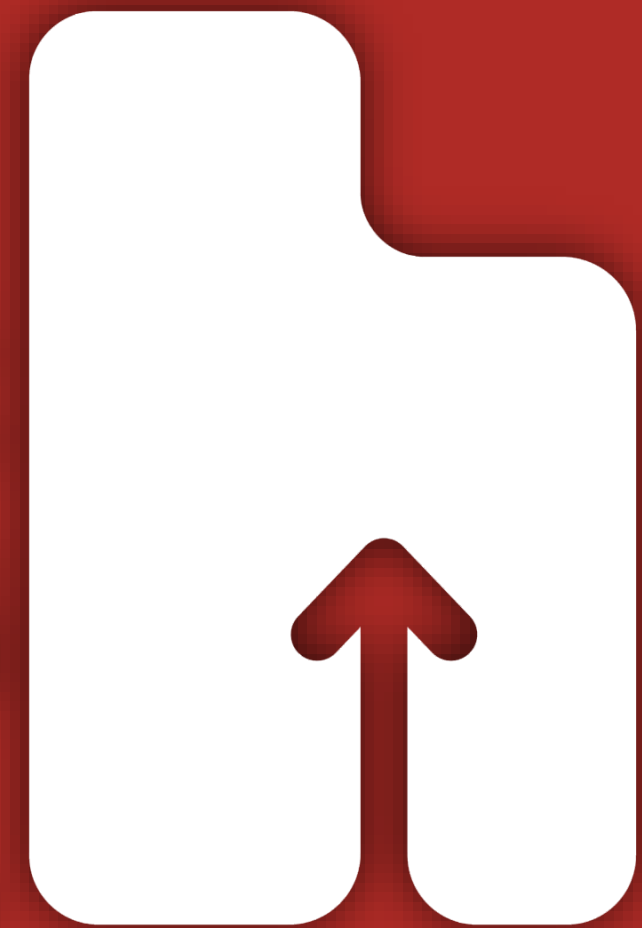




HISPANIC MARKETING COUNCIL



IT'S TIME!

The Power of the Multicultural Majority
Webinar #2 – Media & Representation

JANUARY 2024

MC Majority (GEN Z), The 'Bridge' Gen (Millennials) + A Few Gen Xers...All Through a Cultural Lens

Building on 20,500+ HMC consumer touchpoints to-date

2023 NAT'L ONLINE QUANT

4,600 13-24s (Gen Z) + 25-49s (Millennials/Xers)
= Hispanics, NH Blacks, NH Whites, NH Asians*

2023 QUALITATIVE

48 respondents (24 Gen Z/24 Millennials)
In-home pairs (Hispanic/Black/White/Asian)



* Except AAPI teens (200 v 400) due to lower incidence



MEDIA...

REFLECTS, REPRESENTS, AMPLIFIES & YES, CREATES CULTURE

- Some Basics
- 7 Meaningful Insights



Source: Pexels Free Download

2023 Media Basics

The devices we use...Some things old are new again (flip phones, MP3 players, portable gaming systems)

How we spend our media/entertainment time differs between adults & teens

#1 way we discover & watch long form TV/ movie content has changed since 2018

Most used apps for...

- Long form & short form video
- Social media platforms

Surprise! 2023 Teen Smartphone Daily Usage -19% v 2020 (72% v 89%)

More teens using “no internet, no social media... “Dumb” phones (Gabb, Troomi, Bark, etc.) by own or parent’s choice

- Retro flip phones “in” with Gen Z (along with Y2K fashion)

Adult yesterday usage flat (89% v 92% ‘20)

Smartphones (our BFF) & TVs (cozy trusted companion), while down v 2020, remain top 2 devices used daily

Devices Used Yesterday (13-49)

Smartphones			TV		
2018	2020	2023	2018	2020	2023
92%	91%	83%	84%	86%	79%



em 🍓
@uhhmmily · Follow

Pic Credit: Camilla Cabello/Wikipedia



can we bring back flip phones so we have to press a button multiple times to get the desired letter. maybe people would say less

9:42 PM · Jan 31, 2023



MP3 Player Last 7 Day Usage + 62% '20 – '23 (13% to 21% 13-49s)... Why?

No ads...

“The ads (on Spotify) drove me insane” (Male, 18-24)

“With an MP3, I don't have to deal with annoying ads that come with radio & free apps” (Male, 25-29)

Style...

“The appeal of MP3s is the retro style” (Male, 18-24)

“The digital audio players do consider aesthetics, which I appreciate” (Female, 35-39)

Allowed in “smartphone free” zones

“My employer allows us to listen to music with headphones, but forbids anything with a camera” (Female, 35-39)

“Most professors will let you have them (MP3s) because you can't look up answers on it, but you can record the lectures” (Male, 25-29)





Last 7 Day Usage of Portable Gaming Devices Growing, Consoles Declining

+59% v 2020 with 13-49s (16% 2020/26% 2023)

More gaming going cloud based

- Can play remotely on almost any device (TV, tablet, smartphone)...expensive console not required

Why is portable growing?

- Can go anywhere
- Unique, immersive experiences consoles/smartphones can't offer
- Designed specifically for gaming (unlike phones)
- Retro nostalgia for gamers who grew up with devices such as Game Boy or Game Gear

Take it wherever you go

Pic Credit: ChargerLab

2023 SC14a/2020 SC13b2018 S8b: Devices personally used last 7 days?
2023 BASE: ALL RESPONDENTS: 4,600 13-49s (3,200 18-49s + 1,200 13-17s)/2020: 2,418 13-49s(1198 13-17s + 1220 25-49s)
2018: 3,484 13-49s (2,393 18-49s + 1091 13-17s)

