



# State of Diversity on TV

An analysis of representation across America's TV screens in 2023

# A Changing Landscape

Diversity and representation on TV is not just a moral imperative, but also plays a crucial role in fostering inclusivity and influencing how society is shaped. When we see people on our screens that look like us and our stories, it can break stereotypes, build cultural bridges, and empower our sense of belonging.

At Samba TV, our vision is a world where everyone is more deeply connected to what they love through TV, so we took a deeper look at the impact that diversity and representation has on us, the viewers. With practically unlimited choices of what TV to watch, are we more likely to seek out programs that feature characters who look like us?

Diversity and representation on TV takes on new weight in the context of America's changing demographics. By 2060, over half of Americans will identify as an ethnicity other than white and, with these changes, the TV industry must adapt to reach new audiences.

With a mission to create data at the heart of TV and power a better viewing experience for everyone, Samba TV's analysis sheds new light on what's working, where our industry can do better, and ultimately provides insights to help improve the viewing experience for audiences of all backgrounds.



Team Samba

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## Methodology

Samba TV gathers viewership data via its proprietary Automatic Content Recognition (ACR) technology from tens of millions of opted-in Smart TVs. Samba TV's ACR is integrated at the chipset level across 24 of the top Smart TVs sold in more than 100 countries globally and captures content that crosses the TV screen, regardless of source. This results in unbiased, comprehensive viewership insights from around the world.

As is standard industry practice, Samba TV analyzes the large proprietary dataset to project household-level TV viewership utilizing its research panel of more than 3M smart TVs, balanced and weighted to the U.S. Census across age, gender, ethnicity, and household income. Samba TV's panel is nearly 80x larger than the legacy industry model and is aligned to the U.S. census by 0.03%.

This analysis is based on the top 25 highest reaching direct-to-streaming and top 25 highest reaching linear TV premiere episodes that were released between 1/1/23-5/1/23. To note, shows that released on linear and streaming platforms simultaneously were included as part of the top 25 highest reaching linear TV shows, but demographic viewership data reflects households that accessed the content via any platform. The program list analyzed excludes reality, docuseries, foreign language, and animated content.

Data on top-billed actors was sourced from third-party sites including IMDb and Rotten Tomatoes. In areas where Other/Mixed is not broken out as a standalone ethnic group, actors are included within every group they represent (ex. starring a half-Black and half-Asian actress would mean a show featured Black and Asian representation).

Samba TV's first-party data is also supplemented with data from a nationwide survey conducted within the U.S. from 3/23/23-3/27/23 among 2,506 adults by HarrisX.



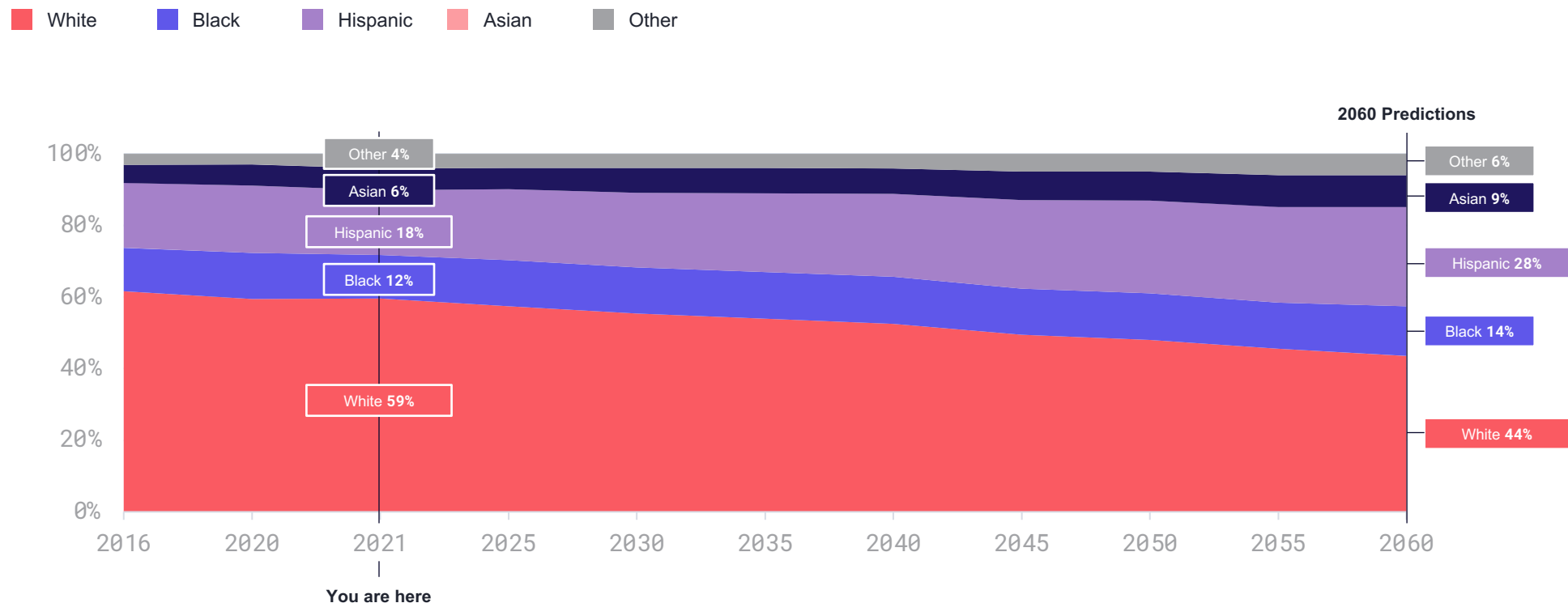
## Diversity & Representation on TV

Is popular TV adequately reflecting the increasingly diverse U.S. population? Our findings show that representation of some groups mirrors the census, while other groups are dramatically underrepresented.

