

# 2021 GLOBAL MARKETING TRENDS

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We entered a unique period in history which affected the people and sectors all around the world as of the first quarter of 2020. We were faced with a

cloud of uncertainty and still are collectively looking for answers. Throughout history, any period that involved changes in human behavior, like a pandemic, created its own innovations and altered the perspectives of people drastically. Everyone, including people, companies and states, had to come up with new survival methods in a world where social distancing became the norm as a result of the pandemic's widespread effects.

### Executives feel the pressure of an uncertain future

So, how do we determine and discuss global marketing trends during a period in which the world seems upside down and keeps on changing unpredictably? In order to answer this question, Deloitte conducted a comprehensive survey and aimed to better understand how people and brands reacted to the pandemic and how some brands continued to grow even under such difficult conditions. Deloitte combined subject expertise and field voices in 2021 Global Marketing Trends report to identify significant points within turmoil of change. It carried out two field surveys, one targeting 2 thousand 447 consumers and the other 405 C-suite executives. The survey emphasizes that executives feel the pressure of an uncertain future as well.

The second meeting within Marketing Türkiye-Deloitte Roundtables series was carried out under the moderation of Deloitte Digital Partner and Deloitte CMO Program Country Leader Özlem Yanmaz and it was hosted by Marketing Türkiye Chief Editor Günseli Özen with "2021 Global Marketing Trends" theme. During the meeting, which was held according to social distancing rules, the seven trends presented by Deloitte in "2021 Global Marketing Trends" report were discussed by the participants, each of whom are pioneers in their own sectors.



Confidence levels of C-suite executives decreased drastically compared to the previous year in terms of their capability in creating organizational and strategic impact.

### Expectation rises as conditions worsen

The survey points out that consumers start to expect more from brands as conditions worsen. According to the consumers, companies are the most competent group when it comes to taking actions that benefit themselves and the society in the current environment. Consumers demand more from companies than they do from governments and civil society institutions. They also reward the companies which manage to fulfill their most important needs and strengthen

the bond between them. Considering all of the above, the survey defines seven marketing trends that will support marketing professionals and C-suite executives in overcoming the wall of uncertainty and taking actions to help people. The seven trends are Purpose, Agility, Human Experience, Trust, Participation, Fusion and Talent. These trends were discussed in detail during Marketing Türkiye-Deloitte Roundtables meeting, with the participation of Petrol Ofisi CMO Beril Alakoç, TAB Gıda CMO Sinan Ünal, Vestel CMO Duygu Badem, ECCO Turkey General Manager Deniz Erda, TV Ekstra CEO Merve Puhaloğlu Eraslanoglu, LCW Baby General Manager Ömer Barbaros Yiş, Ingage General Manager Pınar Ercan Tursun, and Daimler Turkey Marketing Director Emre Kurt.



# 1 PURPOSE

## Lean on your purpose

While some brands are contemplating on how to re-position themselves and better serve their shareholders, others insist on shaping their actions based on their purpose of existence in order to create value for their shareholders. Such “purpose-driven brands” inherently understand why they exist and who they are best built to serve, from their customers and workforces to the community, regardless of what they sell today. They behave according to a unique purpose which embraces the whole organization and manage to embed this purpose to all capillaries of the organization.

**Companies cannot choose when to lean on their purpose. Purpose is a long-term commitment determining why and how a company exists.**

Consumers appreciate and reward these brands. According to the survey, one in four consumers says that these actions positively affect brand perception and one in five state that this positive perception is reflected in their purchase choices. In summary, the survey results show that: Companies cannot choose when to lean on their purpose. Purpose is a long-term commitment determining why and how a company exists. The strength to keep on improving even during most difficult times is hidden under our purpose. Companies which lean on their purpose continue to grow despite the extraordinary tough circumstances.

