

# 2023 LDC

## U.S. LATINOS IN MEDIA REPORT



WARNER BROS.  
DISCOVERY

FOX



The  
WALT DISNEY  
Company

Paramount

prime video



COMCAST

NETFLIX



Latino talent and stories work...

**WE NEED LESS ZEROS  
AND MORE HEROES**

LATINO  
DATA  
COLLABORATIVE  
THINK TANK



# ABOUT THE LATINO DONOR COLLABORATIVE



The LDC is a non-profit and non-partisan organization that creates original economic research about the Latino/Hispanic community in the United States. Our data is used by decision-makers and resource allocators to promote growth in the new mainstream American economy. Together with our partners at top U.S. research centers, we produce fact-based data to identify opportunities.

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# A LETTER FROM SOL TRUJILLO, CO-FOUNDER AND CHAIRMAN OF THE BOARD & ANA VALDEZ, PRESIDENT AND CEO

The 2023 LDC U.S. Latinos in Media Report is a detailed census of the convergence of the U.S. Latino cohort, its cultural influence, its massive economic growth, and how they are driving robust changes in multiple industries, except for one... media.

The data in this report is significant as U.S. Latinos now constitute nearly 20% of our nation's population and 25% of young people in the United States. Their economic clout is undeniable as they contribute a staggering \$3.2 trillion to the U.S. GDP annually. The U.S. Latino cohort's GDP, on average, grows two and a half times faster than non-Latinos. From 2011 to 2021, their income grew at an annualized rate of 4.7%, compared to 1.9% for non-Latinos. Purchases made "by and on behalf of Latinos" grew at 4% compared to 1.9% for non-Latinos, and Latino purchasing power was also more than double that of non-Latinos, 3.9% versus 1.6%.

This cohort is not only prospering and driving U.S. growth, but they are also going to do so for a long time to come, as their most common age is 14 while the most common age of a non-Latino in America is 60. At this pivotal juncture in their lives, many are shaping their content preferences and, by extension, are and will influence the evolving media and the future entertainment landscape.

However, the latest LDC U.S. Latinos in Media Report starkly underscores an alarming and persistent lack of Latino representation in television shows and films. Our comprehensive report has tracked developments since 2018. It reflects a lack of progress in U.S. Latino representation in television shows and films over the past six years, creating a significant blind spot within the industry's strategic landscape. These disparities again stand in stark contrast to the undeniable economic clout of the U.S. Latino cohort, prompting vital inquiries into the industry's strategic objectives.

Even though this report shines a glaring spotlight on the lack of U.S. Latino inclusion, an equally important emphasis should be on how the media industry, which is trying to cut costs and grow its audience, continues to ignore a cohort that is nothing but growth. We hope the data in this report will help leaders realize Latino talent and content sells and that Latinos will continue leaving traditional platforms if they don't see themselves in them. This cohort is a solution to the current pivot the industry is experiencing.

We wish you the best in all your endeavors, and we invite you to review this report because our goal is to provide data to help businesses strategize and grow based on facts and data.

Sincerely,

**Sol Trujillo**  
Co-Founder and  
Chairman of the Board  
The Latino Donor  
Collaborative



**Ana Valdez**  
President and CEO  
The Latino Donor  
Collaborative

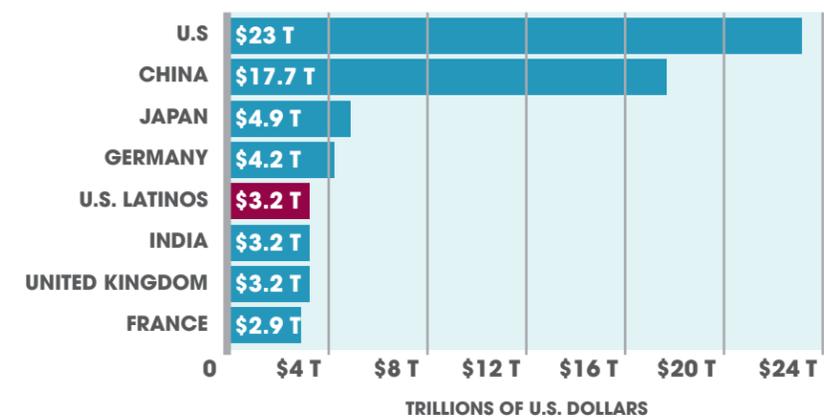


# THE NEW GENERAL MARKET

## U.S. LATINOS ARE A POWERFUL FORCE, SIGNIFICANTLY DRIVING THE ECONOMY AND REDEFINING MARKET DYNAMICS.

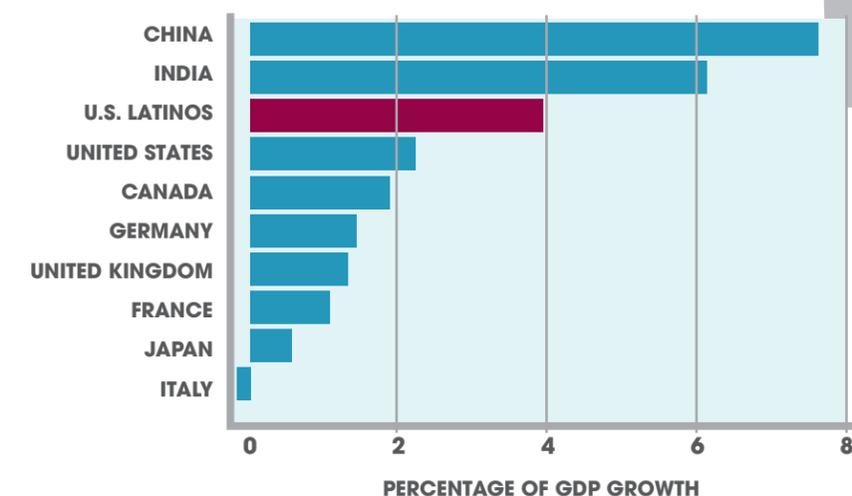
Constituting nearly 20% of the U.S. population<sup>1</sup> and 25% of young people aged 18 and under,<sup>2</sup> Latinos boast a remarkable total economic output of \$3.2 trillion annually (Figure 1.1). If the U.S. Latino population was its own country, it would have the fifth-largest global GDP and the third-fastest growing major economy, trailing only behind China and India (Figure 1.2).

Figure 1.1: The Latino GDP on the World Stage.<sup>3</sup>



THE WORLD'S LEADING ECONOMIES IN 2021 COMPARED TO THE U.S. LATINO GDP AS ESTIMATED FROM EXPENDITURES NAME "BY AND BEHALF" OF MEMBERS OF THIS DEMOGRAPHIC.

Figure 1.2: Latinos Represent the Third-Fastest Growing Economy in the World.<sup>3</sup>



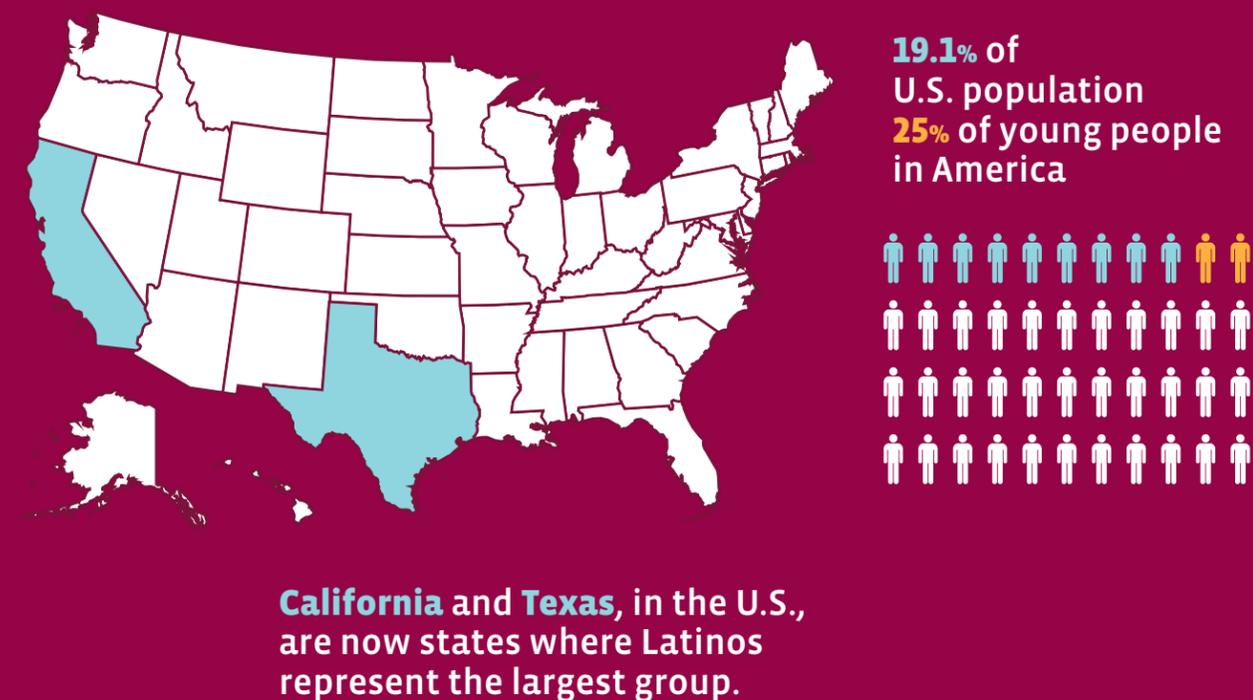
**SINCE THE LDC STARTED MEASURING IT, THE LATINO GDP HAS CONSISTENTLY RANKED AMONG THE TOP 10 GLOBAL ECONOMIES (TABLE 1.3).**

Table 1.3: In 11 years, U.S. Latino GDP has increased by 88%.<sup>1,3</sup>

	LATINOS AS A PERCENTAGE OF U.S. POPULATION	U.S. LATINO GDP	IF LATINOS WERE THEIR OWN COUNTRY, ITS ECONOMY WOULD BE THE...
2010	16.0%	\$1.7 T	-
2015	17.0%	\$2.13 T	7TH LARGEST
2017	18.4%	\$2.3 T	8TH LARGEST
2018	18.7%	\$2.6 T	8TH LARGEST
2019	18.7%	\$2.7 T	7TH LARGEST
2020	19.0%	\$2.8 T	5TH LARGEST
2021	19.1%	\$3.2 T	5TH LARGEST

**U.S. LATINOS' ECONOMIC STRENGTH IS EVIDENCED IN THE ECONOMIES OF CALIFORNIA AND TEXAS, TWO STATES WHERE LATINOS REPRESENT THE LARGEST GROUP THAT ALSO RANK AMONG THE HIGHEST STATE GDPS, AS PRESENTED IN FIGURE 1.4.**

Figure 1.4: U.S. Latino Population in top U.S. States by GDP<sup>4,5</sup>



Latino purchasing power was measured at \$3.4 trillion in 2021.<sup>3</sup> Even more remarkably, Latinos' incomes exhibited an annual growth rate of 4.7%, in striking contrast against the 1.9% growth rate among non-Latinos.<sup>3</sup> Equally noteworthy are Latinos' robust growth rates in consumption and purchasing power, surpassing their non-Latino counterparts by over a factor of two.<sup>3</sup> These figures underscore the substantial contribution that the Latino community makes in driving the advancement of the U.S. economy.

Latinos are often entrepreneurs, accounting for 50% of net new small businesses over the past decade (2007–2017).<sup>6</sup> Even during the COVID-19 pandemic from 2019 to 2022, Latino-owned businesses experienced exceptional growth, increasing revenue by 25% and outpacing their White-owned counterparts, which grew by only 9% (Figure 1.5). This notable achievement underscores the entrepreneurial spirit and resilience embodied within the U.S. Latino community, whose members are 1.7% more likely to become entrepreneurs than non-Latinos.<sup>7</sup>

**NO BUSINESS STRATEGY IS COMPLETE WITHOUT U.S. LATINOS**, as they represent nearly 20% of the population in the United States (Figure 1.6). The powerful presence of Latino consumers in the U.S. demands attention and action. Their collective influence, rooted in their rapidly expanding demographic data, purchasing power, and cultural affinity, holds significant potential to reshape industries. Resource allocators need to recognize the indispensable value of engaging this dynamic cohort to drive growth by establishing a market-proportionate segmentation approach.

