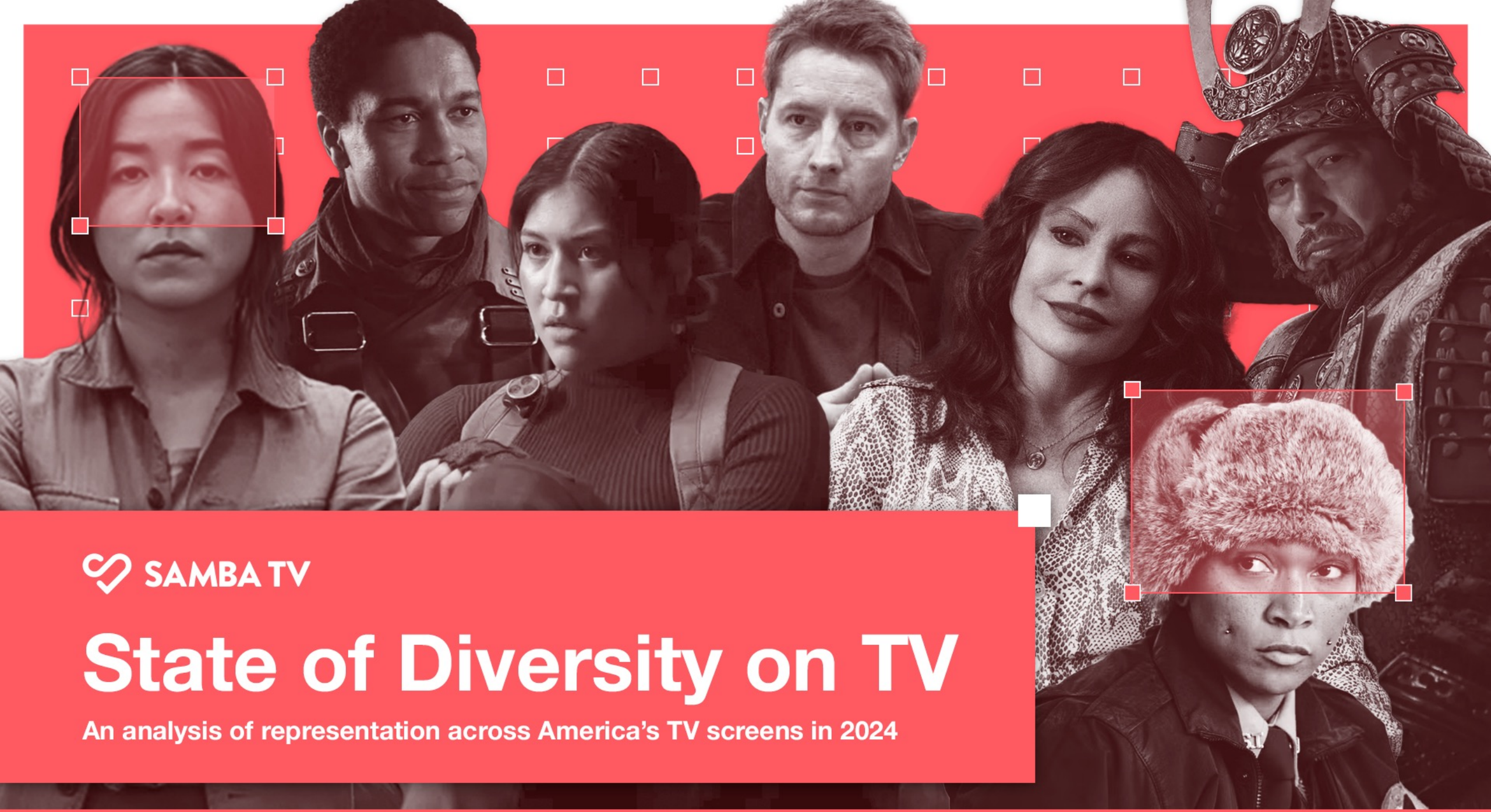

SAMBA TV

State of Diversity on TV

An analysis of representation across America's TV screens in 2024

SAMBA TV

TV that reflects who we are

As we gear up for summer and an exciting slate of new TV shows, Samba TV is pleased to release our second annual State of Diversity on TV report. Using our first-party data, we aim to shed light on the status of ethnic representation within top TV shows and advertisements, as well as the impact that diversity has on viewership and engagement. This remains both a moral imperative and essential information for advertisers and streamers in the battle for attention.

So what did we find this year? Unfortunately, as the United States grows more and more diverse, TV has not followed suit. Representation of non-white leads was down 7% year-over-year, even though data continues to show that diverse casting drives viewership.

As we strive to create data at the heart of TV and power a better viewing experience for everyone, we hope that our new analysis will show what's working and where our industry can do better, because everyone benefits from a viewing experience that is representative and empowering.

Team Samba

SAMBA TV

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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 1/1/24-5/1/24. 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 IMDb. To note, the 2023 version of this report also included Rotten Tomatoes top-billed actors, but since Rotten Tomatoes got rid of this feature it was not included in the 2024 report. 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).