# By 2050, the majority of Americans will be an ethnicity other than white

In America today, over 40% of people identify as an ethnicity other than white and, in the next 40 years the white population\* is projected to shrink by nearly 19 million people. Yet, it's no secret that TV shows have historically focused on the stories of white Americans. In the context of the country's changing landscape, it is imperative that entertainment and advertising content appropriately reflects its audience in order to reach and engage them.

**Ethnic diversity of U.S. population over time**

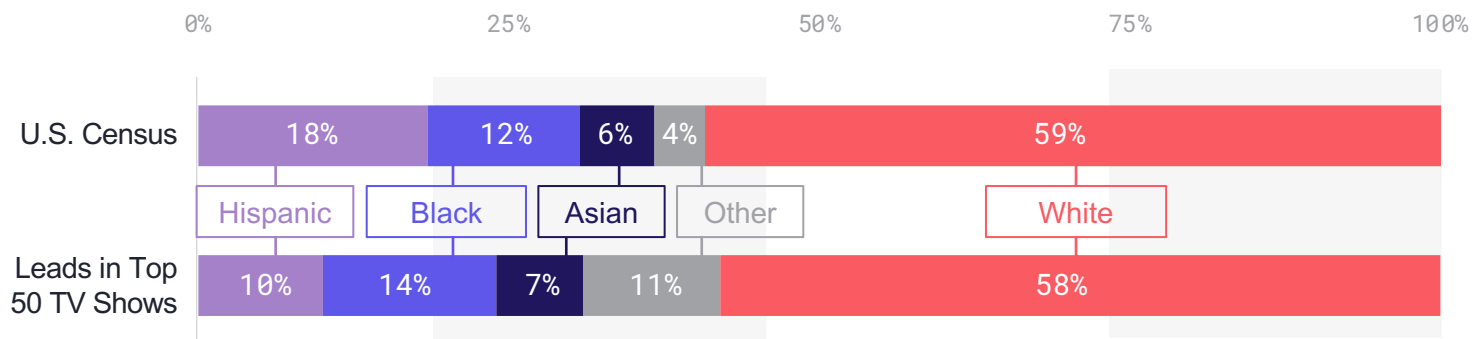


\*Stat refers to the non-Hispanic white population; source is census.gov

# Despite making up almost 20% of the U.S., Hispanic actors only comprise 10% of representation on TV

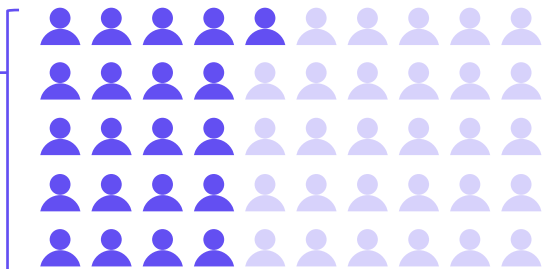
Within the top 50 TV shows, 42% of top-billed actors were Hispanic, Black, Asian, or another ethnicity such as mixed, while 58% were white. Outside of white actors, Black actors were the most represented group within the top-billed cast, while Hispanic actors were underrepresented. Despite comprising 18% of the U.S. population, Hispanic actors accounted for only 10% of the top-billed cast. In fact, none of the top 50 shows featured a majority Hispanic cast, compared to multiple shows featuring majority white, Black, and Asian leads. Turning our attention to gender for this upfront analysis, women actors made up only 45% of top-billed cast members across the top 50 shows, despite the U.S. having had more females than males since 1946.

**Ethnic diversity of leads within top TV shows vs. U.S. population**



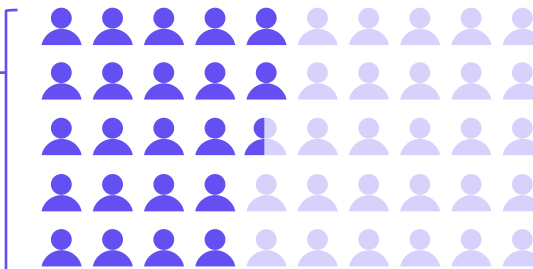
42%

of of top-billed cast members were Black, Hispanic, Asian, mixed, or of another non-white ethnicity



