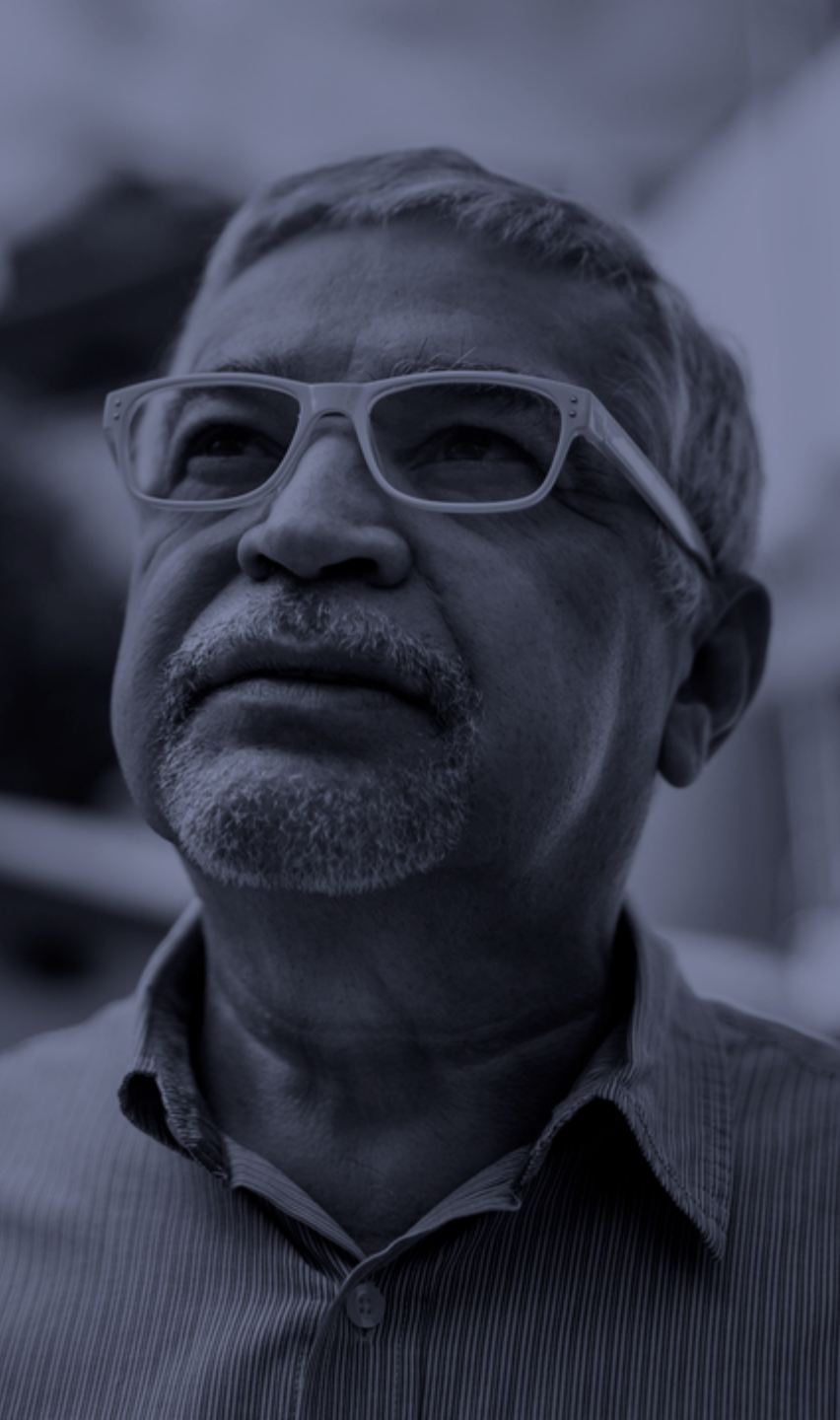


# Latino Representation in Media

2021 LDC REPORT  
SHOWS & FILMS EDITION (ALL PLATFORMS)

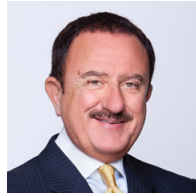
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Since its inception, we at the **Latino Donor Collaborative (LDC)** have understood the power of media and the profound effect it has on public perception. Moreover, as business leaders and resource allocators, we have witnessed money being left on the table when consumer segments are not actively targeted and engaged, especially when the non-targeted population is driving market growth. My experience leading corporations around the world has shown me that information is the key element needed to detecting missed opportunities that often are not obvious to others.

That is the reason for this report. The LDC's focus has always been on empowering Americans by creating data that informs a fact-based understanding of our country in the 21st century.

According to the 2020 U.S. Census, American Latinos represent 18.7% of the U.S. population. They have an annual consumption of \$1.87 trillion and they produce \$2.7 trillion of GDP. If Latinos in the U.S were an economy, they would be the 7th largest economy in the world, statistically tied with France, and they would rank as the third fastest growing of the top 10 global economies.

I encourage you to digest this information, share it with your teams, and leverage the data to help your organization in its quest for top line growth.

Sincerely,

A handwritten signature in black ink that reads "Sol Trujillo". The signature is fluid and cursive.

**Sol Trujillo**, CO-FOUNDER & CHAIR





We have produced this report every season during the last four years as a benchmark for our friends in the media industry. Regretfully, Latino representation has grown only in some areas, and even that growth does not represent a significant difference given that those numbers are very low compared to the total number of TV shows and films. As you will see in this report, Latinos remain invisible in front and behind the camera despite being 18.7% of the American population. If fostering diversity and inclusion for all communities is crucial to the success of this industry, the industry is in danger.

25.7% of Gen Alphas and 25% of Gen Zers in America are Latinos, and 90% of them were born in America. They are proud Americans and proud of their Latino heritage as well. This younger generation of Latinos gravitates towards brands and content in which they can see themselves represented. Young Latinos are

looking for other platforms where they feel welcomed, thus their dominance on social media. Moreover, non-Latino youth live in a diverse reality and want to see content reflect that. Content creators that ignore this robust cohort, which makes up almost 20% of the market, will continue to miss this competitive advantage.

This report provides information on the investment of Hollywood in Latino stories and Latino talent. It helps to understand the state of this industry and highlights areas of opportunity. These metrics are meant to empower decision-makers to enhance their companies' results and deliver increases in value and growth to their shareholders.

All the best,

A handwritten signature in black ink that reads "Ana Valdez".

**Ana Valdez**, EXECUTIVE PRESIDENT





## What is this report & why is it needed?

The Latino Donor Collaborative (LDC) brings you this benchmark report to help you take advantage of the untapped Latino market audience, which represents one out of every four potential viewers on TV and film.

We have studied Latino representation in-depth in mainstream entertainment (English language) since January 2018. We have processed the data and our study reports on annual trends for 2018, 2019, 2020, and from January to August 2021. We have analyzed every primetime show on broadcast, cable, premium cable, and OTT/streaming, all films on OTT/streaming and the top 100 films of the year in theaters in America throughout the last four years.