Figure 1.5: Median Annual Revenue Growth Rate of Latino-owned Businesses compared to White-owned Businesses from 2019 to 2020<sup>7</sup>

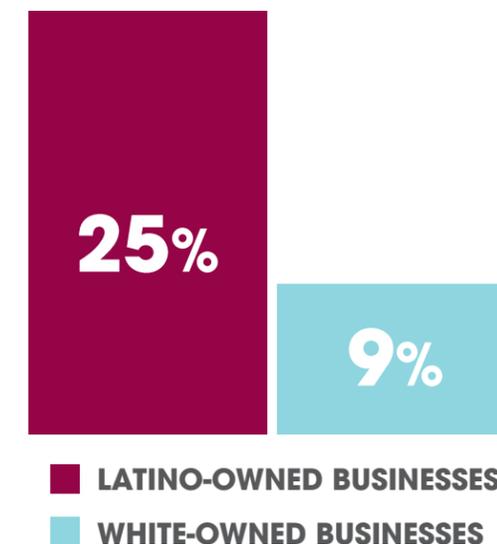
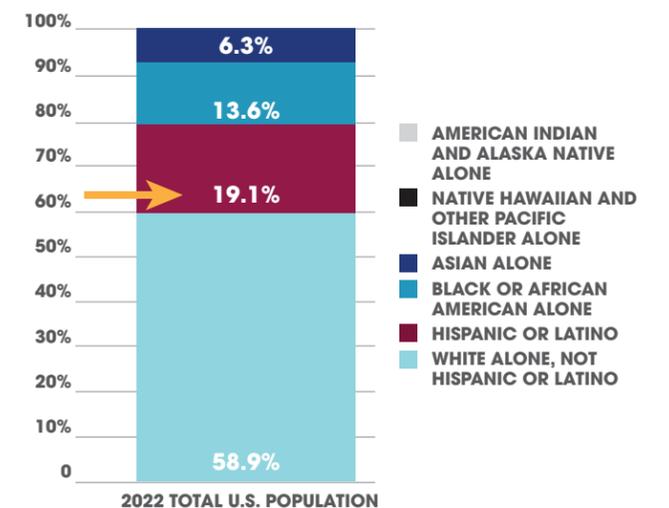


Figure 1.6: U.S. Population Breakdown by Race<sup>1</sup>

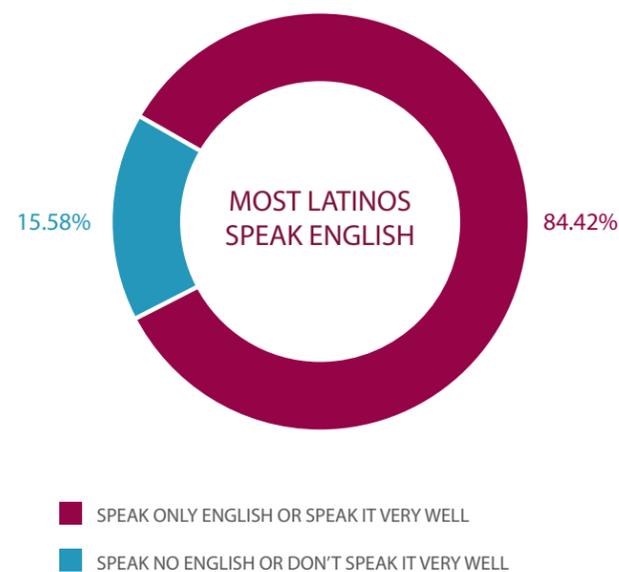


# THE NEW GENERAL MARKET IN THE MEDIA INDUSTRY

**U.S. LATINOS HAVE PLAYED A SIGNIFICANT ROLE IN THE GROWTH OF THE MEDIA AND ARE KEY CONTRIBUTORS OF CURRENT AND FUTURE RELATED REVENUE.**

Their youthfulness (median age of 30 years versus the national average of 38 years<sup>8</sup>), proficiency in English (84.4% are English speakers<sup>9</sup> [Figure 1.7]), and preference for English media consumption make them an incredibly valuable audience.<sup>10</sup> Their significant contribution to the American economy<sup>3</sup> underscores a need to prioritize their authentic representation.

**Figure 1.7:** English Language Proficiency Among Latinos<sup>9</sup>



U.S. Latinos have decreased their average daily time watching television<sup>11</sup> (Figure 1.8) and increased their time spent with other media that better resonate with their representation. Latinos are finding more of what they're looking for outside of traditional television channels.<sup>10</sup> As a result, they spend notably less time watching traditional live and time-shifted television.<sup>10</sup>

Latinos' television viewership habits are attributed to streaming platforms, surpassing other ethnic groups by 43.6%.<sup>10</sup> When Latinos don't see themselves reflected in what they are watching, they go to other platforms. As they exit traditional platforms, they drive growth on new platforms such as TikTok and YouTube.



Across these platforms, YouTube holds especially strong appeal among Latinos. According to Nielsen, this audience spends 57% more time on YouTube than non-Hispanic Whites.<sup>10</sup> This high engagement is attributed to YouTube's culturally relevant content, created by and for Latinos.

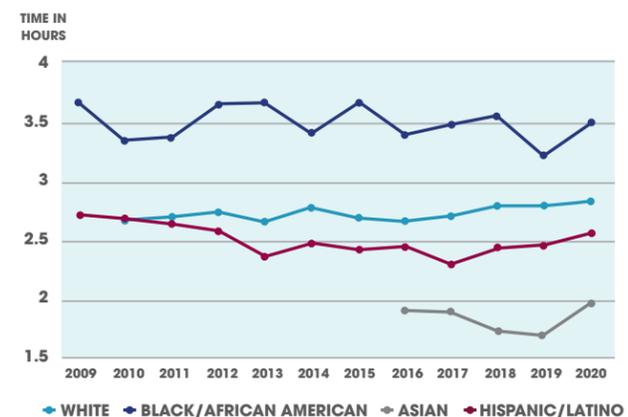
Age also plays a role in Latinos' attraction to streaming content. While younger viewers across different backgrounds engage in streaming at higher rates, Latinos' youthful demographics—over half (58%) of U.S. Hispanics are under 34, and 31% are under 17<sup>22</sup>—contribute substantially to increased streaming time.

While different from traditional media channels, TikTok also competes for Latino attention with relevant content created for and by this group. According to Pew Research, TikTok is used by 31% of U.S. Latinos, surpassing the 21% average usage across all groups.<sup>13</sup>

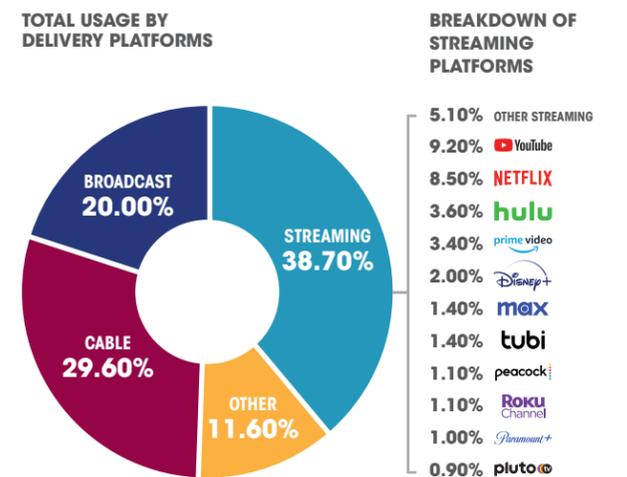
The evolving media landscape presents a pressing challenge for Hollywood. U.S. Latinos increasingly seek content beyond traditional TV, with 56% favoring content that mirrors their identity.<sup>10</sup> As media habits shift and new platforms compete for attention (Figure 1.8), it is imperative for Hollywood to recognize that the absence of U.S. Latino representation, both on- and off-camera, is leading to lower media revenue.

**WHEN LATINOS DON'T SEE THEMSELVES REFLECTED, THEY GO TO OTHER PLATFORMS. AS THEY EXIT TRADITIONAL PLATFORMS, THEY DRIVE GROWTH ON NEW PLATFORMS SUCH AS TIKTOK AND YOUTUBE.**

**Figure 1.8:** Average Daily Time Spent Watching TV per Capita in the United States by Ethnicity<sup>11</sup>



**Figure 1.9:** Viewing Behavior Across Key Television Delivery Platforms



OVERALL TV USAGE WAS UP JUST SLIGHTLY FROM JUNE, BUT STREAMING USAGE HIT A NEW RECORD, AND TRADITIONAL TV USAGE FELL BELOW 50%.

# WHAT IS THIS REPORT, AND WHY IS IT NEEDED?

The 2023 LDC U.S. Latinos in Media Report is the most comprehensive study of U.S. Latino representation in the media. This detailed census of shows and films examines Latino presence on-screen and behind the camera across all platforms: broadcast television, basic cable, premium cable, streaming shows and films, and theatrical films. This report covers data from January through August 2023 with a full-year revised version scheduled for release at the beginning of 2024. It also compares progress from January to August 2022–2023 and over the previous five years, providing an extensive overview of U.S. trends in Latino representation.

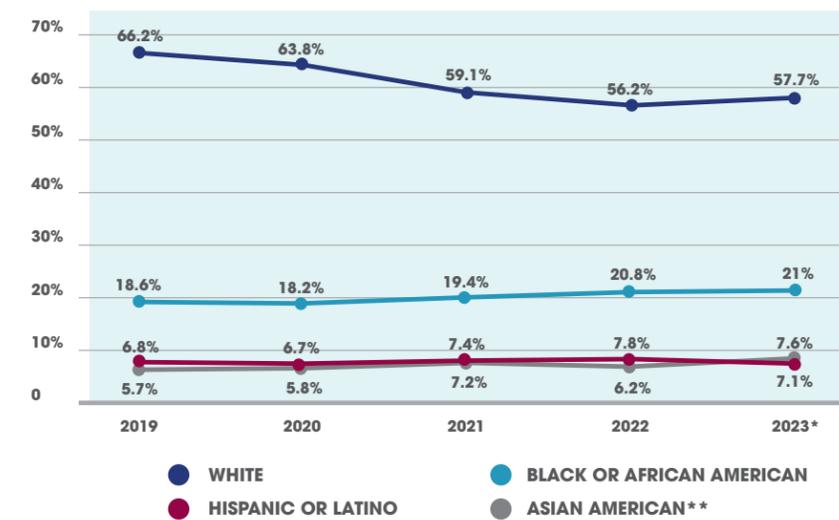
Also of note is that the LDC looks at the specific senior-level categories that drive the real economics of the entertainment industry, such as leads, co-leads, showrunners, screenwriters, and directors, as opposed to broad categories like any speaking role.

The LDC seeks to share this data with media companies as a tool to help decision-makers better understand the full extent of the growth of the U.S. Latino cohort. This data could easily aid companies in expanding their bottom- and top-line growth. For clarity, the Latino Donor Collaborative is fully funded by its board of directors, who are philanthropic leaders from various industries across the United States.

# THE CONSEQUENCES OF BIPOC GROUPING FOR U.S. LATINOS AND THE MEDIA INDUSTRY

Research from the University of California–Los Angeles, the University of Southern California, Nielsen, and other reputable organizations<sup>14, 15, 23</sup> shows, unfortunately, that Latinos have lagged behind in the latest diversity movement (Figures 2.1 and 2.2). It is evident that the media industry is missing an opportunity for top-line growth by ignoring and excluding Latinos—who represent the largest growth opportunity in the U.S. market—across platforms.

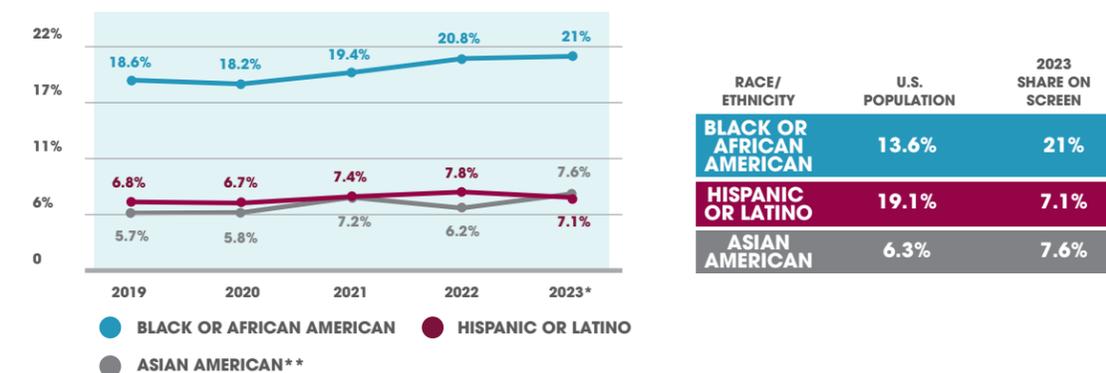
**Figure 2.1:** Diversity Within the Entertainment Industry in the Last Six Years According to Nielsen



**THE MEDIA INDUSTRY IS MISSING AN OPPORTUNITY FOR TOP-LINE GROWTH BY IGNORING AND EXCLUDING LATINOS**

\*\* ASIAN AMERICAN DOES NOT INCLUDE MIDDLE EASTERN OR NORTH AFRICAN.  
 \* DATA IN 2023 ARE FROM JANUARY TO JULY.  
 AMERICAN INDIAN AND ALASKA NATIVE (1.3%) AND NATIVE HAWAIIAN AND OTHER PACIFIC ISLANDER (0.3%) ARE NOT INCLUDED IN THIS GRAPH (U.S. POPULATION).

**Figure 2.2:** Diversity Within the Entertainment Industry in the Last Six Years (Excluding Whites) According to Nielsen



\*\* ASIAN AMERICAN DOES NOT INCLUDE MIDDLE EASTERN OR NORTH AFRICAN.  
 \* DATA IN 2023 ARE FROM JANUARY TO JULY.  
 AMERICAN INDIAN AND ALASKA NATIVE (1.3%) AND NATIVE HAWAIIAN AND OTHER PACIFIC ISLANDER (0.3%) ARE NOT INCLUDED IN THIS GRAPH (U.S. POPULATION).

# EXECUTIVE SUMMARY

More recent studies<sup>16</sup> have found that the common practices of media and entertainment corporations of encompassing all diverse groups into one category, such as Black/Indigenous/People of Color (BIPOC), People of Color (POC), or even Minority/Diversity, often leave Latinos behind. Even though Latinos comprise 50% of these groups and almost 20% of the U.S. population, they only fill 3.3% of the lead roles in shows and 5.7% in films (Figures 2.3 and 2.4).