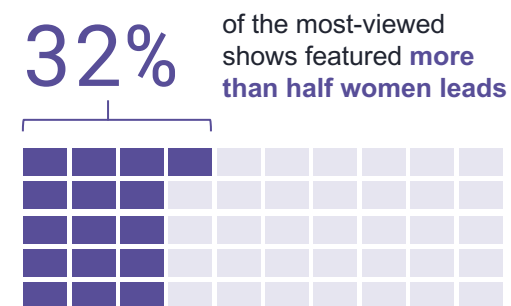
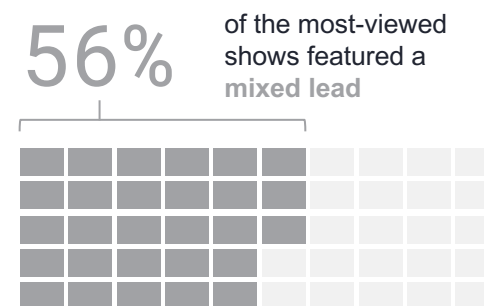
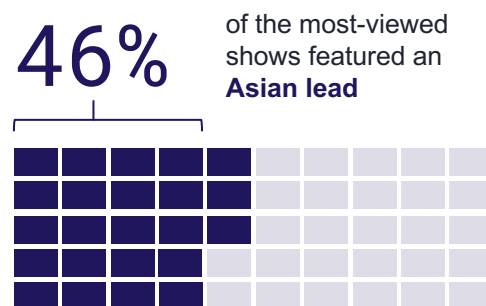
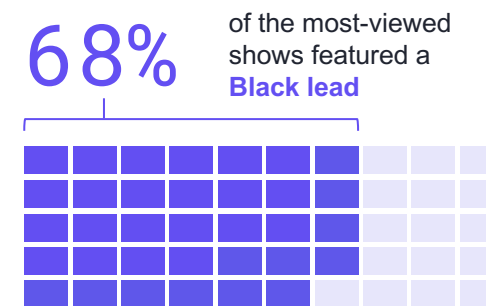
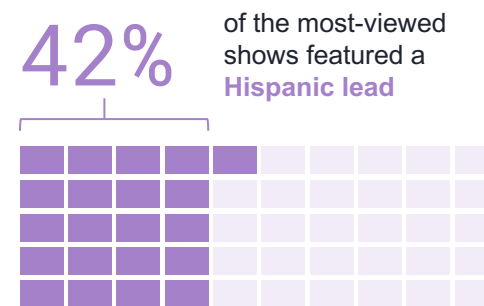
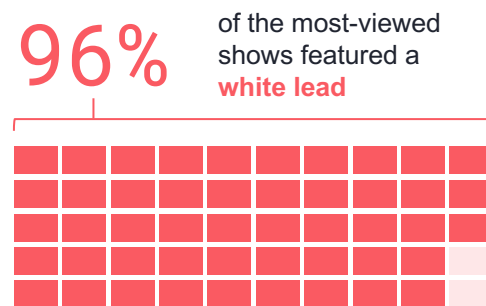
45%

of of top-billed cast members were women



# Majority of programming features white leads, while less than half of shows feature an Asian or Hispanic lead

At the show level, 48 out of the top 50 programs featured a white lead, over two-thirds included a Black lead, and 56% featured mixed leads. However, less than half included Hispanic or Asian leads. Looking at gender representation, over two-thirds of shows were dominated by men, with majority-women shows comprising just 32% of the top 50.

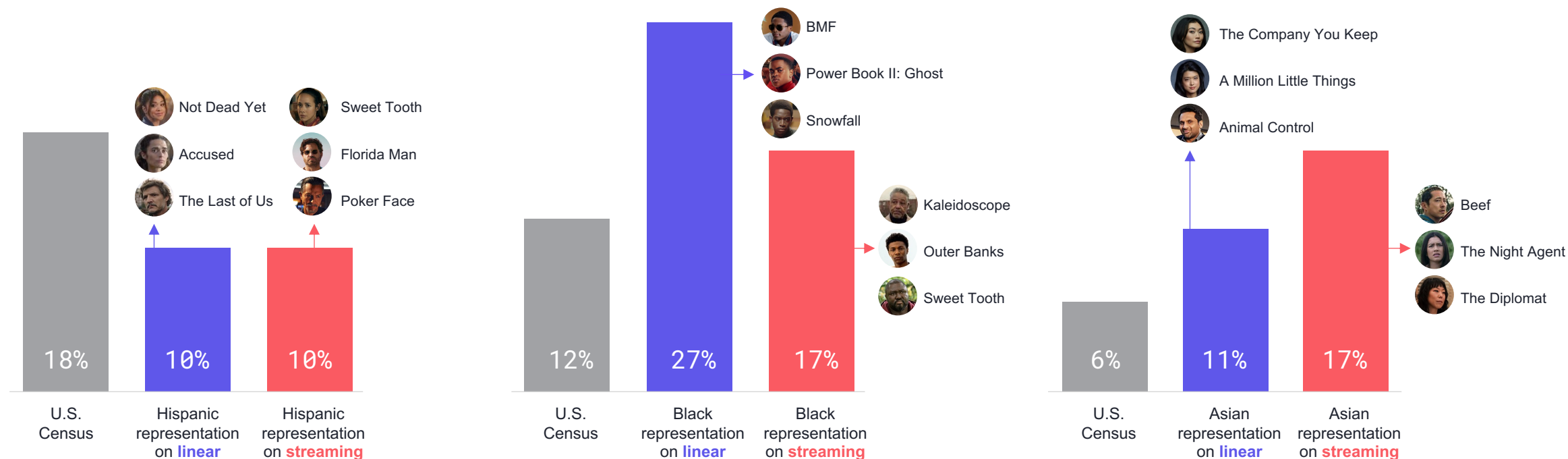


# Linear does well for Black representation, while lack of Hispanic representation is consistent across linear and streaming

Across both linear and streaming, only 10% of lead actors were Hispanic, despite Hispanic people comprising 18% of the U.S. census. Black representation (including mixed Black leads) was particularly strong on linear, impacted by shows with majority Black casts like BMF and Snowfall. Asian representation was strong on streaming, led by trailblazing shows like Netflix's Beef.