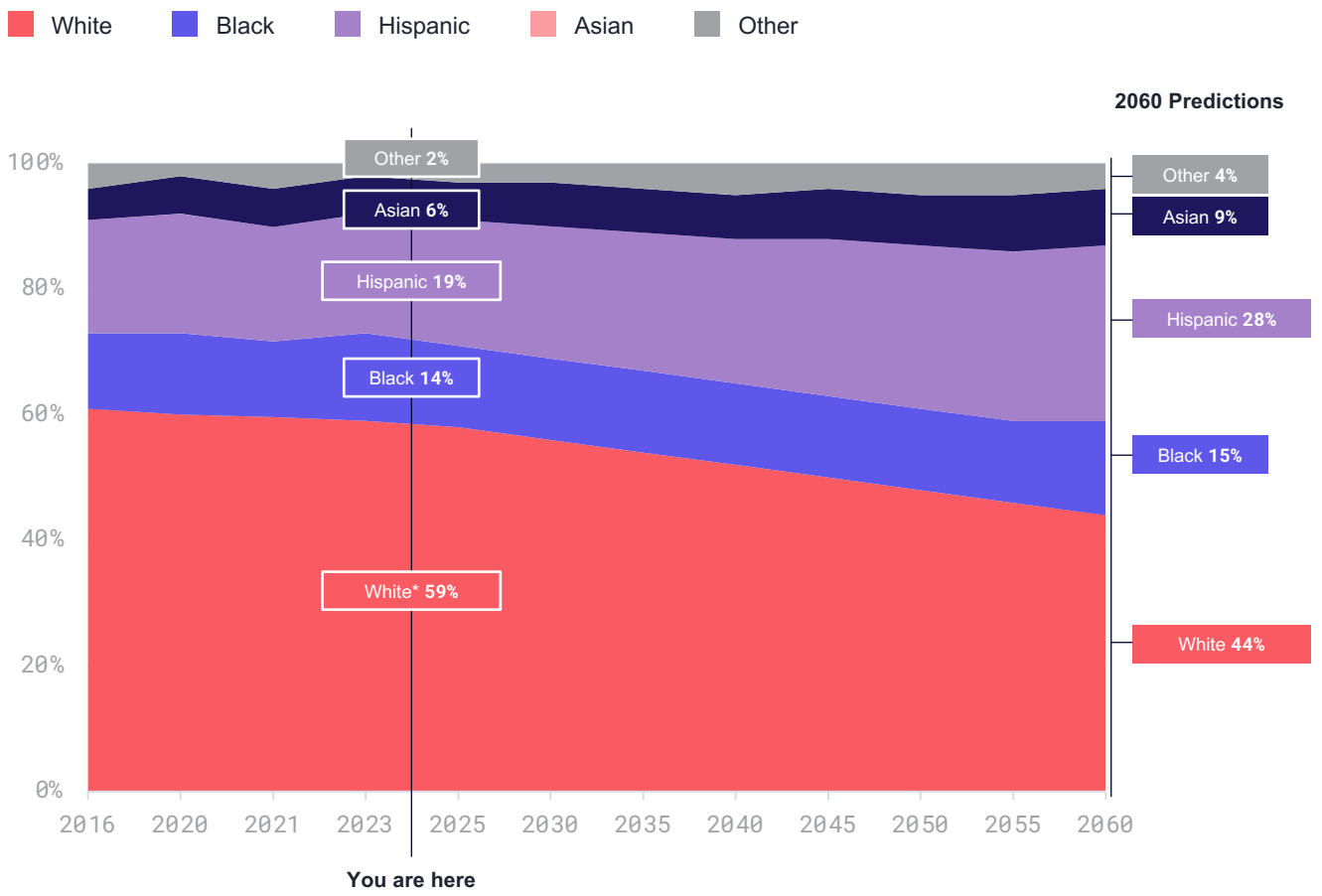
Ad impressions data is sourced from Samba TV's first-party data, which is combined with third-party data sets such as schedules and Experian demographics. Unless otherwise specified, ad impressions data reflects linear and OTT ad impressions across ads served between 1/1/24 - 5/1/24.

Diversity & Representation on TV

With America growing more diverse over time, TV must do the same

The proportion of Americans who identify as ethnicities other than white has already hit 41% and continues to increase, and before 2060 more than half of the country will be part of one of these minority groups. To reflect the changing population and stay relevant, content creators must emphasize the stories of the diverse populations who increasingly define what it means to be an American viewer and consumer.

