Nielsen Latino-led content and viewers

The building blocks for streaming's success

In collaboration with



Diverse Intelligence Series • September 2022



Introduction

The undeniable impact of U.S. Hispanics is evident in the shifting flavor of American entertainment culture. From *Encanto's* Academy Award win for Best Animated Feature to Ariana DeBose's Best Supporting Actor Oscar win to Bad Bunny's history-making Artist of the Year win at this year's VMAs, Hispanic influence on the U.S. entertainment industry is becoming ubiquitous.

The shift isn't surprising, though, as Hispanics now represent 19% of the U.S. population, up 23% over the past decade, outpacing the nation's overall population growth of 7%¹. With a **buying power of \$1.9 trillion**², U.S. Hispanics would be the world's seventh-largest GDP, at \$2.7 trillion, if they were a standalone economy—ahead of Italy, Brazil and Canada³.

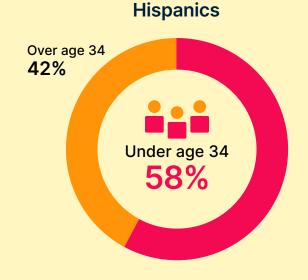
Most U.S. Hispanics today fall into an especially valuable demographic. More than half (58%) are under the age of 34—an age when many are still developing their brand and content affinity tastes.

Let's explore the value of Latino-led content and representation on-screen and behind-thecamera as building blocks of streaming success.



Stacie de Armas SVP, Diverse insights & Intelligence

More than half of U.S. Latinos are under the age of 34



Editor's Note:

There is a rapidly evolving conversation of the profound differences between the terms Latinos (descendants from Latin America) and Hispanics (descendants from Spanish-speaking countries). Within this report, Hispanic and Latino are used interchangeably, following the guidelines of the U.S. Census.

¹ 2020 U.S. Census Bureau

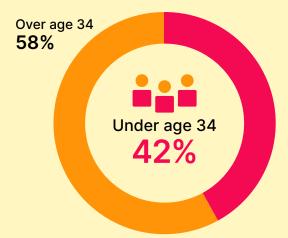
- $^{\,2}$ 2020 Selig Center for Economic Growth, Terry College of Business, The University of Georgia
- ³ Latino Donor Collaborative, September 2021

Source: U.S. Census American Community Survey 2019



Among Hispanics, 19 is the most common age. Among non-Hispanic Whites, it's 61.

Non-Hispanic Whites



Latinos' appetite for streaming

By July of this year, streaming had grown its share of total U.S. TV viewing for five consecutive months to claim its biggest share of viewing (34.8%) to date—overtaking both broadcast and cable viewing as the most watched platform for all people. Among Hispanic audiences, however, the story is even more pronounced, as 43.6% of U.S. Latinos' total TV viewing in July 2022 was attributed to streaming platforms. That's almost 9 percentage points higher than the general population.

43.6% of Latinos' total TV viewing in July 2022 was attributed to streaming platforms.

The high engagement with streaming services reflects an enjoyable streaming experience and the availability of a large volume of content that is either inclusive, in-language, or both. Latinos are voracious consumers of entertainment and media, as evidenced by their outsized appetites for streaming content. From a media and entertainment perspective, streaming has become the predominant way all people watch television, and this could not be more true than it is for the Latino community.

Age is a factor in the attraction to streamed content. While younger viewers of all racial and ethnic backgrounds stream content in higher quantities, the relative youth of Latino audiences is a significant contributor to the increase in their time spent with streaming content.

