEEKS WILL PROBABLY SHAPE THE WORLD FOR YEARS TO COME. THEY WILL SHAPE NOT JUST OUR HEALTHCARE SYSTEMS BUT ALSO OUR ECONOMY, POLITICS AND CULTURE. WE MUST ACT QUICKLY AND DECISIVELY. WE SHOULD ALSO TAKE INTO ACCOUNT THE LONG-TERM CONSEQUENCES OF OUR ACTIONS. WHEN CHOOSING BETWEEN ALTERNATIVES, WE SHOULD ASK OURSELVES NOT ONLY HOW TO OVERCOME THE IMMEDIATE THREAT, BUT ALSO WHAT KIND OF WORLD WE WILL INHABIT ONCE THE STORM PASSES. YES, THE STORM WILL PASS, HUMANKIND WILL SURVIVE, MOST OF US WILL STILL BE ALIVE — BUT WE WILL INHABIT A DIFFERENT WORLD.

YUVAL NOAH HARARI
SUMMARY OF THE CURRENT SITUATION
There are more than 669,000 confirmed cases worldwide, with the US recording more than any other country, including China. Europe has also seen a surge in cases.

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

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

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

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

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

Before Outbreak

Quick Recovery Scenario

2.5

Global Slow Down Scenario

After Outbreak

2

1-1.5

Before Outbreak

5.9

After Outbreak

4.68

3.8

Before Outbreak

0.2

After Outbreak

0

-0.8

# POTENTIAL IMPACT OF COVID-19 OUTBREAK ON 2020 GDP GROWTH

<table>
<thead>
<tr>
<th>Scenario</th>
<th>GDP Growth</th>
<th>Before Outbreak</th>
<th>After Outbreak</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Quick Recovery Scenario</strong></td>
<td></td>
<td>1.84</td>
<td>1.68</td>
</tr>
<tr>
<td><strong>Global Slow Down Scenario</strong></td>
<td></td>
<td>2.09</td>
<td>1.15</td>
</tr>
<tr>
<td><strong>Before Outbreak</strong></td>
<td></td>
<td>3.97</td>
<td>3.94</td>
</tr>
<tr>
<td><strong>After Outbreak</strong></td>
<td></td>
<td>0.75</td>
<td>0.55</td>
</tr>
</tbody>
</table>

**SOURCE:** McKinsey COVID-19 Facts & Insight Report
NEXT FORECAST

MARKETING IN THE MIDDLE OF ACUTE PERIOD

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

Brian Weiser, GroupM Intelligence
Coronavirus Update - March 16, 2020

SOURCE: http://nrg.cs.ucl.ac.uk/mjh/covid19/
EARLY IMPLICATIONS FROM TURKEY
COVID-19 TIMELINE IN TURKEY

21 January
- Corona speeches start with the ambassador’s declaration
- World Health Organization has declared an emergency situation about Corona.

19 February
- 2 people identified with the corona virus in Iran died
- 2 people identified with the corona virus in Iran died
- Passengers who came from Iran caused panic
- The Minister of Health announced the first case of corona virus.

22 February
- Turkish closed border with Iran
- The Minister of Health announced the second case of corona virus. Person was one of the relatives of the first patient.

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

25 February
- Italian declared state of emergency because of Corona
- Entertainment places and cafes have been temporarily closed. Restrictions were imposed on prayer in the mosque.

11 March
- Schools were vacationed due to the corona virus.
- The Minister of Health announced the second case of corona virus. Person was one of the relatives of the first patient.

13 March
- A 61-year-old man died. The number of patients increased to 191.
- The number of those killed by the corona virus has increased to 9

16 March
- Umrah passengers (10,000 passengers) quarantined in Ankara
- Health minister announced 66 years old man died because of Covid-19