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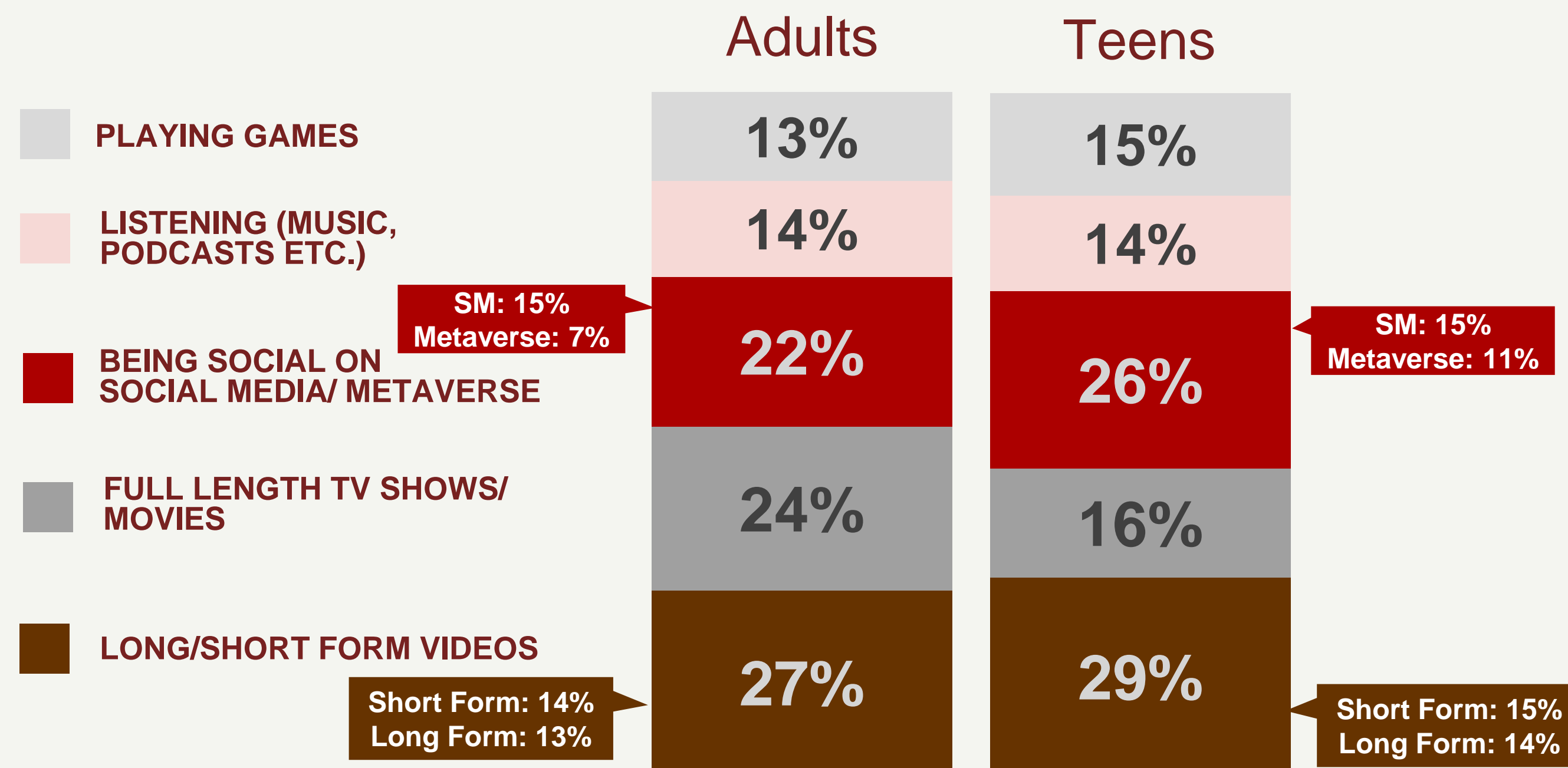
Abbott Elementary

Picking up where they dropped off.



Adults More Daily Time With TV Content, Teens More “Being “Social”, Watching Videos, Gaming

% Media/Entertainment Time Yesterday...



WED 9/21



STREAM ON hulu

Pic Credit: IMDB

2023 M1: What % of your media & entertainment time YESTERDAY was spent...? – Avg. allocation summary?
BASE: ALL RESPONDENTS: 4,600 13-49s (3,200 18-49s + 1,200 13-17s)

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In 2023, #1 Way We Watch TV/Movies is Via Paid Streaming Apps Such as Netflix... #2, Free AVOD Apps

Ways To Watch Full-Length TV Shows/ Movies Currently Use ...(13-49s)

SVOD such as Netflix or Disney+ **69%**

AVOD such as Pluto, FREEVEE or Vix **45%**

**Paid cable, fiber optics or satellite TV multichannel
subscription** such as Optimum or DirecTV **42%**

Paid streaming TV multichannel subscription
such as Sling or YouTube TV **42%**

“Pay-as-you-go” apps such as Prime Video or VUDU **31%**

OTA digital antenna (broadcast channels only) **15%**

Teens 31% more likely to use “Pay-as-you-go” apps (38% v 29% adults)

- ...Asians 45% less likely
- Asians 29% less likely to watch via paid multichannel subscriptions (cable, satellite or streaming)

2023 TVM1: Which of these ways to watch full-length TV shows & movies do you currently use?
SVOD asked as “paid online app subscription such as Netflix or Disney+, etc.”/AVOD asked as “Free ad
supported online streaming apps such as Pluto, Freevee, etc.”

BASE: ALL RESPONDENTS: 4,600 13-49s (3,200 18-49s + 1,200 13-17s)

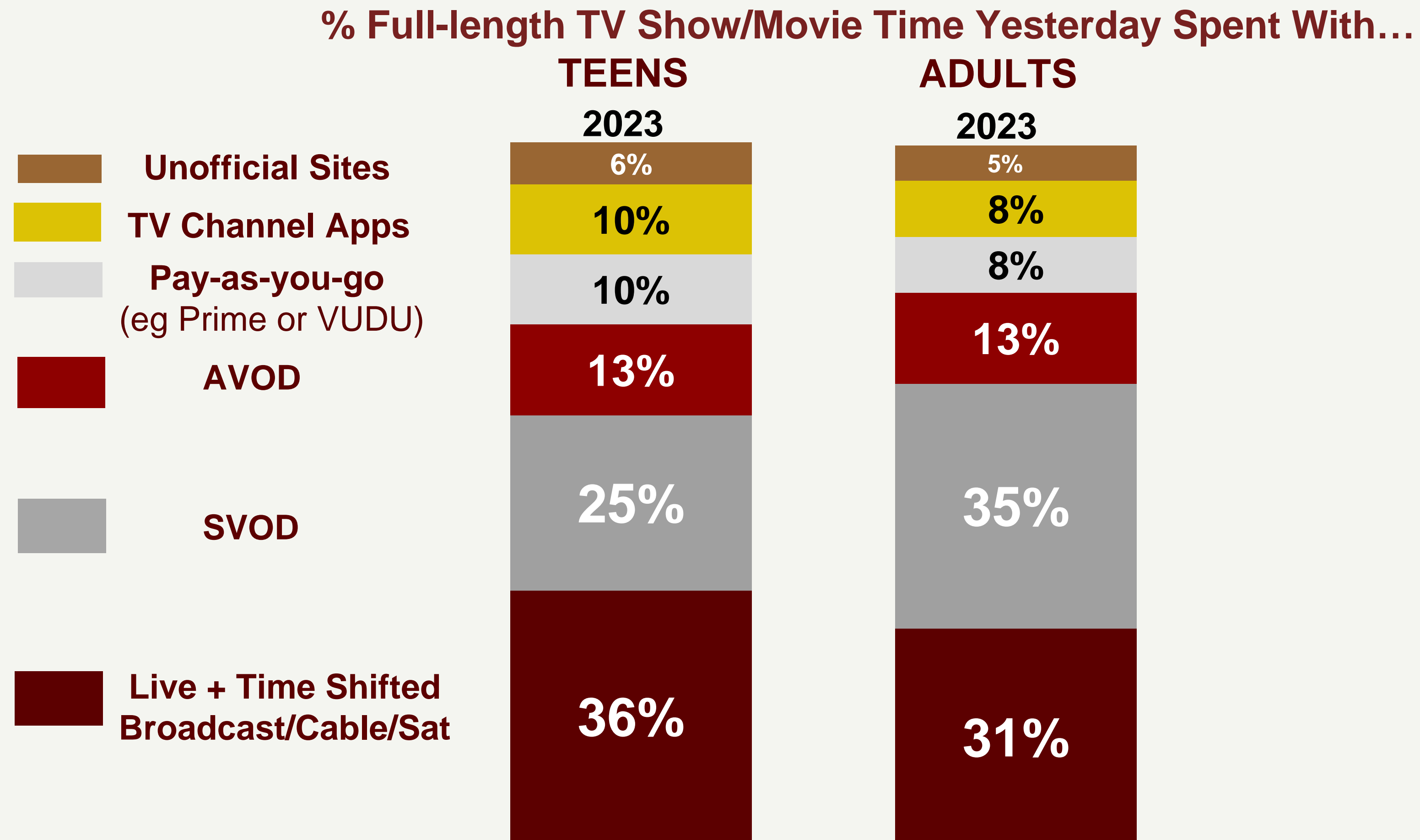
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Adults Spend 40% More Daily Time With SVOD v Teens