The unfortunate reality is that Latino representation in mainstream entertainment in the United States continues to be very small, and that the representation has not significantly improved in the last four years. Latino representation has grown in only some areas, and even that growth does not represent a significant difference given that those numbers are very low compared to the number of TV shows and films.

We often hear from executives that they lack the data to make proper investments in the U.S. Latino cohort, we hope that the data below will help executives make more informed decisions. This report aims to visibly represent data on the lack of Latinos in the industry. It also aims to help identify opportunities for content creators by providing data as a tool to fill the gap between the demand for content that reflects the ethnic diversity of our country. This gap is a blind spot that leaves the Latino community feeling invisible, and deprives the media industry of potential growth opportunities.

Our analysis is a census, not a sample. We analyze all primetime shows on broadcast, cable, and premium cable, as well as on the top five streaming services. We also analyzed all original films on streaming platforms and the top 100 films of every year in theaters. After collecting all qualified content, we conducted a comprehensive census of each production's staff (including actors, writers, showrunners, and directors on Variety Insight, IMDbPro and every source of entertainment information) to identify Latino talent.

### We report:

- **Latino key talent:**
  - Latino lead actors/actresses
  - Latino ensemble/ensemble
  - Latino showrunners
  - Latino writers
  - Latino directors
- **By platform type**
- **By network and by studio/company**
- **By genre**



***Latinos are the largest minority in America, the biggest driver of demographic and economic growth, and the youngest demographic group.***

***Yet, they are vastly underrepresented in mainstream content.***

## Latinos drive the economic & audience growth in the U.S. today

The Latino audience presents a lucrative business opportunity because of its size, its youth, growth rate, and economic power. Below is a snapshot of the U.S. Latino economic performance in the last 10 years:

- According to the 2020 U.S. Census, U.S. Latinos represent 18.7% of the overall U.S. population (almost one out of every five Americans), and 25% of all American Gen Zers (one out of every four young people).<sup>[i]</sup>
- The U.S. Latino population contributed over \$2.7 trillion in GDP in 2019, up from \$1.7 trillion in 2010.<sup>[ii]</sup>
- Real GDP of U.S. Latinos grew 57% faster than the broader U.S. economy and 70% faster than the non-Latino economy. As a standalone economy, the U.S. Latino economy would rank as the 7th largest in the world, tied with France, and is the third fastest growing among the 10 largest GDPs, while the broader U.S. economy ranks fourth.<sup>[iii]</sup>
- The largest GDP driver was individual Latino consumption, which increased 123% faster from 2010 to 2019 than non-Latino consumption.<sup>[iv]</sup>
- Latinos are responsible for 68.2% of the U.S. labor force growth since the recession of 2008.<sup>[v]</sup>
- The number of Latino-owned businesses has grown 34% over the last 10 years compared to just 1% for all other small businesses.<sup>[vi]</sup>

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[i] U.S. Census Bureau, 2020

William H. Frey, Less than half of U.S. children under 15 are white, census shows (Washington, D.C.: Brookings Institute, 2019).

[ii] Dr. David Hayes-Bautista et al., 2021 LDC U.S. Latino GDP Report (Beverly Hills, CA: Latino Donor Collaborative, 2021).

[iii] Ibid.

[iv] Ibid.

[v] Ibid.

[vi] Dr. Douglas Rivers, Dr. Jerry Porras. State of Latino Entrepreneurship 2020 Research Report. (Stanford, CA: Stanford Latino Entrepreneurship Initiative, 2020).





*The representation of Latinos on all platforms remains minimal.*

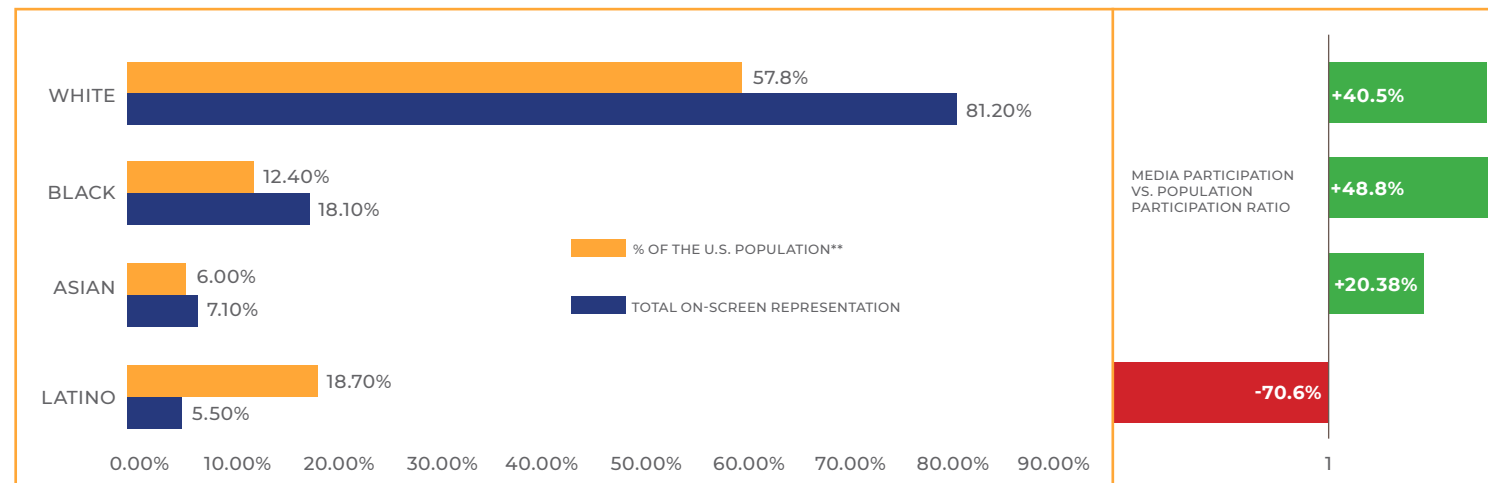
*Latinos are the only major cohort that under-index in media representation. Being the largest minority group in the U.S with 18.7% of the total population they are only 5.5% of all screening representation, yielding a -71% representation ratio.*

## Uncovering opportunities for better-diversified content

When on-screen inclusion by race/ethnicity is analyzed, the Latino community's extreme underrepresentation in media is mostly left unseen. Latinos get lost under the general segmentation of BIPOC or People of Color. To truly understand the opportunity, one must separate the data on Black, Asian and Latino audience as their consumption is quite different and dynamic.

We applaud the growth in inclusion of all groups in media and the numbers that show improvement of screen representation of all people of color. The 2021 LDC Latinos in Media Report provides an additional tool to bring inclusion to the next level. Hollywood needs to effectively invest in U.S. Latinos on screen and behind the camera to remain relevant, as this community brings the audience growth needed to succeed in the extremely competitive market of entertainment content.