18 March
- 29 new Covid-19 case was announced by Fahrettin Koca. Total number is 47

19 March
- Curfew were declared on people over the age of 65.
- Schools were vacationed until April 30.

21 March
- Intercity transportation is restricted
- The number of those killed by the corona virus has increased to 9

23 March
- The number of those killed by the corona virus has increased to 9

25 March
- The number of those killed by the corona virus has increased to 9

27 March
- The number of those killed by the corona virus has increased to 9
• 2 out of every 3 people are afraid of corona, 67% of people are very afraid that the virus will pass to their family.
• 69% think that the Ministry of Health manages the virus outbreak well and they’re trusting in ministry.
• 3 out of 4 people interviewed say they are ready to give up their travel and similar rights if they will prevent the spread of the virus. The rate of those who say that in high school and above educated people is over %80.
• 64% of people think that we will be better off in the next month of the epidemic.
• 69% state that they took action for the virus. Measures taken; first is washing hands more often. Less going out is second, using hand disinfectant is third, personal contact is fourth, wearing a mask is fifth, and using cologne is sixth.
• 43% suspect that there is an unknown force behind the spread of the virus so quickly. The first name that comes to mind is America with 24%, second %10 China, third %5 Israel.
• Government set up Coronavirus Science Board to take actions with experts. Minister of Health in his statement «people who return from abroad, shouldn’t engage with crowd and stay isolated for 14 days at least. Ministry of Health has prepared a COVID-19 guide and prepared a comprehensive guide that explains how to take precautions against the epidemic.

• With serious measures taken at the airports and border gates, more than 10 thousand people went through health checks, including Umrah. Entries and exits from abroad via the air and land were completely closed.

• Since the beginning of March, IBB has increased the level and frequency of disinfection of public transportation.

• So far there are 7,402 cases and 108 losses in Turkey. They’re isolated and being quarantined. Health minister states that they’re doing everything for the virus not to be spread.

• Tests were started in 25 hospitals determined for Coronavirus control. The Coronavirus hotline started to operate on "ALO 184".

• Many cultural events have been canceled. Football, basketball, volleyball and handball matches are decided to play without audience. All the socializing areas like cafes, malls are closed. Market’s working hours are limited. Shopping malls working hours are shortened.

• Government has given leave permit to all schools temporarily and switched to the distance education system.

• Intercity trips are now devoted to the approval of the governorsip. Rare seating arrangement will be applied in public transportation vehicles. International flights are completely closed.

• As in the public sector, flexible working system will be implemented with minimum personnel in the private sector.

• Socialization areas will be closed on weekends, people will not be able to go collectively on weekdays. Sports on the coast side is prohibited.

• In all provinces, a pandemic board will be established under the chairmanship of the governors, and the measures taken will be monitored and additional measures specific to that city will be taken when necessary.

• The decision to apply these measures meticulously in all 30 metropolitan cities such as Istanbul, Ankara, Izmir and Kocaeli has been implemented.

SOURCE: Mediacat & Hürriyet
CONSUMER INCREASED THE DEMAND FOR PREVENTIVE MASKS, DISINFECTANTS AND COLOGNE TO PROTECT AGAINST CORONAVIRUS

Turkey is experiencing an increase in demand for masks and disinfectant to protect against coronavirus together with the world and especially in the last two weeks.

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

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

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

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

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

SOURCE: Hürriyet
COLOGNE, MASK, DISINFECTANTS, CORONAVIRUS AND GLOVE SEARCHES ON WEB STARTED TO INCREASE ON MARCH AND PEAKED ON MARCH 11

SOURCE: Google Trends
THE SITUATION IS GETTING SERIOUS WITH THE INCREASE OF DEATH CASES

When we analyse the relationship between covid-19 searched and death cases, there seems to be a positive correlation between the two. Consumers start to take it more seriously with the increase of death cases. Increasing Evdekal searches also shows us that the self-isolation trend is rising.
The usage of masks to protect from corona is the most common method. Washing hands, hygiene and cleaning comes after usage of masks. *It is seen that «cleaning comes from faith» remark stands out among hygiene mentions. So, religious perspective comes to the fore as well.*

After the announcement of first case and other cases; consumers have increased sharing contents about precaution methods. 0% cologne speech increased to 7%.
COVID-19 CONCERN ALSO AFFECTED THE USAGE OF TRANSPORTATION IN ISTANBUL WITH %60 DECREASE.

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

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

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

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

As consumers are we able to both protect ourselves, nation and earth. Do we really have the power to do that? Looking at the picture that Nasa captured, it seems so.
IN JUST 2 WEEK TURKEY’S AIR POLLUTION HAS BEEN NOTICEABLY CLEANED COMPARING TO PREVIOUS PERIOD

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

March 03, 2020 Turkey

March 17, 2020 Turkey

SOURCE: https://www.havaizleme.gov.tr/
EARLY EFFECTS ON SHOPPING & MEDIA CONSUMPTION BEHAVIOURS IN TURKEY
BETWEEN 11-17 MARCH, THE NUMBER OF HOUSEHOLD CONSUMPTION REGISTRATIONS INCREASED BY %21 COMPARED TO THE PREVIOUS WEEK.