(35% v 25%)

Teens 16% more daily time with Live + TS broadcast/cable/sat (36% v 31%)

- Teen broadcast/cable/sat yesterday viewing +24% v '20; Adults -9% (less v -33% '18 to '20)
- Teen pay-as-you-go & TV channel apps also slightly higher v adults (10% v 8 %)



Netflix Remains #1 Paid or Free Streaming App Used by All (13-49s)

70% use it...Black teens least (59%) Hispanic adults most (78%)

- YouTube (53%) Disney+ (52%) #2/#3 'used'

<50s use many other streaming services as well in 2023 (paid + free)

- In 2020, most used 7-8 services
- In 2023, 18 for teens, 23 for adults...Asians 13-49, less (14)

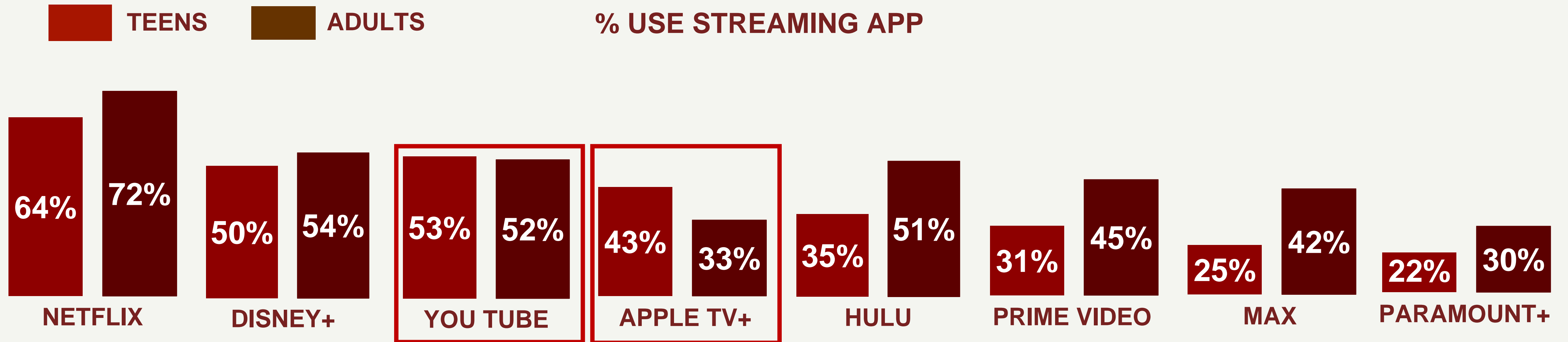


EVERY DAMN STREAMING SERVICE VIDEO

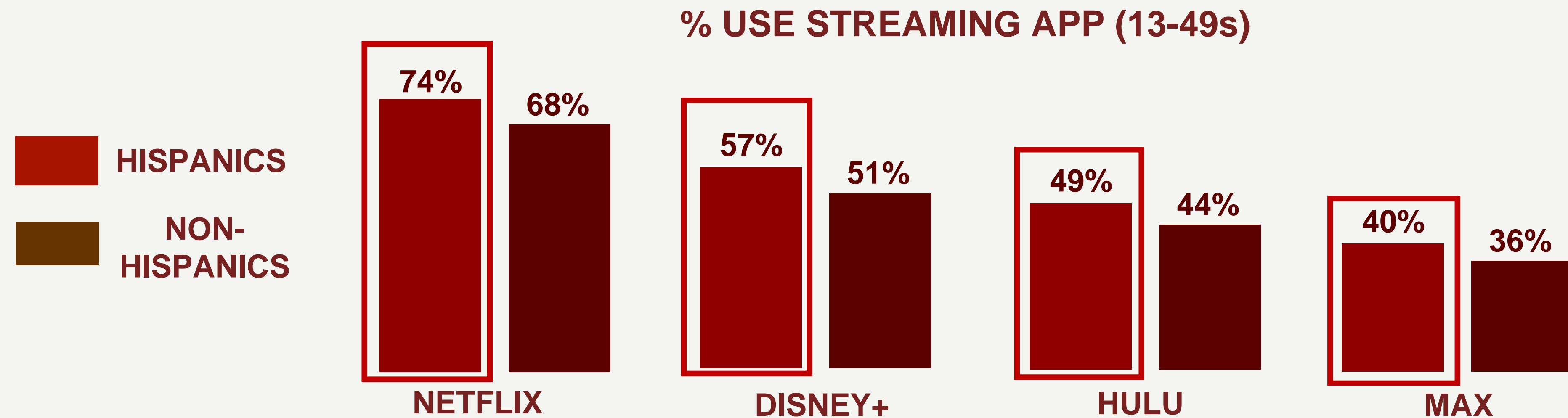
Adults Use Most Top Streaming Apps at Higher Levels v Teens...

...except Apple TV+; teen usage 30% higher v adults (43% v 33%)...

- ...And, YouTube, which teens & adults use at similar levels.



Hispanics Use Netflix, Disney+, HULU, MAX More v Non-Hispanics



Except for Netflix, Disney+, YouTube...Asians had lower usage of streaming apps
BET+, TUBI more popular with Blacks v non-Blacks (28% v 14%)
Pluto stronger with Blacks & Hispanics (20%) v. Whites/Asians (14%)

Netflix Remains Strong #1 in Yesterday SVOD Viewing

However, Netflix, HULU, Prime, Disney+ declined as newer players fragmented viewing

- In 2020, 4 services = 92% of all SVOD yesterday viewing, in 2023...66% (26% share loss)
- As of 2023, MAX, Paramount+, ESPN+, AppleTV+ picked up 28% of yesterday SVOD viewing

% Yesterday SVOD Time Spent With... (13-49s)

	2020	2023	+/- vs. '20
Netflix	43%	30%	-30%
HULU	16%	13%	-19%
Prime Video	19%	12%	-37%
Disney+	14%	11%	-21%
	92%	66%	-26%
MAX	NA	9%	
Paramount+	NA	7%	
ESPN+	NA	6%	
Apple TV+	NA	6%	
	92%	94%	

2023: TVM3/2020: M1b: What % of your time with online PAID subscription services yesterday was with...?
BASE: THOSE SPENDING TIME WITH PAID SUB. APPS YESTERDAY: 2023: 3,719 13-49s (2,545 18-49s + 1,167 13-17s)/2020: 2,005 13-49s (1002 13-17s + 1003 25-49s)
Teen & Adult % generally similar by platform unless noted.