Percentage of time with TV

Viewing source		Total U.S.	Hispanics	English Dominant	Spanish Dominant	Speak Spanish and English equally
	Broadcast	21.6%	23.1%	14.5%	34.9%	21.0%
	Cable	34.4%	20.0%	25.6%	14.7%	18.8%
Â	Streaming	34.8%	43.6%	44.7%	42.5%	43.7%
R	Other	9.2%	13.3%	15.3%	7.9%	16.6%

Read as: 43.6% of Hispanics' time with TV in July was spent with streaming content. Source: Nielsen NPOWER, National TV Panel and Streaming Platform Ratings; July 2022





Where Latinos stream most of their content

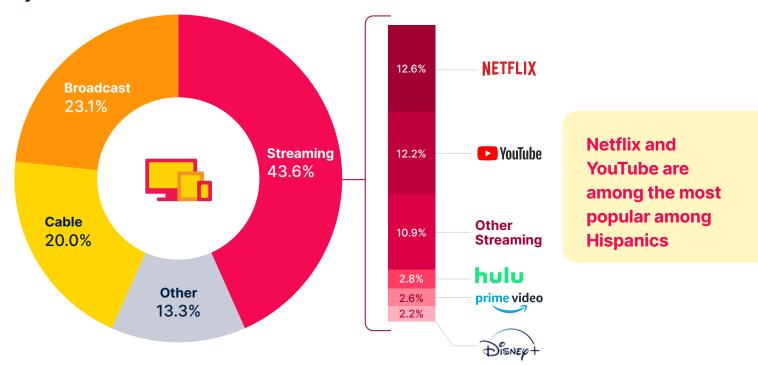
All Americans have leaned into the expanding realm of streaming content, as annual impressions⁴ through July 2022 increased by 23%⁵. Among Hispanics, impressions increased 22% in the same period, while they increased just 20% for non-Hispanic White audiences. Time spent streaming among Hispanics is up more than 19% from last year, as this audience streamed 33.5 billion minutes of video each week as of July 2022.

Across the various platforms and services available, Netflix and YouTube are among the most popular among Hispanics, as this audience spent 24% and 57% more time with these platforms, respectively, than non-Hispanic Whites during the month of July 2022. The growth in time spent among these platforms can be attributed to that fact that Latinos are drawn to refreshed Hispanic content libraries based on Netflix's public commitments to investment and YouTube as a creator-driven content platform, delivering culturally attuned content created by and for Latinos.

⁴ An impression is a metric that validates that an audience member saw content ⁵ Nielsen NPOWER, National TV Panel and Streaming Platform Ratings

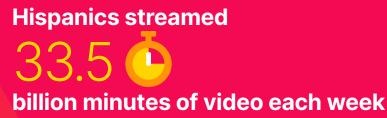
Streaming dominates Latinos' time spent with TV

July 2022



Notes: Hulu includes Hulu Live and YouTube includes YouTube TV; "other streaming" includes any high-bandwidth video streaming on television that is not individually broken out. Providers with less than 1% share of viewing are included in "other streaming." Source: Nielsen NPOWER, National TV Panel and Streaming Platform Ratings; July 2022

> 22% year over year (July 2022)



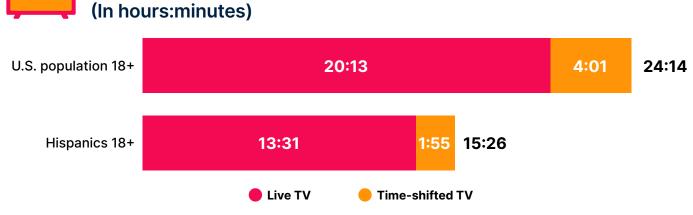


Impressions among Hispanic audiences increased

Source: Nielsen NPOWER, National TV Panel and Streaming Platform Ratings; July 2022

Hispanics love streaming

Compared with the general population, data suggests that Hispanics are satisfied with the technology experience and other benefits of streaming, including finding more of what they're looking for outside of traditional television channels. In the first quarter of this year, Hispanics spent significantly less time with traditional live and time-shifted television, highlighting how much more appealing over-the-top content has become for the Hispanic audience.



Weekly time spent with traditional TV

Source: Nielsen NPOWER, Q1 2022

To keep pace with viewing trends, media companies are racing to bring new platforms and services to market to serve niche identity groups and affinities, with some estimating that Americans now have more than 200 streaming services to choose from. And those streaming services offer significantly more choice than traditional linear channels. As of August 2022, U.S. audiences had more than 757,000 titles to watch on streaming platforms, compared with just over 212,000 on traditional linear channels⁶. And this extensive—and growing—library of streaming content resonates with Hispanic viewers more than traditional TV programming.