Figure 2.3: Index of Population vs. Media Participation in all Platforms by Race in 2023\*

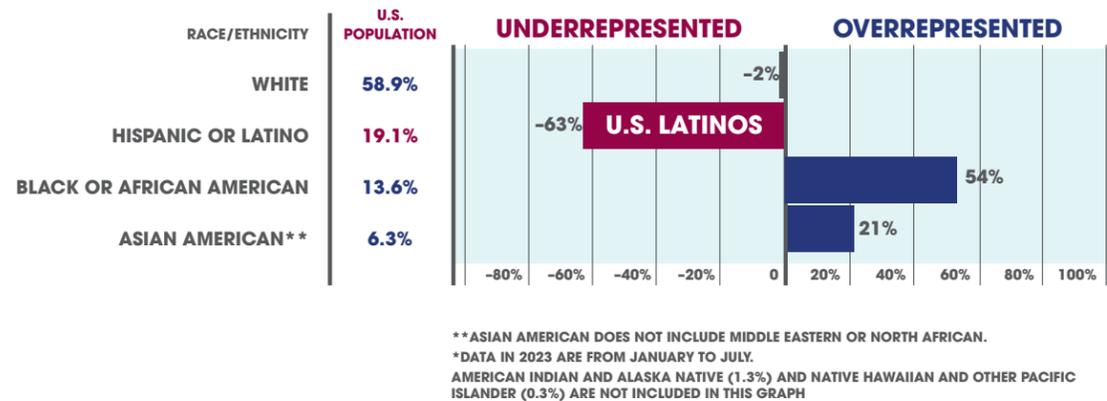
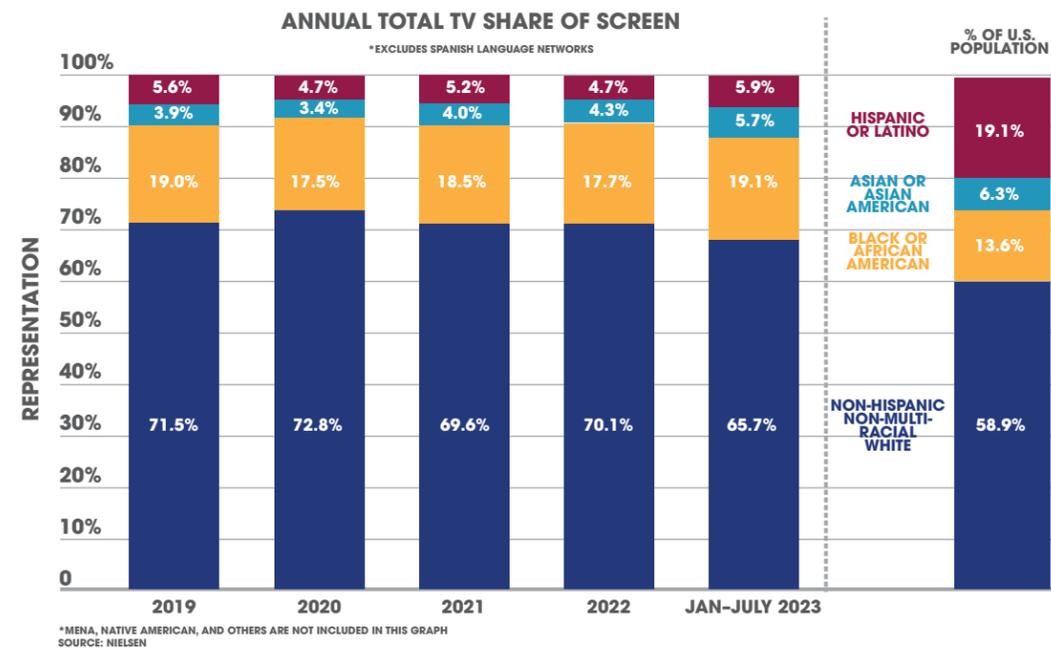


Figure 2.4: Annual Total TV Share of Screen, Excluding Spanish Language Networks



To be clear, we applaud and celebrate the increasing representation of other diverse communities. This growth is needed and long overdue. We know that by extending this intentional effort of fair representation to include Latinos in parity with their population share, this cohort can expand the market for everyone. Our aim is to expand the pie in order to also achieve proportional segmentation for U.S. Latinos. Again, we are in the business of expanding the pie, not taking away anyone's piece.

The good news is that Hollywood has shown us that representation can be achieved with other groups and can, therefore, do the same for U.S. Latinos.

**THE LATINO DONOR COLLABORATIVE HAS BEEN TRACKING U.S. LATINO REPRESENTATION IN SHOWS AND FILMS SINCE BEGINNING THIS LONGITUDINAL REPORT IN 2018. THIS BENCHMARK PROVIDES AN OPPORTUNITY FOR MEDIA PLATFORMS TO GROW, ASSESS THEIR STRATEGIES, AND FILL THEIR COMPANIES' GAPS IN LATINO REPRESENTATION.**

Unfortunately, this report confirms there has been no significant increase in U.S. Latino representation in shows and films during the past six years, which is a HUGE business blind spot. As U.S. Latinos continue to grow, the gap between their economic importance and their absence from the entertainment industry is leaving profitable opportunities on the table.

The percentage of U.S. Latino leads in shows is basically invisible; it moved only slightly from 2.6% in 2022 to 3.3% in 2023, a significant contrast against the proportion of Latinos in the U.S. population (19.1%)<sup>1</sup> (Table 3.1). In films, Latino leads remained severely underrepresented, growing 0.6% from 5.1% to 5.7% (Table 3.2).

Table 3.1: Trend of Latino Participation in Shows from 2018 to 2023

SHOWS	TOTAL U.S. LATINO POPULATION	LATINO LEADS	LATINO CO-LEADS / ENSEMBLES	LATINO SHOWRUNNERS / SCREENWRITERS	LATINO DIRECTORS
2018	18.10%	1.00%	6.00%	1.10%	3.50%
2019	18.40%	1.60%	5.90%	1.30%	3.00%
2020	18.70%	2.40%	5.50%	0.80%	3.70%
2021	18.70%	2.90%	3.70%	2.50%	2.50%
2022	19.00%	2.60%	2.60%	1.40%	1.50%
JAN-AUG 2023	19.10%	3.30%	5.70%	1.60%	1.90%

Table 3.2: Trend of Latino Participation in Films from 2018 to 2023

FILMS	TOTAL U.S. LATINO POPULATION	LATINO LEADS	LATINO CO-LEADS / ENSEMBLES	LATINO SCREENWRITERS	LATINO DIRECTORS
2018	18.10%	1.40%	3.50%	0.70%	1.40%
2019	18.40%	3.70%	3.70%	2.80%	1.10%
2020	18.70%	3.30%	5.50%	3.20%	2.40%
2021	18.70%	7.40%	4.30%	6.90%	6.90%
2022	19.00%	5.10%	4.50%	2.60%	2.90%
JAN-AUG 2023	19.10%	5.70%	8.30%	5.70%	4.50%

In fact, in most of the categories measured here, Latino participation increased until 2021, but it is now declining and trending toward invisibility again.

The entertainment industry must work significantly to grow its U.S. Latino inclusion to a market-proportionate position and a successful 21st-century business strategy.

We have seen an exciting and much-needed diversification in entertainment content in recent years. Unfortunately, Latinos have not benefited from this movement. Even though almost 63 million people in the U.S. are Latinos, and Latinos make up 50% of the total diverse community,<sup>1</sup>

and are 50% of the total diverse community, they continue to remain almost invisible in front of and behind the camera.

This exclusion contrasts with the significant revenue that the industry is collecting from the U.S. Latino community. These data reveal a large missed growth opportunity for content decision-makers.

**IN THIS REPORT, WE WILL EXPLAIN IN DETAIL WHERE THESE MISSED OPPORTUNITIES ARE—BY PLATFORM, BY GENRE, AND BY COMPANY—AND EXPLAIN HOW LATINOS HAVE FALLEN THROUGH THE CRACKS DURING THE OVERALL MEDIA DIVERSITY EFFORT.**



## TELEVISION SHOWS

**TO SUMMARIZE THE INVISIBILITY OF U.S. LATINOS IN SHOWS, ONLY 33 OUT OF 987 SHOWS PRODUCED AND AIRED BY AUGUST 2023 HAD A LATINO LEAD. OUT OF ALMOST 9,870 EPISODES THAT AIRED, ONLY 189 WERE DIRECTED BY LATINOS.**

**HERE ARE THE NUMBERS BY PLATFORM:**

### BROADCAST TELEVISION DATA: HOW LONG IS THE TAIL FOR BROADCAST TELEVISION?

The landscape of broadcast television and media in general continues to evolve. Advertisers drive the broadcast industry, and representation matters as advertisers understand the value of the U.S. Latino cohort and their immense spending power. Unfortunately, broadcast content decision-makers don't seem to be acting on this information.

As shown on Table 3.3, out of 117 shows produced and broadcast during the year up to August 31st, only five shows had a Latino lead. ABC, CBS, FOX, and CW all have an inconsistent presence of Latinos, and all networks are far from achieving market parity.

NBC is the only network that saw gains across all categories. Latino leads on NBC shows rose from 5.6% to 8.0%, and the percentage of co-leads rose from 4.2% to 13.0%. This reflects similar trends with showrunners and directors, making NBC the network with the number closest to Latino market parity of any broadcaster.

Now that a multitude of platforms are competing for ad dollars,<sup>17</sup> broadcast networks would be well served to know that the U.S. Latino cohort will translate into increased revenue, as advertisers, again, are aware of the U.S. Latino cohort's continued growth in population and spending power.

**Table 3.3:** Latino Participation in Broadcast Shows, 2022 vs. 2023

BROADCAST										
NETWORKS	TOTAL SHOWS		LATINO LEADS		LATINO CO-LEADS		LATINO SHOWRUNNERS		LATINO DIRECTORS	
	2022	2023	2022	2023	2022	2023	2022	2023	2022	2023
ABC	19	23	5.3%	8.7%	2.6%	8.7%	10.50%	0.00%	3.70%	1.70%
CBS	14	26	7.1%	0.0%	3.6%	11.5%	0.00%	3.80%	1.40%	5.00%
FOX	18	25	0.0%	4.0%	5.9%	7.0%	0.00%	0.00%	1.20%	2.40%
NBC	17	25	5.6%	8.0%	4.2%	13.0%	0.00%	4.00%	3.30%	9.20%
THE CW NETWORK	16	18	12.5%	0.0%	3.1%	8.3%	6.30%	0.00%	3.80%	2.20%
TOTAL	84	117	6.0%	4.3%	3.9%	9.8%	3.60%	1.70%	2.70%	4.30%

## BASIC CABLE DATA: A NOT-SO-BASIC SET OF PROBLEMS

Basic cable is the unfortunate poster child of what Latino invisibility in media looks like. Unlike Freeform, FX, and National Geographic, most cable channels had ZERO Latino leads, ZERO Latino co-leads, ZERO Latino showrunners, and ZERO Latino directors in 2023. No industry has ignored this cohort year after year as blatantly as cable television (Table 3.4).

It seems that cable channel decision-makers have decided that Latinos do not belong in their programming. As noted above, Latinos are fleeing to other platforms, such as YouTube. The question remains as to how cable channel programmers continue to justify leaving significant potential revenue on the table.

**Table 3.4:** Latino Participation in Cable Shows, 2022 vs. 2023

CABLE CHANNELS										
NETWORKS	TOTAL SHOWS		LATINO LEADS		LATINO CO-LEADS		LATINO SHOWRUNNERS		LATINO DIRECTORS	
	2022	2023	2022	2023	2022	2023	2022	2023	2022	2023
A&E	28	25	3.6%	4.0%	0.0%	0.0%	0.0%	0.0%	0.7%	0.0%
AMC	9	5	0.0%	0.0%	0.0%	5.0%	0.0%	0.0%	1.1%	0.0%
ANIMAL PLANET	2	3	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
BRAVO	12	17	0.0%	0.0%	2.1%	10.3%	0.0%	0.0%	0.0%	0.0%
COMEDY CENTRAL	3	5	0.0%	0.0%	0.0%	15.0%	0.0%	0.0%	0.0%	0.0%
DISCOVERY	27	28	0.0%	0.0%	0.9%	3.6%	0.0%	0.0%	0.0%	0.0%
E!	6	6	0.0%	16.7%	0.0%	12.5%	0.0%	0.0%	0.0%	13.3%
FOOD NETWORK	26	21	0.0%	0.0%	1.0%	1.2%	0.0%	0.0%	0.0%	0.0%
FREEFORM	7	7	14.3%	14.3%	3.6%	10.7%	0.0%	0.0%	4.3%	0.0%
FX NETWORK	9	10	11.1%	10.0%	5.6%	12.5%	0.0%	10.0%	8.9%	10.0%
HALLMARK CHANNEL	2	3	0.0%	0.0%	0.0%	8.3%	0.0%	0.0%	0.0%	0.0%
HGTV	37	36	0.0%	5.6%	0.0%	0.0%	0.0%	2.8%	0.0%	0.0%
HISTORY	25	21	0.0%	0.0%	0.0%	1.2%	0.0%	0.0%	0.0%	0.0%
INVESTIGATION DISCOVERY	32	16	0.0%	0.0%	0.0%	3.1%	0.0%	0.0%	0.0%	0.0%
LIFETIME	8	4	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
MTV	11	12	0.0%	0.0%	0.0%	6.3%	0.0%	0.0%	0.0%	0.0%
NATIONAL GEOGRAPHIC	12	9	8.3%	11.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
OWN	13	9	0.0%	0.0%	1.9%	2.8%	0.0%	0.0%	0.0%	0.0%
SCI	5	4	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
TBS	5	5	0.0%	0.0%	5.0%	0.0%	0.0%	0.0%	2.0%	2.0%
TLC	23	24	0.0%	4.2%	0.0%	12.5%	0.0%	0.0%	0.0%	0.0%
TNT	4	1	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	2.5%	0.0%
TRAVEL CHANNEL	6	5	16.7%	0.0%	0.0%	5.0%	0.0%	0.0%	0.0%	0.0%
USA NETWORK	4	5	0.0%	0.0%	0.0%	5.0%	0.0%	0.0%	0.0%	0.0%
VH1 NETWORK	14	4	0.0%	0.0%	0.0%	12.5%	0.0%	0.0%	0.0%	0.0%
<b>TOTAL</b>	<b>330</b>	<b>285</b>	<b>1.5%</b>	<b>2.8%</b>	<b>0.6%</b>	<b>4.5%</b>	<b>0.0%</b>	<b>0.7%</b>	<b>0.5%</b>	<b>0.7%</b>

## PREMIUM CABLE DATA: SHOW ME THE MONEY

Premium cable fares just as poorly as basic cable for U.S. Latinos. MGM+, Paramount, Showtime, and Starz once again had ZERO Latino leads in 2023. For HBO, Latino co-leads declined from a low 1.8% to an even lower 1%, a full 18.1 percentage points below market parity. The premium cable channel that fared the worst was Paramount Network, which totally excluded U.S. Latinos from all of its categories in 2022, with zero representation in any category, and continued that exclusion in 2023, again with zero representation. The only bright spot in premium cable

was for Starz, as 25% of its co-leads were Latino (Table 3.5).