**Purpose should be the common denominator in all units**

Based on its motto “Everyone deserves to dress well”, LC Waikiki, was ranked 1st in the Turkish RTW clothing industry and 27th among the biggest companies on the Fortune 500 list, aims to offer functional and healthy designs in baby category at affordable prices. Ömer Barbaros Yiş, LCW Baby General Manager, points out that the company’s purpose is embedded in all units of the organization, from leader to designer and from purchasing to sales. “When designing the products, we start with the question ‘Would we let our own child wear this?’.



Beril Alakoç  
Petrol Ofisi CMO

Product teams conduct comprehensive tests to ensure that the response is “Yes”. No compromises are made in these tests even though they sometimes cause delays in shipment.” Yiş emphasizes their intention of not reflecting the increase in costs to customers during the current period of uncertainty.

**“We have to be sincere”**

Petrol Ofisi, the leader in the Turkish fuel and lubricants industry, CMO Beril Alakoç says “Crisis or not, we have to be sincere. We cannot afford such a major loss.” and looking at past experience, she adds “In times of economic crises, customers prefer affordable products rather than premium products for price related reasons. Companies that choose to follow the path of profit-focused defense by imposing limitations in the marketing budget in such times undergo major shrinkage afterwards. It is much more costly to re-gain the lost customers once things return to normal.”



Ömer Barbaros Yiş  
LCW Baby  
General Manager

# 2 AGILITY

## Changing the playbook



Historically, the two primary actions taken by companies in periods of recession are focusing on costs and downsizing. However, the recession we are facing at the moment is unique in that it forced massive, rapid changes in consumer behavior. Due to pandemic triggered conditions, boundaries between physical and digital seem to be irreversibly blurred. According to the survey, 58% of consumers can recall the brands that made changes in their products and services to better adapt to new normal. 82% say such new, up-to-date products and services have a positive impact on brand perception. There is an increasing trend in customers’ appreciation and adaptation towards digital channels as well. 66% of consumers who participated in the survey state that their appreciation for well-designed technologies increased during the pandemic and 63% specify that they will start using digital technologies more compared to the pre-pandemic period. Creativity and data-driven insight are two of the key points in rising above the clutter. This entails understanding customer needs in depth and having

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Merve Puhaloğlu Eraslanoglu  
TV Ekstra CEO

the muscles that make agility possible. CMOs must provide support to C-suite executives to develop agility skills and implement agile practices.

**TV advertisements have to be agile as well!**

The current environment not only tested the business models in unique ways, it also clearly showed that agility is a matter of transformation in mentality and culture in addition to technology. Digital technologies play a critical role in enabling agility for sure. By building its main value proposition upon this concept, TV Ekstra uncovers data-driven insights and presents them to customers to be turned into action. The company ensures that advertisements are directed towards the right person at the right time by analyzing the viewers’ digital footprints in a programmatic manner in “Addressable TV” sector. TV Ekstra benefited from the pandemic thanks to the increase in TV ratings. CEO Merve Puhaloğlu Eraslanoglu says that: “The service we provide is customized based on each household. While watching the same program, your neighbor sees a car advertisement and you see a cosmetics advertisement.

Another important point is the ability of targeting, real time measurement and intervention. You can make changes instantly if you observe that an advertisement is not achieving the expected engagement level.”

**You cannot benefit from opportunities unless you are ready**

The pandemic turned all physical sales and service networks upside down. During this period, Vestel, accounts for 90% of the total TV and 30% of the white goods exports in Turkey, succeeds in bringing its products to customers with “24-hour delivery to all areas of Turkey” concept. When speaking about this example of agility, Vestel CMO Duygu Badem Uylukcuoglu points out that: “You cannot benefit from opportunities emerging from crisis periods unless you are ready. The underlying reason behind our success is that we invested in our e-trade structure before the pandemic. Our biggest advantage in materializing our vision was our widespread dealer network within Turkey. Our sales and brand value were both positively affected during this period.”



Duygu Badem Uylukcuoglu  
Vestel CMO





# 3. HUMAN EXPERIENCE

Efficiency or human experience?