Ethnic diversity of U.S. population over time

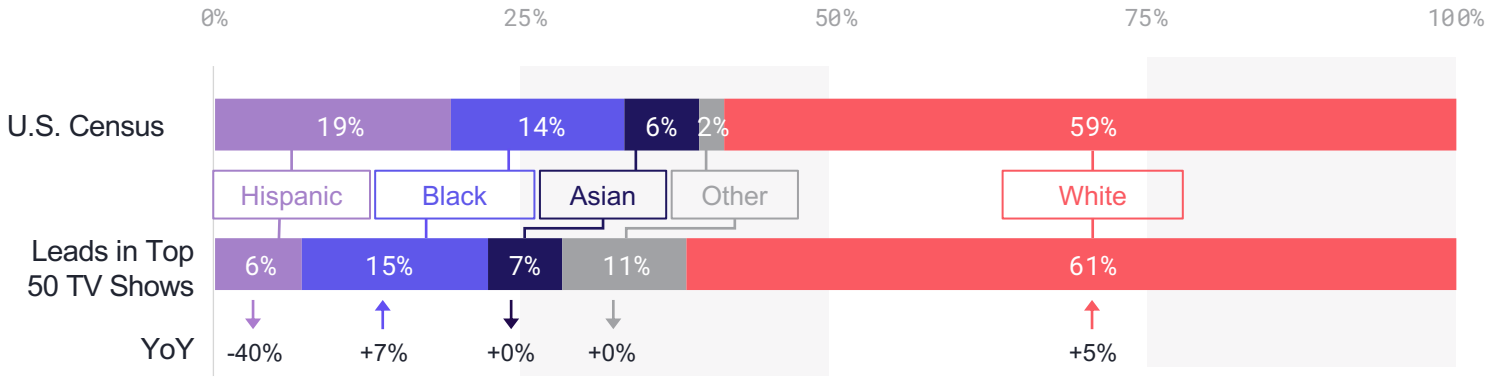


*Stat refers to the non-Hispanic white population; source is census.gov

Hispanic actors severely underrepresented on TV, with shrinking presence year-over-year

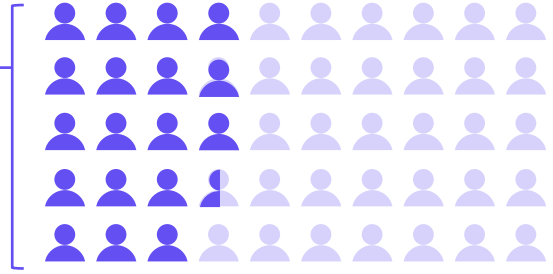
Within the top 50 TV shows, 39% of top-billed actors were Hispanic, Black, Asian, or another ethnicity such as mixed or Native, while 61% were white. This marked a 7% decrease in representation of diverse groups year-over-year. Outside of white actors, Black actors were the most represented group within the top-billed cast, while Hispanic actors were underrepresented. Despite comprising 19% of the U.S. population, Hispanic actors accounted for only 6% of the top-billed cast, with representation of this group down 40% year-over-year.

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



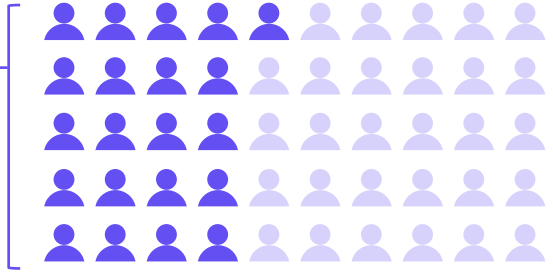
39%

of top-billed cast members were Black, Hispanic, Asian, mixed race, or of another non-white ethnicity, down **7%** year-over-year



42%

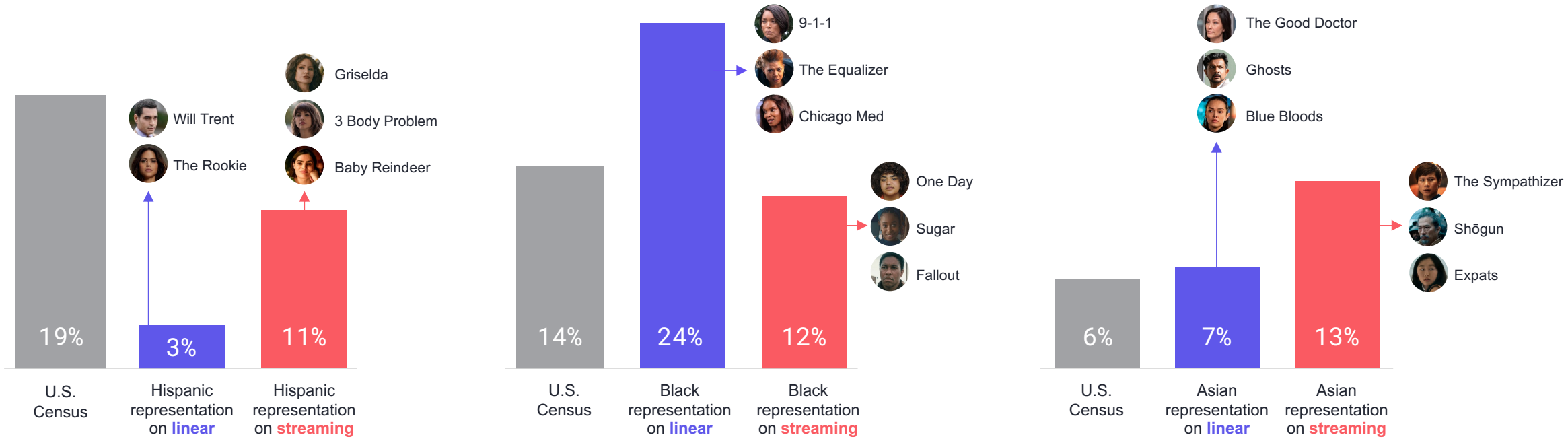
of top-billed cast members were women, down **7%** year-over-year



Lack of Hispanic representation is consistent across linear and streaming, while Black leads are prominent on linear and Asian leads on streaming

Across both linear and streaming, top shows severely underrepresented Hispanic actors, with linear falling particularly short with just 3% of leads being Hispanic - despite Hispanic people comprising 19% of the U.S. census. Consistent with last year, Black representation (including mixed Black leads) was particularly strong on linear, impacted by shows like The Equalizer featuring a majority Black cast. Also similar to last year, Asian representation was strong on streaming, led by trailblazing shows like Hulu and FX's Shōgun and Max's The Sympathizer.

