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**MRS Awards 2023**  
Cultural Insights

**Winner**

**VERVE**  
**BBC Studios**

**Leather-clad baddies, feisty matriarchs, and The Queen Vic: Future-proofing the cultural institution of Soap Operas**

## SUMMARY

Soap Operas (EastEnders, Emmerdale, Corrie...) are a British cultural phenomenon. Many Brits were raised on soaps, with Pat Butcher's earrings holding a warm place in our collective hearts.

But today, the proliferation of content available across so many platforms leaves Soap Opera views waning (-15% year-on-year). From Love Island to Game of Thrones – we're getting our fix of drama elsewhere.

BBC Studios worked in partnership with insight agency Verve to tackle this challenge, and answer the question 'What is the future of Soap Operas?'

Our research combined cultural analysis, commercial semiotics of soap operas and competitor content, with in-home and auto-ethnography. The output was a blueprint on how soaps should evolve to meet future audience needs, including recommendations on format, marketing, characters, plotlines, set design and dialogue.

The work was hugely influential at the BBC, shared across EastEnders and Casualty teams in two co-creation workshops. It inspired 40 Producers, Storyliners, Script Writers, Script Editors and Researchers step outside of their day-to-day to consider how Soap Operas should be shaped for the new world, extending their potential into exciting new territory.

## SYNOPSIS

### The Brief

In 2022, we were approached by BBC Studios to tackle a project looking at "The Future of Soap Operas". The core challenge is that soap operas are in decline (-15% year-on-year), and BBC Studios needed a strategy to navigate this landscape.

The two objectives:

1. Determine if there is a future for Soap Operas. Do they still have a place in people's lives? What role do they play?
2. If there is a future, what is it? How do Soap Operas need to adapt to changing cultural and consumer needs?

### The Innovative Approach

Whilst our client expected a traditional qual approach, we knew consumer feedback alone wouldn't get to the heart of the true problems. Audiences can tell us their drivers and barriers to watching, and articulate emotional stories around favourite characters – but they can't tell us the wider cultural changes impacting Soaps decline or advise how to move in the right direction (in everything from format, set design, character design, plot...).

We knew cultural methodologies would be integral to this project so we combined in-home and auto-ethnography (with soap viewers & non-viewers), cultural analysis (what world do we live in now, vs. when soaps last had major commercial success?) and commercial semiotics (a de-code of soap episodes, alongside a de-code of 'other' more commercially successful content).

Using these 3 methods, we knew we would get a 360-degree view of what Soap Operas mean in both culture and consumer lives.

### Phase 1: Culture & Trends

We began with Culture & Trends to understand how the world has fundamentally changed since soaps began.

Academic desk research helped us to understand what the core drivers of entertainment are from an anthropological perspective. Entertainment Theory tells us that, whether it be theater or TV programmes, there are universal human needs content must meet - Identity, Surveillance, Relationships, Escapism & Emotion.

From here, we looked at the history of Soap Operas – why did they begin? How did they meet these needs in the early days? Soaps began on radio, as escapism for housewives to pass time whilst conducting household chores, featuring relatable stories from families just like me and offering light drama & catharsis in seemingly mundane lives.

When soaps shifted to television, they occupied a fundamental slot on Broadcast television. In our smaller, less global communities, they became a collective spectacle – discussed in corner shops, local cafes and between families at prime time.

Looking at how these needs have changed for today's audiences, we conducted desk-analysis of lifestyle trends, viewer data and social media conversation to identify the core cultural shifts beneath each driver - giving us a set of hypotheses to test in primary research.

### Phase 2: In-home & Auto Ethnography

This phase took the form of auto-ethnography via a diary study with 40 viewers & non-viewers, and in-home ethnography with 10 UK households – getting up close and personal with the lived audience experience – Gogglebox style!

The ethnography was invaluable in inviting us into people's lives and living rooms. We delved into all the content they consume (e.g. Podcasts on the bus, evening TV), plus specific deep-dives on soaps themselves.

Viewers were emotional in articulating their love for soaps. From their sensitive articulation of hard-hitting issues; through to adoration for iconic soap characters like Pat Butcher, it was clear there's still strong affection and desire for them to continue.

"My mum has bipolar, schizophrenia, psychosis and OCD. I have never known anyone close to me to experience what I had to go through with my mum's illness. I was watching an EastEnders episode about someone who was bipolar and it was like "omg, this is like my mum". Female, 25-44, ABC1

Both current & lapsed viewers saw Soaps as an institution and felt it important they remain a cultural constant. However, there were clear barriers, too, with many of our hypotheses remaining true for soap viewers and non-viewers alike. Key tensions arose, particularly around character relatability, pessimistic tone, predictability in plot lines, and a lack of believability.