## Ethnic diversity of leads in top 50 TV shows vs. U.S. population

Top 25 linear shows vs. top 25 streaming shows

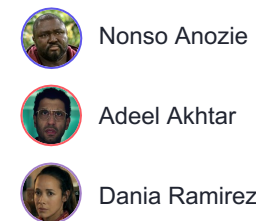
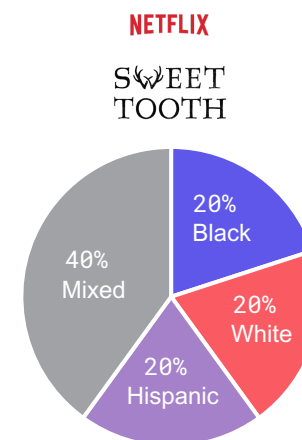
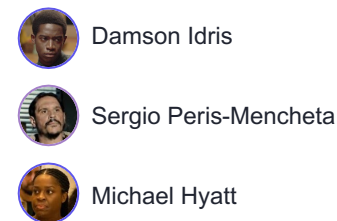
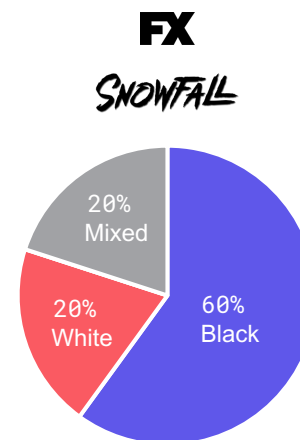
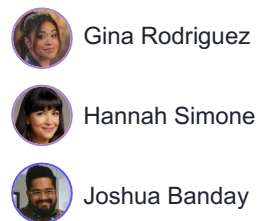
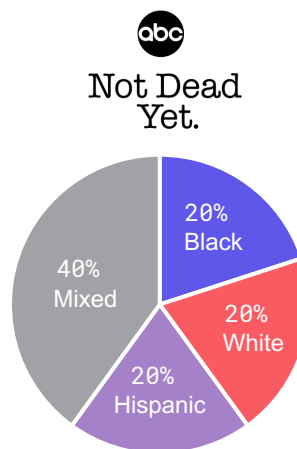
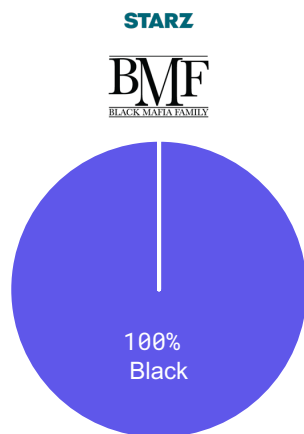
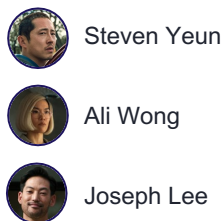
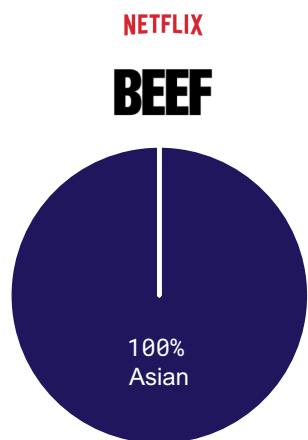


# Breakout shows like Beef and BMF provide blueprint for telling diverse stories

Shows like Beef have been praised for nuanced portrayal of Asian-American characters, and that investment has paid off for Netflix with Beef ranking as the #7 streaming premiere among those analyzed. Starz's BMF, meanwhile, has received acclaim for its majority Black cast and powerful storytelling through Black writers. Other linear networks, ABC and FX, also developed highly represented content, with FX's Snowfall in particular providing strong representation of Black actors.

## Shows with high levels of diverse representation

Black White Hispanic Asian Mixed





## **Does Representative Content Drive Diverse Viewership?**

Over half of people say that they are more likely to watch TV where they see themselves represented. How are audiences engaging with this content in 2023?

# Diverse casting draws in diverse viewership

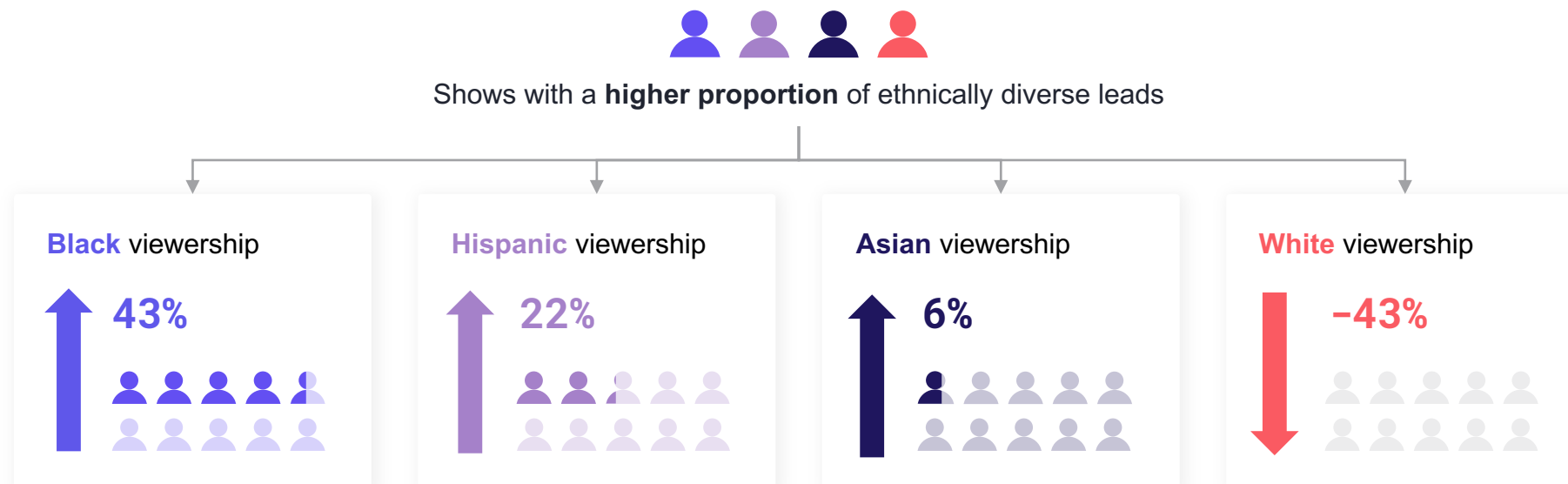
Our findings showed a positive correlation of 43% among households with Black, Hispanic, Asian, mixed race, or another non-white ethnicity watching programs with higher percentages of non-white stars, indicating that cast diversity is a selling point among diverse households. Conversely, there was a negative correlation among households with white viewers watching shows featuring diverse casts. Of any group, Black households saw the strongest correlation with watching shows with higher levels of diversity. As content creators seek to increase viewership, they should bear in mind that more representation boosts attention among growing, diverse populations.

