

Internationalization of Turkish TV Soap Operas: A Case Study

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Abstract

As multi-channel television gained popularity in Türkiye, Turkish soap operas began to attract international audiences. Their success in international trade and rising prominence in the global television market have significantly boosted Turkey's service exports and strengthened its global image. In 2023, the country became the third largest exporter of television soap operas in the world, with exports reaching around \$600 million, behind only the U.S. and the U.K. This study offers a comprehensive perspective on the internationalization process of Turkish soap operas. The study employed an interpretative paradigm, utilizing semi-structured interviews and content analysis of pertinent literature. A gradual internationalization process model for Turkish soap operas is proposed, highlighting key industry dynamics.

Introduction

Technological advances have dramatically transformed the media landscape in recent years, particularly in television, fueling excitement and optimism about the industry's future. In 2023, the global market for television shows and films was valued at USD 104.49 billion and is projected to grow to USD 182.23 billion by 2031.¹ Meanwhile, Statista estimates that the overall TV and video industry will generate USD 701.10 billion in revenue by 2024. The

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top 10 most valuable markets include the USA, the UK, Germany, France, Brazil, China, Japan, South Korea, India, and Canada.²

Today, television content is tailored for different audience demographics, with television soap operas maintaining a strong and lasting presence. These soap operas offer several key benefits, including the ability to wield soft power,³ promote destinations,^{4,5} and serve as a tool for international marketing.⁶ Since their inception in the 1930s, soap operas have played a pivotal role in shaping both media and culture. In the 1950s, television formats began to cross national borders through licensing, primarily led by American game shows. By the late 1990s, the industry had significantly expanded, with more licensed markets and an increasing number of production companies contributing to its evolution.

The internationalization of media content aligns with established models of innovation adoption in global trade.⁷ Scholars such as Bilkey and Tesar,⁸ Cavuşgil,⁹ Reid,¹⁰ and Czinkota¹¹ have examined how exports emerge from innovation, sometimes building on Rogers' stages of adoption.¹² These models emphasize that technological advances, digitalization, establishment of professional service associations, and global trade agreements have accelerated the global exchange of goods and services.^{13,14} In this context, the international spread of television content, including soap operas, follows these established pathways, as they can now be exported, licensed, or directly invested.¹⁵

Turkish soap operas, known for their unique portrayal of life's complexities and tragedies, have gained international recognition through the efforts of Turkish distributors.¹⁶ Their integration into global content trade networks has been crucial. Additionally, the close collaboration between producers, broadcasters, and international partners has played an essential role in bringing these shows to foreign markets. Strategic marketing efforts by distributors has also played a key role in their global success.¹⁷

In 2023, Türkiye became the third largest exporter of television soap operas in the world, with exports reaching around \$600 million, behind only the US (\$2.83 billion in 2022),¹⁸ and the UK (\$1.97 billion).¹⁹ Research conducted by Parrot Analytics showed a remarkable 184% increase in global demand for Turkish soap operas from 2020 to 2023, led by key markets such as Spain, Saudi Arabia, and Egypt.²⁰ In the US, demand for Turkish soap operas grew by 24% in 2023 compared to 2022.²¹ Staggeringly, over the past 15 years, the trade volume of Turkish soap operas has expanded 60-fold, with forecasts suggesting it could hit \$1 billion soon.²²

This article explores the internationalization journey of Turkish soap operas through a case study of *Ay Yapım*, a leading content producer in the country.

Internationalization Process of Turkish Series: A Case Study of Ay Yapım

Founded in 2005, Ay Yapım quickly rose to become one of Türkiye's premier content producers, playing a pivotal role in the global expansion of Turkish TV soap operas.

Prior to this, Turkish dramas were primarily exported in an uncoordinated, low-revenue manner. For instance, in 2001, *Deli Yürek*, produced by the smaller rival Sinagraf, was broadcast on Kazakhstan State Television for a mere \$30 per episode^{23,24}—a reflection of the undervalued nature of Turkish content on the global stage at that time. Ay Yapım's strategic approach, however, ushered in a new era, transforming these soap operas into a lucrative export industry.