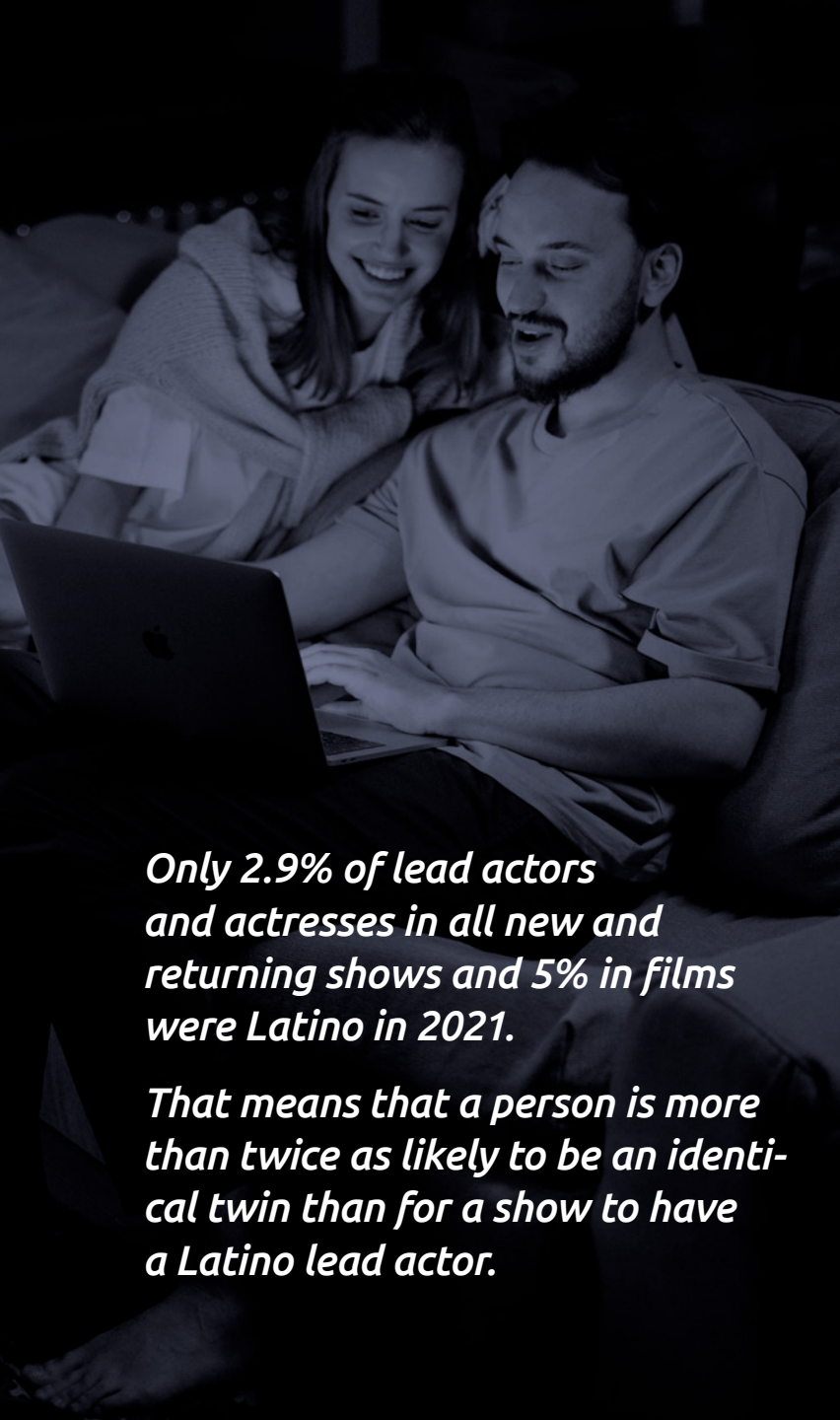
### TOTAL ON-SCREEN REPRESENTATION ACCORDING TO NIELSEN\*



\* "Being Seen on Screen: Diverse Representation & Inclusion on TV, a Nielsen Diverse Intelligence Series Report" (New York, NY: Nielsen Holdings plc, 2020).

\*\* 2020 U.S. Census data





**Only 2.9% of lead actors and actresses in all new and returning shows and 5% in films were Latino in 2021.**

**That means that a person is more than twice as likely to be an identical twin than for a show to have a Latino lead actor.**

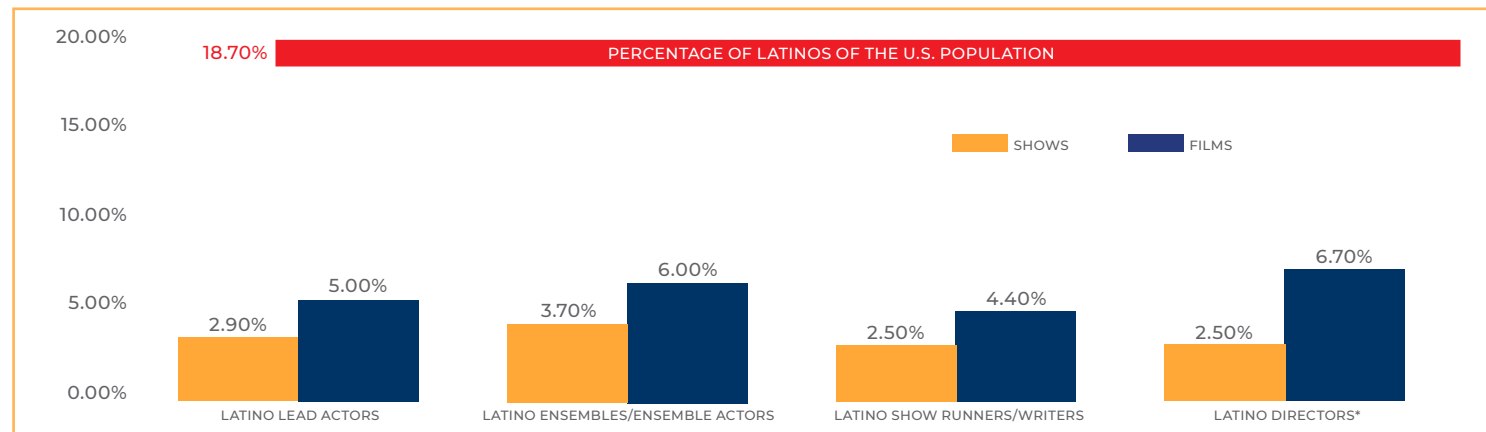
## Latino Talent Representation—Shows & Films

All numbers of Latino representation in both films and shows — Latino Leads and Co-Lead, Showrunners, Writers, and Directors — are very low compared to their level as audience: For example, Latinos are 23% of all moviegoers and buy 29% of all box office tickets\*.

Furthermore, a large percentage of those few roles are associated with crimes and drugs. Therefore Latinos have not found much relevant content on networks or streaming platforms. Young Latinos do not see themselves reflected on those channels, so they are looking for other platforms such as TikTok and YouTube for representation.

It is important to remember that consumer product companies are aware of the growth in the Latino population and economic power and are counting on Latinos to help drive growth and recovery: Advertisers will increasingly look to target this segment and will favor outlets with content that can deliver quality media products to this demographic.