YouTube #1 in Yesterday AVOD Viewership

Strongest with Asians (55% 13-49 v 31% non-Asians)

- All other AVOD platforms <10% each

2023: TVM3a What % of your time with FREE AD supported streaming services yesterday was with:
BASE: THOSE SPENDING TIME WITH FREE APPS YESTERDAY: 2,839 13-49s (1,823 18-49s + 1,006 13-17s)
Teen & Adult % generally similar by platform unless noted.

Pic Credit: PEXELS FREE DOWNLOAD

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YouTube #1 SM Platform & Growing, Yet Most View as Entertainment Platform (eg: Netflix)

More SM platforms grew with adults as they broadened their SM portfolios, especially TikTok
Only YouTube and WhatsApp** grew with teens 2020 - 2023

- FYI, WhatsApp skews Hispanic (48% v 39% total 13-49s)

Social Media Platforms Used						
Teens			Adults			
	2023	+/- v '20	2023	+/- v '20		
YouTube	74%	+7%	80%	+29%		
Facebook	54%	-24%	75%	-18%		
Instagram	61%	-24%	72%	+6%		
TikTok	49%	+/-0%	55%	+139%		
Twitter	37%	-46%	50%	+/-0%		
Snapchat	37%	-46%	46%	-4%		
WhatsApp*	39%	+35%	39%	+3%		
Pinterest	16%	-58%	34%	-17%		

* Also, many view TikTok as more of a short form video entertainment content platform vs. a “social” platform

** WhatsApp Skews Hispanic 48% v. 39% total 13-49 (Hisp. V total index: 123)

2023 OV1/2020 M3/2018: SM6 Below are different social media/virtual media apps. Select the icons for the PLATFORMS you use. BASE SM users/(2023: 4,043 13-49s; 3,074 18-49s + 1,330 13-17s)/(2020: 2,297 13-49s; 1,175 25-49s + 1,122 13-17s)/(2018: 3,199 13-49s; 2,178 18-49s + 1,021 13-17s)

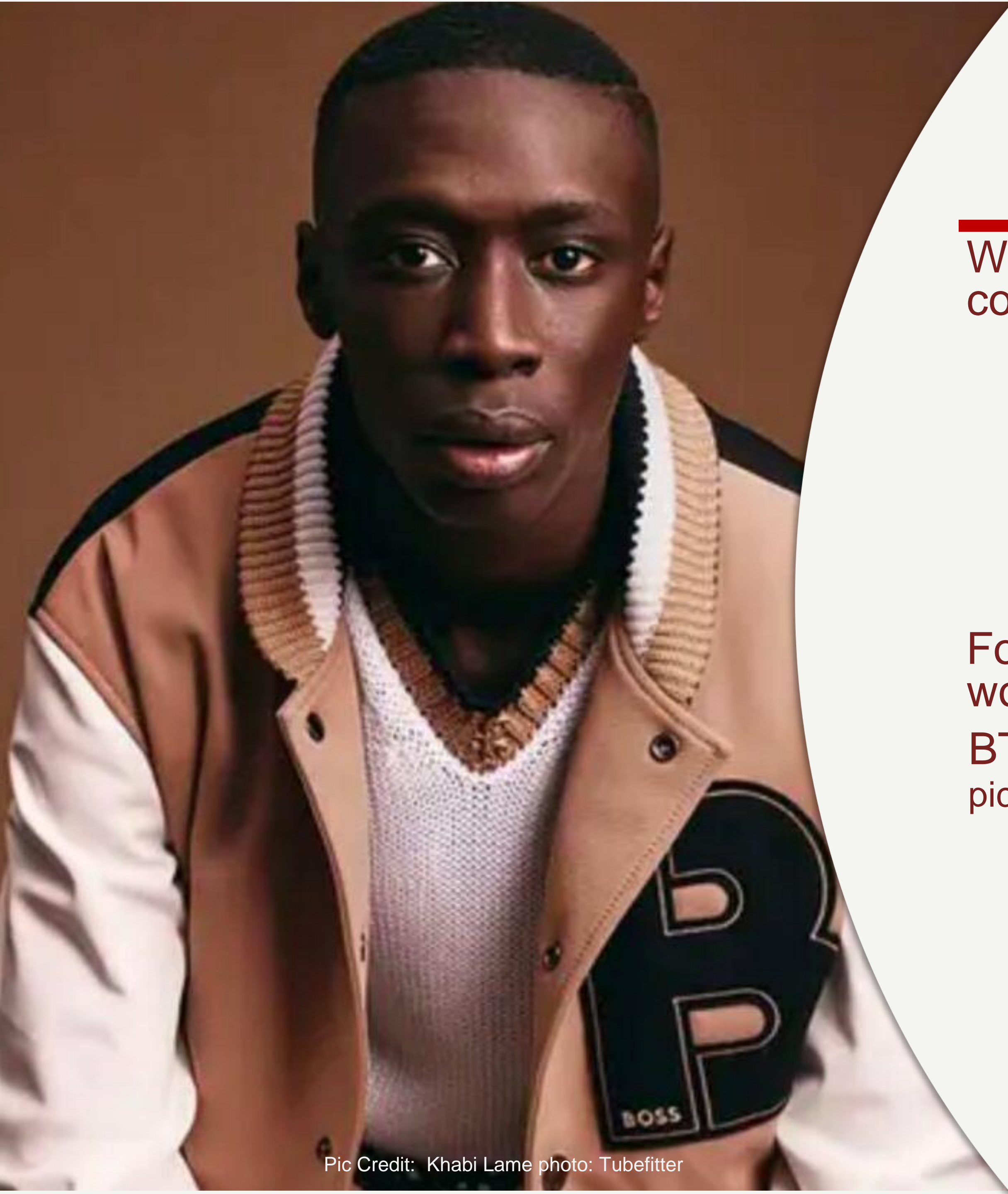
Facebook & Instagram: ‘BEST’ For Brand Discovery

	Teens	Adults
Facebook	31%	35%
Instagram	36%	33%
YouTube	18%	12%
TikTok	9%	12%



'S6a. Which social media site is BEST for finding out about new brands/services/products? BASE: THOSE EVER PURCHASED VIA SM: 3,162 13-49S (2,155 18-49s + 1,005 13-17s





#1 Way Most Discover New TV/Movie Content: Social Media Influencers

(In 2018 was 'trailers')

Whether looking for overall English language content OR in-culture content

Discover TV/Movie Content Through Social Media Influencers/Creators (% 13-49)

Overall English Content (All)	Black/Hispanic* Content	Asian Content
61%	47%	35%

For Asians, social influencers tied with YouTube & word-of-mouth to discover TV/Movie content

BTW, top 3 influencers all MCs: Khabib Lame (left in pic), Huda Kattan (Middle Eastern), Lele Pons (Hispanic)

Note: Khabib Lame (80 million followers)/Huda Kattan (52 million followers)/Lele Pons (51 million followers)

* HISP refers to Spanish content specifically

TVM4a How do you discover new full-length TV/Movie content to view? English content for ALL persons, regardless of race/ethnicity BASE: ALL RESPONDENTS: 4,600 13-49s (3,200 18-49s + 1,200 13-17s)/ Spanish language content BASE: ALL HISPANICS 1,201 13-49s (800 18-49s + 401 13-17s)/Black focus content BASE: ALL NHBs: 1,202 13-49s (804 18-49s + 398 13-17s)/ Asian focused content? BASE: ALL Asians: 689 13-49s (567 18-49s + 122 13-17s)

Pic Credit: Khabib Lame photo: Tubefitter



While Mega Influencers Have “Reach”, Micro & Nano Influencers Have “Trust” ... Increasingly Important For Brands

“I like those [micro influencers] better. They're much more real & honest because big influencers are normally being paid a lot. So they're not going to tell you this pre-workout product tasted disgusting & they barely could swallow it. I feel micro- influencer reviews are much more raw.”