When looking at these data through a business lens, the observer sees an entire segment of the entertainment industry that is missing an opportunity for not only top-line growth but for the very survival of their business. Anything less than a concerted effort to tap into the U.S. Latino market, which represents almost 20% of the population, should be considered a questionable business decision.

**Table 3.5:** Latino Participation in Premium Cable Shows, 2022 vs. 2023

PREMIUM CABLE CHANNELS										
NETWORKS	TOTAL SHOWS		LATINO LEADS		LATINO CO-LEADS		LATINO SHOWRUNNERS		LATINO DIRECTORS	
	2022	2023	2022	2023	2022	2023	2022	2023	2022	2023
HBO	28	25	0.0%	8.0%	1.8%	1.0%	0.00%	4.00%	0.00%	3.60%
MGM+	6	6	0.0%	0.0%	8.3%	4.2%	0.00%	0.00%	0.00%	5.00%
PARAMOUNT NETWORK	1	2	0.0%	0.0%	0.0%	0.0%	0.00%	0.00%	0.00%	0.00%
SHOWTIME	17	17	0.0%	0.0%	1.5%	4.4%	0.00%	0.00%	0.00%	0.00%
STARZ	6	9	0.0%	0.0%	0.0%	25.0%	0.00%	11.10%	1.70%	11.10%
<b>TOTAL</b>	<b>58</b>	<b>59</b>	<b>0.0%</b>	<b>3.4%</b>	<b>2.2%</b>	<b>5.9%</b>	<b>0.00%</b>	<b>3.40%</b>	<b>0.20%</b>	<b>3.70%</b>



## STREAMING SHOWS DATA: BATTLING AUDIENCE CHURN AND RISING PRODUCTION COSTS

The evolving content distribution landscape, including streaming, faces challenges such as increasing costs and significant audience turnover. However, a solution lies in attracting more subscribers by offering diverse and engaging content tailored to the underserved U.S. Latino market. Yet again, this platform does not seem to have gotten the memo.

As shown in Table 3.6, out of the 113 shows so far on Netflix in 2023, only five included a Latino lead. Out of the 448 co-leads in Netflix's shows, only 8.4% were Latinos, and the numbers are lower for directors and showrunners.

At Max, Latino leads dropped from 9.6% to 2.0%. Co-leads fell from 4.8% to 2.0%, and showrunners from 11.5% to ZERO. Latino directors also fell from 4.4% to 1%. Max's sister company, Discovery+, saw Latino leads decline from 2.3% to 2.0% and co-leads increase from 0.6% to 2.8%. Latino showrunners and Latino directors showed almost no change from 2022 to 2023, remaining close to or at ZERO.

Disney+ decreased its number of Latino leads, dropping from 11.1% to 6.7%. Latino co-leads remained the same as in 2022, Latino showrunners rose from ZERO to 3.3%, and Latino directors from ZERO to 4%. None of these numbers are close to market parity relative to the U.S. Latino audience. At Disney's sister company Hulu, the proportion of Latino co-lead rose from 4.7% to 7.7%, but the proportion of Latino leads dropped from 8.1% to 4.3%. Latino

showrunners dropped from 5.4% to 4.3%, and Latino directors dropped from 3.2% to 0.4%. The Disney+ streaming platform is home to two of streaming's most viewed shows—*The Mandalorian* and *Andor*—and both have Latino leads. One wonders why they limit Latino leads to only two shows.

Peacock saw slight gains, as Latino leads grew from 8.3% to 9.1%. The service's proportion of Latino co-leads jumped from 2.8% to 8%. Showrunners also rose from ZERO to 4.5% and directors saw a slight bump from 0.6% to 2.7%. Paramount+ Latino leads grew from ZERO in 2022 to 4.9% in 2023. Co-leads also climbed from 1.7% to 6.7%. However, in 2022 and 2023, ZERO showrunners were Latinos, and the proportion of directors declined from 5.7% in 2022 to 1.5% in 2023.

Latino representation for Prime Video and Apple TV+ was mostly at 2% or below, and representation dropped in every category for Apple TV+.

Not only are streaming companies being challenged by each other and by competition from social media platforms, but they are also facing the challenge of an additional pivot to Advertising-based Video on Demand (AVOD)<sup>38</sup> models and being able to accumulate enough sets of eyeballs to generate sufficient advertising revenue to support such a pivot. Given the massive size of the U.S. Latino cohort as well as its continued growth, it is evident that this group could be a real solution to upcoming challenges.

Table 3.6: Latino Participation in Streaming Shows, 2022 vs. 2023

NETWORKS	TOTAL SHOWS		LATINO LEADS		LATINO CO-LEADS		LATINO SHOWRUNNERS		LATINO DIRECTORS	
	2022	2023	2022	2023	2022	2023	2022	2023	2022	2023
APPLE TV	44	45	2.3%	0.0%	2.3%	2.2%	4.5%	2.2%	2.3%	0.9%
DISCOVERY+	43	151	2.3%	2.0%	0.6%	2.8%	0.0%	0.7%	0.0%	0.0%
DISNEY+	18	30	11.1%	6.7%	1.4%	1.7%	0.0%	3.3%	0.0%	4.0%
MAX	52	50	9.6%	2.0%	4.8%	2.0%	11.5%	0.0%	4.4%	1.0%
HULU	37	49	8.1%	4.1%	4.7%	7.7%	5.4%	4.1%	3.2%	0.4%
NETFLIX	124	113	1.6%	4.4%	3.0%	8.4%	0.0%	1.8%	0.7%	4.0%
PARAMOUNT+	30	41	0.0%	4.9%	1.7%	6.7%	0.0%	0.0%	5.7%	1.5%
PEACOCK	36	22	8.3%	9.1%	2.8%	8.0%	0.0%	4.5%	0.6%	2.7%
PRIME VIDEO	27	25	3.7%	4.0%	2.8%	16.0%	0.0%	8.0%	1.9%	7.2%
TOTAL	411	526	4.4%	3.4%	2.9%	5.4%	2.4%	1.9%	1.9%	1.9%

## FILMS

### STREAMING/DIGITAL FILMS DATA: JUST THE FACTS

The streaming film industry has exhibited minimal growth in Latino representation from 2022 to 2023.<sup>39</sup> Latino leads decreased from 6.9% to 6.3%, while Latino co-leads, showrunners, and directors experienced slight increases from 4.8% to 6.8%, 3.9% to 6.9%, and 3.9% to 5.6%, respectively. However, these figures remain notably low, far from reaching potential business parity (Table 3.7).

Unfortunately, even with slight increases, the industry severely lags and would have to triple and quadruple their current numbers to achieve a 19.1% U.S. Latino market parity.

More specifically, in 2023, the proportion of Latino leads on both Apple TV+ and Peacock dropped from 25% to ZERO. Peacock's digital films also had ZERO Latino co-leads, screenwriters, and Latino directors.

Disney+ had gains in Latino leads for their streaming films, going from ZERO to 5.3%. In addition, Latino co-leads increased from 3.9% to 7.9%. For both, Latino screenwriters and directors, Disney+ made a jump from ZERO to 15.8%. Hulu trended downward in the category of Latino leads from

11.8% to 5.6%. Its numbers did rise in the category of Latino co-leads, increasing slightly from 4.4% to 6.9%. Hulu's largest jump happened with Latino screenwriters going from ZERO to 16.7%. Latino directors also rose from ZERO to 5.6%.

Netflix's Latino leads in its streaming films slightly increased from 5.8% to 7.3%, but it remained significantly behind in achieving U.S. Latino market parity. Paramount+ Latino leads went from ZERO to 16.7%. The proportion of Latino co-leads also rose from 1.9% to 14.6%. Latino screenwriters also had a significant jump from ZERO to 16.7%, and Latino directors rose from ZERO to 8.3%.

Prime Video went from ZERO to 12.5% in Latino leads but dropped from 12.5% to 7.8% in Latino co-leads. It also rose in Latino screenwriters from ZERO to 12.5%, and ZERO to 6.3% for Latino directors.

HBO Max (now Max) showed a decrease in most categories measured after it was bought by Discovery. Max fell from 14.3% to ZERO for Latino leads, 21.4% to ZERO for screenwriters and Latino directors spiraled downward from 21.4% to 4.2%. As the world of content and distribution contin-

Table 3.7: Latino Participation in Streaming Films, 2022 vs. 2023

NETWORKS	TOTAL SHOWS		LATINO LEADS		LATINO CO-LEADS		LATINO SCREENWRITERS		LATINO DIRECTORS	
	2022	2023	2022	2023	2022	2023	2022	2023	2022	2023
APPLE TV+	4	7	25.0%	0.0%	6.3%	3.6%	0.0%	0.0%	0.0%	0.0%
DISCOVERY+	1	1	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
DISNEY+	19	19	0.0%	5.3%	3.9%	7.9%	0.0%	15.8%	0.0%	15.8%
MAX	14	24	14.3%	0.0%	5.4%	7.3%	21.4%	0.0%	21.4%	4.2%
HULU	17	18	11.8%	5.6%	4.4%	6.9%	0.0%	16.7%	0.0%	5.6%
NETFLIX	52	41	5.8%	7.3%	4.3%	4.9%	3.8%	0.0%	3.8%	2.4%
PARAMOUNT+	13	12	0.0%	16.7%	1.9%	14.6%	0.0%	16.7%	0.0%	8.3%
PEACOCK	4	6	25.0%	0.0%	12.5%	0.0%	0.0%	0.0%	0.0%	0.0%
PRIME VIDEO	6	16	0.0%	12.5%	12.5%	7.8%	0.0%	12.5%	0.0%	6.3%
TOTAL	130	144	6.9%	6.3%	4.8%	6.8%	3.9%	6.9%	3.9%	5.6%

ues to evolve and encounter disruptions, the undeniable vacuum of U.S. Latino talent and stories creates a myopic business model. The percentages of representation stated above reflect a constant missed opportunity. Authentic content that includes the U.S. Latino cohort would in-

crease Latino and non-Latino subscribers.<sup>20</sup> Hiring Latino showrunners and directors to drive a content initiative will create programming resonating with desired audiences and crossing over to all other audiences.



## THEATRICAL FILM DATA: LIGHTS, CAMERA BUT NO ACTION

Despite decades of data from a multitude of universities and research institutes highlighting the lack of Latino representation in films, very little has changed. These same studies have shown that, although U.S. Latinos are contributing over 25% of all national box office revenues and a significantly higher percentage in major media markets<sup>21</sup>, U.S. Latinos would go to movie theaters more if there were films that authentically reflected their experiences in America.<sup>20</sup>

Latino leads in theatrical films remain significantly below market parity representation (Table 3.8). Latino co-leads in this category grew from 5.5% in 2022 to 10.5% in 2023, a move in the right direction although far from proportionate representation. When looking at screenwriters and directors, the lack of representation is still dramatic despite minor changes, but with no real movement to create more inclusion of Latino stories and talent.

**Table 3.8:** Latino Participation in the Top 100 Box Office Films, 2022 vs. 2023

BOX OFFICE FILMS										
PLATFORMS	TOTAL SHOWS		LATINO LEADS		LATINO CO-LEADS		LATINO SCREENWRITERS		LATINO DIRECTORS	
	2022	2023	2022	2023	2022	2023	2022	2023	2022	2023
BOX OFFICE FILMS	100	100	3.0%	5.0%	5.5%	10.5%	1.0%	4.0%	3.0%	3.0%
GRAND TOTAL	100	100	3.0%	5.0%	5.5%	10.5%	1.0%	4.0%	3.0%	3.0%

## SOME CONCLUSIONS

Across the disturbing invisibility of U.S. Latinos in entertainment, it is worth stressing that the U.S. Latino population grew from 30.8 million in 1998 to nearly 63 million in 2022.<sup>1</sup> The entertainment industry remains unmoved by this fact. Based on the available data, a reasonable deduction would suggest that industry decision-makers are likely aware of this particular demographic and economic growth in the past twenty-five years, but they are actively ignoring it for both on- and off-screen hiring practices.

The 2023 LDC U.S. Latinos in Media Report reveals significant concerns regarding a persistent exclusion and, in certain instances, complete exclusion of Latinos within the entertainment industry. As U.S. Latinos increasingly drive economic growth in the country, media companies need to evolve alongside their audiences, fostering stories and talent that reflect the American audience's reality. Again, young audiences are already noticing the disconnect and flocking to platforms such as YouTube and TikTok.<sup>22</sup>

As Hollywood conducts a numerical exclusion of U.S. Latino representation, it inadvertently affects its own profitability. Data from an upcoming McKinsey report titled Latino Representation In Hollywood show that including Latinos in media not only aligns with ethical representation but also contributes to increased audience engagement and higher revenue.<sup>23</sup>

The exclusion of U.S. Latinos is prominent across every platform. It starts with the near invisibility of leadership behind the camera—showrunners, screenwriters, and directors—and manifests itself into equally low numbers of Latino characters and stories on screen.

**WE ENCOURAGE YOU TO CONTINUE READING THE FULL REPORT'S RESULTS FOR A MUCH DEEPER ANALYSIS.**



# TELEVISION SHOWS

THE LATINO DONOR COLLABORATIVE HAS BEEN TRACKING U.S. LATINO REPRESENTATION ON SHOWS SINCE ITS LONGITUDINAL REPORT BEGAN IN 2018. THIS SIX-YEAR BENCHMARK PROVIDES AN OPPORTUNITY FOR MEDIA PLATFORMS TO CONSIDER WHETHER PRODUCTIVE CHANGES HAVE BEEN IMPLEMENTED AT THEIR COMPANIES.