43%

There was a positive correlation between diverse households watching TV shows featuring a higher proportion of diverse cast members.

## Were diverse audiences more likely to watch shows with higher levels of diversity?

Correlation between shows starring a higher proportion of ethnically diverse leads and diverse viewership\*



\*Correlations shown as percentages

# Black audiences were most likely to watch shows featuring Black leads

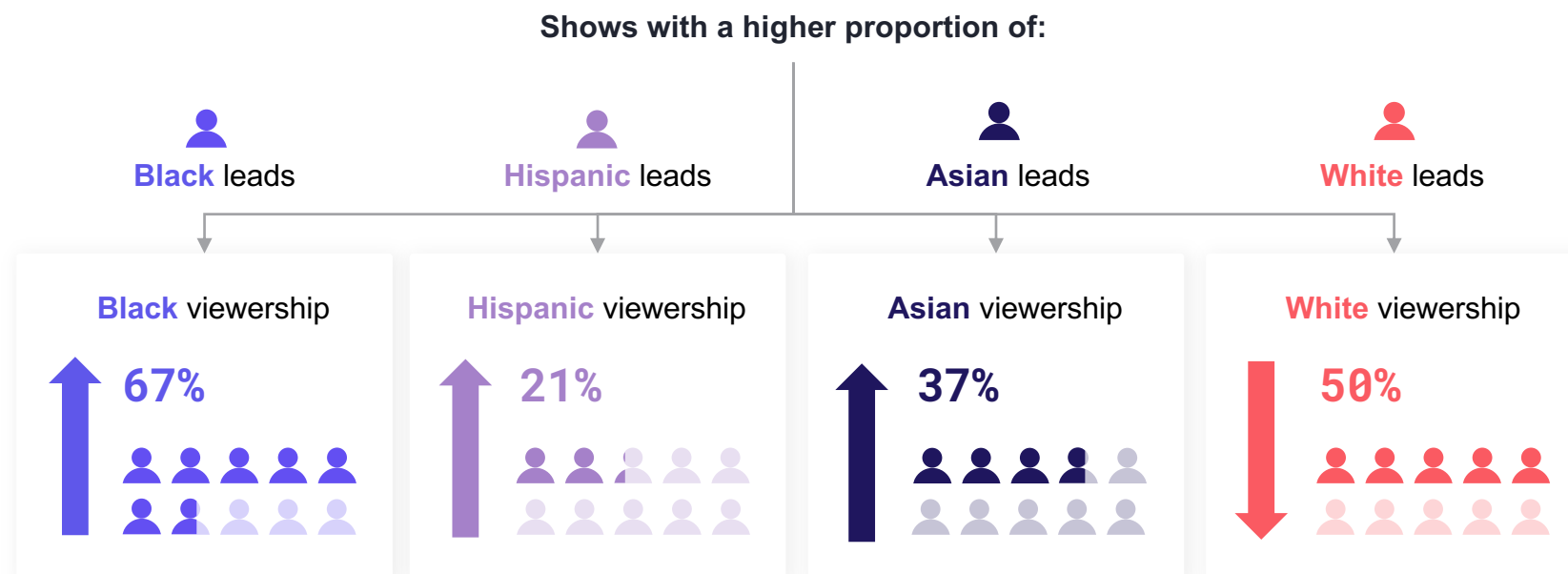
While every ethnic group saw a positive correlation between representation and viewership, the strongest correlation was among Black households. There was a positive correlation of 67% among Black households watching shows featuring a higher percentage of Black leads, impacted by shows with a high percentage of Black leads like BMF and Snowfall dramatically over-indexing in viewership among Black households. This strong positive correlation indicates that advertisers seeking to increase viewership from Black viewers should keep representation top of mind. Meanwhile, the correlation between Hispanic audiences watching programming with a higher percentage of Hispanic leads was lower, perhaps impacted by sporadic Hispanic representation across top shows and none of the top 50 shows featuring a majority Hispanic cast.

66%

of **Black** people say they are more likely to watch programming where they see themselves represented.\*



**Were people of certain ethnic groups more likely to watch shows where they saw themselves represented?**  
Correlation between households watching shows starring a higher percentage of members of their own ethnicity\*\*



\*Source: Samba TV and HarrisX survey data

\*\*Correlations shown as percentages

# Opportunity to reach Black households boosted by strong representation on linear, while Asian viewers best reached on streaming