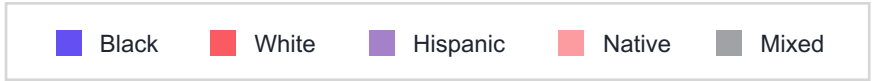
Ethnic diversity of leads in top 50 TV shows vs. U.S. population
Top 25 linear shows vs. top 25 streaming shows released 1/1/24- 5/1/24



Netflix leans in to Hispanic and Native representation, while Black representation is strong on linear

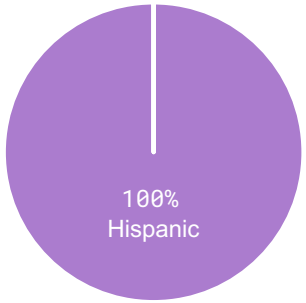
Several top streaming shows featured casts starring entirely non-white leads, including Griselda's all-Latino cast and Echo's strong representation of Native actors. Meanwhile, representative linear shows tended to include a more mixed group, including shows with majority (though not fully) diverse stars like CBS's The Equalizer and ABC's Will Trent.

Shows with high levels of diverse representation released 1/1/24- 5/1/24



NETFLIX

GRISELDA



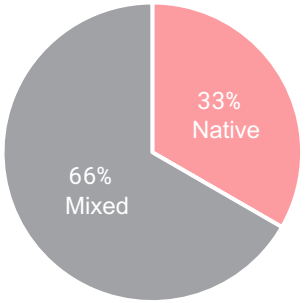
Sofia Vergara

Juliana Martinez

Alberto Guerra

NETFLIX

AVATAR THE LAST AIRBENDER



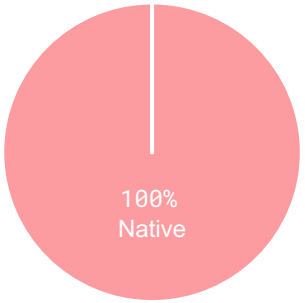
Kiawentiio

Gordon Cormier

Ian Ousley

Disney+

ECHO



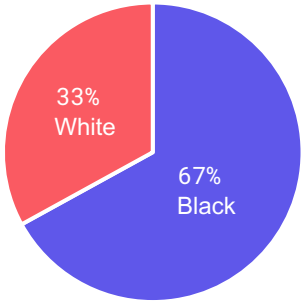
Alaqua Cox

Chaske Spenser

Tantoo Cardinal

CBS

THE EQUALIZER



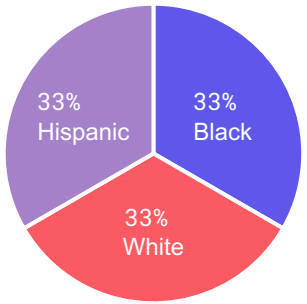
Queen Latifah

Tory Kittles

Adam Goldberg

abc

WILL TRENT



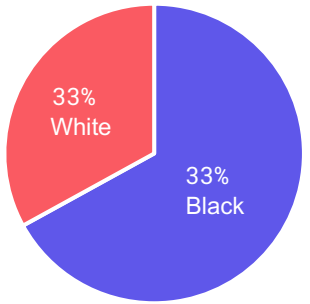
Ramón Rodríguez

Erika Christensen

Iantha Richardson

NBC

CHICAGO MED



Marlyne Barrett

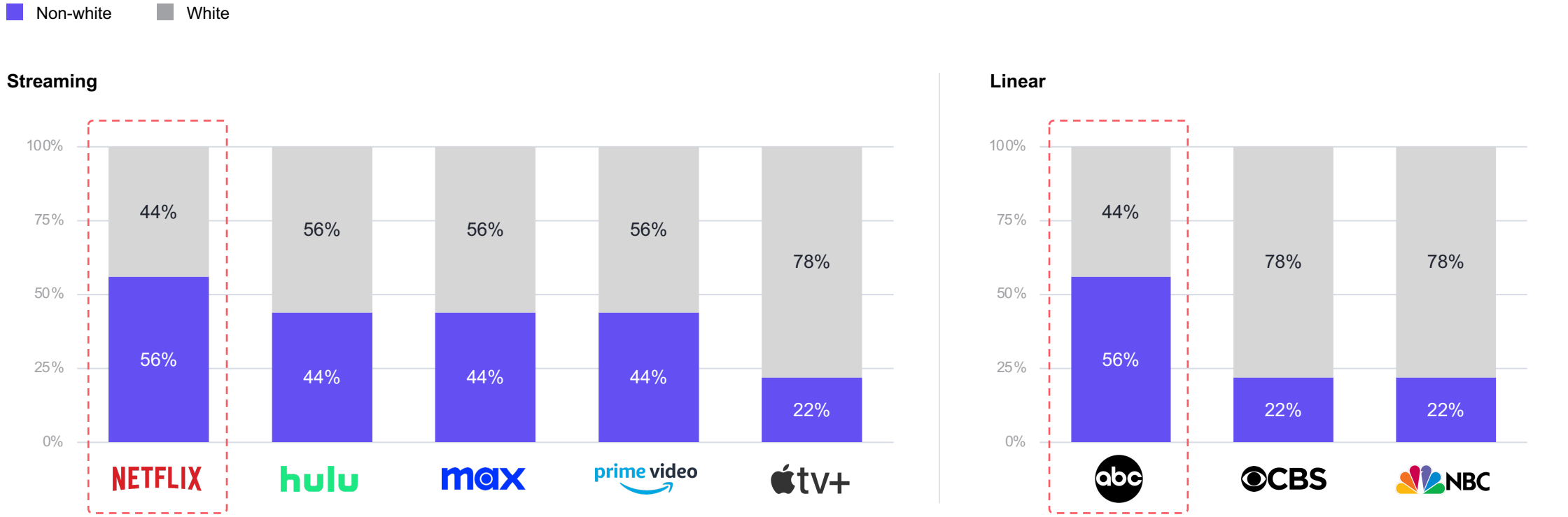
S.Epatha Merkerson

Oliver Platt

Netflix and ABC excel at telling diverse stories

Across the streaming services and linear networks with top shows from 2024, Netflix and ABC were the only two where over half of leads within the top three shows were non-white. On streaming, Hulu, Max, and Amazon Prime Video all tied for second place with slightly less than half of leads coming from diverse backgrounds, while Apple TV+ and NBC each had just 22% levels of diversity.

Percentage of non-white leads in top 3 shows by service
Among streaming services and networks with 3 shows in the top 50 released 1/1/24-5/1/24



Does Representative Content Drive Diverse Viewership?

Diverse casting continues to draw in diverse viewership