### 2021 LATINO REPRESENTATION BY PLATFORM



\* MPA 2020 Theme Report

*Latino representation in shows across all platforms is low, which presents opportunities for growth.*

*Only 2.9% of lead actors and actresses were Latino in all of the new and returning primetime shows that premiered in 2021 in America.*

*This translates into only 20 out of the 931 shows that aired in primetime and streaming platforms in America last year having Latino lead actors.*

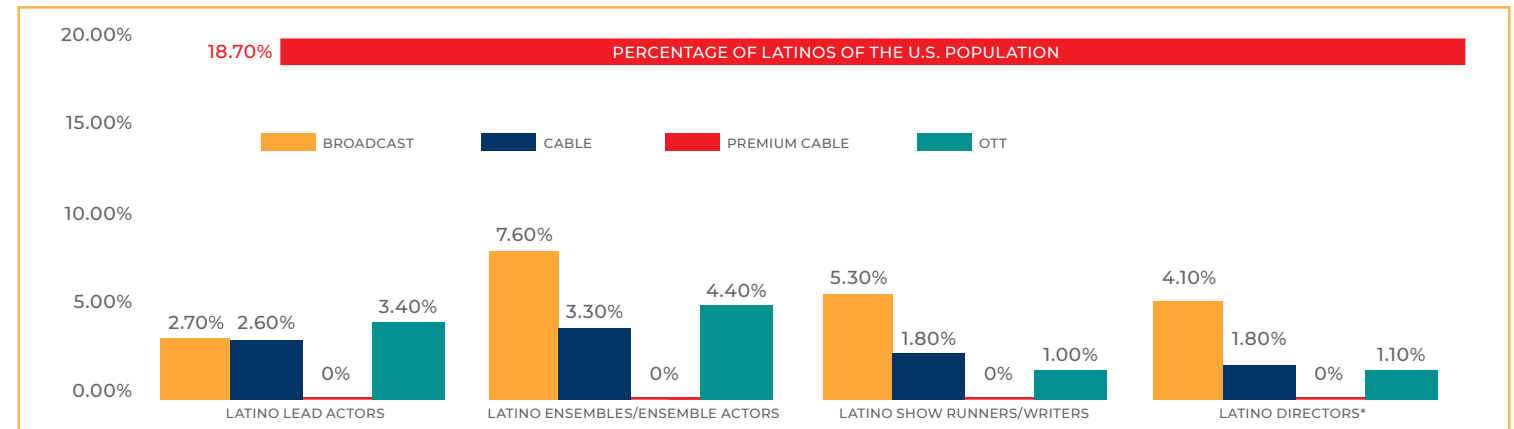
## Shows: Latino Visibility in Show Platforms

Although CBS and CW on broadcast have attempted to add Latino secondary roles, Latino showrunners and Latino directors, the number of Latino talent and stories on American shows on all platforms remains severely limited. See the graphic below while keeping in mind that Latinos are **18.7%** of the general population and **25%** of all American Gen Zers.

Cable shows represented 45.1% of primetime programming in 2020, and there were only two networks that featured a Latino leading actor. Of the top 23 cable companies in the U.S., only USA Network and E! had a Latino lead.

And in the case of OTT, streaming companies are the new normal and they are fighting for the attention of subscribers and young people entering the market. Unfortunately, American Latinos remain mostly invisible despite of their abundant investment in new digital content. Netflix added a few Latino leads; Disney, Hulu and Amazon added one; and Apple TV+ added zero.