GenZ 18-24 Black Female

“... the micro ones are a lot better and you learn a lot more from them.”

GenZ 18-24 White Male

SOCIAL MEDIA & DIGITAL ID VIDEO



Meaningful Insight #1

Most Gen Zs 16-24 Aware They Live Their Life in the Spotlight...

On social media, video, texts, out & about

- What they say & do can impact schools they want to go to, jobs they want to get, their social standing

Can make them hyper-aware & precise about words & “tone” they use* as well as with public actions

- To align with own internal standards & of those who control their daily/future lives & social standing
- Carefully crafting their digital public identities

Expect the same from other people and brands

- Not afraid to apply pressure & exert influence using these tools for their own purposes

Pic Credit: PEXELS FREE DOWNLOAD

* Such as how some 13-24s were hesitant to describe themselves as a POC externally even if ID as such internally. They could be perceived as appropriating the term by those darker than themselves within their own multicultural segment or by Blacks who they see as “having experienced so much worse than they have.”

Source: 2023 Qualitative Pic Credit: Media Panache 4/12/21

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Digital ID Peer Pressure: iPhone v Android

Gen Z/Millennial teen ID tied to & strongly divided by whether you use iPhone or Android

iPhone users “shunning” friends & family for “green” Android texts (blue texts v green texts)

- iPhone is winning... 87% of teens own iPhones
- Yes, there are functional reasons to prefer iMessage yet the push for “blue text” conformity creates stress and “othering”

“I Got 99 Problems & Jacob’s Green Texts Are ALL of Them”

Jacob: It’s not easy being green. Android discrimination is 1 of the last acceptable forms of hate in this country.

Abbott Elementary

Copy & paste link if wish to view Abbott Elementary take on the iPhone vs. Android digital culture war
<https://www.facebook.com/abbottlemabc/videos/i-got-99-problems-and-jacobs-green-texts-are-all-of-them/664749152085326/>

Source for iPhone ownership: Piper Sandler “Taking Stock of Teen” survey reported by Apple Insider 4/4/23
2023 SC14a/2020 SC13b2018 S8b: Devices personally used last 7 days ? 2023 BASE: ALL RESPONDENTS:
4,600 13-49s (3,200 18-49s + 1,200 13-17s)/ 2020: 2,418 13-49s(1198 13-17s + 1220 25-49s)2018: 3,484 13-49s
(2,393 18-49s + 1091 13-17s)

BLUE TEXTS, GREEN TEXTS VIDEO

Meaningful Insight #2

The Power of “Culture” ...

Can Super-Charge Advertising/Marketing

MCs pay more attention to, have greater trust in & are more likely to try/buy/use a brand that markets to them within an “in-culture” content environment

- Also, with ‘in-culture’ and/or authentically diverse ads outside of “in-culture” specific content

Most 13-49 Blacks, Hispanics & Asians agree their segment’s ‘in-culture’ TV channels are “very important” or “important” (top 2 box)



Source: BigStock Photo



Pic Credit: IMDB

Yesterday TV/Movie Viewing With In-Culture Content, Significant & Grew v 2018

% Full-Length TV/Movie Time Yesterday Spent in Hispanic, Black, Asian Content ...

	13-49s		
	2018	2023	% +/-
Hispanics	35%	41%	+17%
Blacks	39%	48%	+23%
Asians	NA	30%	NA

* No specific data on % of content specifically for non-white segments however UCLA Hollywood Diversity Report does report % of film leads (27% for 2022) and scripted TV leads (35% for 2021-22 season) versus Census 2021 population – MCs = 44% of Total U.S. population

2023 TVM2b/2d/2e/2018 TVM14/15 What percent of your TOTAL time spent watching full length TV shows/movies YESTERDAY was in content specifically for Hispanics/Blacks/Asians? 2023 BASE: 2023: TOTAL Hispanics, Non-Hispanic Blacks & Non-Hispanic Asians: 3,092 13-49s (2,171 18-49s + 921 13-17s)/2022: TOTAL Hispanics & Non-Hispanic Blacks 2,325 13-49s (1,598 18-49s + 727 13-17s)

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Blacks & Hispanics 13-49 + Asian Teens
View Their Segment's TV Channels as
Very Important/Important...

Agreeing they “have unique content 100% for & about my culture & a primary way I connect with it” OR “a way I & my family come together to connect with our culture”

What best describes the cultural importance of
(Black/Asian/Hispanic channels such as...?)
Sum Very Important/Important (Top 2 box)

Blacks/Hispanics 13-49	Asian Teens	Asian Adults
75%	62%	48%



R17. Which statement best describes the cultural importance of Hispanic TV content from traditional Hispanic channels such as Univision & Telemundo for you? They are.../R18: Which statement best describes the cultural importance of Black-centric TV channels such as BET or ALL BLK? They are.../R19. Which statement best describes the cultural importance of Asian-centric TV channels such as The Filipino Channel, GMA Pinoy, ETTV, TVB, KBS, MBC, Zee TV, Little Saigon? They are... BASE: ALL MC RESPONDENTS: 1,191 13-49 HISP/1,202 NHB 13-49/775 AAPI 13-49



Pic Credit: Telemundo



**Traditional
Spanish TV
Bonds Remain
Strong: 8 in 10
H13-49 View***

45% view “frequently”...

*58% of 1st Gen foreign borns
50% of US born 2nd Gens &
33% of US born 3rd+ Gens*



**NOTICIERO
UNIVISION**

*8 in 10 same as in 2020
2023: TVM13/2020: M13 Do you watch traditional Spanish TV channels such as Univision or Telemundo?
BASE: TL HISP RESPONDENTS/ 2023: unweighted base 1,191 Hispanic 13-49s/2020: 820 Hispanics 13-49

Pic Credit: TelevisaUnivision

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आज लिखेंगे कल

**Traditional Asian TV:
5 in 10
13-49 View
20% view “frequently”**



2023: TVM13/2020: M13 Do you watch traditional Asian TV channels such as The Filipino Channel, GMA Pinoy, ETTV, TVB, KBS, MBC, Zee TV, Little Saigon?
BASE: TL AAPI RESPONDENTS/: unweighted base 775 Asian 13-49s PIC CREDIT: ZEE-TV

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Pic Credit: ZEETV

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Hispanic & Asian In-Culture Content Time Split Almost Equally Between English & Language of Heritage (TV/Movies & Online/Virtual Content)

Language of heritage remains an important in-culture connection

	% of In Culture Content Time* Yesterday in...	
	HISP	Asians
English	52%	54%
Language of Heritage or Bilingual	49%	46%