Which one is more important, efficiency or human experience? As technology's place in our lives is reinforced more and more each day, the fact that its main focus is actually human experience can be ignored or human experience can be pushed into the background. Companies which design their digital future by focusing only on efficiency rather than human connection accrue 'experience debt'. Survey results show that people walk away from brands which act in favor of company interests. More than 70% of consumers in the survey state that they support digital innovations which offer solutions to basic needs. Many customers tried online experiences for the first time during the pandemic and responded positively in general. People were much more open and eager to try new solutions than ever before during this test drive all over the world. 79% of survey participants tried at least one of eight different digital activities for the first time in this period. These eight activities were; face timing colleagues and family, online grocery shopping, using a training app, using an exercise app, learning a new skill entirely from online sources, ordering food delivery from a restaurant via an app, watching a movie with friends in different places via an app and undergoing examination and treatment via telemedicine. 53% of participants in all categories agreed that new digital experiences may replace non-digital ones and one-third said that digital methods were superior to previous experiences. For companies, surviving under uncertain conditions entail re-thinking the needs and experiences of the audience they serve.

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Deniz Erda  
ECCO Turkey  
General Manager

To avoid losing focus on humanness, brands should develop value-based products and help establish an infrastructure that fulfills the society's basic needs.

**"Employee experience is a huge part of human experience as well"**

In the past, companies relied on inter- personal engagement to increase human connection. Although creating such a connection on new digital solutions is far more difficult, some companies succeeded in taking fast action in this regard. One of these companies is Denmark-based shoe, bag and accessories manufacturer ECCO. After mentioning they moved the company's traditional hot-shop design event (which they have been organizing for 13 years) to the digital environment this year, ECCO Turkey General Manager Deniz

Erda adds that "We were able to come up with innovative designs that can turn the leather industry upside down thanks to 150 participants from 27 countries in 10 different time zones." The company kept all of its stores closed during the pandemic and has less traffic than before in the normalization process as expected. At this point, ECCO thought about customer motivation and made use of a nostalgic experience element that is compatible with its purpose in order to increase the time customers spend in stores. Today, you can benefit from free shoe care service when you visit an ECCO store even if you do not buy anything. This ensures that customers stay longer in stores, which means sales teams get the opportunity to talk about the brand and products. In addition, Erda points out that: "Employee experience is a huge part of human experience as well. We held video conferences with experts right after the pandemic began to increase employee awareness and told our employees that they had the right to not come to work. We did not let anyone work without taking a Covid-19 test. Our employees take the test each month. We showed an increase in employee satisfaction in this period as well."

# 4. TRUST

The promises we keep—or don't

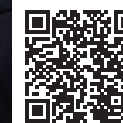
Trust is a highly contextualized conversation. The CEO may see trust as delivering on the promise of bringing innovative products and services to the market, the chief information security officer (CISO) may view trust in terms of data transparency and cybersecurity, and the chief marketing officer (CMO) may think of it as brand messaging and experience. Trust also depends on what customers, and employees, value the most. While the meaning of trust varies by audience, one thing is universally constant: When delivery doesn't meet expectations, trust breaks down.

Deloitte carried out a survey with 3 thousand customers and 4 thousand 500 employees to understand the connection between trust and decision making and identified four factors that measure trust level and more importantly, affect future behavior. Humanity, transparency, capability and reliability. Humanity and transparency reflect a company's intentions while capability and reliability demonstrate its competency in fulfilling those intentions. When brands demonstrate humanity, customers are 1.6 times more likely to purchase from the brand over competitors and employees are 2.6 times more likely to feel motivated at work. When brands demonstrate transparency in their intentions, customers are 2.8 times more likely to continue purchasing from the brand after a data breach and employees are 1.7 times more likely to be satisfied with their compensation.

The pandemic re-emphasized the relationship between brand and trust. 66% of participants were able to recall when brands acted in their own self-interest (e.g., raising prices on essential items). In this case, brands became the losers. One fourth of participants added that they walked away from brands which acted like this. To build and reinforce trust in difficult times, brands should understand what people value and keep their promises. In companies, specific areas have specific responsible persons.