Our findings showed a positive correlation of 39% 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. Of any group, Black households saw the strongest correlation with watching shows with higher levels of diversity at 46%. With the streaming wars waging, content creators looking to boost viewership should increase cast diversity to gain attention from diverse populations.

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 among top shows released 1/1/24- 5/1/24*

Shows with a higher proportion of ethnically diverse leads

Black viewership

+46% ⬆

Hispanic viewership

+26% ⬆

Asian viewership

+23% ⬆

+39%

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

*Correlations shown as percentages

Hispanic audiences were most likely to watch shows featuring Hispanic leads, despite limited shows to choose from

This year's findings show that diverse audiences were more likely to watch TV programming where they saw themselves represented. While every ethnic group saw a positive correlation between representation and viewership, the strongest correlation was among Hispanic households, who were heavily underrepresented within the top TV shows. There was a positive correlation of 50% among Hispanic households watching shows featuring a higher percentage of Hispanic leads, impacted by shows with a high percentage of Hispanic leads like Griselda dramatically over-indexing in viewership among Hispanic households. This strong positive correlation indicates that advertisers seeking to increase viewership from Hispanic viewers should keep representation top of mind.

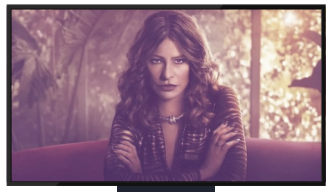
Were people of certain ethnic groups more likely to watch shows where they saw themselves represented?
Correlation between households watching shows starring a higher percentage of members of their own ethnicity among top shows released 1/1/24- 5/1/24*

Shows with a higher proportion of Black leads

Black viewership

+27%

Shows with a higher proportion of Hispanic leads



Hispanic viewership

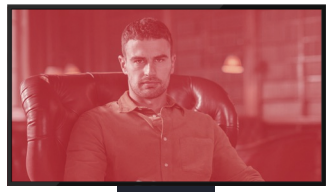
+50%

Shows with a higher proportion of Asian leads

Asian viewership

+43%

Shows with a higher proportion of White leads



White viewership

+20%

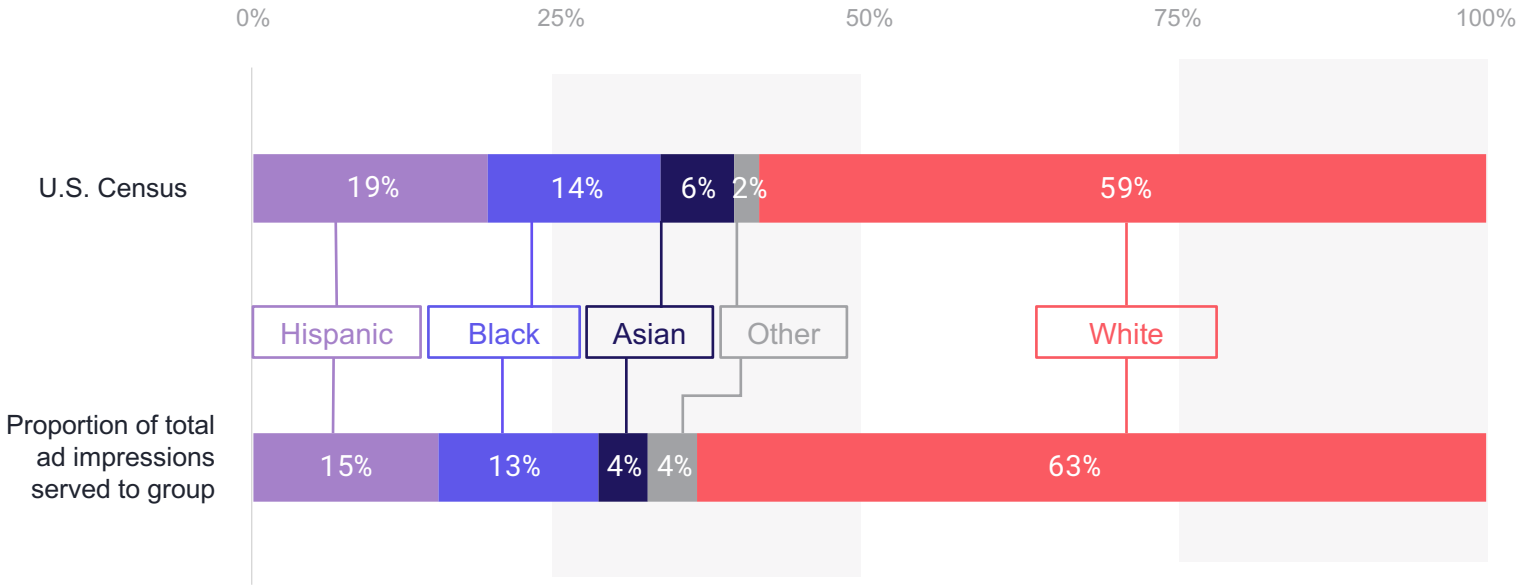
*Groups include mixed actors within ethnicity group (ex. a mixed Black and Hispanic actor would mean a show had Black and Hispanic representation); correlations shows as percentages