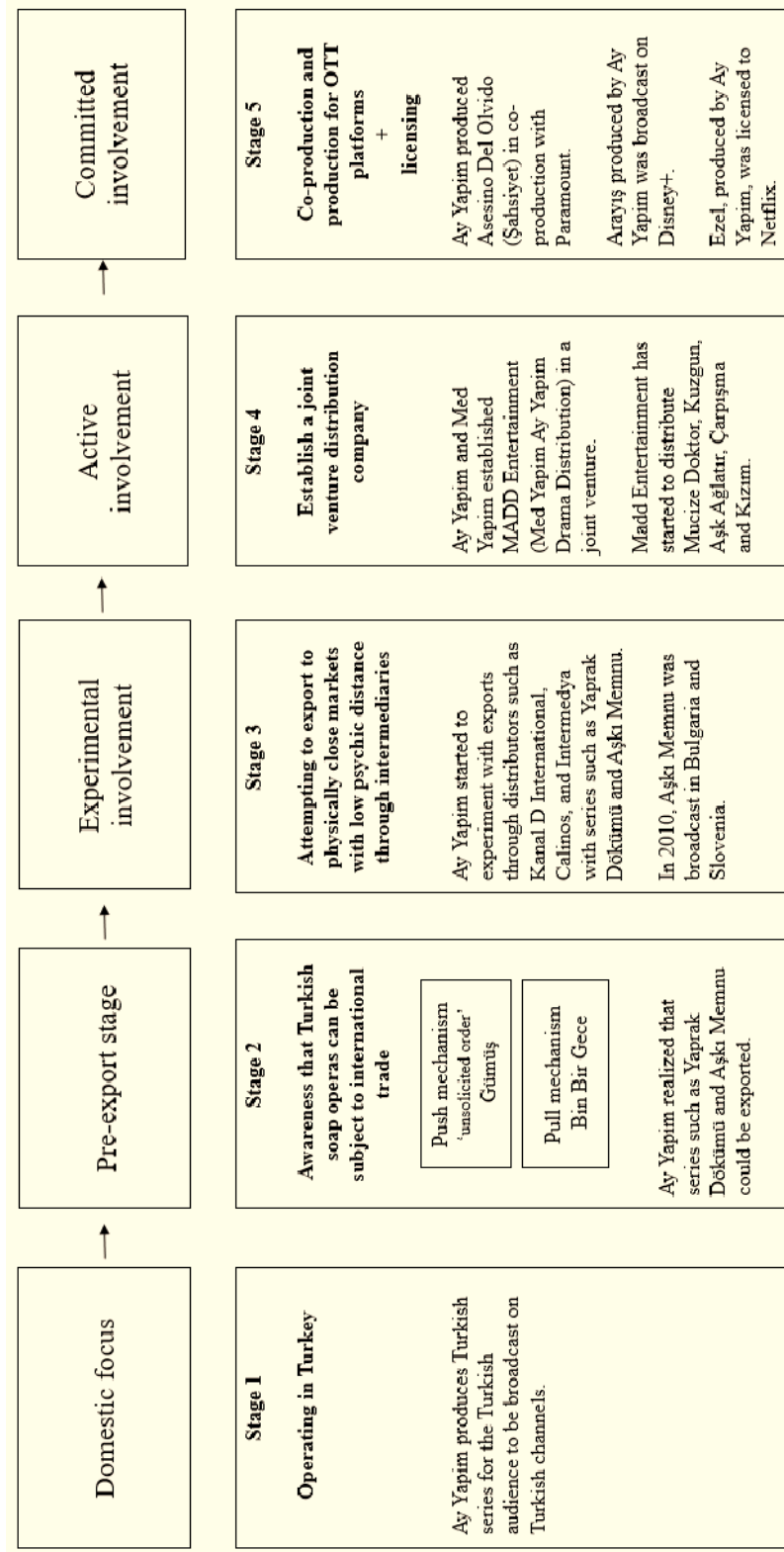
By 2016, the company had firmly established itself internationally, with its award-winning series captivating audiences worldwide.²⁵ *Yaprak Dökümü* (2006) marked its first major success, followed by the internationally acclaimed *Aşk-ı Memnu* and *Ezel*, which together reached over 100 million viewers.²⁶ By 2022, *Ezel* and *Aşk-ı Memnu* ranked among the top three most-watched Turkish series globally. Dubbed in languages from Arabic to Spanish, these shows command per-episode fees between \$50,000 and \$600,000, showcasing Ay Yapım's global impact.^{27,28}

In analyzing Ay Yapım's global expansion, the stages of internalization were integrated into the broader process model as illustrated in Figure 1.

Stage 1. Domestic focus: Operating in Türkiye

In the early stages of Turkish television, producers and broadcasters mainly focused on the domestic market, creating soap operas tailored to local audiences while relying heavily on advertising revenue from Turkish companies. Ay Yapım initially followed this same approach when it began producing soap operas in 2005, targeting Turkish viewers. As mentioned above, the company's first major success came with the premiere of *Yaprak Dökümü* on Kanal D in 2006, which achieved high domestic ratings over its five-season run. In 2008, Ay Yapım released *Aşk-ı Memnu*, a series that continues to influence Turkish television today. Airing for only two seasons, it also had consistently high ratings until its conclusion in 2010. While not the initial intent, both of these soap operas would go on to achieve significant international success.