Sinan Ünal  
TAB Gıda CMO



However, building trust requires coordinated effort from all C-suite executives.

**"250 restaurants remained open for those who had to be outside"**

Trust is the most important factor in the food sector, which was -naturally- one of the sectors highly affected by the pandemic. TAB Gıda, leading company of the food sector in Turkey, CMO Sinan Ünal states that they immediately implemented the social distancing rules in their stores due to the pandemic but this process took longer in places like shopping malls where they do not have total control. He explains that: "We closed approximately a thousand restaurants as it was much more profitable. However, almost 250 restaurants remained open for those who had to be outside, such as health workers or municipality workers, and who did not have the chance to cook at

home, in order to reciprocate the trust of our customers. Our employees embraced this mission and kept on working by putting their health anxieties aside. Salary took the backseat during this process and the motivations of truck drivers and service personnel were the same." Ünal also talks about the personalized interaction approach they followed in this period with their customers and says: "By following their digital footprints, we identified the customers who stayed at home, had a high level of health anxiety and doubt about products coming from outside and we did not contact these customers in any way. We kept in mind the experiences we had in China operations and waited for almost 45 days. Then, we saw a demand in food delivery that was far beyond our expectations. There were moments when we failed to meet the demand and disappointed the customers, who punished us with low scores in rating platforms... In such cases, we apologized for the inconvenience and realized that sincerity enabled us to win back the trust of our customers."

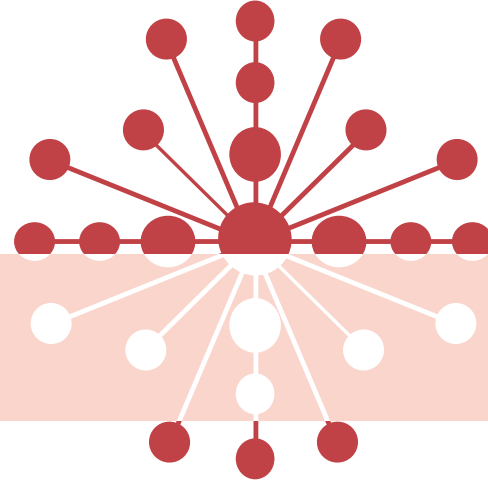
**"The most important issue is data security"**

One of the most widely discussed topics about trust is data security. TV Ekstra CEO Merve Puhaloğlu Eraslanoglu states that in TV Ekstra, whose value proposition is built on data processing, they proceed by consulting with experts in issues related to Law on Protection of Personal Data and other data security and privacy issues. Legal obligations related to data security may require involvement of different parties within the process depending on the scenario. Eraslanoglu explains "We do not store but process the data. These data mainly consist of marketplace data. We may process first party data in case the brand fulfills relevant criteria. Related media purchasing agencies may have to get involved for authorized communication."



# 5. PARTICIPATION

## A two-way street



Customers are interacting with brands more than ever. How deeply a customer engages with and participates in a brand can vary across a wide spectrum. Participation can manifest in low-touch, low-effort activities such as writing online reviews and posting about a brand on social media, to deeper forms such as co-creating with a brand to develop new products or produce original content (e.g., uploading videos and blogging). Deeper participation forms include uploading videos, writing blogs, giving product advice, providing how-to expertise, joining design idea contests and direct co-creation.

Deloitte's survey of 7,506 customers found out that 56% of people engaged in at least one activity over the course of the past year. As digital technologies bring people and brands closer together, the deeper, higher- effort forms of participation are gaining in popularity. Customer engagement is quickly becoming a two-way street where customers participate as brand ambassadors, influencers, collaborators, and innovators.