There has not been a significant increase in U.S. Latino representation in shows during the past six years (Table 4.1). The percentage of U.S. Latino leads in shows increased from 1% in 2018 to 3.3% in 2023. U.S. Latino representation among co-leads and directors actually decreased during this six-year period. The percentage of co-leads decreased from 6% in 2018 to 5.7% in 2023. Notably, U.S. Latino directors have shown a significant decline in numbers, from 3.5% in 2018 to only 1.9% in 2023. Showrunners stayed at basically the same level of invisibility, moving from 1.1% in 2018 to 1.6% in 2023.

The industry has much work to do to grow U.S. Latino inclusion to a market-proportionate position based on the U.S. Latino 18-and-under demographic.

The examination of U.S. Latinos in shows across all platforms highlights the continuing underrepresentation of Latinos, both on-screen and behind the camera.

Latino actors held lead roles in only 33 out of 987 shows (3.3%). Latino directors only directed 1.9% of the almost 9,870 episodes that aired during the studied season.

Cable viewing platforms had the lowest U.S. Latino representation, with 2.8% Latino leads, 4.5% co-leads, and 0.7% showrunners and directors.

Since we started measuring Latino representation in shows, the trend has not changed; it is at the same or lower levels of unacceptable underrepresentation.

Table 4.1: Trend of Latino Participation in Television Shows from 2018 to 2023\*

SHOWS	TOTAL LATINO U.S. POPULATION	LATINO LEADS	LATINO CO-LEADS / ENSEMBLES	LATINO SHOWRUNNERS / SCREENWRITERS	LATINO DIRECTORS
2018	18.1%	1.0%	6.0%	1.1%	3.5%
2019	18.4%	1.6%	5.9%	1.3%	3.0%
2020	18.7%	2.4%	5.5%	0.8%	3.7%
2021	18.7%	2.9%	3.7%	2.5%	2.5%
2022	19.0%	2.6%	2.6%	1.4%	1.5%
JAN-AUG 2023*	19.1%	3.3%	5.7%	1.6%	1.9%

# SHOW ANALYSIS BY PLATFORM

## BROADCAST TELEVISION SHOWS

### A Perspective:

Our first data set delves into the world of broadcast television. The broadcast business relies on affiliate fees, which are being strained by continued cord-cutting and high churn rates among cable and satellite operators.<sup>24</sup>

It is no secret that advertisers are the lifeblood of broadcasters.<sup>25</sup> However, advertisers may now choose from a plethora of other media platforms to spread their messages across.

As a multitude of platforms continues to grow and compete for ad dollars, networks would be better served by increasing their U.S. Latino talent and stories, which would translate into increased revenue and larger engagement of the growing segment that advertisers want to reach.

The Latino population in the United States has increased from 11.4% in 1998 to 19.1% in 2022,<sup>1</sup> but they are still severely underrepresented in the media. By focusing on closing this gap, broadcasters might be able to extend the length of the tail for their industry.

### Broadcast Television Data:

A specific look at the 2022 vs. 2023 performance of broadcast channels in Latino representation shows mixed results (Table 4.2). ABC saw an increase in Latino leads from 5.3% to 8.7% and an increase in co-leads from 2.6% to 8.7%, significantly lagging behind market proportionate representation. The percentage of Latino showrunners dropped from 10.5% to ZERO, and the percentage of directors fell from an already low 3.7% to 1.7%.

CBS saw a notable drop in Latino leads from 7.1% to ZERO. Co-leads grew from 3.6% to 11.5%, and showrunners went from ZERO to 3.8%, still severely underrepresented.

FOX continues to ignore its Latino underrepresentation on its broadcast channel. It has ZERO Latino showrunners, and only 4% of their leads are Latino. It has 7% Latino co-leads and 2.4% Latino directors.

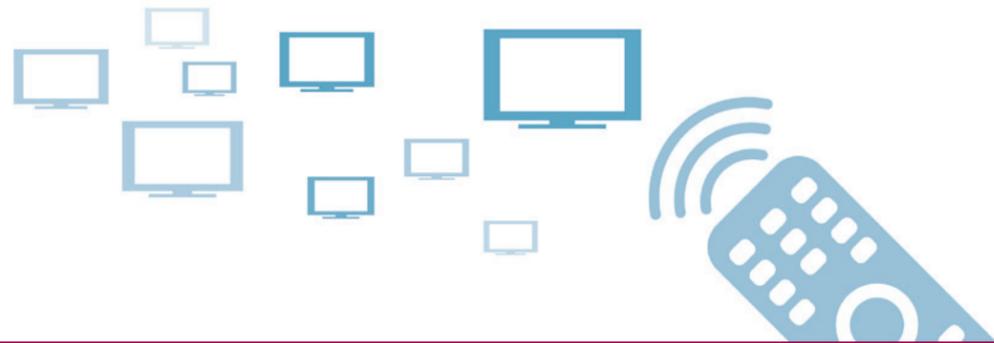
NBC is the only network that saw gains across all categories in 2023. Latino leads rose from 5.6% to 8.0%, and co-leads rose from 4.2% to 13.0%, making

Table 4.2: Latino Participation in Broadcast Shows, 2022 vs. 2023

BROADCAST										
NETWORKS	TOTAL SHOWS		LATINO LEADS		LATINO CO-LEADS		LATINO SHOWRUNNERS		LATINO DIRECTORS	
	2022	2023	2022	2023	2022	2023	2022	2023	2022	2023
ABC	19	23	5.3%	8.7%	2.6%	8.7%	10.5%	0.0%	3.7%	1.7%
CBS	14	26	7.1%	0.0%	3.6%	11.5%	0.0%	3.8%	1.4%	5.0%
FOX	18	25	0.0%	4.0%	5.9%	7.0%	0.0%	0.0%	1.2%	2.4%
NBC	17	25	5.6%	8.0%	4.2%	13.0%	0.0%	4.0%	3.3%	9.2%
THE CW NETWORK	16	18	12.5%	0.0%	3.1%	8.3%	6.3%	0.0%	3.8%	2.2%
TOTAL	84	117	6.0%	4.3%	3.9%	9.8%	3.6%	1.7%	2.7%	4.3%

this the network with the closest number to Latino market parity of any broadcaster, even though it is still six percentage points below parity.

Closing the list is The CW, and its Latino omissions are of significant concern. This is particularly noteworthy considering The CW's emphasis on a youth-oriented market, where Latinos comprise 25% of the demographic.<sup>2</sup> Notably, Latino leads and showrunners are entirely absent, and the representation of Latinos remains limited in other categories.



### In Conclusion:

The data from the broadcast television industry clearly shows that U.S. Latinos are not getting enough visibility. Broadcasters have a big opportunity to connect with the growing U.S. Latino market. Recent business analyses suggest that when U.S. Latinos see themselves well-represented, more people watch, which can lead to higher revenue.<sup>14</sup>

## BASIC CABLE SHOWS

### A Perspective:

Disruption is an inherent facet of modern business evolution. Notably, basic and premium cable television services disrupted broadcast television during the 1970's. Subsequently, streaming disrupted the cable television model. Currently, the landscape is being reshaped by social media platforms such as TikTok and YouTube, particularly within the U.S. Latino audience segment.<sup>22</sup>

The ongoing paradigm shift in Hollywood is evident. It is understood that even high-profile stars or directors might not automatically drive value. The industry has failed to recognize the value of precise market segmentation. This shift must involve moving from the traditional approach of creating content and searching for audiences through a more strategic process of understanding specific audience segments and producing content tailored to their preferences.

### Basic Cable Data:

Basic cable stands as a prominent example of the tangible effects of Latino underrepresentation in media. The statistics paint a clear picture: Latino representation holds a mere 2.8% among leads, 4.5% among co-leads, and a meager 0.7% among showrunners and directors (Table 4.3).

On a slightly positive note, E! leads the pack in terms of Latino representation at 16.7%, slightly under Latino market parity, but notable in a positive way. Freeform is closely behind with 14.3% Latino leads, and National Geographic follows in third place with 11%. The remaining channels are HGTV at 5.6%, TLC at 4.2%, and A&E at 4%.

Table 4.3: Latino Participation in Cable Shows, 2022 vs. 2023

CABLE CHANNELS	TOTAL SHOWS		LATINO LEADS		LATINO CO-LEADS		LATINO SHOWRUNNERS		LATINO DIRECTORS	
	2022	2023	2022	2023	2022	2023	2022	2023	2022	2023
A&E	28	25	3.6%	4.0%	0.0%	0.0%	0.0%	0.0%	0.7%	0.0%
AMC	9	5	0.0%	0.0%	0.0%	5.0%	0.0%	0.0%	1.1%	0.0%
ANIMAL PLANET	2	3	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
BRAVO	12	17	0.0%	0.0%	2.1%	10.3%	0.0%	0.0%	0.0%	0.0%
COMEDY CENTRAL	3	5	0.0%	0.0%	0.0%	15.0%	0.0%	0.0%	0.0%	0.0%
DISCOVERY	27	28	0.0%	0.0%	0.9%	3.6%	0.0%	0.0%	0.0%	0.0%
E!	6	6	0.0%	16.7%	0.0%	12.5%	0.0%	0.0%	0.0%	13.3%
FOOD NETWORK	26	21	0.0%	0.0%	1.0%	1.2%	0.0%	0.0%	0.0%	0.0%
FREEFORM	7	7	14.3%	14.3%	3.6%	10.7%	0.0%	0.0%	4.3%	0.0%
FX NETWORK	9	10	11.1%	10.0%	5.6%	12.5%	0.0%	10.0%	8.9%	10.0%
HALLMARK CHANNEL	2	3	0.0%	0.0%	0.0%	8.3%	0.0%	0.0%	0.0%	0.0%
HGTV	37	36	0.0%	5.6%	0.0%	0.0%	0.0%	2.8%	0.0%	0.0%
HISTORY	25	21	0.0%	0.0%	0.0%	1.2%	0.0%	0.0%	0.0%	0.0%
INVESTIGATION DISCOVERY	32	16	0.0%	0.0%	0.0%	3.1%	0.0%	0.0%	0.0%	0.0%
LIFETIME	8	4	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
MTV	11	12	0.0%	0.0%	0.0%	6.3%	0.0%	0.0%	0.0%	0.0%
NATIONAL GEOGRAPHIC	12	9	8.3%	11.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
OWN	13	9	0.0%	0.0%	1.9%	2.8%	0.0%	0.0%	0.0%	0.0%
SCI	5	4	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
TBS	5	5	0.0%	0.0%	5.0%	0.0%	0.0%	0.0%	2.0%	2.0%
TLC	23	24	0.0%	4.2%	0.0%	12.5%	0.0%	0.0%	0.0%	0.0%
TNT	4	1	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	2.5%	0.0%
TRAVEL CHANNEL	6	5	16.7%	0.0%	0.0%	5.0%	0.0%	0.0%	0.0%	0.0%
USA NETWORK	4	5	0.0%	0.0%	0.0%	5.0%	0.0%	0.0%	0.0%	0.0%
VH1 NETWORK	14	4	0.0%	0.0%	0.0%	12.5%	0.0%	0.0%	0.0%	0.0%
TOTAL	330	285	1.5%	2.8%	0.6%	4.5%	0.0%	0.7%	0.5%	0.7%

### In Conclusion:

Among various industries, cable television is particularly conspicuous for its repeated neglect of this demographic. Other platforms, notably TikTok and YouTube, thrive in the U.S. Latino segment<sup>13</sup>, and cable's inability to adapt and embrace inclusivity becomes increasingly evident. To paraphrase Verizon CEO Hans Vestberg, "If your company doesn't invest in the U.S. Latino market now, in ten years you won't have a company".



## PREMIUM CABLE SHOWS

### A Perspective:

Premium cable relies solely on its subscribers for income,<sup>26</sup> unlike broadcasters and cable networks that also earn revenue from fees and ads. For a long time, these companies faced scant competition, but that situation changed when Netflix entered the subscription video-on-demand (SVOD) market, eroding their market share.

### Premium Cable Data:

Regarding including U.S. Latinos, premium cable fails to perform better than basic cable. In 2023, channels like MGM+, Paramount, Showtime, and Starz still had no Latino leads in their shows (Table 4.4).

One standout is Starz; 25% of its co-lead roles were filled by Latinos. This is a significant number, especially since no other premium cable channel had such strong representation.

HBO's performance showed mixed results. While it did better by featuring Latino leads in 8% of its content in 2023 after having none in 2022, more progress still needs to be made.

Paramount Network had the worst record. It completely left out U.S. Latinos in all categories in 2022 and continued that trend in 2023 with zero representation.

### In Conclusion:

When viewed from a business perspective, these data underscore a glaring oversight within the entertainment industry: ignoring an entire segment means missing out on not only revenue growth, but also the long-term fundamental sustainability of operations. For these channels, failing to proactively engage the U.S. Latino demographic has been a questionable strategic choice. The latent financial gains from this demographic warrant serious consideration.

Moreover, it is crucial to acknowledge that the value of the Latino community extends to the talent side. The success stories that transcend industries serve as a testament to the formidable influence and potential of this demographic. Ignoring this reality is a missed opportunity for business growth.