While the lockdown periods at the start of the COVID-19 pandemic accelerated streaming adoption for all people, much of the increase thereafter is attributable to the growing list of platforms and services that offer an increasing wealth of video options—which now feature a mix of both live and on-demand content. The growing list of choices has been attractive to consumers, as a survey Nielsen conducted earlier this year found that 41% of Americans pay for three or four streaming services, with 17% opting to pay for five or more. Among those surveyed, Hispanics were the most pleased with their streaming experience.

Hispanics: most pleased with their streaming experience



Percentages reflect agreement with this statement: "I love my experiences with video streaming services." Source: Nielsen streaming media consumer survey, Q1 2022

 78%
 of Hispanics say "I love my experience with video streaming services."

⁶ Gracenote Global Video Data





Perceptions of content that connects

Hispanics want to see themselves in the content they watch

As the streaming landscape broadens—and engagement rises—the importance of inclusion and accurate representation can't be overstated, especially as competition for audience attention increases. Given Hispanics' appetite for streaming, creators and distributors have a significant opportunity if they give this audience more of what they're looking for. Fifty-six percent of Hispanics say they're more likely to continue watching content when it features someone from their identity group. That won't happen, however, if they believe inclusion and accurate representation are declining.

56%

of Hispanics say they're more likely to continue watching content when it features someone from their identity group.

Hispanics enjoy content inclusive of other identity groups

It's also worth noting that Hispanics are drawn to content inclusive of other identity groups as well. According to Nielsen's 2022 Attitudes on Representation TV study, **more than one-third of Latinos say they are interested in seeing content with people featured from other identity groups.** In analyzing the 345 most-streamed shows in 2021, 25% (87) had a Latino share of audience that was above 19%, indicating that Latinos were more likely to watch those shows. Sixty-two percent of those shows (87), where Latinos watched a level above their population percent, are inclusive of Black Indigenous People of Color (BIPOC), including Middle Eastern North African, with MENA on-screen representation at population parity or above (42% BIPOC universe estimate). Simply put, this illustrates that Latinos are drawn to and consume content with representation outside of their identity group as well.





241%

of Hispanics feel there's not enough content that represents them, up from 39% from 2021.

Hispanics are

more likely to say that streaming airs content most relevant to their identity group.

Only

of Hispanics say that representation, when

present on-screen, is accurate.

Source: Nielsen Attitudes on Representation on TV study, April 2022 **SPOTLIGHT**

The impact of advertising in inclusive content

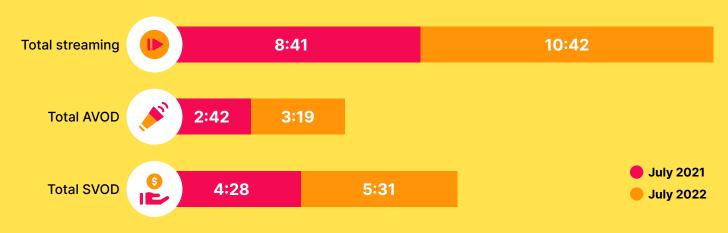
As the streaming landscape diversifies, distribution and platform strategies are evolving as well, and Hispanic audiences are gravitating to all available options.

While the streaming wars were originally driven by subscription video-on-demand (SVOD) players, audiences are now welcoming an abundance of ad-supported models and hybrids. During the second half of 2021, ad-supported video-on-demand (AVOD) accounted for 25% of streaming minutes viewed⁷. Hispanic viewers have done their part to drive this trend. This year, weekly AVOD viewing among Hispanics has increased by 23%⁸, on par with their increased SVOD consumption.