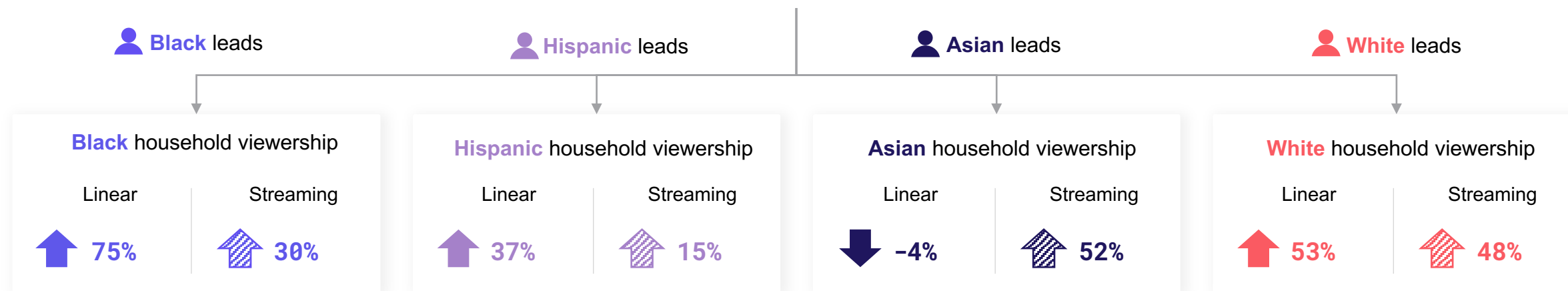
Across linear TV shows, there was a 38% positive correlation between diverse households watching shows featuring a higher proportion of diverse leads. On streaming, there was an even higher positive correlation of 53% between diverse households watching TV shows featuring a higher proportion of diverse leads. The positive correlation on linear was impacted by Black households, who showed an extremely high likelihood to watch programming with Black leads. Meanwhile, on streaming platforms, there was a high correlation between Asian households watching shows with Asian leads, impacted by the success of Beef on Netflix among that audience.

## Streaming vs. Linear

Correlation between households watching shows starring a higher percentage of members of their own ethnicity\*

● Linear    ● Streaming

### Shows with a higher proportion of:



\*Correlations shown as percentages

# Netflix streaming shows draw in viewers who saw themselves represented within the cast

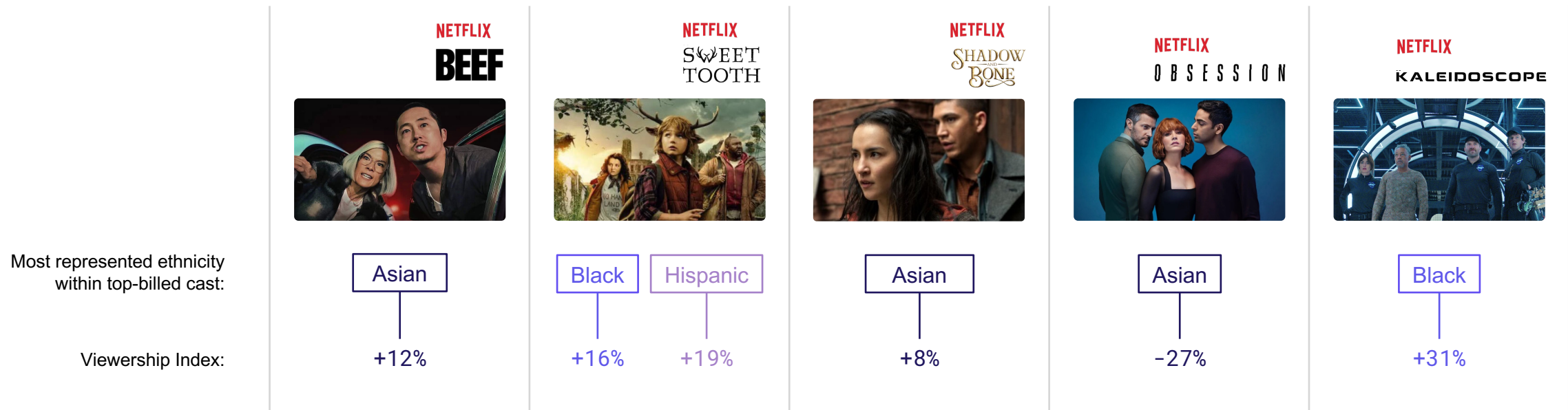
Looking at the streaming shows with the highest percentage of non-white stars, almost each one over-indexed in viewership among households that were heavily represented within their cast composition. For example, shows with a high percentage of Black leads like Sweet Tooth and Kaleidoscope over-indexed by double digits in viewership among Black households, further highlighting how diverse audiences are more likely to watch programming where they see themselves represented. Notably, the most diverse streaming shows were all Netflix originals.