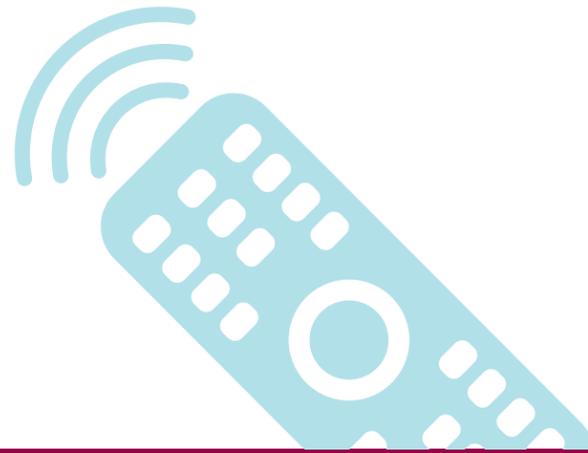


Table 4.4: Latino Participation in Premium Cable Shows, 2022 vs. 2023

PREMIUM CABLE CHANNELS										
NETWORKS	TOTAL SHOWS		LATINO LEADS		LATINO CO-LEADS		LATINO SHOWRUNNERS		LATINO DIRECTORS	
	2022	2023	2022	2023	2022	2023	2022	2023	2022	2023
HBO	28	25	0.0%	8.0%	1.8%	1.0%	0.0%	4.0%	0.0%	3.6%
MGM+	6	6	0.0%	0.0%	8.3%	4.2%	0.0%	0.0%	0.0%	5.0%
PARAMOUNT NETWORK	1	2	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
SHOWTIME	17	17	0.0%	0.0%	1.5%	4.4%	0.0%	0.0%	0.0%	0.0%
STARZ	6	9	0.0%	0.0%	0.0%	25.0%	0.0%	11.1%	1.7%	11.1%
TOTAL	58	59	0.0%	3.4%	2.2%	5.9%	0.0%	3.4%	0.2%	3.7%

## STREAMING SHOWS

### A Perspective:

When Netflix emerged in 2007,<sup>27</sup> it pursued a strategy of utilizing content from various studios that readily licensed their extensive libraries to it. Netflix capitalized on this content to establish a strong market presence. Simultaneously, it initiated a robust effort to create its own original content,<sup>28</sup> anticipating a time when major studios would reclaim their content for their proprietary streaming platforms. This approach proved remarkably effective, allowing Netflix to secure an early mover advantage.

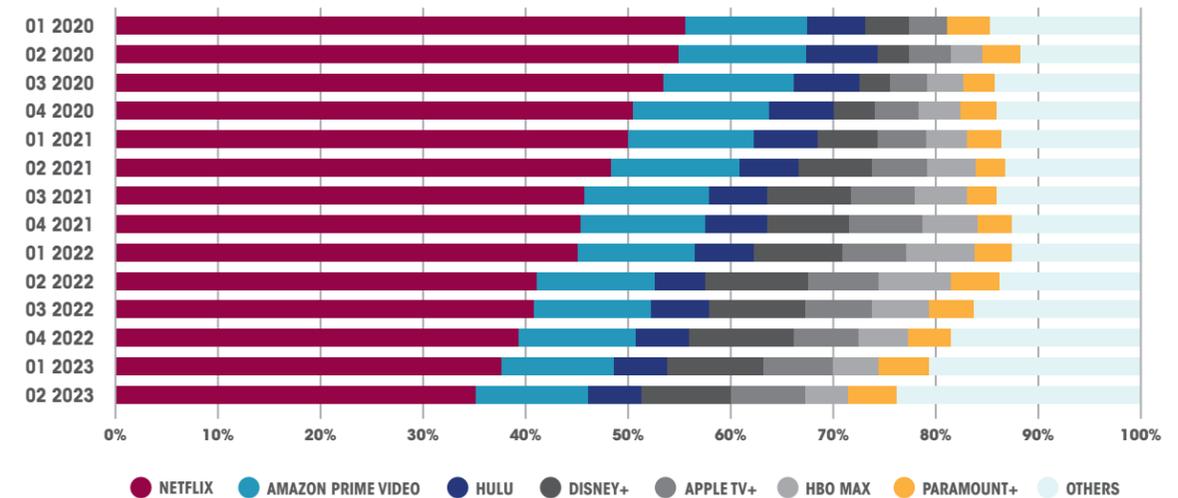
However, Netflix's market dominance has waned with the subsequent launch of streaming platforms such as Disney+, Paramount+, Max, and Peacock from major media companies.

Even more contenders have recently entered the streaming market. As indicated by a recent analysis by Parrott Analytics (Figure 4.5), emerging players ("others" in the analysis) have experienced rapid growth in the streaming service sector. This has led to a redistributed market share from traditional media companies, contributing to the still-evolving dynamics of the streaming landscape.

Included below is a "gauge" representation from Nielsen depicting the viewership distribution within the media industry (Figure 4.6). Notably, YouTube on its own would be equal to half of the broadcast viewership, a third of cable viewership, and a quarter of streaming viewership. The "other streaming" category in this context refers to unmeasurable sources, such as VOD services.

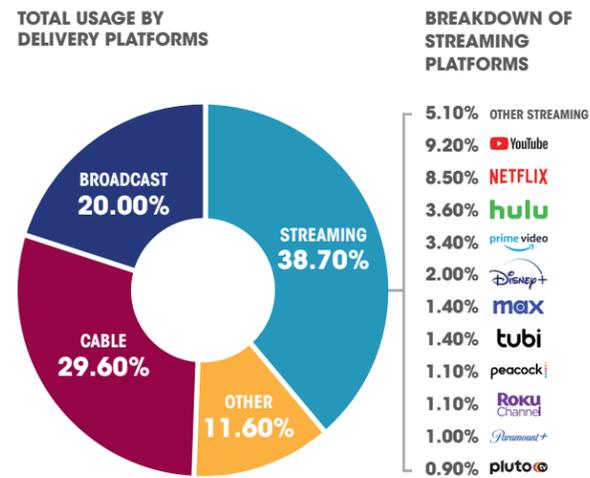
Figure 4.5: Share of Global Demand for Original Programming

### SHARE OF GLOBAL DEMAND FOR ORIGINAL PROGRAMMING Q1 2020 - Q2 2023



SHARE OF GLOBAL DEMAND FOR ORIGINAL PROGRAMMING, 2020-2023. U.S. (PARROT ANALYTICS)

**Figure 4.6:** Audience Viewing Behaviors Across Key Television Delivery Platforms



OVERALL TV USAGE WAS UP JUST SLIGHTLY FROM JUNE, BUT STREAMING USAGE HIT A NEW RECORD, AND TRADITIONAL TV USAGE FELL BELOW 50%.

U.S. Latinos are increasingly gravitating toward YouTube and alternative platforms, largely due to their limited representation in traditional media. This surge in viewership is propelling the growth of YouTube and platforms categorized as “other.” As shown by a recent Nielsen study, YouTube ranks as the preferred choice among U.S. Latinos, who devoted 57% more time to the platform than non-Latino Whites in July 2022.<sup>10</sup>

## Streaming Shows Data

Representation of U.S. Latinos both in front of and behind the camera in streaming content remains notably sparse when compared to the Latino cohort’s market share (19.1% of the U.S. population). Specifically, Latino leads account for 3.4%, co-leads for 5.4%, and both showrunners and directors for 1.9% of the total representation (Table 4.7).

Netflix, the pioneer in streaming,<sup>29</sup> is notably lacking in Latino representation across various categories. Among its 113 shows in 2023, only 4.4% featured Latino leads. The percentage is also low for co-leads, directors, and showrunners. This deficiency contrasts with the U.S. Latino population, indicating an under-indexing. Interestingly, two of Netflix’s most successful series, *Wednesday* and *The Lincoln Lawyer*, showcase Latino leads.

Prime Video’s response to data has led to general improvements, with Latino presence increasing to 16% among co-leads, 8% among showrunners, and 7.2% among directors. However, Latino leads saw only marginal growth.

Max experienced the most significant decline, revealing a possibly intentional erasure of Latinos. This decline followed the decision to cancel shows with substantial Latino representation, leading to a sharp drop in Latino leads (2%), co-leads (2%), showrunners (0%), and directors (1%) after the service’s merger with Discovery.

Similarly, Discovery+ exhibited almost no representation with minimal fluctuations in Latino leads, co-leads, showrunners, and directors.

Disney+ saw decreases in Latino leads, though co-leads, showrunners, and directors saw slight increases. Hulu experienced mixed results, with changes in all categories.

Apple TV+ witnessed a decline in every category, with Latino representation becoming almost non-existent.

Peacock, part of NBCUniversal, experienced growth in Latino leads, co-leads, showrunners, and directors.

Finally, Paramount+ showcased both gains and losses. Latino leads and co-leads saw improvement, while showrunners and directors experienced setbacks.

## In Conclusion:

The streaming industry faces multifaceted challenges<sup>30</sup> affecting its financial sustainability such as rising production costs, audience turnover, competition from social media content platforms, and the advent of AVOD and fast channels. Several new entrants catering to the growing U.S. Latino viewer population could further erode an industry that has neglected this 19% demographic. Targeting the substantial U.S. Latino audience could serve as a solution to current and future challenges in the media space.

## SHOW ANALYSIS BY GENRE

The findings of this report affirm the ongoing underrepresentation of U.S. Latinos across all show genres. In our analysis, dramas and comedies displayed the highest (6.5%) Latino lead actor representation, which was still relatively modest. Notably, co-leads saw more substantial Latino representation, at 11.8% and 11.6% for comedy and drama, respectively (Table 4.8).

In contrast, other genres such as alternative, animation, TV specials, and talk shows exhibited notably low participation of U.S. Latinos, with their representation almost non-existent.

To address these challenges and continue to move beyond stereotypes, it becomes imperative to strive for proportionate representation of U.S. Latinos across all genres in alignment with their market share.

**Table 4.7:** Latino Participation in Streaming Shows, 2022 vs. 2023

NETWORKS	TOTAL SHOWS		LATINO LEADS		LATINO CO-LEADS		LATINO SHOWRUNNERS		LATINO DIRECTORS	
	2022	2023	2022	2023	2022	2023	2022	2023	2022	2023
APPLE TV	44	45	2.3%	0.0%	2.3%	2.2%	4.5%	2.2%	2.3%	0.9%
DISCOVERY+	43	151	2.3%	2.0%	0.6%	2.8%	0.0%	0.7%	0.0%	0.0%
DISNEY+	18	30	11.1%	6.7%	1.4%	1.7%	0.0%	3.3%	0.0%	4.0%
MAX	52	50	9.6%	2.0%	4.8%	2.0%	11.5%	0.0%	4.4%	1.0%
HULU	37	49	8.1%	4.1%	4.7%	7.7%	5.4%	4.1%	3.2%	0.4%
NETFLIX	124	113	1.6%	4.4%	3.0%	8.4%	0.0%	1.8%	0.7%	4.0%
PARAMOUNT+	30	41	0.0%	4.9%	1.7%	6.7%	0.0%	0.0%	5.7%	1.5%
PEACOCK	36	22	8.3%	9.1%	2.8%	8.0%	0.0%	4.5%	0.6%	2.7%
PRIME VIDEO	27	25	3.7%	4.0%	2.8%	16.0%	0.0%	8.0%	1.9%	7.2%
TOTAL	411	526	4.4%	3.4%	2.9%	5.4%	2.4%	1.9%	1.9%	1.9%

**Table 4.8:** Latino Participation in All Shows by Genre

GENRE	LEADS	CO-LEADS	SHOWRUNNERS	DIRECTORS
ALTERNATIVE	2.5%	3.2%	1.0%	0.4%
ANIMATION	0.0%	3.9%	2.4%	3.3%
COMEDY	6.5%	11.6%	2.8%	3.5%
DRAMA	6.5%	11.8%	2.9%	5.8%
SPECIAL	0.0%	4.5%	0.0%	0.0%
TALK	0.0%	8.3%	0.0%	0.0%

# FILMS

**OVER THE PAST SIX YEARS OF TRACKING U.S. LATINO REPRESENTATION IN FILMS, THE LDC HAS OBSERVED SOME PROGRESS, BUT REPRESENTATION IS STILL SIGNIFICANTLY BELOW.**

The percentage of U.S. Latino leads in films increased from 1.4% in 2018 to 5.7% in 2023.\* Similarly, co-leads experienced growth from 3.5% in 2018 to 8.3% in 2023, which was still below market-proportionate segmentation. Screenwriters and directors also showed improvement, moving from 0.7% in 2018 to 5.7% in 2023 and from 1.4% in 2018 to 4.5% in 2023, respectively (Table 5.1 and Figure 5.2).

The industry faces the imperative task of enhancing U.S. Latino representation to align with a market-proportionate position, as evidenced by the growing U.S. Latino 18-and-under demographic, which currently stands at 25%.<sup>2</sup>

**Table 5.1:** Trend of Latino Representation in Films in Lead, Co-lead, Screenwriter and Director Positions, from 2018 to 2023

FILMS	TOTAL LATINO U.S. POPULATION	LATINO LEADS	LATINO CO-LEADS / ENSEMBLES	LATINO SCREENWRITERS	LATINO DIRECTORS
2018	18.1%	1.4%	3.5%	0.7%	1.4%
2019	18.4%	3.7%	3.7%	2.8%	1.1%
2020	18.7%	3.3%	5.5%	3.2%	2.4%
2021	18.7%	7.4%	4.3%	6.9%	6.9%
2022	19.0%	5.1%	4.5%	2.6%	2.9%
JAN-AUG 2023	19.1%	5.7%	8.3%	5.7%	4.5%

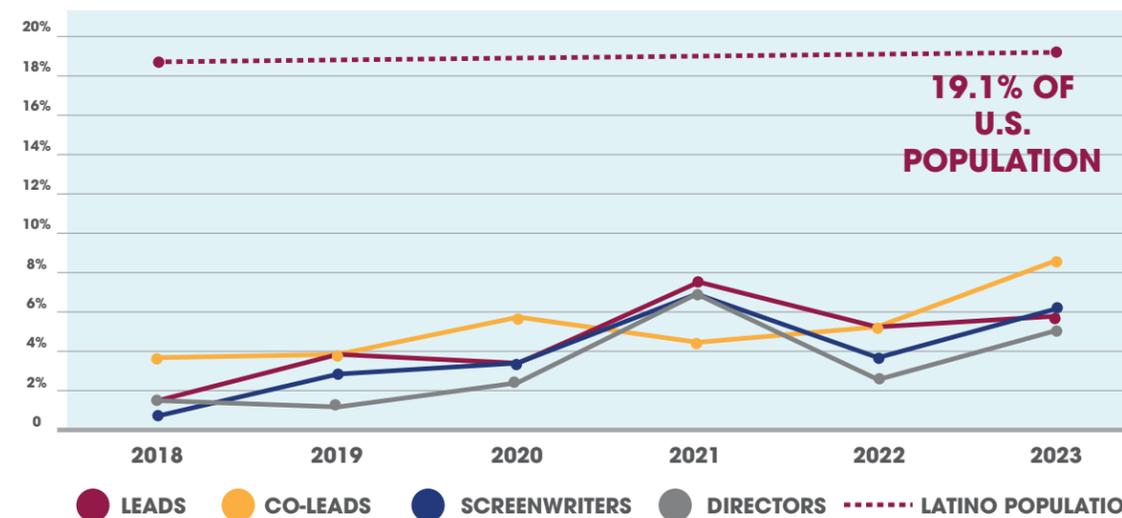
In the context of films, the presence of U.S. Latino actors remains significantly limited. Only 5% of leads and 10.5% of co-leads in theatrically released films were U.S. Latino actors. Streaming platforms also showed underrepresentation, with only 6.3% of streaming films featuring a U.S. Latino actor in the lead role, and 6.8% of co-leads.