⁷ Nielsen State of Play report, April 2022 ⁸ Nielsen Streaming Platform Ratings

Nielsen

Weekly time spent watching among Hispanics (In hours:minutes)



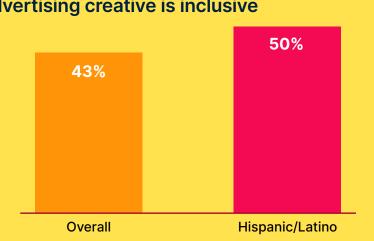
Source: Nielsen Streaming Platform Ratings

In addition to engaging viewers from a content perspective, the growth of ad-supported content presents brands with new marketing opportunities. Insider Intelligence, for example, expects AVOD to generate nearly \$19 billion in revenue this year—that's double what it generated in 2020.

For marketers that tap into content that Hispanics believe is representative, the upside is significant. According to Nielsen's 2022 Attitudes on Representation TV study, 49% of Hispanic viewers say they're more likely to buy from brands that advertise in inclusive content. And when the ads feature someone from their identity group, the benefits are even greater.

The impact of inclusive creative

Latinos are more likely to buy when advertising creative is inclusive



Source: Nielsen Attitudes on Representation on TV study, April 2022

9% of Hispanic viewers say they're more likely to buy from brands that advertise in inclusive content.

Inclusive content attracts new audiences

A study with Latino Donor Collaborative

ATINO DONOR

In addition to benefiting brands, inclusion has a direct impact on viewer engagement and subscriber status. Amid the abundance of streaming provider options, we set out to understand if Latino-led content drives new viewers to a streaming provider—and if they stay to watch more.

We teamed up with Latino Donor Collaborative to evaluate the attractive power Latino-led shows have to bring new subscribers to streaming platforms. Specifically, we looked at a subset of streamed shows with Latino-inclusive casts and Latino-led production teams to see what percentage of the streaming audience who watched the Latino-led shows had not previously used the platform. We then looked at the same audience's viewing behavior within the platform months later to see whether the audience stayed to watch other content.

For the content we evaluated, we found that Latino-led content amplified the value of the streaming platforms because audiences came for it and stayed to watch more than the program that originally drew them in.

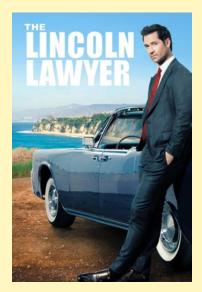
These audience numbers are small within the context of total platform or total streaming use, but they illustrate the halo effect of inclusive programming on continued engagement.

more content.



Latino-led content serves Latino audiences, and it attracts new viewers and subscribers who stay longer and consume

Hispanic-led content attracts more than **Hispanic audiences**



The Lincoln Lawyer

On May 13, 2022, Netflix released six episodes of The Lincoln Lawyer, which stars Mexican-American actor Manuel Garcia-Rulfo. These episodes attracted 114,000 new viewers who did not watch any content on Netflix between March 28 and May 11. But they did watch more content on the platform in addition to The Lincoln Lawyer, and 27,000 (24%) were Hispanic. And none of the 35,000 who only watched The Lincoln Lawyer were Hispanic.

Gordita Chronicles

On June 23, 2022, HBO Max released 10 episodes of the Gordita Chronicles, which centers on a Hispanic reporter looking back on her childhood as a Dominican immigrant growing up with her eccentric family in 1980s Miami. While HBO Max canceled the program shortly thereafter amid a programming strategy shift, the critically acclaimed comedy series did attract new viewers to the platform. The 10 episodes attracted 138,000 new viewers who did not watch any content on HBO Max between May 30 and June 22. But they did watch more content on the platform after the premiere, and 78,000 (57%) were Hispanic. This means that during the period we reviewed, approximately 5% of the overall Hispanic audience on HBO Max came to the platform specifically from Gordita Chronicles.





Father of the Bride

On June 16, 2022, HBO Max released the third film version of Father of the Bride based on the 1949 novel of the same name. The film, which centers on a Cuban-American family and an approaching wedding, attracted 448,000 new viewers who had not previously watched content on HBO Max and stayed to watch more content on the platform afterward. Nearly half (216,000, or 48%) were Hispanic.

Only Murders in the Building

On June 28, 2022, Hulu released the first two episodes from season 2 of Only Murders in the Building, starring Steve Martin, Martin Short and Selena Gomez. The arrival of these two episodes attracted approximately 5.3 million new viewers to the platform who stayed to watch more content on Hulu. Approximately 520,000 (10%) were Hispanic.