Figure 1. Internationalization process of Ay Yapim Turkish soap operas



Stage 2. Pre-export stage: Awareness that Turkish soap operas can be subject to international trade

The internationalization of Turkish soap operas entered a new phase around 2008, as Turkish producers began seeking opportunities abroad and organic demand from international markets simultaneously started to grow. This "push and pull" dynamic highlighted the growing appeal of Turkish TV dramas. A key example of this mechanism unfolded when an executive from the Dubai-based Middle East Broadcasting Center (MBC Group), a leading player in the regional media landscape, visited Istanbul and noticed *Gümüş*, a series produced by D Productions. Sensing its potential, MBC swiftly acquired the broadcast rights. As *Variety* recounted in a 2013 article: "...Arab broadcaster MBC acquired the rights for a pittance and started a revolution. "Noor," as the show was renamed, became a phenomenon across the Arab world, reaching an audience of 85 million viewers at its peak and kindling a demand for Turkish content that turned the country into a major global player in less than five years."²⁹

That same year, Global Agency, known for distributing international content like game shows, facilitated the entry of *Binbir Gece* (One Thousand and One Nights) into the Balkans. Produced by rival company TMC Film, the show received high ratings and was well-received by audiences across the region.

The international popularity of *Gümüş* and *Binbir Gece* highlighted the immense potential for exporting Turkish TV content. Even as this trend gained momentum, shows like *Yaprak Dökümü*, *Aşk Yeniden*, *Menekşe ile Halil*, *Dudaktan Kalbe*, and *Aşk-ı Memnu*—all produced by Ay Yapım—continued to captivate local audiences in Türkiye. This success encouraged Ay Yapım to explore the export of its content more actively, driven by both internal ambitions and the increasing opportunities presented by foreign markets.

Stage 3. Experimental involvement: Attempting to export to physically close markets with low psychic distance through intermediaries

After identifying the growing international potential of Turkish soap operas, Ay Yapım strategically began its global expansion by targeting markets with low "psychic distance"—those with fewer perceived cultural, linguistic, and value differences.³⁰ The Middle East and Central Asian Turkic Republics were prime candidates due to their shared religious, historical, and cultural ties with Türkiye.

During this phase, Ay Yapım licensed its shows to foreign broadcasters through intermediaries like Kanal D International, Calinos, Intermedya, and

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Global Agency. These agreements allowed broadcasters to air popular dramas such as *Yaprak Dökümü*, *Aşk-ı Memnu*, and *Dudaktan Kalbe*³¹ for a set period, in specific regions and languages, with a limited number of repeats. This approach allowed Ay Yapım to retain control over its intellectual property while leveraging the intermediaries' expertise in foreign markets, enabling its content to quickly gain traction in culturally similar regions.

Going even further abroad, a significant milestone was the adaptation of *Aşk-ı Memnu* into *Pasión Prohibida* by Telemundo in the U.S. in 2013, catering to Hispanic audiences. The adaptation, produced with local actors, marked an important shift from simply exporting Turkish shows to localizing them for new markets. Similar adaptations were produced in Romania and India,³² demonstrating how Turkish dramas could be successfully tailored for diverse audiences.

By starting in culturally similar markets, Ay Yapım gained experience and build a reputation for itself, laying the groundwork for its more ambitious global expansion plans.

Stage 4. Active export activity: Establish a Joint Venture Distribution Company

At this stage, Ay Yapım adopted a more aggressive approach to international expansion, as it sought to capitalize on the growing global demand for its content. Maintaining a forward-looking, positive outlook on expanding operations in foreign markets became critical to sustaining this growth trajectory.³³

Building on strong distributor partnerships and favorable market conditions, Turkish soap operas gained significant traction, especially in Latin America. This success drove Ay Yapım to refine its production strategies, targeting global audiences by casting actors with international followings and focusing on universal themes like drama and romance to broaden its appeal.

In 2018, Ay Yapım took its international strategy one step further by establishing **Madd Entertainment**, a joint venture with Med Yapım. This move marked a shift from relying solely on external distributors to having greater control over how its content was promoted and distributed.

The creation of Madd Entertainment marked Ay Yapım's shift to a more integrated export model, strengthening its control over distribution and solidifying its position as a major player in the global television industry. This allowed Ay Yapım to manage its expansion more effectively, boosting visibility through direct client outreach and active participation in global television content fairs.

Stage 5. Committed Involvement: Co-Production and Production for OTT Platforms

In the fifth stage of international expansion, Ay Yapim reallocated resources to digital platforms, moving beyond traditional television. Turkish soap operas, once limited to TV channels, are now widely available through OTT (Over the Top) platforms like Netflix, Amazon Prime, Apple TV+, Disney+, and local services such as Exxen, BluTV, and PuhuTV. This shift reflects the broader transformation in global broadcasting driven by the rise of streaming services.