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

Besides, the most purchased categories during this period are biscuits, pasta, milk, legumes, chocolate coated products, cheese and household hygiene products.
THE OUTBREAK EFFECT ON E-COMMERCE

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

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

Although sessions are decreased by 10% on the last year, it is increased by 8% on 2020.
**EARLY EFFECTS ON MEDIA CONSUMPTION**

**TVR**

- Total TVR increased;
  - 8% compared to 13-14-15-16 March 2019
  - 18% compared to 7-8-9 March

**ATS**

- Total ATS increased;
  - 6% compared to 13-14-15-16 March 2019
  - 13% compared to 7-8-9 March

*SOURCE: Kantar*
EARLY EFFECTS ON MEDIA CONSUMPTION

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

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

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

Netflix;
30% increase by 14-16 March av. daily reach (vs prev week)
16 Mar, Mon vs prev week +56% ; vs prev 2 weeks +50%

Mynet;
• page/session increased 12% on mobile, 8% on desktop compare to previous week
• Session/user increased 20% on mobile, 5% on desktop
EARLY EFFECT ON CONTENT CONSUMPTION

13-14-15 March vs 7-8-9 March;
News typology **doubled**
Health typology increased by **33%**
Children typology **doubled**.
EARLY IMPLICATIONS ON SOCIAL MEDIA
In Turkey, 9M mentions were shared about Corona since December 2019. These 11M mentions were shared by 2M unique users.

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

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

SOURCE: Brandwatch
It is observed peaks on 31th of January, 24th of February and 8th of March. Unlike European countries, China’s corona speeches are decreasing. The number of cases and the number of mentions are correlated.
It is observed peaks on 31th of January, 24th of February and 8th of March.

Salvo su un treno per Pesaro.
Nella carrozza entra un ragazzo cinese.
Una tizia esclama ad alta voce: "Ecco qua, così c'è un virus che ci ha infettati tutti".
Il ragazzo prontamente risponde: "A signor, io la Cina in vita mia l'ho vista solo su Google Maps!".

Applausi

#coronavirus
CONSUMERS’ AGENDA SHIFTED TO COVID-19 AND ACCELERATED IN TIME AS OF 31 JAN

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

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

Before outbreak, most re-shared contents were the humorous ones. However, after the outbreak mentions got serious. Fahrettin Koca’s announcements on Twitter, in the evenings, increase the mention volume on social media.
AFTER FIRST CORONA CASE WAS ANNOUNCED,
CORONA MENTIONS HAVE DRAMATICALLY INCREASED.

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

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

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

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

People support quarantina by sharing #stayinhomeTurkey hashtags.
Although the issues get serious after March 9, humor takes an important place in social media.

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

Users who found the health minister successful used applause emoji.
**IMAGE ANALYSIS**

**Pfizer and Nurofen:** The French Ministry of Health warned against drugs that have an active ingredient ibuprofen, due to the risk of triggering a corona virus.

**Twitter:** Twitter let its staff work from home,

**Adidas:** Since Juventus jerseys sponsored by Adidas, adidas comes to the fore after news «Coronavirus detected in 3 players in Juventus»

**Netflix:** Due to quarantina restriction, social media users shared their Netflix lists to watch while they are at home

**Spotify:** Spotify podcasts about corona virus and last updates come to the fore
EARLY RESEARCH FINDINGS
THE OUTBREAK CHANGED PEOPLE’S LIFESTYLE

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

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

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

CLOUD LIVING
EMERGING ONLINE CONTENT HELPS CONSUMERS TO BUILD CLOUD LIFE AT HOME. CLOUD FITNESS, CLOUD COOKING, CLOUD STUDY, CLOUD PARTY. WORK – LIFE CONVERGENCE.
COVID-19 IS TAKEN VERY SERIOUSLY BY CONSUMERS, %38 ARE QUITE WORRIED ABOUT THE OUTBREAK, TO AVOID THE EPIDEMIC LOTS OF HYGIENE AND HEALTH PRECAUTIONS ARE TAKEN

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

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

SOURCE: GroupM Turkey Covid-19 Survey – Wave 1
THERE ARE SOME MAJOR CHANGES IN CONSUMER BEHAVIOUR. TIME SPENT AT HOME INCREASES DRAMATICALLY, CREATING NEW WAYS OF INDOOR ACTIVITIES.

How these feelings reflect on consumer behaviour?