> Through the lens of these case studies⁹, we can see that quality Latino-led content has the power to drive new, valuable audiences and subscribers to platforms and services for the first time. Importantly, Hispanic-led content doesn't just attract Hispanic audiences. In fact, just

42% of the new audiences attracted to the Lincoln Lawyer, Gordita Chronicles and Father of the Bride were Hispanic. And what's more, these audiences stayed once they came for what attracted them in the first place.

e Source: Custom Analysis of Nielsen National TV Panel and Streaming Content Ratings data based on available measurable content across platforms. Images sourced from Gracenote view.

Nielsen



The building blocks of inclusive content

Our collaborative work shows that carrying/acquiring Latino-led content yields outsized value for streaming platforms because audiences come specifically to watch it and stay to watch more.

Ana Valdez President & CEO of Latino Donor Collaborative Understanding which audiences are watching content, at what pace and what they watch next will be critical for long-term engagement and audience growth. And while new data sets can tell us whether audiences consider content "bingeworthy," they can also help us validate the importance of inclusivity on both sides of the camera as well as the effect of inclusivity on bingeability.

We know that on-screen inclusion plays a role in attracting Hispanic audiences, as well as how that engagement leads to continued time within a specific service. But Nielsen and Latino Donor Collaborative found that program bingeability¹⁰ among Hispanics increases when Hispanics are represented both in front of and behind the camera.

For this first-of-its-kind analysis, we looked at the 530-most streamed programs¹¹ in the U.S. from 2021 through first-quarter 2022 to better understand what drives bingeability and cultural watchability (Hispanic share of audience). Of these programs, only 66 (8%) had Hispanic behind-the-camera representation. On the other side of the camera, just 156 had some level of Hispanic representation, while just 88 had on-screen Hispanic representation that was at parity with the rest of the cast.



How much does inclusion drive bingeability and cultural watchability? It turns out quite a bit. Continuing with our collaboration with Latino Donor Collaborative, we evaluated the relationship between Latino share of screen, behind-the-camera representation, Gracenote's new bingeability scores and Hispanic share of audience among the most-streamed content of the past year.

Among the 530 most-streamed programs, 464 (92%) did not have Hispanic behindthe-camera representation in a key role¹², while 66 (8%) had Hispanic behind-thecamera representation. For shows with behind-the-camera Hispanic representation, the share of Hispanic audience (i.e., cultural watchability) averaged 25.2%, irrespective of on-camera representation. When behind-the-camera representation was present as in-front of the camera representation increased, cultural watchability increased.

With these building blocks, we can begin to see how representation in content, on both sides of the camera, influences bingeability and cultural watchability (i.e., Hispanic share of audience at or above population parity of 19%).

¹⁰ Bingeability scores from Gracenote's Distribution Dynamics and Program Availability Archive data measure the average number of show episodes viewers watched per day to quantify viewer propensity to consume multiple episodes in a row.

¹¹ 2021-Q1 2022 National TV Panel and Streaming Platform Ratings

¹² Within the context of this report, we define "key role" as executive producer, writer, director, creator/showrunner.

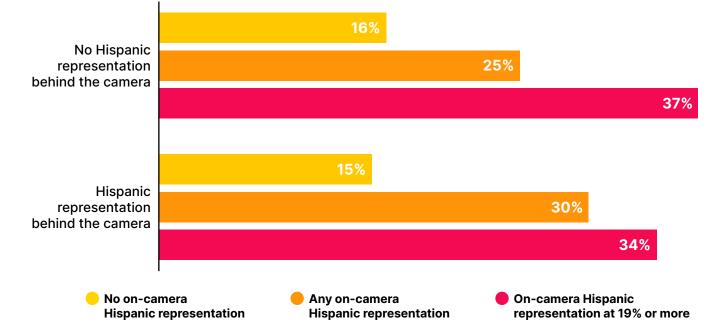


Representation matters

For example, cultural watchability increases when on-screen Hispanic representation is equal to this audience's percentage of the U.S. population (19%) or above and there is some level of Hispanic representation on the other side of the camera in a key role. Said differently, the Latino audience increases when the content features Hispanic representation both in front of and behind the camera both in combination or independently.