### 2021 LATINO REPRESENTATION IN SHOWS BY PLATFORM

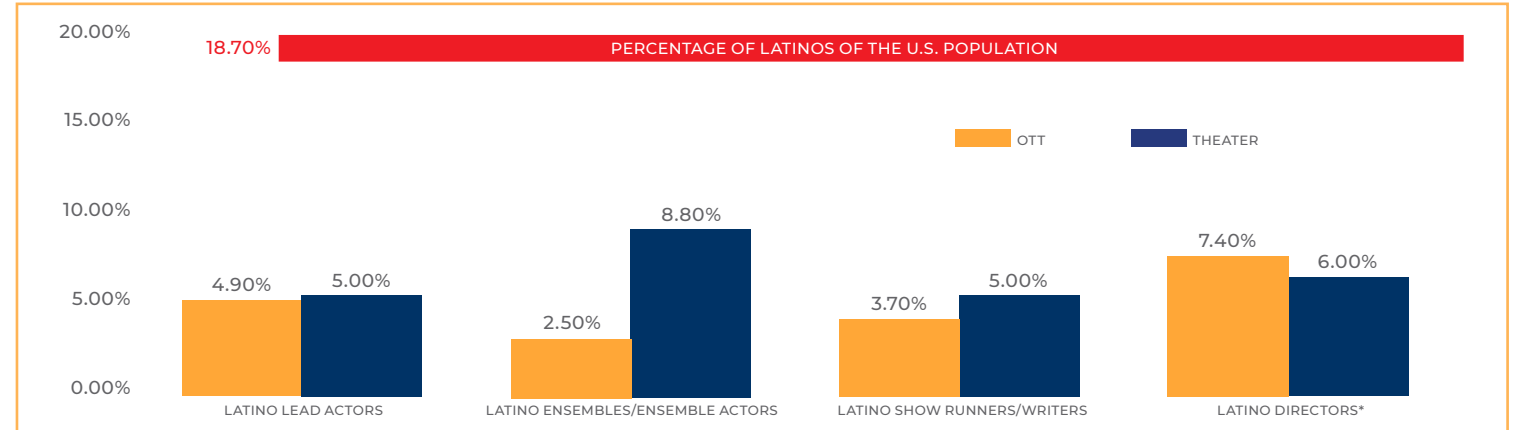


## Films: Latino Visibility in Theaters & Streaming

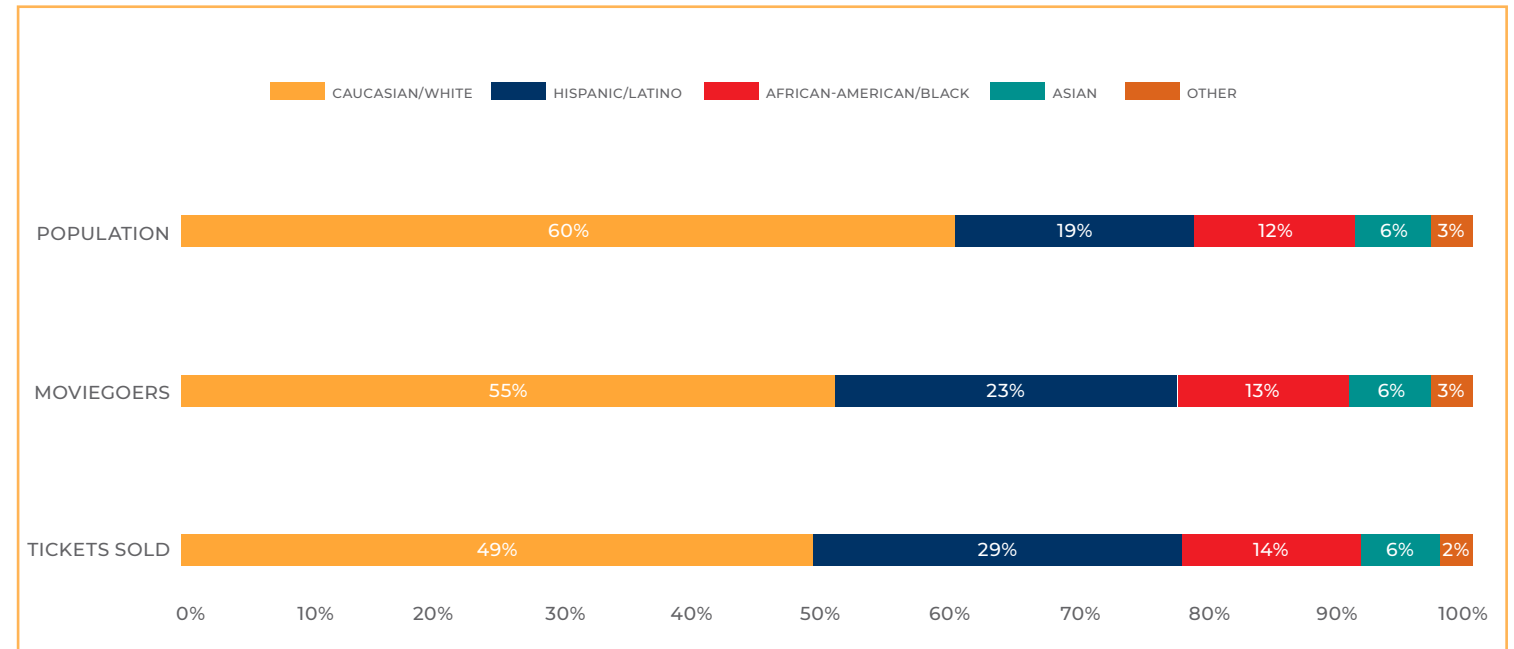
The distinction between box-office and direct-to-consumer (“streaming”) films blurred over the years and the COVID-19 pandemic accelerated this change. Two streaming films that played a major role in this evolution were *Roma* and *Hamilton*, and we would be remiss to overlook the fact that these game-changing films were made by and starred Latinos.

Latino talent and Latino authentic stories succeed and become drivers of trends: *F9* and *Cinderella* are examples of bets of Sony and Universal. In the case of Netflix, the following films that featured a Latino lead or co-lead in 2019 (which was the year with the largest investment of Netflix on the Latino community), reached Netflix’s Top 10 Most Popular Films List for multiple days: *Dangerous Lies*, *Feel the Beat*, *The Legend of Walter Mercado*, and *Sergio*.

### 2021 LATINO REPRESENTATION IN FILMS BY PLATFORM



### 2020 ETHNICITY SHARE OF TOTAL POPULATION, MOVIEGOERS & TICKETS SOLD\*



\* MPA 2020 Theme Report





*The genres of drama and comedy are where Latinos are beginning to be included in shows and films.*

*In the case of films, animation is another genre where Latinos play a few more roles than in other genres. Unfortunately, these films are limited to voice-over performances.*

## Shows & Films: Latino Representation by Genre

All genres are not equal on screen, and Latinos are not represented equally across each genre.

Most of the Latino leads in TV **shows** appear in dramas. Comedy has some Latino ensemble actors and actresses, some showrunners and directors, but basically no Latino leads. The number of Latinos in shows is close to zero in the genres of alternative and animation, and this is likely a result of network hiring practices. Cable networks hired the fewest Latino leads, and it produces most of the alternative content. We conclude that the reason alternative shows have less than 1% Latino leads, showrunners, and episode directors is because cable networks do not hire Latinos.

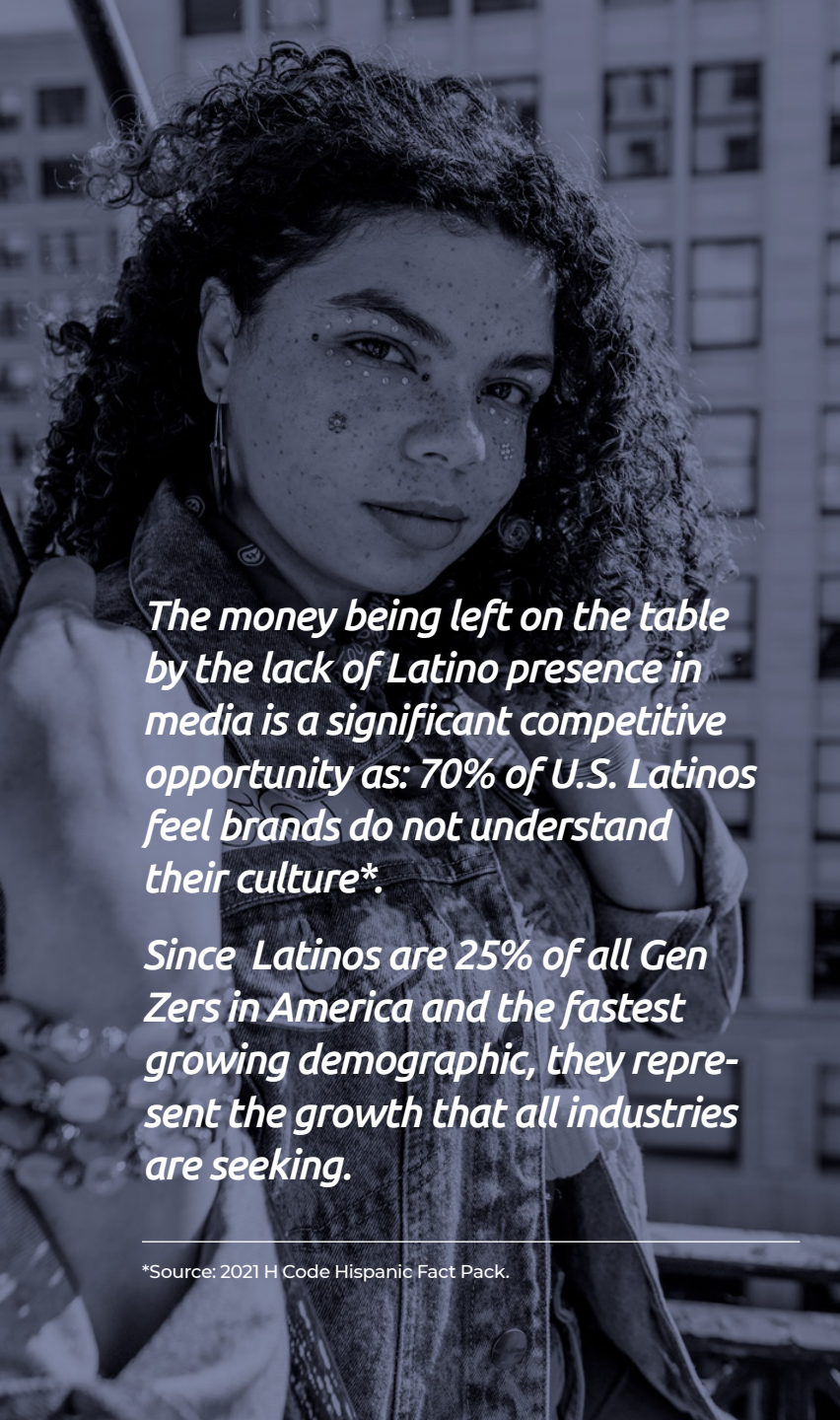
In the case of **films**, comedy and animation are the top genres where Latinos are hired, with drama writers being included more than before. The opportunity to include Latino talent is constant in every genre and in every platform. Although there has been an improvement in drama and comedy, the numbers overall remain at the level of 70% underrepresentation in every segment of content.