Ay Yapim does not merely list its content on OTT platforms, it also produces original content for streaming services, like *Arayış* for Disney+, highlighting its strategic commitment to these platforms. Meanwhile, *Ezel*, originally made for Turkish audiences and later exported to numerous countries in Latin America, the Middle East and Europe, found a new audience on Netflix, further extending its reach. Meanwhile Ay Yapim's series *Şahsiyet*³⁴ (Personality), garnered international acclaim, with its lead actor winning an International Emmy Award for Best Actor. It also became the first Turkish series licensed in Germany, airing on Megenta TV under the title *Ein Guter Mensch*.

Practical Implications

Turkiye's TV and video market is growing rapidly. It is expected to generate USD 3.20 billion in revenue in 2024, driven by a rising demand for locally produced content that reflects the preferences of Turkish audiences for local entertainment.³⁵ Overall, the entertainment and media sector is projected to grow at a 9.5% CAGR by 2028, signaling continued expansion.³⁶ This influx of resources has led to a notable improvement in both the quality and quantity of Turkish soap operas, as the expanding domestic market supports more sophisticated and higher-caliber productions.

Beyond its borders, the global export of Turkish soap operas, licensed on a per-episode basis, has become a cultural phenomenon. These dramas now air in over 150 countries, driving both economic gains and soft power for Turkiye. To capitalize on this momentum, the Turkish government has introduced a number of favorable regulations, making the production process even more attractive for local creators. Through the efforts of the Ministry of Trade and the Istanbul Chamber of Commerce, producers also receive assistance to participate in international fairs, opening opportunities to tap into new markets.³⁷

In a competitive landscape dominated by global streaming giants like Netflix and Disney+, Turkiye's own digital platforms—such as BluTV, Exxen, and Gain—are also thriving, creating fresh opportunities for the industry.

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With six major TV channels producing 60-70 soap operas annually,³⁸ and industry players actively seeking co-production opportunities for OTT platforms,³⁹ the Turkish soap opera industry is poised to build an increasingly powerful global presence.

More than just entertainment, Turkish soap operas have become a strategic asset for Türkiye, boosting the country's image as a premier tourist destination.⁴⁰ Continued government support will likely sustain this momentum and foster the creation of more high-quality, export-ready productions. Additionally, while Turkish soap operas resonate with many audiences through shared cultural values, loosening censorship could inspire more creative and diverse storytelling. Many in the industry believe that implementing a specialized regulation and support program for soap operas with high export potential could further the nation's brand on the global stage.

Conclusion

This case study reveals the steady path of internationalization that has propelled Turkish soap operas onto the global stage, driven by leading production companies such as Ay Yapım. Initially produced for domestic audiences, these soap operas, often running over 150 minutes per episode, began gaining international traction when their appeal was noticed in nearby countries in the Middle East and the Balkans. Over time, Turkish production companies implemented a more deliberate strategy, adapting their shows through dubbing, subtitling, and rebranding for diverse global markets.

This methodical approach allowed Turkish content producers to capture key distant regions in Latin America and Asia. Now, in 2024, the industry is on target to exceed \$1 billion in revenue as distributors expand further into new European markets and China.⁴¹

Ay Yapım exemplifies how Turkish production companies have shifted from reacting to international demand to proactively targeting global markets. The next phase of growth comes through co-productions and partnerships with OTT platforms like Netflix and Disney+, where Turkish soap operas are thriving.

Turkey's entertainment industry has firmly established itself as a key player on the global stage. With high production quality, compelling storytelling, and a strategic approach to internationalization, the foundation for continued growth is set. As the industry strengthens its presence in international markets, it will play an increasingly influential role in shaping the global entertainment landscape and enhancing Turkey's global brand.

Discussion Questions

How does Ay Yapim's internationalization journey align with the stages of internationalization discussed in the text? What are the key learnings from each stage?

What entry modes did Ay Yapim utilize for its international expansion? What are the advantages and disadvantages of each mode?

How did the establishment of Madd Entertainment contribute to Ay Yapim's international success? What are the benefits and challenges of joint ventures in international expansion?

How did Ay Yapim adapt its content to different cultural contexts? What are the key considerations for adapting content for international audiences?

How has the rise of OTT platforms impacted the internationalization of Turkish soap operas? What are the opportunities and challenges presented by these platforms?

How is Ay Yapim adapting its content creation strategies for OTT platforms? What are the key differences between producing content for traditional television and streaming services?

How do OTT platforms contribute to the global reach and brand building of Turkish soap operas?

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