Cultural watchability

(Hispanic share of audience)



Sources: Gracenote Inclusion Analytics 2021 and Q1 2022; StudioSystem, custom coding in collaboration with Latino Donor Collaborative, Nielsen NPOWER, National TV Panel and Streaming Platform Ratings.

Of the 530 top shows, 36 had on-camera representation at parity (19%) for on-screen AND behind-the-camera representation. For these shows at the intersection of premium inclusive content, the cultural watchability, or share of Hispanic audience, rose to 34.22%. For Hollywood, inclusion in front of and behind the camera is a critical strategy to increase cultural watchability when considering the growing size and importance of the Hispanic audience.



For Hollywood, inclusion in front of and behind the camera is a critical strategy to increase cultural watchability.

Nielsen

Cultural relevance matters

As on-screen Hispanic representation increases, so does Hispanic cultural watchability. While these findings indicate whether or not Hispanic in-front-of and behind-the-camera inclusion, independently or in combination, influences viewership, they do not represent whether or not content culturally resonates.



On that front, Nielsen leveraged the new Cultural Insights Impact Measure[™] (CIIM[™]) metric from the Cultural Inclusion Accelerator. CIIM scores identify the impact and effectiveness of cultural relevance in ads and programming. When CIIM scores are applied to content with the

inclusive dimensions Nielsen and Latino Donor Collaborative evaluated, the value of inclusive content is amplified. The more representation there was behind and in front of the camera, the more likely the content was to have cultural relevance and resonate with Hispanic viewers, leading to higher CIIM scores. While representation in content or behind-the-camera doesn't necessarily imply culturally authentic portrayals, we saw a relationship in this analysis. "Inclusivity is table stakes. CIIM scores reveal the importance of behind-the-camera representation in creating cultural relevance. Cultural relevance increases with accurate portrayals of Hispanics, especially when representation is behind-the-camera," said Carlos Santiago, Cultural Inclusion Accelerator and ANA AIMM co-founder.



Cultural Insights Impact Measure[™] (CIIM[™])

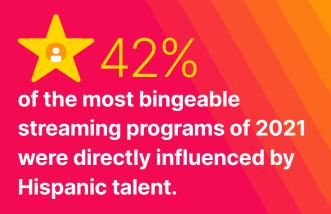
	Any Hispanic representation on camera	Hispanic on camera representation at 19% or more
No Hispanic representation behind the camera	Miraculous: Tales of Ladybug and Cat Noir (D)	Lucifer (B)
Any Hispanic representation behind the camera	Charmed (C)	Gentefied (B) Diary of a Future President (B)

Note: CIIM score grades range from A-D where D marks cultural indifference/ offensiveness, C marks below average cultural rating, and B marks above average cultural relevance and A marks best-In-culture. Source: The Cultural Inclusion Accelerator and CIIM

Inclusivity is table stakes. CIIM scores reveal the importance of behind-the-camera representation in creating cultural relevance. Cultural relevance increases with accurate portrayals of Hispanics, especially when representation is behind-the-camera.

Carlos Santiago AIMM co-founder

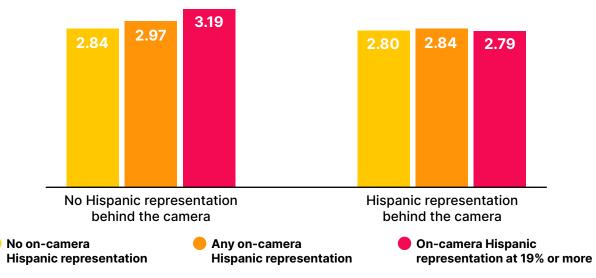
Nielsen





We found that Hispanic representation is correlated with bingeworthy programming on two dimensions: on-camera representation and Hispanic talent. First, when a show included in-front of the camera Hispanic representation, bingeability scores increased.