As expected, younger generations interact most frequently with brands because participation is a natural behavior for Gen Z. Electronics, beauty and personal care, health and wellness, apparel and footwear, grocery and beverage are the top five sectors as far as participation is concerned. People are most motivated to participate in an effort to help others. Helping others regularly outranked other motivations such as "wanting to share something exciting," "having expertise in a product or service," or a "brand launching a new product." Today, marketing professionals have more opportunities than ever to create a new road in engagement thanks to digital technologies. Brands which include their

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customers in their strategy, product and enable deeper forms of customer participation gain competitive advantage.

**"Listening to the customer gives you a strong insight"**

Ingage operates in digital marketing fields such as media planning, visual advertising and performance marketing. It works on shaping and deepening the engagement-



Pinar Ercan Tursun  
Ingage  
General Manager

between brands and customers. The initiative carried out in collaboration with Fiat, the largest automobile manufacturer in Italy, is an example of consumer participation via viewers' engagement with a TV series. Ingage General Manager Pinar Ercan Tursun defines this initiative as a good example of how a personalized experience affects business results. In this initiative, only the viewers who Shazam'd the fascinating final scene of the series were able to see who the killer was. Tursun interprets the participation trend from a service provider perspective as follows: "One side of successful applications is made up of good social listening. If you listen well, you get a strong insight. Marketing used to be only a matter of creativity but it is now closely linked with engineering and architecture as well. Even opinion leaders have different personas, the amount of engagement received by campaigns is measured along with impact and return on investment of such campaigns throughout the sales funnel. We use data and technology in turning theory into practice."

# 6. FUSION

## Develop fusion through business partnerships



Brands can better help the people they serve by creating innovative experiences through cross-industry partnerships. Fusion represents the art and science of gathering new collaborations, customer insights and digital platforms to create ecosystems that address human needs in a more holistic manner.

Covid-19 reminded us of the importance of human needs and changed all dynamics overnight for some brands. Brands took different actions to deal with the pandemic. Some changed the way they engaged with the customer, some formed new partnerships to better fulfill customer needs and some changed their business model by entering new geographical markets, new sectors or new product groups. 78% of C-suite executives agree that new partnerships forged during COVID-19 will continue after the pandemic subsides as long-term strategies.

Brands can better help the people they serve by forming creative and innovative experiences through cross-industry partnerships to satisfy changing customer needs. Today's unnoticed actions have the potential to create innovations and growth opportunity that may result in more income and turn the sector upside down in the future.

**Fusion represents the art and science of gathering new collaborations, customer insights and digital platforms to create ecosystems that address human needs in a more holistic manner.**

**78% of C-suite executives agree that new partnerships forged during COVID-19 will continue after the pandemic subsides as long-term strategies.**

**A project may change a lot of things**

Petrol Ofisi CMO Beril Alakoç talks about the partnership they established with ITU Çekirdek Incubation Center, one of the most prominent university entrepreneurship centers in the world, during the pandemic and the journey they embarked upon with the motto "Fight Covid-19". Alakoç says: "We provide mentorship to various projects, from technology studies that ensure protection against coronavirus in hospitals to IT applications that minimize the pandemics' negative impacts on our social and business lives and we invest in initiatives that reached a certain stage. The motivation behind this effort is: It would be a big step for humanity even if one of these projects proves to be successful. This is far beyond any appreciation!" Relevance of initiative with brand purpose comes to the forefront as a critical success factor in making fast business partnership decisions and in progress.

**Innovations are made through ecosystems in the automotive sector**

The automotive sector witnesses many business partnerships during non- pandemic periods as well. Emre Kurt, Marketing Director of Daimler (which incorporates global automotive brands such as Mercedes-Benz, Smart and Setra), mentions the 'connected vehicle' strategy they followed based on 'internet of things' infrastructure that enabled many innovations within the automotive sector.