When it comes to directing, U.S. Latino film directors were underrepresented too, making up only 3% in box office and 5.6% in streaming.

Additionally, U.S. Latino screenwriters faced significant underrepresentation, accounting for just 4% in box office films and 6.9% in streaming.

Given U.S. Latinos' significantly elevated film consumption—making up 29% of theater movie ticket sales,<sup>31</sup> comprising 27% of online streaming users, and accounting for 24% of online subscription customers<sup>20</sup>—the film industry must grasp the potential impact of their lack of inclusion on revenue and future opportunities. Latinos report being more likely to watch content when it features someone from their identity group.<sup>10</sup> An expanding range of choices means substantial shifts in media consumption behaviors.

**Figure 5.2:** Trend of Latino Representation in Films in Lead, Co-lead, Screenwriter, and Director Positions, from 2018 to 2023



# FILMS ANALYSIS BY PLATFORM

## STREAMING FILMS

### Perspective:

The COVID-19 pandemic triggered a significant change in the industry, leading more people to watch movies on digital platforms as they stayed home.<sup>32</sup> Streaming films now hold a considerable market share, and U.S. Latino audiences play a key role. In July 2022, Latinos spent 43.6% of their television time on streaming platforms, higher than other ethnic groups and the national average of 34.8%.<sup>10</sup> This trend is due to this cohort's adeptness with technology and their youthful engagement.

### Streaming Film Data:

Across the streaming film industry, inconsistent Latino participation by companies is the norm for total lead actors. Minimal change was evident from 2022 to 2023 for Latino leads, which decreased from 6.9% to 6.3%. However, Latino co-leads improved from 4.8% to 6.8%, as did Latino screenwriters, who saw a minor increase from 3.9% to 6.9%. Latino directors rose slightly from 3.9% to 5.6% (Table 5.3). Substantial progress is necessary to reach 19.1% market parity.

As shown in Table 5.3, Prime Video and Paramount+ showed progress in the inclusion of Latino leads between 2022 and 2023. However, certain platforms experienced setbacks. Notably, Apple TV+ and Peacock saw declines, dropping from 25% to ZERO representation in Latino leads. This inconsistency highlights the lack of a uniform strategy for proportional Latino representation.

Peacock's decline extended to Latino co-leads, whose numbers decreased from 12.5% in 2022 to zero in 2023. Additionally, the platform did not hire any Latino screenwriters or directors for streaming films in 2023, consistent with its 2022 record of ZERO representation. As a result, Latino representation across all roles remained at ZERO.

After its acquisition by Discovery, Max's Latino representation dropped across most positions. Latino leads fell from 14.3% in 2022 to ZERO in 2023. Screenwriters and Latino directors fell from 21.4% to 4.2%.

Disney+ witnessed slight improvements, progressing from zero to 5.3% in Latino leads and 3.9% to 7.9% in Latino co-leads between 2022 and 2023. Most notably, the platform achieved a substantial leap in Latino screenwriters and directors, ascending from zero to 15.8%.

Hulu experienced a reduction in Latino leads from 11.8% to 5.6% in 2023. However, positive changes included a rise in Latino co-leads from 4.4% to 6.9% and a significant jump in Latino screenwriters from zero to 16.7%. Latino directors also increased from zero to 5.6%.

Netflix's Latino leads increased from 5.8% to 7.3%, though it remains far from achieving market parity. It is also important to note that it has zero Latino screenwriters in films. The platform could tap deeper into the Latino demographic to counteract market share loss.

Notably, Paramount+ reported significant progress, escalating from zero to 16.7% in Latino leads and 1.9% to 14.6% in Latino co-leads. Latino screenwriters and directors both surged from zero to 16.7% and zero to 8.3%, respectively. Prime Video showed improvement in leads, screenwriters and directors, ascending from zero to 12.5%, zero to 12.5%, and zero to 6.3%, respectively. Meanwhile, Latino co-leads slipped from 12.5% to 7.8%.

### In Conclusion:

The streaming landscape is experiencing disruptions as significant players like TikTok and YouTube are emerging in the digital sphere. According to Pew Research, TikTok's adoption among U.S. Latinos stands at 31%, exceeding the 21% average across all groups.<sup>33</sup> Furthermore, a recent Nielsen study highlights YouTube's predominant popularity among U.S. Latinos, who dedicated 57% more time to the platform compared to non-Latino Whites.<sup>10</sup> The appeal for U.S. Latinos on TikTok and YouTube is evident, as they offer authentic representation that contrasts with the near-invisibility on traditional platforms. These platforms enable U.S. Latinos to not only see themselves represented but also to amplify their voices, along with those of their community. Incorporating U.S. Latinos consistently and authentically into the strategies of the streaming industry is imperative.



Table 5.3: Latino Participation in Streaming Films, 2022 vs. 2023

NETWORKS	TOTAL SHOWS		LATINO LEADS		LATINO CO-LEADS		LATINO SCREENWRITERS		LATINO DIRECTORS	
	2022	2023	2022	2023	2022	2023	2022	2023	2022	2023
APPLE TV+	4	7	25.0%	0.0%	6.3%	3.6%	0.0%	0.0%	0.0%	0.0%
DISCOVERY +	1	1	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
DISNEY +	19	19	0.0%	5.3%	3.9%	7.9%	0.0%	15.8%	0.0%	15.8%
MAX	14	24	14.3%	0.0%	5.4%	7.3%	21.4%	0.0%	21.4%	4.2%
HULU	17	18	11.8%	5.6%	4.4%	6.9%	0.0%	16.7%	0.0%	5.6%
NETFLIX	52	41	5.8%	7.3%	4.3%	4.9%	3.8%	0.0%	3.8%	2.4%
PARAMOUNT+	13	12	0.0%	16.7%	1.9%	14.6%	0.0%	16.7%	0.0%	8.3%
PEACOCK	4	6	25.0%	0.0%	12.5%	0.0%	0.0%	0.0%	0.0%	0.0%
PRIME VIDEO	6	16	0.0%	12.5%	12.5%	7.8%	0.0%	12.5%	0.0%	6.3%
TOTAL	130	144	6.9%	6.3%	4.8%	6.8%	3.9%	6.9%	3.9%	5.6%

## THEATRICAL FILMS

### A Perspective:

As we finalize this report for printing, the actors and writers strike is currently underway. However, even prior to that significant event, the theatrical industry was grappling with shifting dynamics.<sup>33</sup> Studios and exhibitors are navigating a complex landscape with factors that are reshaping the industry's future: adapting strategies at the box office and moving to digital release methods such as SVOD, home entertainment, VOD,<sup>34</sup> and emerging platforms that serve as entertainment, such as YouTube and TikTok.

From a practical business perspective, one might question the necessity of further strategic change, considering that U.S. Latinos are already active consumers of Hollywood movies. A similar argument arose in the music industry, which transformed due to digital platforms that democratized access and offered consumers a wider array of content choices. This shift enabled Latino audiences to engage with emerging artists like Bad Bunny, Peso Pluma, and Becky G, resulting in their widespread popularity. Consequently, the music industry experienced substantial growth,<sup>35</sup> benefiting all stakeholders.

Film studios would be wise to derive insights from the music industry's evolution and replicate its achievements. By diversifying the range of captivating narratives to align with the new mainstream of the 21st century, they have the potential to achieve comparable successes.

### Theatrical Films Data:

The underrepresentation of Latino leads in theatrical films is evident, which seems counterintuitive considering that U.S. Latinos contribute over 25% of the total national box office earnings.<sup>36</sup> However, the reality is that only 5% of lead roles and 10.5% of co-leads in the top 100 box office films featured U.S. Latino actors. This disparity extends to the realm of directing, where U.S. Latinos constitute only 3.0% of them. Furthermore, U.S. Latino screenwriters also face substantial underrepresentation, accounting for just 4.0% (Table 5.4).

### In Conclusion:

Comparing data from theatrical films and streaming films highlights a notable gap in representation, indicating that both sectors have substantial progress to make. Given the extensive datasets spanning decades, it is reasonable to once more infer that the industry's decision-makers are well aware of the significant absence of U.S. Latinos. This ongoing omission would be unacceptable in the market strategy of any other industry.

Table 5.4: Latino Participation in Box Office Films, 2022 vs. 2023

BOX OFFICE FILMS										
PLATFORMS	TOTAL SHOWS		LATINO LEADS		LATINO CO-LEADS		LATINO SCREENWRITERS		LATINO DIRECTORS	
	2022	2023	2022	2023	2022	2023	2022	2023	2022	2023
BOX OFFICE FILMS	100	100	3.0%	5.0%	5.5%	10.5%	1.0%	4.0%	3.0%	3.0%
GRAND TOTAL	100	100	3.0%	5.0%	5.5%	10.5%	1.0%	4.0%	3.0%	3.0%

## FILM ANALYSIS BY GENRE

There is a need for screenwriters to tell stories and create worlds that will resonate with nearly 20% of their audience. This 2023 partial report analysis reveals that among the seven genres examined, two lacked any U.S. Latino screenwriters (Table 5.5).

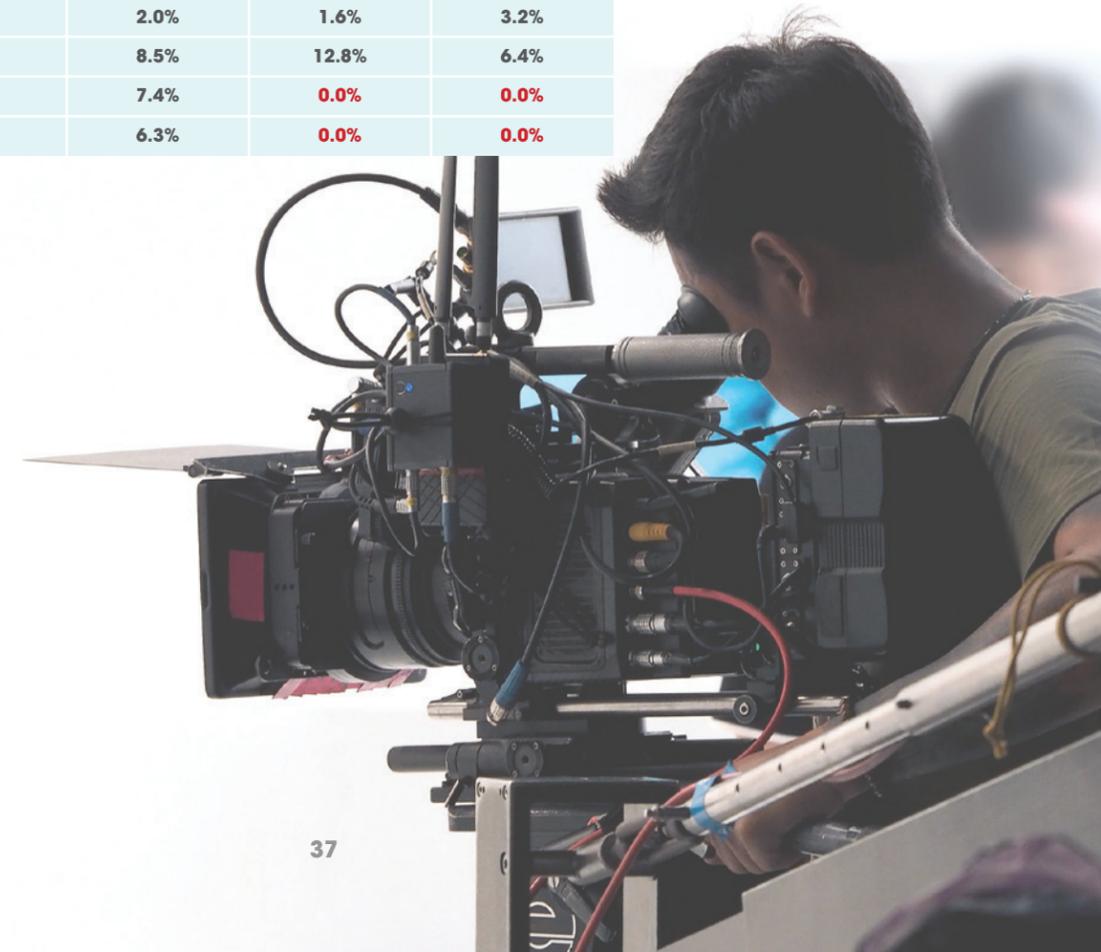
Around half of all film genres had no U.S. Latino directors. The animation genre featured the highest representation of U.S. Latino leads, while the

action genre came second with 12.8%. Additionally, the action genre exhibited an above-parity figure of 19.2% for Latino co-leads.