Ad Viewership by Ethnicity

Black, Hispanic, and Asian audiences are all underserved by advertisers, as traditional advertising fails to reach diverse audiences

White households are continually served a disproportionate amount of TV ad impressions, while advertisers are missing diverse audiences. In particular, despite their massive spending power and growth to 19% of the U.S. population, Hispanic households are served just 15% of ad impressions. Advertisers looking to reach diverse viewers should seek out advanced targeting to hit these audiences, rather than depend on the unreliable results of linear TV advertising.

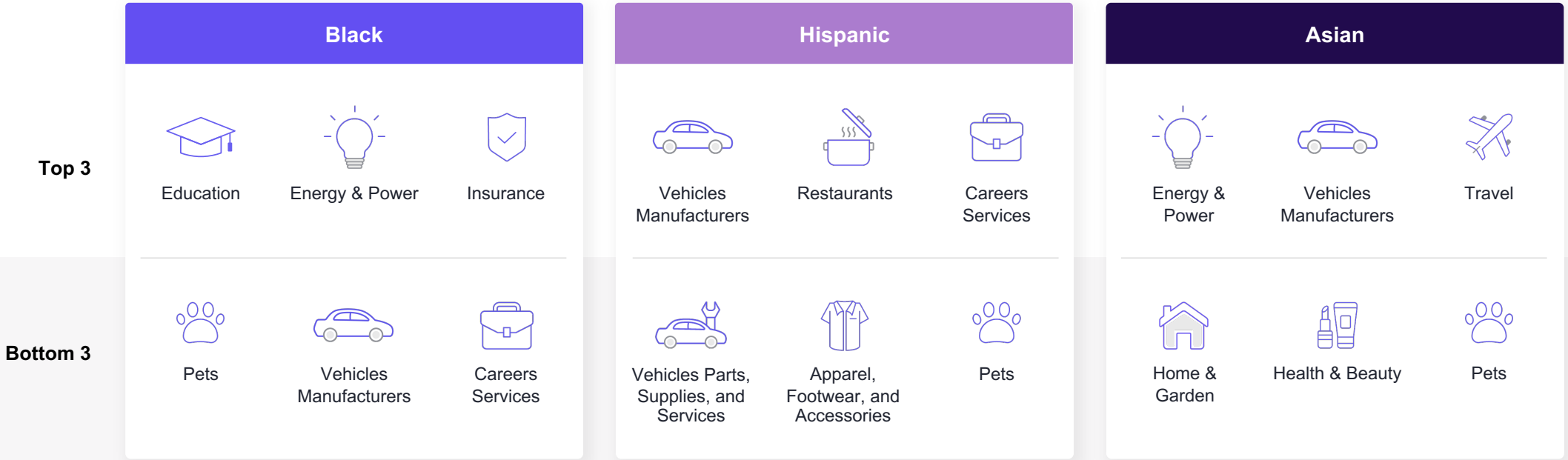
Linear & OTT ad impressions served by ethnic group vs. census breakdown
Based on ad impressions served 1/1/24- 5/1/24



Ads for cars and energy effectively reach minority groups, while pets products miss them

Advertisers across different verticals are doing a good job at reaching different diverse groups. In particular, automotive advertisers like Acura, KIA, and Volkswagen are serving more than 20% of their ads to Hispanic households, which slightly outpaces their 19% representation within the census. Similarly, education brands like the University of Maryland Global Campus and online, for-profit schools like Capella University are over-indexing in ads seen by Black households. Conversely, pet brands such food and supplements are underserving Black, Hispanic, and Asian audiences.