#1

NETFLIX

Each of the most diverse streaming shows aired on Netflix

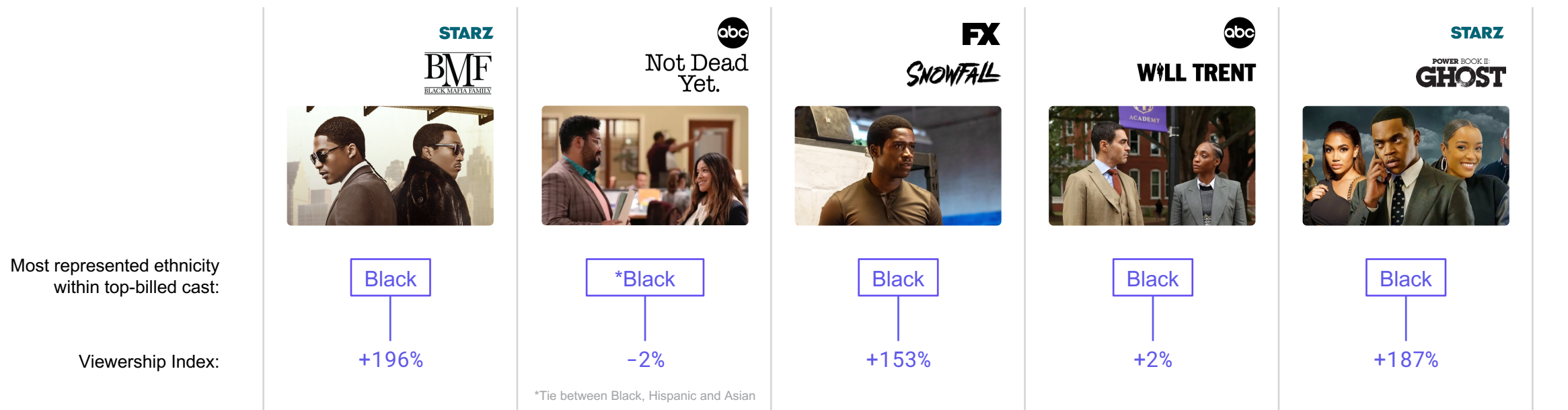
## Most diverse streaming shows



# Linear programming offers strong Black representation, creating ideal platform to target the audience

More than 1 in 4 of the lead actors among the top linear shows was Black, and that representation paid off for those shows from a viewership standpoint. Multiple shows with a majority Black leading cast over-indexed in the triple digits based on Black household viewership, including BMF, Snowfall, and Power Book II: Ghost. While Netflix dominated the streaming space from a representation standpoint, multiple linear networks saw shows rank among the most representative cast compositions, ranging from premium to cable to broadcast.

## Most diverse linear shows



In addition to shows visualized above, A Million Little Things (ABC), Alert: Missing Persons Unit (FOX), Animal Control (FOX), Magnum P.I. (NBC), Night Court (NBC), The Blacklist (NBC), and True Lies (CBS) tied for the fourth highest percentage of non-white leads.



## **TV & Ad Viewership by Ethnicity**

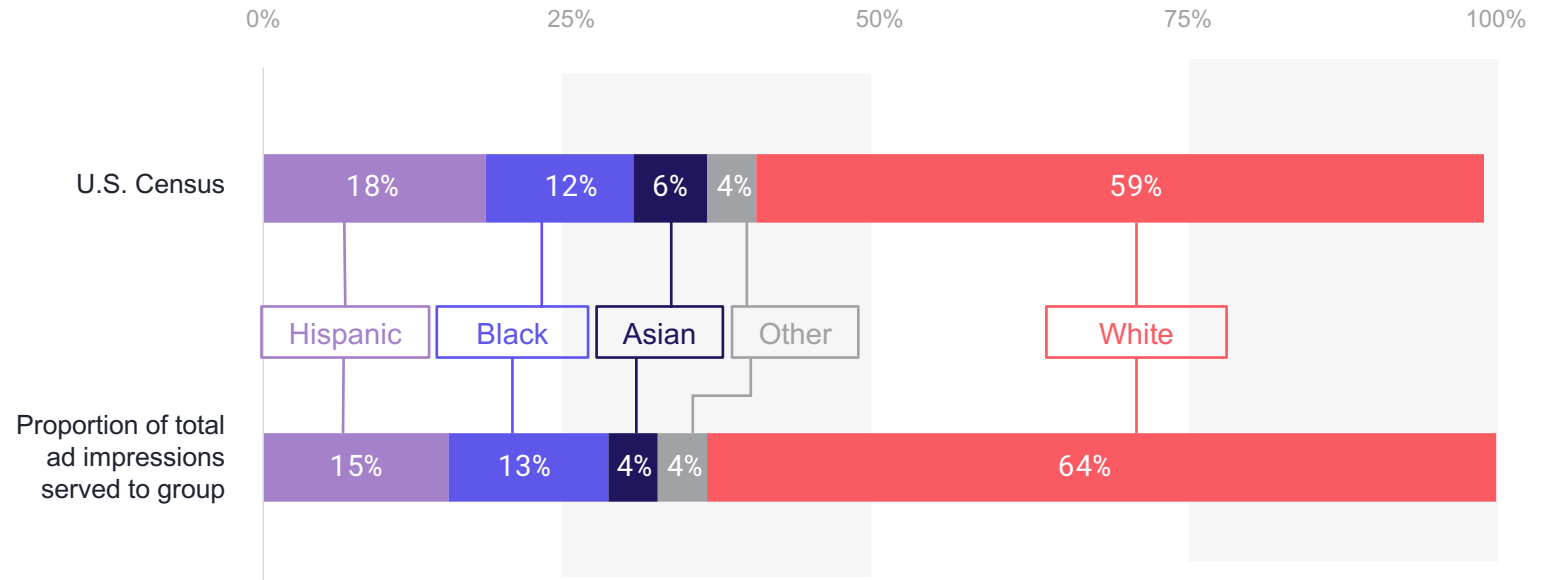
In today's fragmented and competitive landscape, it's essential for advertisers to stand out among key audiences. For many marketers, this includes diverse groups who have demonstrated that representation matters to them. How are advertisers reaching these diverse audiences? For advertisers looking to engage these groups further, where are the best places to do so?

# Advertisers are underserving Hispanic and Asian audiences

With \$2T in spending power and making up close to 20% of the U.S. population, the Hispanic audience is a massive one for advertisers to reach. Despite their high and growing proportion in the U.S. population, Hispanic households are only served 15% of ad impressions. Asian audiences are also being under-served, with just 4% of ad impressions reaching them. White audiences, however, are overserved the most with 64% of ad impressions reaching this group.