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

- %72 of consumers avoids going to the malls
- %65 doesn’t go to restaurants anymore
- %63 doesn’t go to areas where Coronavirus is dense
- %66 stopped going to cinema
- %62 stopped going to touristic places

SOURCE: GroupM Turkey Covid-19 Survey – Wave 1
CONSUMERS STRIVE TO KEEP THE ENVIRONMENT THAT THEY’RE LIVING CLEAN. BASIC NEED IS THEY WANT TO FEEL SAFE FOR THEMSELVES AND THEIR LOVED ONES.

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

*Brands need to prepare themselves to a consumer group that integrated with their home more than ever.*
CHANGES IN MEDIA CONSUMPTION
DURING EPIDEMIC, DIGITAL BECOMES THE SAVIOR OF CONSUMERS. THEY STARTED TO SPEND MORE TIME ONLINE TO FOLLOW THE NEWS FROM UNLIMITED SOURCES.

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

SOURCE: GroupM Turkey Covid-19 Survey – Wave 1
IN A PERIOD WHERE TRUST IS VERY IMPORTANT, TURKISH PEOPLE MOSTLY RELY ON GOVERNMENT ADMINISTRATION. GOVERNMENT OFFICIALS ARE AHEAD OF THE HEALTHCARE PROFESSIONALS.

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

SOURCE: GroupM Turkey Covid-19 Survey – Wave 1
CHANGES IN SHOPPING BEHAVIOUR
PRIORITIES ARE CHANGING & BASIC NEEDS ARE BECOMING MORE IMPORTANT

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

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

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

SOURCE: GroupM Turkey Covid-19 Survey – Wave 1
Shopping channels are also being reshaped in this period because we are going through a very volatile period. But the important thing in shopping channels is to understand consumers’ different needs and integrate them into the channel which drives the sales. They either choose their neighborhood grocer for being near and well-known or they choose the high way with digital channels to avoid going out. *In the long run, consumers will choose channels that are clean & safe with 7/24 quick acces.*

**SOURCE:** GroupM Turkey Covid-19 Survey – Wave 1
CONSUMER EXPECTATIONS
DURING COVID-19 EPIDEMIC, WE NEED TO RECONSIDER CONSUMERS’ EXPECTATIONS FROM BRANDS AND THE GOVERNMENT

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

**Expectations from brands**
- 65% wants products to be extra hygienically,
- 64% wants hygiene control in cargo deliveries,
- 64% wants to be informed about store and areas that they’re using,
- 63% wants face mask for every worker and
- 58% demands supply of health equipment.

**Expectations from government**
- 79% thinks all people should be tested enters who enters Turkey from affected areas by the virus,
- 75% supports same people should be also quarantined,
- 73% says anyone entering the county should be quarantined,
- 72% thinks schools must be closed and continue education from home,
- 71% of consumers says travel should be banned for a limited time.

SOURCE: GroupM Turkey Covid-19 Survey – Wave 1
TURKEY VS. GLOBAL
COMPARING BETWEEN DIFFERENT GENERATIONS
Consumers are mostly concerned for speed of the virus spreading US%54 – UK %45. Their second concern is if their relatives catch the virus US %52 – UK %56. Thirdly elderly people are afraid of the virus US %47 – UK %56 and this is the opposite in Turkey. Older ones amongst Turkish people are generally not concerned about Coronavirus youth is scared for their future.

Consumer think that virus can spread on any age US%72 – UK%80. For precaution they’re mostly believe on frequently handwashing and using hand sanitizer US%69 – UK%84. Handwashing ratio is higher with %84 in Turkish people.
CONSUMERS THINK THAT THEY HAVE ENOUGH INFORMATION ABOUT THE RECOMMENDED PRECAUTIONS TO TAKE TO STAY HEALTHY

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

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

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

<table>
<thead>
<tr>
<th></th>
<th>All</th>
<th>U.S.</th>
<th>UK</th>
<th>Gen Z</th>
<th>Gen Y</th>
<th>Gen X</th>
<th>Boomers</th>
<th>Lower Inc</th>
<th>Higher Inc</th>
</tr>
</thead>
<tbody>
<tr>
<td>Yes, I have enough info</td>
<td>50</td>
<td>48</td>
<td>60</td>
<td>41</td>
<td>52</td>
<td>52</td>
<td>56</td>
<td>41</td>
<td>65</td>
</tr>
<tr>
<td>No, I don’t have info</td>
<td>29</td>
<td>30</td>
<td>22</td>
<td>41</td>
<td>31</td>
<td>23</td>
<td>22</td>
<td>33</td>
<td>23</td>
</tr>
<tr>
<td>I’m not sure</td>
<td>21</td>
<td>22</td>
<td>17</td>
<td>18</td>
<td>17</td>
<td>26</td>
<td>22</td>
<td>26</td>
<td>12</td>
</tr>
</tbody>
</table>

*SOURCE: GWI 2020*
There are strong levels of trust in the reported figures shared so far about infection / mortality rates overall. Almost half in the UK and U.S. do trust these reported figures.