### 2021 LATINO INCLUSION IN SHOWS BY GENRE

	% LATINO LEADS	%LATINO ENSEMBLES	%LATINO SHOW-RUNNERS	%LATINO DIRECTORS
ALTERNATIVE	1.2%	1.7%	0%	0%
COMEDY	2.4%	10.6%	7.4%	6.1%
DRAMA	9.7%	10.5%	5.4%	7.8%
ANIMATION	2.8%	4.3%	0%	2.0%
<b>TOTAL</b>	<b>2.9%</b>	<b>3.7%</b>	<b>2.5%</b>	<b>2.5%</b>

### 2021 LATINO INCLUSION IN FILMS BY GENRE

	% LATINO LEADS	%LATINO ENSEMBLES	%LATINO SHOW-RUNNERS	%LATINO DIRECTORS
ACTION	0%	5.8%	5.8%	11.8%
COMEDY	10.7%	17.8%	0%	3.6%
DRAMA	3.6%	6.0%	8.9%	5.4%
ANIMATION	7.6%	10.7%	14.3%	21.4%
DOCUMENTARY	9.5%	4.8%	4.8%	0%
HORROR	4.7%	2.4%	0%	4.7%
THRILLER	0%	1.9%	0%	0%
SCI-FI	0%	8.4%	0%	0%
<b>TOTAL</b>	<b>5.0%</b>	<b>6.0%</b>	<b>4.4%</b>	<b>6.7%</b>



*The money being left on the table by the lack of Latino presence in media is a significant competitive opportunity as: 70% of U.S. Latinos feel brands do not understand their culture\*.*

*Since Latinos are 25% of all Gen Zers in America and the fastest growing demographic, they represent the growth that all industries are seeking.*

\*Source: 2021 H Code Hispanic Fact Pack.

## Shows & Films in the Last Four Years: 2018–2021

The participation of Latinos in **TV shows** remains low through the last four years. Proportionate to the money spent in subscriptions to platforms and cable, Latino participation on screen and behind the scenes is less than 1/6, and it is also less than 1/5 compared to their participation on money spent in services and products advertised on TV and other platforms. Whatever the reason for this disproportionate lack of participation may be, it highlights the economic peril that this blind spot creates: Latinos could be engaged to much higher levels if they saw themselves reflected and portrayed in shows, and if their stories were authentically told.

In the case of **films**, we noticed a small increase of Latinos at all levels, specifically from Sony and Universal. These two companies have invested in the evolving new mainstream market and the evolving entertainment technology. Sony as the studio and Netflix as both studio and distributor have achieved success with movies like *Cinderella* which portray a leading Latina in a mainstream American story, showing that Latino talent crosses over.

There is still much to do, but with a few studios leading the way the industry will have no option except to include more Latinos to remain competitive.

**TRENDS OF LATINO REPRESENTATION IN SHOWS 2018–2021**

	% LATINO LEADS	%LATINO ENSEMBLES	%LATINO SHOW-RUNNERS	%LATINO DIRECTORS
2018	1.0%	6.0%	1.1%	3.5%
2019	1.6%	5.9%	1.3%	3.0%
2020	2.4%	5.5%	0.8%	3.7%
2021*	2.9%	3.7%	2.5%	2.5%

**TRENDS OF LATINO REPRESENTATION IN FILMS 2018–2021**

	% LATINO LEADS	%LATINO ENSEMBLES	%LATINO SHOW-RUNNERS	%LATINO DIRECTORS
2018	1.4%	3.5%	0.7%	1.4%
2019	3.7%	3.7%	2.8%	1.1%
2020	3.3%	5.5%	3.2%	2.4%
2021*	5.0%	6.0%	4.4%	6.7%

\* January through August 2021



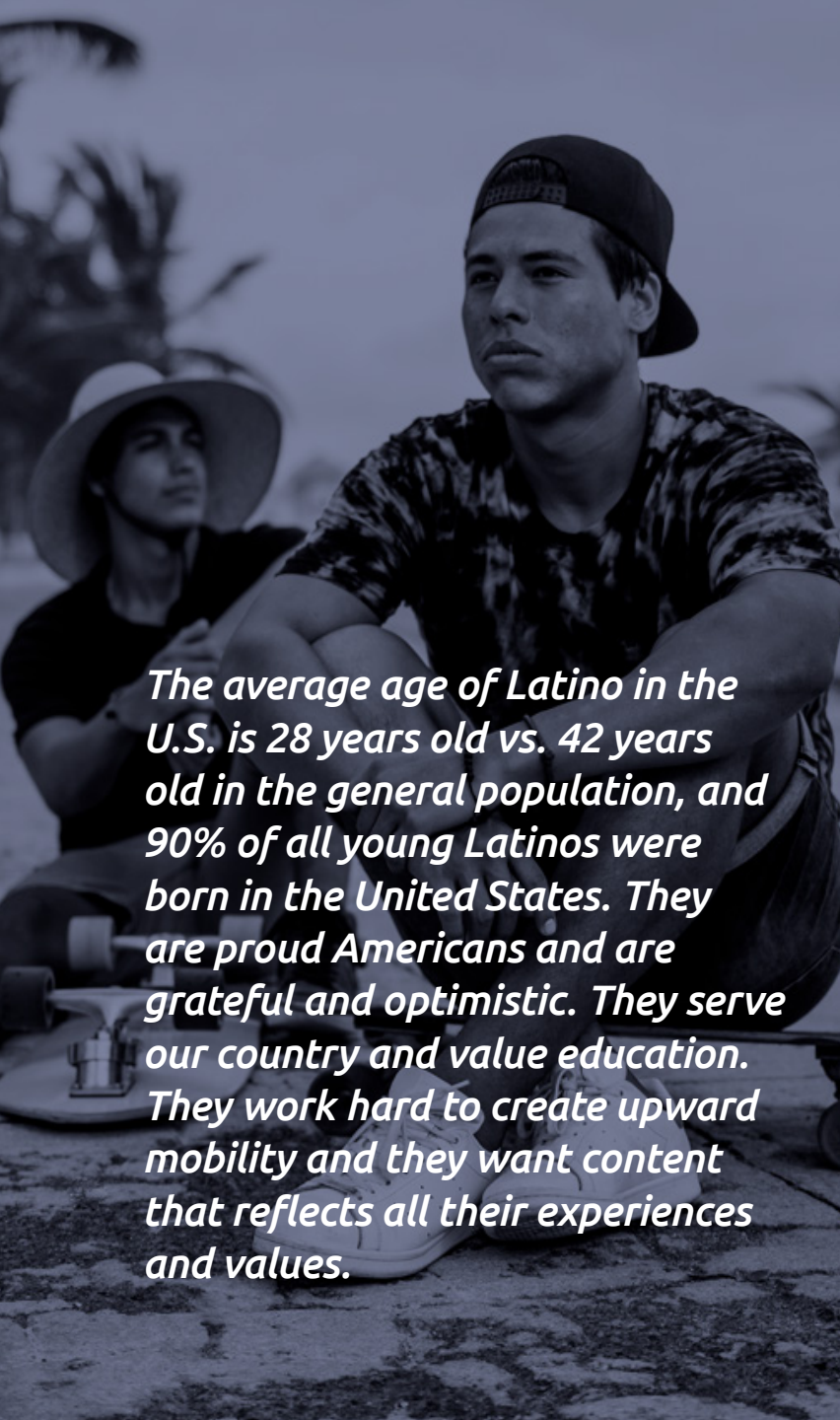
## Hollywood Executives & Other Decision-Makers