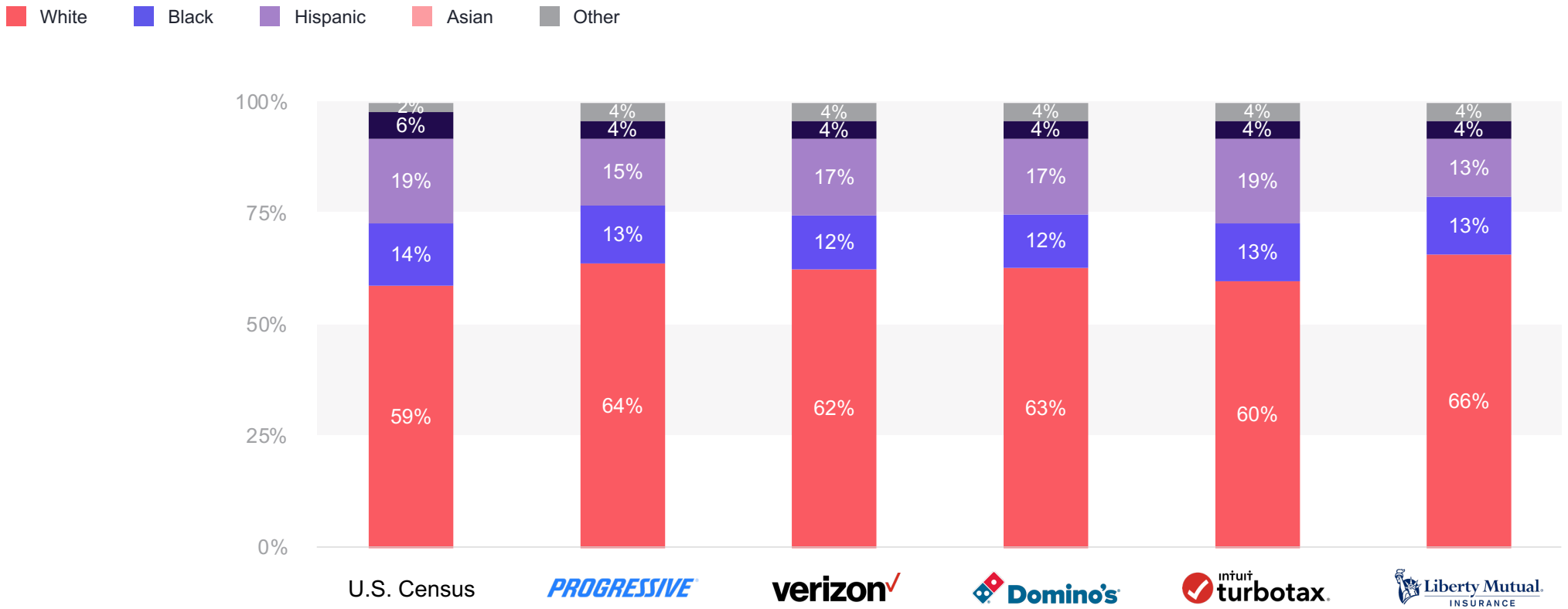
Top 3 and bottom 3 advertising categories by ethnicity
Based on percentage of linear & OTT impressions within category served to group 1/1/24- 5/1/24



Of the top advertisers, TurboTax effectively reaches Hispanic audiences

Consistent with the overall distribution of TV ad impressions by ethnicity, each of the top five advertisers served a disproportionate amount of ads to white households. However, TurboTax distinguished itself by serving ads proportionately to Hispanic households at 19%, while each of the other top advertisers underserved that group. Meanwhile, each top advertiser underserved Black and Asian households.

Percentage of linear & OTT ad impressions served by ethnicity among top 5 advertisers
Based on ad impressions served 1/1/24- 5/1/24



Consumer Snapshots

Spanish-language TV and advertising reaches underserved Hispanic households

Netflix continues to be a great platform to reach underserved Hispanic households, who gravitated towards action films and shows like Griselda with strong Hispanic representation. With a 50% correlation between Hispanic households watching content with Hispanic leads, content creators and advertisers stand to gain from embracing diversity in casting to include Hispanic representation. Advertisers that embrace Spanish-language ads are successfully reaching underserved Hispanic audiences, such as Heineken through its ad promoting the 150th anniversary.

+26%

There was a positive correlation of 0.26 between Hispanic households watching content starring a higher proportion of ethnically diverse actors among the top 50 reaching shows and movies

+50%

There was a positive correlation of 0.50 between Hispanic households watching content starring a higher proportion of Hispanic actors among the top 50 reaching shows and movies

Top 5 indexing streaming premieres of 2024 among Hispanic households
Based on likelihood of Hispanic households to watch relative to the U.S. overall

NETFLIX

Testament: The Story of Moses

NETFLIX

Griselda

NETFLIX

Code 8: Part II

NETFLIX

Orion and the Dark

max

Aquaman and the Lost Kingdom

Top 5 indexing linear networks among Hispanic households
Based on likelihood of Hispanic households to watch relative to the U.S. overall

TELEMUNDO · UNIVISION · UNIMÁS · ESTRELLATV · Galavisión

Top 5 indexing linear networks among Hispanic households, excluding Spanish-language
Based on likelihood of Hispanic households to watch relative to the U.S. overall

beIN SPORT · MTV LIVE · FOX SPORTS 2 · YES · THE CW

Top advertisers by percentage of impressions served to Hispanic households
Among top 500 advertisers

Heineken · gsk GlaxoSmithKline · Colgate · TYLENOL · cricket wireless

*Based on viewership data between 1/1/24 - 5/1/24

Black households gravitate towards highly representative content

With a strong correlation between Black households watching content that features a higher proportion of ethnically diverse leads, representation in content is key. In fact, all the top streaming programs had strong representation of Black leads, with Amazon Prime Video distinguishing itself as a top platform among Black audiences with The Underdoggs, Mr. & Mrs. Smith, and Role Play. The top advertisers for this audience spanned ad categories, including furniture, legal services, automotive, and insurance. One of the top ad verticals reaching Black households was insurance, and The General stood out as the top indexing insurance advertiser reaching this group.