* TV/Movies/Online/Virtual

Language of Heritage: Spanish language for Hispanics & Asian OR Pacific Islander Language of Heritage for AAPIs
2023 OV12: What percent of your online/virtual HISPANIC CONTENT time in the last week, NOT INCLUDING long-form TV/Movies was...in Spanish or bilingual spaces/in English spaces BASE: HISPANCS THAT VISIT HISPANIC IN-CULTURE SPACES: (555 HISP 13-49)
2023 OV17 What percent of your online/virtual ASIAN OR NATIVE PACIFIC ISLANDER CONTENT time in the last week, NOT INCLUDING long-form TV/Movies was... in Asian/Native Pacific Islander language of heritage spaces/in English spaces BASE: AAPIs THAT VISIT AAPI IN-CULTURE SPACES: (180 AAPIs 13-49)

2023 TVM2c//f2018 TVM14a What percent of your Hispanic content time was in...(language choices for TV/Movie content time) Hispanics/Blacks/Asians? BASE: HISPANICS/ASIANS THAT CONSUME IN-CULTURE CONTENT 2023: 950 Hispanics 13-49 (623 18-49s + 327 13-17s)/2022: 1,174 Hispanics 13-49 (808 18-49s + 366 13-17s)

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Pic Credit: Estrella Media

Most Hispanics & Asians Watch English TV/Movies in Spanish or Asian Language Via Sub-Titles or Dubbing

% Watch English Streaming TV/Movie Content in Spanish/Asian Language? (% Yes 13-49)

Hispanics	Asians
82%	63%

42% of ALL Hispanic 13-49 streaming viewing is done in Spanish...34% Asian viewing in Asian language*

*Most Asian language content is already sub-titled in English



TVM5/TVM6 Have you watched English language TV shows/movies from any online streaming apps such as Netflix, Prime Video, Disney+, YouTube etc. using Spanish/Asian language dubbing or sub-titles? /TVM11. What % of your paid or free subscription video viewing to mainstream services such as Netflix, Prime Video, Pluto TV, etc. is in Spanish? [including shows originally in Spanish or non-Spanish shows dubbed/subtitled in Spanish]
TVM12. What % of your paid or free subscription video viewing to services such as Netflix, Prime Video, Pluto TV etc. is in an Asian language? [including shows originally in an Asian language or non-Asian shows dubbed/subtitled in an Asian language] BASE: HISPANICS/ASIANS THAT WATCH ANY PAID OR FREE STREAMING SERVICES: TVM 5/6: unweighted base 1,184 Hispanics 13-49/689 AAPIs 13-49/TVM11/12: 1,174 Hispanics 13-49/675 AAPI 13-49



81% (13-49s) Want Spanish TV Content Sub-Titled in English

Non-Hispanics to explore global content they've been excluded from

Hispanics... to share their cultural content with others; Pride! + enable English dominant Hispanics to culturally connect as well



Ads in an “In-Culture” Content Environment Have More Power, Across Ages & Languages

Most MCs 13-49 agree...ads within “in-culture” content environments make them pay more attention, make them trust the ad more & make them more likely to “try, buy or use” that brand
Asian adults less likely to feel this way than Asian teens & other MC segments

You are on a Hispanic/Black/Asian site, social media or virtual space OR watching Hispanic/Black/Asian TV/Movie content. You see an ad. You...



* IN ENGLISH OR NATIVE LANGUAGE IN-CULTURE CONTENT: % ALMOST IDENTICAL.
R1, R2, R4 series: You are on a Hispanic/Black/Asian site, social media or virtual space OR watching Hispanic/Black/Asian TV/Movie content. You see an ad. You...(pay more attention to the brand or service, trust the brand/service more, are more likely to try, buy or use the brand/service),
BASE: ALL HISPANICS: 1,191 13-49s (791 Adults/400 Teens)/ ALL NHBs: 1,207 13-49s (804 Adults/402 Teens)/ ALL AAPIs: 699 13-49s (567 Adults + 122 Teens)

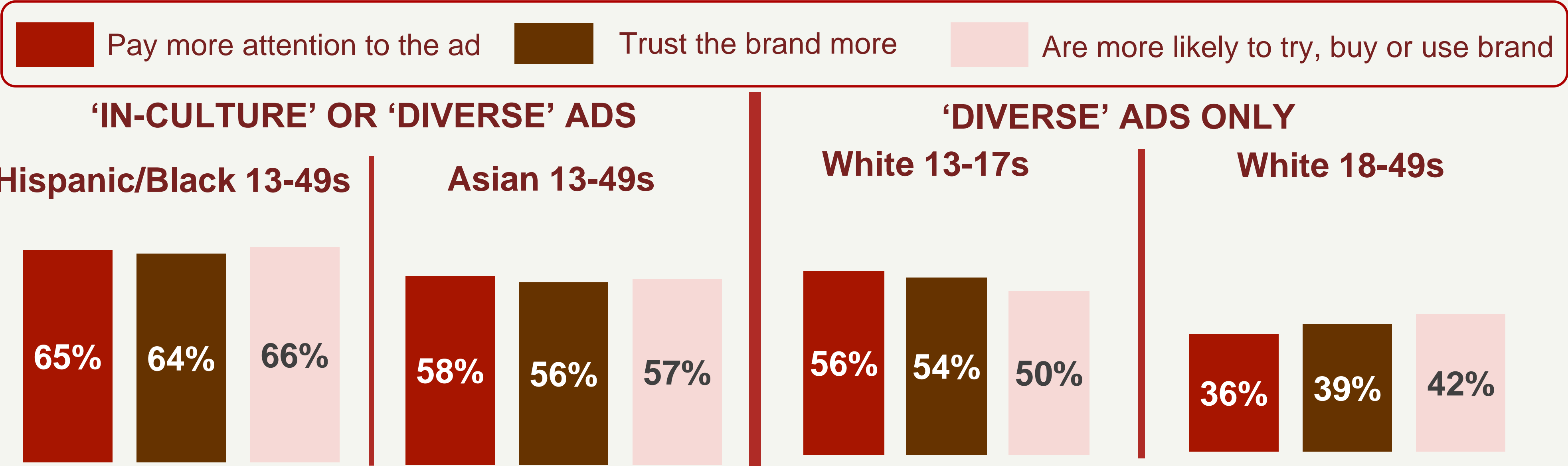
Authentic ‘In-Culture’ &/or ‘Diverse’ Ads

Viewed Outside of ‘In-Culture’ Content Have Power As Well

56%+ of MCs 13-49 agree they pay more attention to these ads, trust the brand more & are more likely to “try, buy or use” that brand... Asians slightly less v Hispanics/Blacks

Diverse ads also have this power with 50%+ white teens...4 in 10 white adults

You are on an English language mainstream site, social media or virtual space OR watching content FOR EVERYONE...You see an ad (definitely & authentically for Hispanics/Blacks/Asians/that authentically portrays Hispanics, Blacks, Asians & NHWs &/or other POCs together) . You...