Buyers of content and content creators are often caught in a vicious cycle where they mostly rely on recognizable names with long track records. Yet, when Latino executives and producers are in a position of authority, they have shown time and again the ability to go outside the traditional pipeline to find Latino talent.

For example, an NCP study shows that most successful directors started with music videos or short films, but gained access by an executive seeing their early work and making a “bet” on them. Most often, these bets pay handsome dividends. Making such bets on Latino talent is essential to growing a company’s Latino audience.





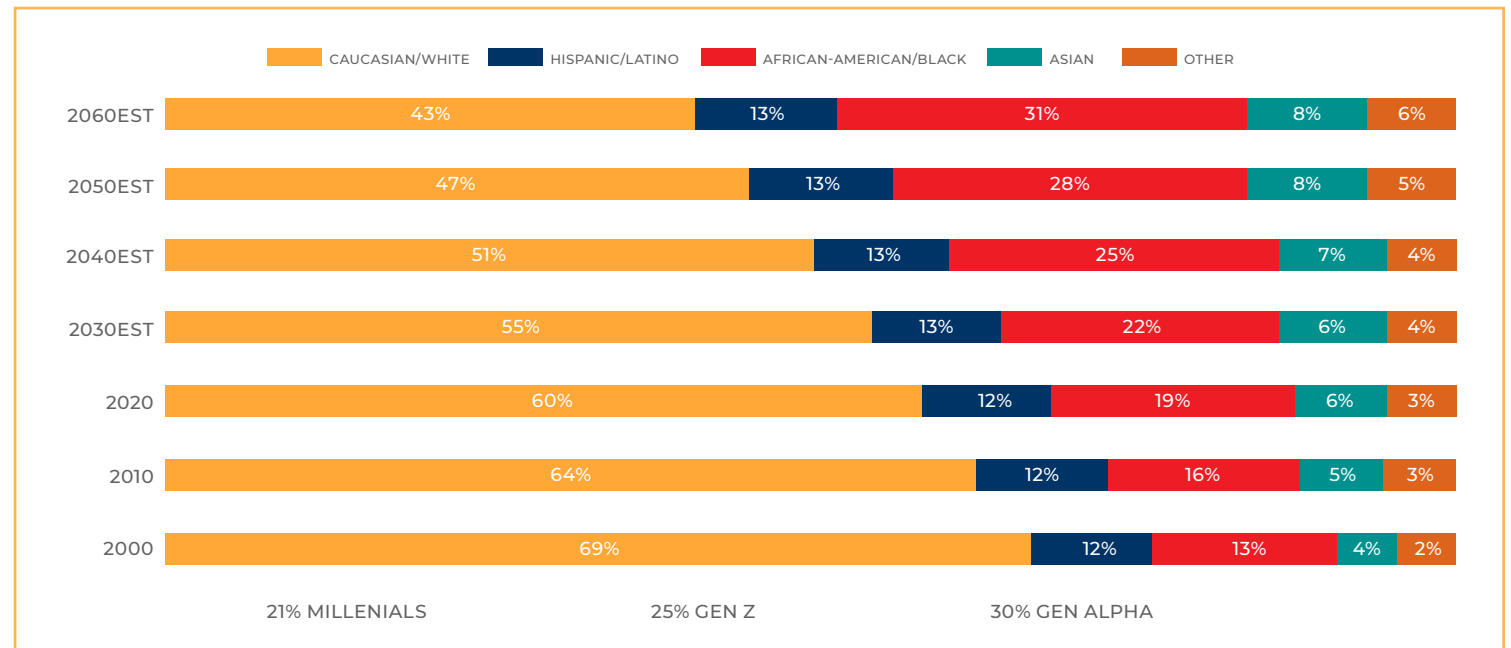


*The average age of Latino in the U.S. is 28 years old vs. 42 years old in the general population, and 90% of all young Latinos were born in the United States. They are proud Americans and are grateful and optimistic. They serve our country and value education. They work hard to create upward mobility and they want content that reflects all their experiences and values.*

## Audience Trends: Representation Matters Even More for New Generations

All studies show that Gen Zers and Millennials are more civically engaged than previous generations and **have higher expectations for culturally relevant messaging**. Content creators who recognize this change will avoid bearing the business consequences of ignoring the new direction of the market.