+46%

There was a positive correlation of 0.46 between Black households watching content starring a higher proportion of ethnically diverse actors among the top 50 reaching shows and movies

+27%

There was a positive correlation of 0.27 between Black households watching content starring a higher proportion of Black actors among the top 50 reaching shows and movies

Top 5 indexing streaming premieres of 2024 among Black households
Based on likelihood of Black households to watch relative to the U.S. overall

Mea Culpa

Shirley

The Underdoggs

Mr. & Mrs. Smith

Role Play

Top 5 indexing linear networks among Black households
Based on likelihood of Black households to watch relative to the U.S. overall

TV ONE, dabl get into it, BET, BET her, aspire

Top advertisers by percentage of impressions served to Black households
Among top 500 advertisers

Rooms To Go, Morgan & Morgan, CarMax, Popeyes, The General

*Based on viewership data between 1/1/24 - 5/1/24

Record-breaking streaming shows like Shōgun reach Asian audiences, along with news and sports on linear

With a 43% correlation between Asian households watching content starring a large proportion of Asian actors, this group cares about on-screen representation, with shows like Shōgun and The Brothers Sun rising to the top of the list. On the linear side of things, this group favors sports and news content. Advertisers successfully reaching this demographic span verticals, with insurance brands like AAA driving high reach with its “Grandpa’s Car” campaign emphasizing intergenerational connectivity.

+23%

There was a positive correlation of 0.23 between Asian households watching content starring a higher proportion of ethnically diverse actors among the top 50 reaching shows and movies

+43%

There was a positive correlation of 0.43 between Asian households watching content starring a higher proportion of Asian actors among the top 50 reaching shows and movies

Top 5 indexing streaming premieres of 2024 among Asian households
Based on likelihood of Asian households to watch relative to the U.S. overall

NETFLIX

The Brothers Sun

hulu

Shōgun

NETFLIX

3 Body Problem

NETFLIX

Avatar: The Last Airbender

NETFLIX

You Are What You Eat: A Twin Experiment

Top 5 indexing linear networks among Asian households
Based on likelihood of Asian households to watch relative to the U.S. overall

beIN SPORT · NBA TV · CNBC · YES · ESTRELLA TV

Top advertisers by percentage of impressions served to Asian households
Among top 500 advertisers

AAA · the Jewelry Exchange Factory Direct! · WING STOP · SHEN YUN PERFORMING ARTS · 1-800-GOT-JUNK?

*Based on viewership data between 1/1/24 - 5/1/24

Univision viewers likely to consume TV across Netflix and other Spanish-language networks

There were similarities between the content consumed by Univision viewers and Hispanic households, but the two were not identical, indicating that Univision viewers span ethnic backgrounds. Streaming shows starring diverse leads of different ethnicities rose to the top for this audience, including Hispanic-led Griselda and Black-led The Underdoggs. Univision viewers tended to watch other Spanish-language networks on linear, such as Galavisión and Telemundo, and often hailed from DMAs with a high Hispanic population including Miami and Los Angeles.

66M

U.S households watched Univision between 1/1/24 - 5/1/24

+15%

Of the top 25 DMAs, Miami and Los Angeles households were most likely to watch Univision, each over-indexing by 15%

Top 5 indexing streaming premieres of 2024 among Univision viewing households
Based on likelihood of Univision viewing households to watch relative to the U.S. overall

NETFLIX

Griselda

NETFLIX

Files of the Unexplained

prime video

The Underdoggs

NETFLIX

Mea Culpa

Paramount+

Mission: Impossible: Dead Reckoning Part One

Top 5 indexing linear networks among Univision viewing households
Based on likelihood of Univision viewing households to watch relative to the U.S. overall

Galavisión · TUDN · UNIMÁS · familia Discovery · TELEMUNDO

Top advertisers by percentage of impressions served to Univision viewing households
Among top 500 advertisers

Heineken · Colgate · TYLENOL · gsk GlaxoSmithKline · cricket wireless

*Based on viewership data between 1/1/24 - 5/1/24

Key Insights

1

Representation drives engagement from diverse audiences

Hispanic, Black, and Asian households are all more likely to watch TV where they seem themselves represented. Advertisers looking to engage these audiences should work diversity into their creatives.

2

Advertisers are missing Hispanic, Asian, and Black audiences with traditional methods

A disproportionate amount of linear and OTT ad impressions are reaching white Americans. To reach different ethnic groups, advertisers must look to advanced targeting tactics across CTV and digital that allow for precision.

3

Hispanic actors are particularly underrepresented, and Hispanic audiences are underserved ads

To reach Hispanic audiences, advertisers must think creatively. Beyond simply serving ads on Spanish-language networks, they should target viewers of top programs among Hispanic audiences, such as Griselda.

4

Studios and content creators must do a better job of representing diverse Americans

In the context of America's changing demographics, studios must showcase diverse stories or risk losing their audiences.

5

Advertisers should choose blocks with diverse programming

With diverse programming attracting valuable, diverse audiences, advertisers should prioritize this airtime when choosing when to buy ads.

6

Amidst waging streaming wars, promoting diversity is a way studios can distinguish themselves

Just 39% of top-billed cast members across top shows were ethnic minorities, which is a decline year-over-year. With representation driving viewership, streaming platforms should focus on diversity as a differentiator.