R3, R5, R8 series: You are on an English language mainstream site, social media or virtual space OR watching content for everyone, not just for Hispanics/Blacks/Asians. You see an ad that is definitely & authentically for Hispanics/Blacks/Asians. You...(pay more attention to the brand or service, trust the brand/service more, are more likely to try, buy or use the brand/service),
BASE: ALL HISPANICS: 1,191 13-49s (791 Adults/400 Teens)/ ALL NHBs: 1,207 13-49s (804 Adults/402 Teens)/ ALL AAPIs: 699 13-49s (567 Adults + 122 Teens)
R9, R10, R11, R12 series: You are in an English language mainstream place for everyone, not just for [Hispanics, Blacks, AAPIs or Whites] , and see an ad that authentically portrays Hispanics, Blacks, Asian-Americans, Whites and/or other people of color together. (On a site, social media/virtual space or watching a TV show/movie) - Do you...(pay more attention to the ad/trust the brand or service more/are you more likely to try, buy, or use the brand/service?
BASE: Same as R3, R5, R8 series + ALL NHWs: 1,127 13-49s (799 Adults + 328 Teens)



Meaningful Insight #3

72% of Us Now Cross “Cultural” Content Worlds Daily

The construct of a “Mainstream” content world (*White/American*) with satellite in-culture & global culture content worlds no longer exists for most 13-49s

Not uncommon for the same person to watch *The Blacklist*, anime, *Snowfall*, *Elite*, *BMF* & *Lupin*

BTW, English only speakers of all cultures expect Spanish & Asian language “in-culture” content to be available via dubbing/sub-titles

- Expect no barriers in 2023’s “Everything, Everywhere, All at Once” content reality

13-49s are increasingly identifying with cultural segments not their own

“I watch The Blacklist...BMF & Power. The Blacklist is more for white people, you know”
Black male Millennial 25-42

“Elite...It’s a Spanish show...It’s like crazy, really good”
Black female Gen Z 16-17

“I think this TV show called Never Have I Ever...the main character...she’s very relatable...she’s Indian”
Hispanic female Gen Z 16-17

6 in 10 13-49s Have Watched a Show in a Language They do Not Speak

57% 55% 63% 62%
WHITES BLACKS HISPANICS ASIANS

5 of Netflix Top 10 non-English series as of 6/23 are Spanish language, 4 are Korean, 1 is French.
72% of 13-49s watch TV Shows/movies featuring a cast/themes about racial/ethnic segment not their own



*Non-AAPI percentages similar to 2020
TVM7,8,9. Many paid/free online TV & movie apps such as Netflix, Amazon Prime Video , YouTube, HULU offer global programming in languages other than a language you speak. Have you ever watched any of these shows? YES BASE: ALL THOSE THAT WATCH PAID OR FREE STREAMING SERVICES unweighted base: 4,314 13-49s (1,191 NHW/1184 NHB/1,174 HISP/765 AAPI)
R20/R21/R22/R24. Do you watch TV shows/movies featuring a cast and themes about a racial or ethnic segment NOT your own such as...(list of shows that vary by segment)? BASE: ALL RESPONDENTS: 4,600 13-49s (3,200 18-49s + 1,200 13-17s)/ Spanish language content

Asian, Black, & Hispanic Segment Content Well Watched

With All 13-49s

8 in 10 watch their own MC segment's content via streaming services
55%+ watch content featuring & about other MC segments

% Watch on Streaming Services (13-49s)

Asian shows* with Asian cast/storyline in English or a foreign language	64% Non-Asians
Black shows* with Black cast/storyline	66% Non-Blacks
Hispanic shows* with Hispanic cast/storyline in English or Spanish	55% Non-Hispanics

* PRODUCED IN U.S. OR ELSEWHERE (OVERSEAS OR LATIN AMERICA ETC.)

TVM10-01. Do you watch any of the following types of shows on streaming services such as Netflix, Prime Video, HULU, Disney + etc. and/or YouTube? - Asian shows produced in the U.S. or overseas with an Asian cast & storyline, in English or a foreign language?
TVM10-02. Do you watch any of the following types of shows on streaming services such as Netflix, Prime Video, HULU, Disney + etc. and/or YouTube? - Black shows produced in the U.S. or elsewhere with a Black cast & storyline, in English or a foreign language?
TVM10-03. Do you watch any of the following types of shows on streaming services such as Netflix, Prime Video, HULU, Disney + etc. and/or YouTube? - Hispanic/Latino shows produced in the U.S. or in Latin America with a Hispanic/Latino cast & storyline, in English or in Spanish?
BASE: ALL RESPONDENTS 4,600 13-49s (3,200 18-49s + 1,400 13-17s)

EVERYTHING EVERYWHERE ALL AT ONCE VIDEO



Meaningful Insight #4

Perception Does Not Always Match Reality in Representation

58% of 13-49 respondents believe that Blacks, Hispanics, & Asians are not yet properly represented in advertising & TV/movie content

Also believe each MC segment is equally underrepresented

Reality Check: Hispanics Are Most Shamefully Under-Represented...Followed by Asians

% Of Scripted Lead Roles
(2023 UCLA Hollywood Diversity Report)

	% TI. Pop.	% TV Leads	% Film Leads
NH White	56%	65%	73%
NH Black	13%	16%	11%
Hispanic	19%	4%	4%
NH Asian	7%	3%	2%

80% of film directors, 84% of writers are white
TV fares better...66% of directors, 62% of writers are white

2023 R 12, 14 & 15 series: When it comes to Black/Hispanic/Asian representation in advertising/full length TV shows & movies overall, do you believe there is still a long way to go or room for improvement ...? - In casting, in authentic representation, in positive portrayals 2020 QM1A: When it comes to African-American/Hispanic representation in advertising/full length TV shows& movies or music do you believe there is still a long way to go or room for improvement?
BASE: ALL RESPONDENTS: 2023: 4,600 13-49s (3,200 adults + 1,400 teens)/2020: 2,418 13-49s (1,220 adults/1,198 teens)



Pic Credit: BigStock Photo

Respondents Gave TV Services Letter Grades (A-F) on Having Authentic Diverse & Inclusive Content for ALL. They Were Easy Graders!

The average channel got an A or B grade from 67% of 13-49 respondents

Only 2 TV services got an A grade from over 50%... Netflix (55%) & YouTube (53%)

Top Performers 70%+ A/B Grade

Netflix	80%
YouTube	80%
YouTube TV	74%
Disney+	73%
Prime Video	73%
HULU	72%
MAX	72%

Lowest performers (A/B grade): ROKU Channel (65%) Showtime (64%), Tubi (62%), Starz & Pluto (60%), FREEVEE (58%), Crackle & VUDU (56%)
R16. Please give a letter grade to each TV service/platform choice below, that you watch, on having diverse and inclusive content for ALL races & ethnicities BASE: ALL RESPONDENTS: 4,600 13-49s (3,200 18-49s + 1,200 13-17s)



EL AMOR INVENCIBLE



Pic Credit: Televisa/Univision

MCs Gave Letter Grades (A-F) on Culturally Relevant Content for Their Race/Ethnicity

Again, Netflix & YouTube led
Asians tougher graders: 56% A/B v 70% 'ish Blacks/Hispanics
Among MC channels, Univision (#3) & BET (#7) tops @ 75%
• ALLBLK, Telemundo & Sling TV Asian channels also fared well