### U.S. LATINOS ARE YOUNG

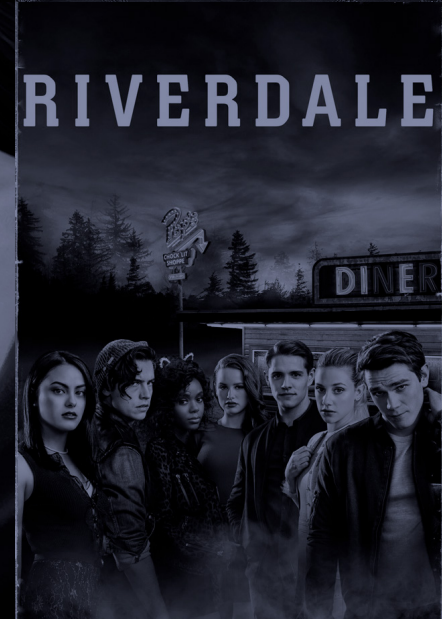
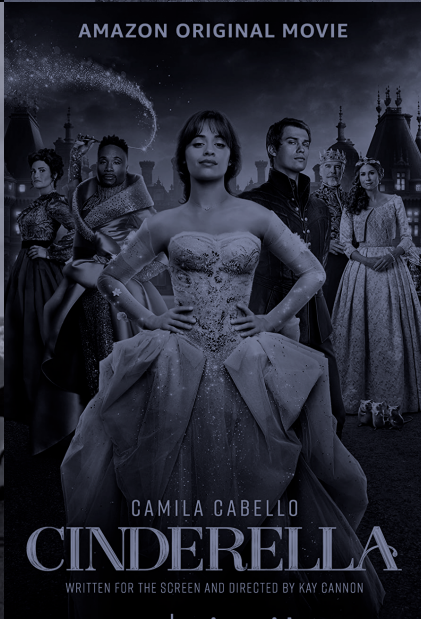
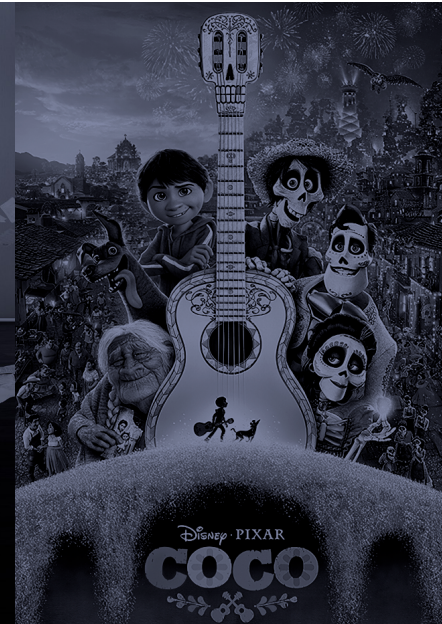


\* U.S. Census Bureau  
 \* Numbers may not add up due to rounding



# Latino Content Succeeds & Sells

Latino talent and stories sell, and they appeal not only to the Latino segment in America, but to all Americans and other global audiences.







## Yes, There is Latino Talent! Introducing The Source Database

Latino talent includes artists like Jennifer Lopez, America Ferrera, Oscar Isaac, Jay Hernandez, Salma Hayek, Pedro Pascal, Eva Longoria, Alejandro Gonzalez-Iñárritu, Alfonso Cuarón, Rodrigo Prieto, Andy Garcia, Sofia Vergara, Zoe Saldana, Selena Gomez, and Michelle Rodriguez.

To find the more than 3500 names of the not-so-well-known Latino talent available, the LDC has created **THE SOURCE**, a database of Latinos that have worked on at least one network show or one studio film during the last four years. The data base is vetted by content creators and has the capacity to become an engagement tool for all content creators



For more information about the TheSourceDataBase.org email us at: [info@latinocollaborative.org](mailto:info@latinocollaborative.org)





## Opportunity & Solutions Going Forward

- Do not rely on your traditional talent pipeline and training programs. Get out of the usual channels.
- Stay relevant. Recognize the opportunity: include Latinos as the new generations are demanding content that reflects their culture.
- Take chances. Bet on new people and stories.
- Move away from Latino stereotyped stories. Most Latinos in the U.S. were born here and are third-generation Americans or more. Naturally, they have mainstream American stories and their first language is English.
- Define the audience and make content for them, rather than making content and then searching for the audience.
- Set specific short and long-term goals with the numbers of the LDC Latinos in Media Report to reach Latino audiences. Hold yourself and others around you accountable.
- Create access: Latinos live in a 'creative prison' because of unconscious bias and stereotyping views prevalent in the industry.
- Take advantage of the cross-over potential for Latino content .
- Examine the data of Blacks, Latinos and Asians individually, not under POC or BIPOC. Lumping them together will not give an accurate assessment of the data.
- Hire Latino executives and producers who understand the market and have the ability to greenlight projects. Latino executives and producers have shown time and again the ability to go outside the traditional pipeline to find Latino directing talent.



## Methodology

This dataset includes new and returning shows with premiere dates between January 1, 2018, and August 31, 2021, from primetime (8-11 PM) broadcast, cable, and premium cable networks and the top OTT/streaming services. Futon Critic and VI are used to determine the network show time slots. Any content outside primetime was eliminated.

In the case of films, it includes the top 100 grossing films from the box office mojo website in 2018, 2019, 2020, and 2021 up to August 2021, and all films originally released on OTT streaming services between January 1, 2018, and August 31, 2021.

After collecting all qualified content, we conducted a comprehensive census of each productions' staff, as it relates to actors, writers, showrunners, and directors on both VI and IMDbPro to identify Latino talent.

For the purposes of this study, the term "Latino" includes both Hispanics and Latinos, sans individuals from Spain or Portugal. A majority of the talents' ethnicity was confirmed through Variety Insight, IMDbPro, or self-identification. If information was not found for a person, and that individual had not previously stated their ethnicity, they were excluded from the results. Otherwise, the LDC checked and recorded all leads, directors, showrunners, and ensembles. The working definitions for these roles are provided in the definitions table on the next page.

ROLE	QUALIFICATION
A showrunner/film writer is either:	1) The head of the show writer's room, who holds ultimate creative and management authority; OR 2) The lead producer of the show who holds ultimate creative and management authority; OR 3) The screenwriter of the film.
An episodic director*	Executes the Showrunner's vision. There can be many directors per season.
An ensemble actor is either:	1) An Ensemble Cast Member in a plot that distributes approximately equal screen time and importance to each Ensemble character in TV or film; OR 2) A Judge on a panel in a competition show; OR 3) An Ensemble Cast Member in a non-elimination reality series
A lead actor is either:	1) The main character in a plot that revolves around a singular protagonist in TV or film; OR 2) The Host of a competition show; OR 3) The singular main character in a non-elimination reality series.

\* These roles were selected to use as measurements of progress in Latino talent and stories' representation because they are the most influential and consequential roles in telling the narrative and creating images.



## Acknowledgements

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Andrew Liu

Nick P. Carter





## About the Latino Donor Collaborative

At the LDC, we are proud to analyze new economic opportunities regarding American Latinos, as Latinos become a driving force behind the New Mainstream Economy. Our data helps resource allocators make market-based decisions, expand the economic pie, and set up the current and next generations for success.

Our focus on economic growth is why our partners work with us: as demographics and digitalization continue to evolve our economy, it becomes clearer that Latinos are a powerful economic force.

As a fiercely independent non-profit, we prioritize two LDC pillars:

- 1) fact-based economic data about the Latino cohort in America; and
- 2) partnerships with American CEOs and other resource allocators who utilize our data to create results and grow their success.

Our job is not only to create reports but to communicate the data to key influencers. Our research regularly gains media coverage from major news

organizations, such as *WSJ*, *Forbes*, *Bloomberg*, *Fortune*, and *CNBC*, as well as from local press in cities across America. Because of the LDC, key decision-makers are learning more and more about the economic power of the Latino community, and the related benefits for all Americans.

TO LEARN MORE, FIND US AT:

[latinodonorcollaborative.org](https://latinodonorcollaborative.org)

Twitter: @LDCLatino

Facebook: @LatinoCollaborative

Instagram: @LatinoDonorCollaborative

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