Ultimately, we found alternative content is satisfying viewer needs more so than soaps. Soaps therefore need to adapt to new lifestyles and evolve around changing viewer needs.

### Phase 3: Commercial Semiotics

Now we had a good steer of the drivers toward soaps, the barriers, as well as the content people are watching instead of soaps – we needed to tie it together with tangible guidance and next steps for the BBC.

Our Commercial Semiotician watched a selection of soap episodes including EastEnders, Coronation Street & Emmerdale. These were semiotically de-coded, unpicking elements such as: character archetypes & personalities, character dress, set design, dialogue, camera angles and tonal range. Our aim was to understand how soaps are tapping into the 5 universal needs (Identity, Surveillance, Relationships, Escapism & Emotion) via on-screen signifiers & cues.

We were able to bring to life many of the tensions uncovered in the primary research phase. For example, the need for 'Identity' is compromised as people find soap characters to be unrelatable and not reflective of real life anymore (see VERVE\_BBC\_1). Our Semiotics could tell us why – from homosexual characters (see VERVE\_BBC\_2) articulated through stereotypical

signifiers (glittery tops, excessive references to RuPaul, typically camp body-language) and a lack of understanding of who they are beyond their homosexuality; through to 'classic' villains presented time and time again (gangsters dressed in chains and leather jackets, depicted in dark settings). These character clichés felt too superficial for audiences to relate to.

We then compared this to parallel content resonating with consumers today. We selected a range of shows which met a set of parameters ensuring they were comparable to Soaps e.g. promising to reflect 'real lives' and representing a mix of target audiences, and included Love Island, Sex Education and Gavin & Stacey.

We analysed a sample of episodes per show, again, unpicking how each meets the 5 universal needs through its construction.

The parallel content analysis provided inspirational ways to solve the tensions. For example, characters are seen to be more well-rounded and believable, articulated through cues like: distinctive character dress (Nessa, Gavin & Stacey), showcasing character interests on screen (books, music in set backgrounds, subtle quirky eating habits at dining tables) through to showcasing diversity in a way that feels truly genuine (Eric, Sex Education – a homosexual, second generation Nigerian who is never presented as 'the other' and showcases personality beyond his queerness. Indeed, the straight-white male Otis is the character most struggling with his identity) (see VERVE\_BBC\_3).

Our final report brought to life the 5 universal needs, and how they are and aren't being met by soaps today (with consumer & semiotic evidence), plus guidelines on how they can be met, through inspiring parallel content.

### Phase 4: Research Activation & Outcomes

We presented our final report in a debrief with BBC Studios' Insight Team & Exec Producers, which facilitated so much conversation, we needed to split it over two days! We had in-depth discussion and some light-bulb moments, particularly when we challenged Stakeholders with questions like "What's Phil Mitchell's favorite band?" or "How would Kat Slater vote in an election?"

We received the following feedback:

"It's not that we haven't heard these kinds of things before, but what you've done is give us the blueprint to make the changes."  
- Executive Producer, BBC

Subsequent, hands-on workshops were commissioned for the EastEnders & Casualty teams – amounting to the attendance of 40 Producers, Storyliners, Script Writers, Script Editors and Researchers working on Soap Operas & Scripted Drama. Using the insight as stimulus, we re-wrote characters, created new plots, and considered new format structures.

The future of Soap Operas can expect more psychological narrative arcs, moral ambiguity and contrasting archetypes...

"The Future of Soap Operas work has been brilliantly received by everyone at BBC Studios. The combination of cultural

analysis, qualitative research and semiotics led to very detailed and actionable findings that Production teams can easily apply to their work, and those attending the workshops we held were really appreciative of having such a good understanding of their audience. It will continue to be used well into the future for sure!” – Tom Morris, Scripted Insight Manager, BBC Studios

With both EastEnders and Casualty currently showing evidence of positive audience response, this work has established the framework for ensuring that continues.

#### Why this entry should win...

This entry is the perfect example of cultural analysis & semiotics delivering a ‘fresh perspective’ that conventional research alone couldn’t have delivered.

It showcases perfectly how external cultural influences – from the changes in our homes and family units, through to changes in content consumption – directly influence our perceptions of “good” television.

To quote again the Exec Producer, she’d heard many of the consumer tensions before, but the academic framework, cultural shifts & semiotic de-codes helped to provide a blueprint as to why these tensions exist (with examples of where soaps aren’t hitting the mark) and, more importantly, nuanced detail on the change’s soaps need to make to build more cultural relevance.