Ad impressions served by ethnic group vs. census breakdown



- 05
- 06
- 08
- 09
- 10
- 12
- 13
- 14
- 15
- 16
- 18
- 19
- 20
- 21
- 22

# Spanish-language programming performs best across linear and streaming

## Hispanic households

As Netflix opens doors for advertisers looking to reach fragmented streaming audiences, data shows that it's the best platform to reach underserved Hispanic households. While Hispanic households may be soaking up Spanish-language programming via the top linear networks, on Netflix this audience is seeking out international content. With 80% of Hispanic people saying diverse content is important when choosing what to watch, content creators and advertisers would benefit from diversifying casts to include Hispanic representation. This audience is underserved by advertisers, but each of the top five indexing advertisers reached audiences with Spanish-language advertising. Burlington, uniquely, was among the top advertisers for not just Hispanic audiences but Asian and Black households as well.

### 22%

There was a positive correlation of 22% between Hispanic households watching content starring a higher proportion of ethnically diverse actors.

### 21%

There was a positive correlation of 21% between Hispanic households watching content starring a higher proportion of Hispanic actors.

### 80%

8 in 10 Hispanic people say that having diverse representation is important to them when choosing what content to watch.

### Top 5 indexing streaming premieres among Hispanic households

NETFLIX



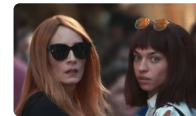
Triptych

NETFLIX



Sky High:  
The series

NETFLIX



Who Were We  
Running From?

NETFLIX



The Snow Girl

NETFLIX



Bling Empire:  
New York

### Top 5 indexing linear networks among Hispanic households



### Top advertisers by percentage of impressions served to Hispanic households



\*Source: Samba TV and HarrisX survey data

# Black representation is key to reaching **Black** households across screens

With a strong correlation between Black households watching content that features a higher proportion of Black actors, Black representation in content is key. In fact, four of the top five streaming programs had majority Black casts. Furthermore, this audience can be reached through international programming, with two of the top three Netflix shows coming from outside the U.S. The top advertisers for this audience spanned ad categories from furniture, legal services, automotive, and clothing. Notably, Burlington was among the top five indexing advertisers for not just Black households but Hispanic and Asian households as well.

## 43%

There was a positive correlation of 43% between Black households watching content starring a higher proportion of ethnically diverse actors.

## 67%

There was a positive correlation of 67% between Black households watching content starring a higher proportion of Black actors.

## 90%

The vast majority of Black audiences say that having diverse representation is important to them when choosing what content to watch.\*

### Top 5 indexing streaming premieres among Black households

NETFLIX



My Name is Mo'Nique

prime video



Swarm

hulu



Unprisoned

NETFLIX



Unseen

NETFLIX



Rough Diamonds

### Top 5 indexing linear networks among Black households

BET★  
NETWORKS

BET★her

TV ONE

Bounce

VH1

### Top advertisers by percentage of impressions served to Black households

ROOMS  
TO GO

MORGAN & MORGAN

CARmax

Burlington

CarShield

\*Source: Samba TV and HarrisX survey data

# Linear sports and news reaches Asian audiences while they turn to streaming for reality

Over two-thirds of Asian audiences say that having diverse representation is important to them when choosing what content to watch. Based on the strong Asian cast representation across the top five indexing streaming programs, this rang true. On streaming platforms, Asian audiences are drawn to reality and action series, while beyond streaming, the top linear networks were dominated by sports as well as news and music. The advertisers best reaching this audience fell largely within the auto segment, however, Burlington was again seen as a top advertiser to Asian households as they were with Black and Hispanic households.

6%

There was a positive correlation of 6% between Asian households watching content starring a higher proportion of ethnically diverse actors.

37%

There was a positive correlation of 37% between Asian households watching content starring a higher proportion of Asian actors.

70%

Over two-thirds of Asian audiences say that having diverse representation is important to them when choosing what content to watch.\*

## Top 5 indexing streaming premieres among Asian households

NETFLIX



Bling Empire:  
New York

NETFLIX



How to Get Rich

NETFLIX



Physical: 100

prime video



Citadel

NETFLIX



Beef

## Top 5 indexing linear networks among Asian households



## Top advertisers by percentage of impressions served to Asian households



Burlington



CARmax

\*Source: Samba TV and HarrisX survey data

# Key Insights

With the U.S. growing increasingly diverse each day and the spending power of Hispanic, Black, and Asian audiences reaching close to \$5T, it is imperative that content creators and advertisers are incorporating diverse and representative casts to authentically reach these viewers. The findings of our State of Diversity in TV report clearly show that there are steps our industry must take to improve representation on TV, and data shows that audiences will reward the content creators who take action to do so.

1

Diverse audiences are **more likely to watch** programming **where they see themselves represented**

The positive correlation between diverse audiences watching shows with diverse leads indicates that representation is a deciding factor when people choose what TV to watch. Content creators that do not take this into account risk losing these audiences.

2

In today's changing landscape, studios must **increase Hispanic and Asian** representation

With more and more of the U.S. identifying as ethnicities other than white, studios will fail to drive interest in new programs if they do not reflect the population. In particular, less than half of the top TV shows featured Hispanic or Asian leads. Streamers like Netflix, however, are leaning into diverse representation in their content.

3

It is valuable for advertisers to choose blocks with **diverse programming**

With less than half of U.S. adults subscribing to cable and the streaming landscape fragmenting further, it's essential for advertisers to choose ad buys wisely. The data proves that diverse programming, now excelling in streaming, attracts valuable audiences to reach.

4

**Hispanic** audiences are being **underserved** with advertising

Despite comprising 18% of the population, only 15% of ads are reaching Hispanic households. With huge spending power and continued projected population growth, advertisers should make this audience a priority.