Bingeability

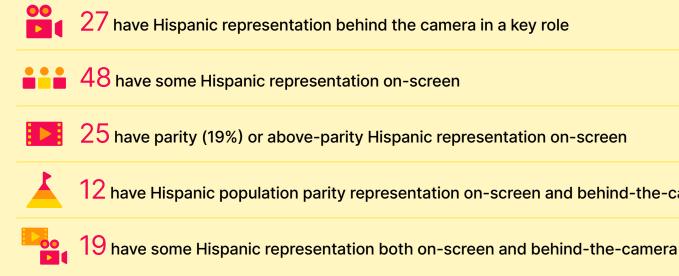


Bingeability scores measure the average number of show episodes viewers watched per day to quantify viewer propensity to consume multiple episodes in a row.

Sources: Gracenote Inclusion Analytics 2021 and Q1 2022; StudioSystem, custom coding in collaboration with Latino Donor Collaborative; Nielsen NPOWER, National TV Panel and Streaming Platform Ratings.

Overall, Hispanic talent contribution to bingeable content is significant. Out of the top streaming programs in 2021, 134 had bingeability scores of 3 or higher. On the bingeability scale, programs with a score of 3 or higher are considered highly bingeable. When looking at top bingeable content (a score of 3 or more), Hispanic talent has a significant contribution to the production of a show, as 56 of these 134 programs feature Hispanic representation on at least one side of the camera.

Of the most bingeworthy shows of 2021:



Top Spanish language streamed content delivers inclusion

Among top Spanish language streamed shows in 2021 (originating in Spanish), we see solid male/female gender distribution and higher LGBTQ share of screen* than in total streaming.

Share of screen

Top Spanish language streamed content

All streamed content

Source: Gracenote Inclusion Analytics custom segment evaluation 2021 Streamed content Spanish language originating *Share of screen - % of an identity group that appears on-screen as a recurring cast member



adventure.

Nielsen

12 have Hispanic population parity representation on-screen and behind-the-camera

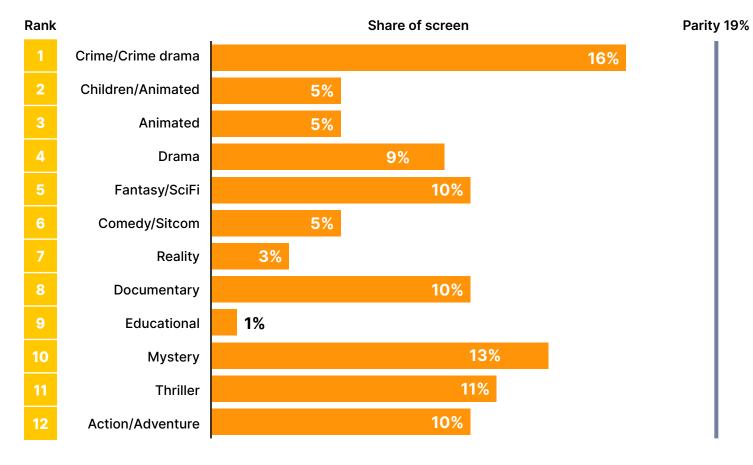
Afro Latinx	LGBTQ	Female	Male
1.1%	7.4%	45.8%	52.4%
0.6%	4.9%	44.9%	55.1%

Top streamed content that originates in Spanish has an average bingeability score of 2.5, and nearly half of the shows are in the drama genre, followed by thriller/action

Where is the mostinclusive content?

The goal of meaningful, culturally relevant content that resonates is to authentically showcase the audiences that consume it. Audiences want to watch it, and they want to feel connected to it. To explore feelings of representation, we analyzed the most-watched genres among Hispanics alongside Gracenote Inclusion Analytics data by genre. Of note, not one of the top 12 mostwatched streaming genres had on-screen Hispanic representation at population parity (19%) or above. Only six genres had a share of screen of more than 10%, which represented just 50% of population parity.