Emre Kurt  
Daimler Marketing Director

He says: "Our aim is to satisfy a variety of customer needs, from daily actions of drivers such as remotely warming up the car before getting in during cold weather to remotely monitoring the car's indicators to eliminate possible deficiencies and from generating warnings related to risky situations that the driver is unaware of to developing measures against accidents." After stating that the automotive sector may collaborate with other sectors like white goods and fuel via talkable devices, Kurt points out "All of these create an ecosystem through which a serious amount of data production is made and consumer habits can be monitored on-site. Security and legal regulations have critical importance in this regard. Although the consumers in Turkey are ahead of many countries in terms of tendency towards digital, they sometimes have to experience new technologies with delay because legal regulations in this area are not yet finalized."



# 7 TALENT

## Turning talent into a competitive differentiator



Marketers need to push talent transformation to the forefront of their agenda to address the accelerated pace of change. We asked our participants how they evaluated the marketing's talent model transformation and the technology literacy level of marketing teams. According to LC Waikiki Baby General Manager Ömer Barbaros Yiş: "Marketing and technology are two sides of the same coin. I think CMO and CTO roles may merge in the future. Artificial Intelligence (AI) will be used more and more as well. Marketers that keep up with technology will be much better at adaptation. With this perspective, LCW stands close to entrepreneurship ecosystem and identifies the points where AI may come into play within the value chain and engages with relevant entrepreneurs."

Petrol Ofisi CMO Beril Alakoç says that the company's marketing went through a three-year transformation and evolved from a service department under sales to a strategic directorate under general manager. C-suite executives' modern point of view and fast decision-making skills made this possible. Alakoç adds: "Investment in marketing sends an important message throughout the company, sector and business partners that the company invests in the future." She also states that they currently outsource the services related to data analytics and such services may be provided in-house as the team's level of digitalization increases. After mentioning that they direct their attention towards information technology experts that may fit the marketing profile when the marketing team needs resources, Daimler Marketing Director Emre Kurt continues by saying: "As marketing professionals, we need to improve in technology literacy. Younger team members are far ahead in this area and we should not refrain from asking their opinion or learning from them."



Özlem Yanmaz  
Deloitte Digital Partner and  
Deloitte CMO Program Country  
Leader

### LUCK COMES TO THOSE WHO ARE READY

"The 2021 global marketing trends (namely Purpose, Agility, Human Experience, Trust, Participation, Fusion and Talent) pushes the marketing professionals to break out of current thought patterns in this changing environment and invites them to take a more holistic and unique look towards human needs. These trends represent a preparation for "possible futures" that marketing professionals may come face to face with. For brands, this entails making arrangements for new opportunities along with helping people and the world because as we always say, luck comes to those who are ready."

ECCO Turkey General Manager Deniz Erda talks about the program aimed at raising the strategic thinkers of the future and explains that: "All around the world, each new employee stepping into marketing starts in factories and works in different fields such as production, sales and logistics to become a business model developer." TV Ekstra CEO Merve Puhaloğlu Eraslanoglu says "We focus on end-to-end skill development in our young team. While our main skill is technology, we intend to develop creative skills as well." Moreover, TAB Gıda CMO Sinan Ünal states that: "Marketing unit has to transform into a strategic unit from an operational unit and this requires elevating the job from quantity to quality and gaining data literacy. In digital, we benefit from the skills of young people. We entrusted one of the youngest team members with all digital operations. Although it is important to benefit from AI for efficiency purposes, we must consider applicability in field operations as well. Each new member of the marketing team receives a restaurant training to

familiarize themselves with our modus-operandi in the field. We work with both internal and external sources in marketing and prefer establishing business partnerships with outsourcing companies." Ingage General Manager Pınar Ercan Tursun says that jobs like media purchasing may be controlled by AI in upcoming periods and that they plan to transform the company to provide strategic and technological consultancy to their business partners. She adds: "We focus on creating excellence with automation in operations and developing the brands in strategy and technology by equipping them with different models in these areas." When we asked executives what are the most important functional areas over the next 12 months, they ranked digital and technology first (68%) and marketing and sales second (61%). There is also evidence that the CMO's role may be gaining momentum. Just 20 months ago, 46% of CMOs said they had a significant impact on C-suite conversations relating to marketing strategy. Now, this number has almost doubled to 81%.

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