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

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

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

**SOURCE:** GWI 2020
For two matter of what is changed after COVID-19 is same in every country regardless of culture. Washing hands more frequently and read more news to keep up to date are the key behaviour of the consumer after Coronavirus. Consumers for frequently hand washing USA %58 – UK %57.

Turkish consumers has a higher rate for hand washing %84. According to this they increase their hygiene shopping.

** Behaviour Comparison Between Countries **

<table>
<thead>
<tr>
<th>Behaviour</th>
<th>TR</th>
<th>UK</th>
<th>USA</th>
</tr>
</thead>
<tbody>
<tr>
<td>Washing hands more frequently</td>
<td>85%</td>
<td>57%</td>
<td>58%</td>
</tr>
<tr>
<td>Read the news more often to keep up to date</td>
<td>69%</td>
<td>40%</td>
<td>49%</td>
</tr>
<tr>
<td>Avoiding going to busy public places</td>
<td>75%</td>
<td>30%</td>
<td>29%</td>
</tr>
<tr>
<td>Checking social media more often</td>
<td>58%</td>
<td>29%</td>
<td>21%</td>
</tr>
<tr>
<td>Avoiding eating out at restaurants</td>
<td>47%</td>
<td>11%</td>
<td>10%</td>
</tr>
<tr>
<td>Avoiding travelling</td>
<td>58%</td>
<td>21%</td>
<td>3%</td>
</tr>
<tr>
<td>Started wearing face mask</td>
<td>21%</td>
<td>13%</td>
<td>5%</td>
</tr>
<tr>
<td>Working from home often</td>
<td>21%</td>
<td>11%</td>
<td>5%</td>
</tr>
</tbody>
</table>

** SOURCE: GWI 2020 **
TONE OF VOICE & EMERGING CONTENT TYPES
If there is life, there is hope: With the rapid spread of the epidemic disease and deaths, some people are hopeless and anxious. As a brand that cares about people, it is important to give hope and to advise them to manage stress.
With the Covid-19 virus, the consumer is confused about what to do, especially in the precautions part. After the first cases have been announced, consumers’ contents have become serious. Suggestions about what people can do to protect from virus have increased. It is important for brands to meet this need and that the brand acts as an informative source even if the corona subject is not directly related to the brand or product.
With the support of social isolation, people are sharing about how to spend time at home. At this point, it is important to give spare time activity suggestions to the consumer like their friends. However, it is also important to remember this is a serious topic. So, be their friend but do it in a convenient way.

SOURCE: Brandwatch
INFORMATIVE CONTENTS

SOURCE: Brandwatch
ADVICE CONTENTS

SOURCE: Brandwatch
DIRECT ACTIONS

SOURCE: Brandwatch
A TIME TO LEAD WITH PURPOSE AND HUMANITY
Healthy living» and «enviroment» have been on our agenda for a while. But now it is time to reconsider it within the crisis we are going through. Consumers seek for transparency more than ever. Hygienically safe environment and products are getting more and more importance everyday.

**Consumer Expectation from Brands**

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

**SOURCE:** GroupM Coronavirus Survey 2020
BRAND PURPOSE: TODAY IT IS MORE IMPORTANT TO GENERATE RELATIONS THAN TO SELL

WELL BEING / HEALTHY LIFESTYLE

HYGIENE

FAMILY RELATIONSHIP

MENTAL HEALTH

EDUCATION

ENVIRONMENTAL HYGIENE

PERSONAL HYGIENE
TOP 5 TOPICS TO GENERATE VALUE FOR CONSUMERS

HYGIENE

FAMILY RELATIONSHIP

MENTAL HEALTH

ENVIRONMENTAL HYGIENE

ONLINE EDUCATION

SOURCE: Brandwatch
KEY OUTPUTS FOR BRANDS
5 IMPLICATIONS ON BRANDS MEDIA VISIBILITY DURING PHASE1

Demonstrate Purpose
It is time ask ourselves ‘How can we support customers during this time?’.
It is better to design campaigns to support the management of the outbreak, such as making donations to the healthcare authorities.

Precise Targeting
Use data allow to intercept new audiences and build closer relationship with the right content, right audience and right creative
- DMP
- DCO
- Addressable TV

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

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