Most-watched genres by Hispanics with Hispanic share of screen

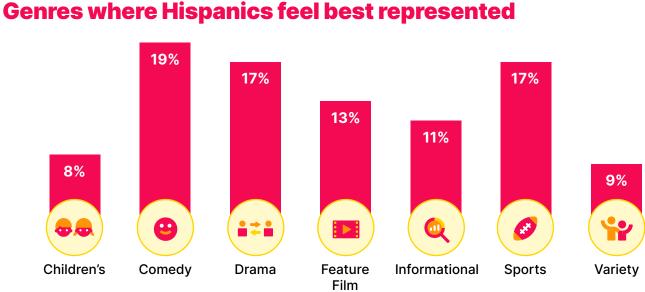


Source: Streaming Genre, TV with Digital, Linear with VOD, Q1 2022, Hispanic 2+

Latino share of screen in streaming content increased to

3% in 2021 (8.9% in 2020)

Crime/crime drama is the most-watched genre in this analysis¹³. It also has the highest Hispanic share of screen. The context in which representation occurs, within genres, themes and narratives, is important. It shapes how communities self perceive, and informs perceptions of other identity groups. Broad representation across genres can help break stereotypes and biases. In this analysis, we see notable disparities in representation across all of the mostwatched genres by Hispanics.



Source: Attitudes on representation on TV study, April 2022

¹³ Includes series and episodic programming





Closing

Recently, the entertainment industry has been publicly criticized for a lack of on-screen and behind-the-camera Hispanic representation. Public missteps, like casting non-Latino actors in Latino roles, and the cancellation of beloved Latino-led shows, can cause more than reputational damage. They can lead to a loss of the Latino audience.

Our analysis found that Hispanic representation varies by platform and genre and that overall, lack of representation in streamed content is prevalent. At the same time, our research shows that the more inclusive the content is, the more likely it is that Latinos will be drawn to watch it. As the public discourse has increased around Hispanic representation in media, the conversation has also made its way into the political sphere. In July, California Governor Gavin Newsom signed SB144, a bill ensuring, among other things, equity and diversity workforce development in entertainment media for Latinos.

Many in the industry have applauded this, as the U.S. Government accountability office reports that Latinos only account for 12% of the employed people working in the media and entertainment industry, averaging 8 percentage points lower than population parity. And, of that 12%, Hispanic representation is skewed toward manual roles, like camera operations and media equipment occupations, and lower for positions involving writing and showrunning. As our analysis showed, the importance of key behind-the-camera influence in roles like producing, writing and showrunning to the overall cultural watchability and cultural relevance of a program cannot be overstated. But changing the ratio of influence for Latinos in Hollywood will take decisive action from allies at every level of staffing, casting and executive decision-making.

The more inclusive the content is, the more likely it is that Latinos will be drawn to watch it—and stay to watch more.





Methodology

Television methodology

Television data is derived from Nielsen's National TV Panel that is based on a sample of over 42,000 homes that are selected based on area probability sampling. Data used in this report is inclusive of multicultural audiences.

Nielsen NPOWER

NPOWER is the Nielsen Company's national custom analysis system. It is a powerful tool that offers an unparalleled ability to focus on very specific audience characteristics and opens opportunities for detailed analysis of national television media. NPOWER employs a respondent-level data warehouse that subscribers access through a browser-based interface. Audience estimates can be generated, not only for all standard demographics and market breaks, but also for expanded audience characteristics that cannot be accessed anywhere else.

Gracenote Inclusion Analytics

Designed to accelerate diversity and equity in media, Gracenote Inclusion Analytics illuminates representation of on-screen talent compared with audience diversity. The solution empowers content owners, distributors and brands to make better informed decisions around inclusive content investments.

Nielsen attitudes on representation on TV survey

Survey of over 2,000 smartphone respondents via Nielsen's Computer and Mobile Panel, weighted for age, gender, race, ethnicity, income and Android and iOS users conducted April 2022.

Nielsen Streaming Content Ratings

Provides viewing to subscription-based video on demand (SVOD) content at the title, program and episode level.

Nielsen Streaming Platform Ratings

Audience measurement data that details the amount of time consumers spend streaming and on which platforms.

Contributors

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About Nielsen

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