When U.S. Latino actors are on-screen, there is greater media consumption by U.S. Latinos and other cohorts. For instance, in the case of the 2021 hit F9: The Fast Saga, U.S. Latinos made up 37% of all ticket sales.<sup>37</sup>

Table 5.5: Latino Participation in Films by Genre

GENRE	LEADS	CO-LEADS	SCREENWRITERS	DIRECTORS
ACTION	12.8%	19.2%	5.1%	7.7%
ANIMATION	18.8%	9.4%	12.5%	0.0%
COMEDY	3.4%	7.6%	5.1%	5.1%
DOCUMENTARY	1.6%	2.0%	1.6%	3.2%
DRAMA	4.3%	8.5%	12.8%	6.4%
HORROR	5.9%	7.4%	0.0%	0.0%
THRILLER	0.0%	6.3%	0.0%	0.0%



# STEREOTYPES: HOW U.S. LATINOS ARE PORTRAYED IN FILMS AND SHOWS

A NOTABLE HIGHLIGHT FROM THIS REPORT IS THE POSITIVE EVOLUTION IN LATINO PORTRAYALS, PARTICULARLY IN TERMS OF STEREOTYPES, IN SHOWS AND FILMS.

Despite a significant shortage of Latino representation, the year 2023 demonstrated a favorable transformation. Among the limited number of shows featuring Latino leads across various media platforms, 75% presented them in positive roles. Similarly, in films, 90.9% depicted Latino leads in positive roles, as seen in Tables 5.6 and 5.7.

In shows, 9.4% of Latino leads leaned toward stereotypes and 9.1% adhered to stereotypes in films. Negative portrayals accounted for 15.6% in shows and none in films.

This progress represents a significant step forward for the industry and deserves recognition. However, it is important to note that this measurement is for leads only and does not include co-leads or other roles, where there is still work to be done.

AMONG THE LIMITED NUMBER OF SHOWS FEATURING LATINO LEADS ACROSS VARIOUS MEDIA PLATFORMS, 75% PRESENTED THEM IN POSITIVE ROLES.

Table 5.6: Stereotypes in Lead Roles in Films

PORTRAIT	LATINO LEADS
NEGATIVE	0.00%
POSITIVE	91.70%
STEREOTYPED	8.30%
GRAND TOTAL	100.00%

Table 5.7: Stereotypes Lead Roles in Shows

PORTRAIT	LATINO LEADS
NEGATIVE	15.60%
POSITIVE	75.00%
STEREOTYPED	9.40%
GRAND TOTAL	100.00%

## CASE STUDY 1: THE U.S. LATINO TALENT SUCCESS RATE

When Latinos are included, content succeeds at a higher rate. Even though Latinos only have 5% of lead roles and 10.5% of co-lead roles, those few movies represented 13 out of the top 20 movies in Box Office Mojo as of August 2023 (Table 6). Imagine a scenario in which proportionate representation was at work: the results would lead to more success and growth.

Table 6: Top 20 Domestic Grossing Films in 2023\*

RANK	TITLE	GROSS IN 2023	RANK	TITLE	GROSS IN 2023
1	BARBIE	\$596,095,173	11	INDIANA JONES AND THE DIAL OF DESTINY	\$174,146,711
2	THE SUPER MARIO BROS. MOVIE	\$574,801,500	12	MISSION: IMPOSSIBLE - DEAD RECKONING PART ONE	\$168,522,281
3	SPIDER-MAN: ACROSS THE SPIDER-VERSE	\$381,189,158	13	TRANSFORMERS: RISE OF THE BEASTS	\$157,066,392
4	GUARDIANS OF THE GALAXY VOL. 3	\$358,995,815	14	CREED III	\$156,248,615
5	OPPENHEIMER	\$301,257,310	15	ELEMENTAL	\$151,727,062
6	THE LITTLE MERMAID	\$297,952,985	16	FAST X	\$145,960,660
7	AVATAR: THE WAY OF WATER	\$283,067,859	17	PUSS IN BOOTS: THE LAST WISH	\$129,870,190
8	ANT-MAN AND THE WASP: QUANTUMANIA	\$214,504,909	18	SCREAM VI	\$108,161,389
9	JOHN WICK: CHAPTER 4	\$187,131,806	19	THE FLASH	\$108,133,313
10	SOUND OF FREEDOM	\$180,926,341	20	TEENAGE MUTANT NINJA TURTLES: MUTANT MAYHEM	\$100,577,874

● MOVIE WITH LATINO LEAD ● MOVIE WITH LATINO CO-LEAD ● NON-LATINO LEAD OR CO-LEAD \*UPDATED AUG 31

**Leads:**

Spiderman, Transformers, and Scream VI.

**Co-leads:**

Barbie, Spider-Man, Guardians of the Galaxy, Avatar: The Way of Water, Sound of Freedom, Mission Impossible: Dead Reckoning Part One, Transformers, Creed III, Fast X, Puss in Boots: The Last Wish, Scream VI, The Flash, and Teenage Mutant Ninja Turtles: Mutant Mayhem.

Content succeeds when Latinos are well represented. From the 13 out of 20 Box Office Mojo movies with Latino representation in lead or co-lead roles:

- All leads (3) were represented in a positive way (heroes).
- From all co-leads (19):

👍 Positive: 15 (79%)  
 🗨️ Negative: 4 (21%)

## CASE STUDY 2: THE TEN BIGGEST FILM FRANCHISES

Despite the historical underrepresentation of U.S. Latinos in films, accounting for just 5.7% of lead roles and 8.3% of co-lead roles,\* when franchises integrate Latinos, it consistently leads to profitable outcomes, proving that when included, Latino talent crosses over and sells more.

As seen on Table 7.1, four out of the top five (80%) franchises globally have had Latinos in leading roles.

**Table 7.1:** Top 5 Highest Grossing Franchises and their Latino Participation

RANK	TITLE	GROSS (WORLDWIDE)	LATINO PARTICIPATION
1	MARVEL CINEMATIC UNIVERSE	\$29.59 B	YES
2	STAR WARS	\$10.32 B	YES
3	SPIDERMAN	\$8.96 B	YES
4	JAMES BOND	\$7.87 B	NO
5	FAST & FURIOUS	\$7.33B	YES

Among the top 5 global franchises, those that have adapted to the new general market by incorporating Latino leads or co-leads have consistently experienced revenue growth, unlike the franchises that have not made similar adaptations.

→ Star Wars: The third movie with the biggest domestic box office features a Latino (*Rogue One: A Star Wars Story*). Star Wars' two top live-action shows are Latino-led (*The Mandalorian* and *Andor*).

→ Marvel Cinematic Universe: From the seven movies of Phase Four of the Marvel Cinematic Universe (2021-2022), four featured a Latino in a leading/co-leading role.

→ Spider-Man: The Spider-Man franchise features a saga in which the main character, Miles Morales, is of Latino descent.

→ The Fast and Furious franchise is all about Latino culture. Latinos have been a very important part of these films' box office returns, representing in some cases a majority of the audience during opening weekends.

→ DCU: *Blue Beetle* was released during the actor's strike without the usual publicity push.

**Figure 7.2:** Evolution of the Fast and Furious Franchise and Latino Community Participation in Box Office Performance



# THE SOURCE, THE U.S. LATINO TALENT DATABASE FOR HOLLYWOOD

## BOOSTING LATINO REPRESENTATION IN THE ENTERTAINMENT INDUSTRY

The Source, The Latino Talent Database for Hollywood (THE SOURCE), is the premier database highlighting Latino actors, writers, and directors who have recently worked on major network and OTT content as well as the highest-grossing box office films. THE SOURCE is a solution to counter the misconception in the entertainment industry about a lack of available Latino talent. THE SOURCE is a reliable and up-to-date tool available to content creators seeking to engage Latino talent and, by extension, Latino audiences.

The LDC is committed to providing fact-based data reports as well as tools to boost Latino representation free of charge. In the same way, THE SOURCE is a powerful tool that is also available for free.

Every individual in our database has already been vetted and hired by leading networks or studios.

To access THE SOURCE visit [www.thesourcedatabase.org](http://www.thesourcedatabase.org)



# RECOMMENDATIONS

**ADDRESSING THE INADEQUATE REPRESENTATION OF U.S. LATINOS IN ENGLISH-LANGUAGE MEDIA TO ENHANCE COMPETITIVENESS REQUIRES DELIBERATE ACTION. LEADERS WITHIN THE ENTERTAINMENT INDUSTRY MUST PROACTIVELY INVOLVE THEIR TEAMS AND ALLOCATE RESOURCES TOWARDS THIS OBJECTIVE TO POSITION THEMSELVES AS PIONEERS IN CAPTURING THIS MARKET SEGMENT.**

Ignoring the fact that nearly 20% of the total American market and 25% of the American youth market are of Latino descent<sup>2</sup> is unsustainable for media companies' growth. Neglecting to develop a comprehensive U.S. Latino strategy is not only detrimental to their domestic bottom lines but also impacts their global approaches. The marketability of Latino talent both on-screen and behind the scenes, along with Latino narratives, has been substantiated globally, as highlighted in this report.

Increasingly, young consumers are seeking genuine content that mirrors their realities. Entertainment enterprises must recognize that failing to include Latinos in Hollywood leads to the loss of viewership to more inclusive platforms, such as TikTok and YouTube.<sup>10, 24</sup> As the Latino audience continues to expand, advertisers will naturally align with this growing market.



## TO GUIDE INDUSTRY LEADERS, THE LDC HAS FORMULATED A SET OF RECOMMENDATIONS FOR CONSIDERATION

**If you are a CEO or any decision-maker with bottom-line responsibility at a studio, network, or streaming platform:**

- ✓ Boost Latino on-screen presence to capitalize on untapped potential. Remember: **Latino content sells globally!**
- ✓ Employ this report as a **performance benchmark** to follow up on your performance and your team's performance to create accurate U.S. Latino representation in content and consumer campaigns.
- ✓ **Analyze group representation** individually, avoiding broad terms like BIPOC or POC.
- ✓ Access **The Source**, The Latino Talent Database for Hollywood, to enhance casting and hiring skilled Latino talent. Combat the 'no Latino talent' misconception. Visit [thesourcedatabase.org](https://thesourcedatabase.org)
- ✓ **Include U.S. Latino leaders** in your C-Suite, providing them with the authority to develop authentic content. They will understand, identify, recruit, nurture, and guide U.S. Latino investment.
- ✓ **Join** our LDC Advisory Network to connect with many of the Latino and non-Latino leaders dedicated to creating a powerful, fact-based, dignified, and profitable Latino narrative. Contact [info@latinocollaborative.org](mailto:info@latinocollaborative.org) for more information.

**If you are an advertiser:**

- ✓ **Invest in media platforms** that understand and have empowering **content for Latinos** in English language. Remember that 84.4% of U.S. Latinos speak English and 90% of young Latinos are U.S.-born, making English their first language.<sup>9</sup>
- ✓ **Let the media know** that you will put your money where the market is.
- ✓ **Advertise in content** that reflects authentic U.S. Latino experiences, moving beyond limiting stereotypes that shrink content reach.
- ✓ **Feature Latino talent** in your ads. Seventy percent of Latinos feel that brands fail to understand their culture and gravitate toward brands that do.<sup>10</sup>
- ✓ **Engage** U.S. Latino creative talent for mainstream content.
- ✓ **Join our LDC Advisory Network** to connect with leaders dedicated to shaping an authentic, impactful, and cost-efficient Latino narrative. Reach us at [info@latinocollaborative.org](mailto:info@latinocollaborative.org).

**If you are part of the audience and want to create change:**

- ✓ **Register** on our website to receive the LDC newsletter.
- ✓ **Spread the word!** Our free reports are available for download on the LDC website ([www.latinodonorcollaborative.org](http://www.latinodonorcollaborative.org)). Utilize our factual reports, distribute our infographics, and be a community ambassador and spokesperson.
- ✓ **Use the power of your purse.** Support content showcasing positive Latino talent that authentically resonates with your experiences, successes, and challenges, as well as those of your families and friends in a dignified manner
- ✓ **Your voice** holds influence; express it confidently.

# METHODOLOGY

This dataset includes every new and returning primetime (8-11 PM) broadcast, cable, and premium cable networks shows with premiere dates between January 1, 2023 and August 31, 2023; it also includes all original shows from OTT/streaming services. IMDbPro and Nielsen are the primary sources of data. The dataset is a census and not a sample. It is a longitudinal report. It has been conducted every year since 2018.

The film study includes all original films released on OTT streaming services between January 1, 2023, and August 31, 2023, as well as the top 100 total domestic gross films from Box Office Mojo at IMDbPro from December 1, 2022, until August 31, 2023. After collecting all qualified content, LDC conducts a comprehensive analysis of every included show and film. It reports the presence of Latino actresses, actors, screenplay writers, showrunners, and directors to identify the representation and participation of U.S. Latinos in mainstream content in the United States. In this report, U.S. Latino representation is further broken down by genre, viewing platform, company, and channel. The LDC includes case studies.

For the purposes of this study, the term “U.S. Latino” does not include Europeans from countries such as Spain and Portugal. The ethnicity of talent was collected from sources such as IMDbPro and Nielsen or from self-identification in other outlets. If information was not found for a person and that individual had not previously stated their ethnicity, they were not included in the Latino 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.

ROLE	QUALIFICATION
<b>A SHOWRUNNER/FILM WRITER IS EITHER:</b>	<b>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.</b>
<b>AN EPISODIC DIRECTOR:*</b>	<b>EXECUTES THE SHOWRUNNER’S VISION. THERE CAN BE MANY DIRECTORS PER SEASON.</b>
<b>A CO-LEAD/ENSEMBLE ACTOR IS EITHER:</b>	<b>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.</b>
<b>A LEAD ACTOR IS EITHER:</b>	<b>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.</b>

These roles were selected as measurements of progress in Latino talent and story representation because they are the most influential and consequential roles in telling narratives and creating images.

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