Blacks	Hispanics	Asians
Avg. A/B 71%	Avg. A/B 69%	Avg. A/B 56%
Netflix 80%	Netflix 80%	YouTube 76%
YouTube 80%	YouTube 80%	Netflix 73%
Prime Video 76%	Univision 75%	HULU 66%
HULU 76%	Prime Video 75%	Prime Video 65%
Disney+ 75%	HULU 75%	Disney+ 64%
BET 75%	YouTube TV 74%	YouTube TV 63%
ALLBLK 74%	Disney+ 73%	Sling TV Asian Channels 60%
YouTube TV 74%	Telemundo 72%	Discovery+ 59%

Other Hispanic channels 13-49%: Pantaya (66%, Vix (64%), Vix+ (63%), Canela Media (61%)
Other AAPI channels 13-49 %: Filipino Channel *57%), GMA Pinoy (56%), VIKI (56%), KBS (55% - 60% Teens), Little Saigon (54%), MBC (54% - 70% Teens), TVB (53%), ZEE TV (51%), IQIYI (50% - 60% Teens), ODK (50%), KOKOWA (49%), ETTV (47%)
R16a. Please give a letter grade to each TV service/platform choice below, that you watch, on having culturally relevant content for MY race/ethnicity
BASE: ALL BLK, HISP & AAPI RESPONDENTS that have watched the channel Base varies by channel.

DIVERSITY IN CONTENT VIDEO

Meaningful Insight #5

Most 13-49s Spend Time in the Metaverse, Even if Clueless

What It Is

Only 1 Millennial (Mike) could say what it is
Quant: 2 reasons to spend time there;
playing games & socializing

- Qual, another; unique entertainment experiences you can't do easily elsewhere (e.g. 2023 Coachella)

The metaverse skews white

Users influenced by metaverse brand experiences

Most participate in culturally themed experiences

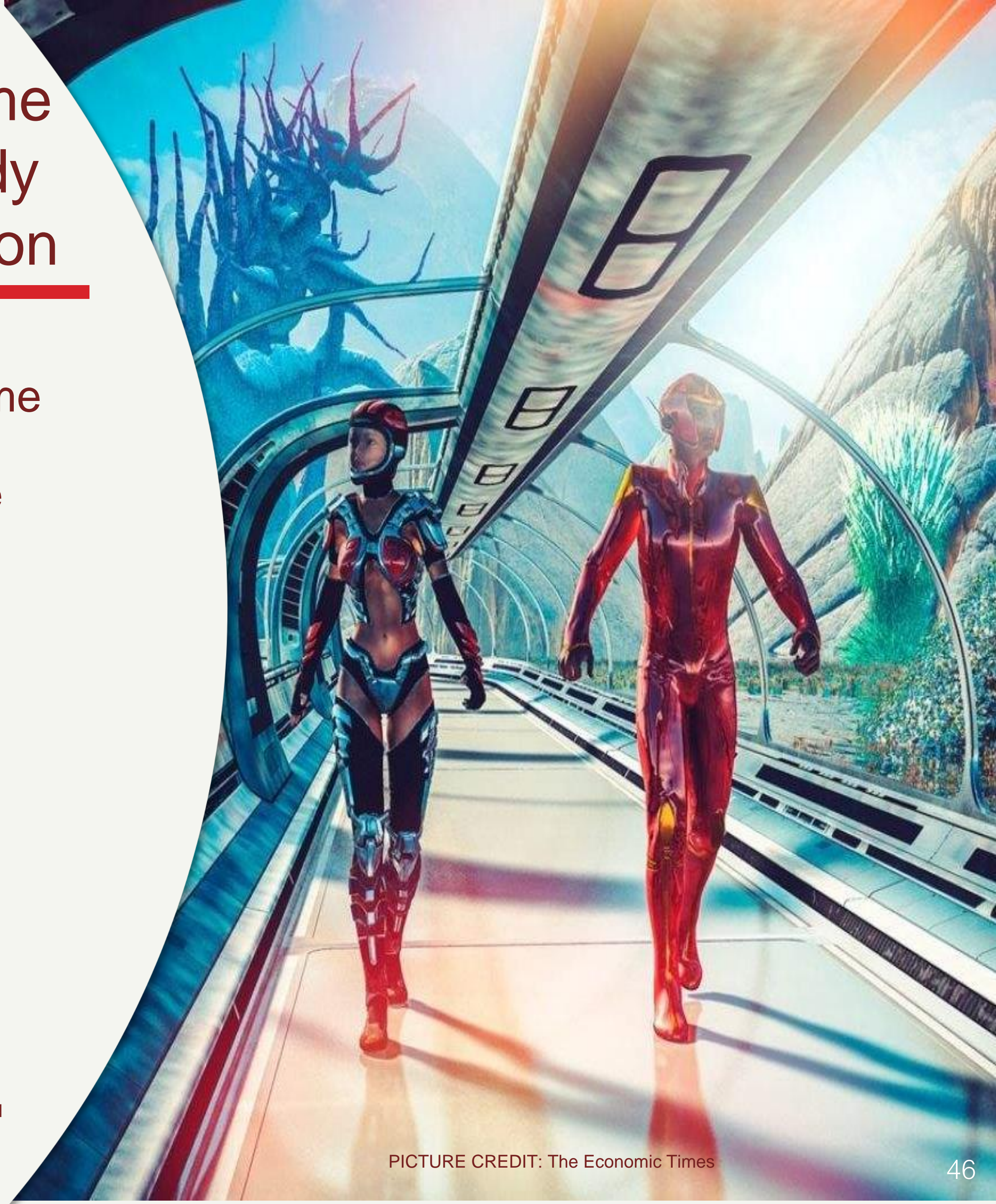


44% of Adults, 55% of Teens Spend Time in the Metaverse, Even If Almost Nobody Knows What It Is – Until Given Description

Only 25% of Asian adults

In qual, most thought the Metaverse was just a new name for Facebook

- When provided a description, many realize they ARE in the metaverse primarily for playing games & socializing



**“THE METAVERSE...NOBODY KNOWS BUT MIKE”
&
“MIKE EXPLAINS THE METAVERSE”**

Most Metaverse Platforms Users Skew White, Especially Decentraland

Except Asians (19%),The Sandbox almost equally diverse amongst Whites, Blacks & Hispanics (37%/38%/33% respectively)

- Asians less likely to use many platforms

Fortnite & Roblox leading platforms in 2023

Metaverse Platforms Spend Time In 13-49s (% of Metaverse Users)

	Whites	Non-Whites	Non-White Index
Fortnite	62%	55%	89
Roblox	57%	45%	79
Discord	43%	28%	65
Horizon Worlds	39%	24%	62
The Sandbox	37%	30%	81
Decentraland	26%	12%	46

WELCOME TO
ROBLOX





$\frac{3}{4}$ of Metaverse Visitors Shop & Interact With Brand Experiences That Influence What They “Try, Buy, Use” in Real Life

True, all segments except Asian adults – 6 in 10

- Asian teens shop/interact with brands similar to non-Asians (8 in 10)
- More like Asian adult counterparts re: being influenced to “try, buy, use” a brand (6 in 10)

Have Done in Metaverse...	TOTAL 13-49s	Asian 13-17s	Asian 18-49s
Shopped	75%	80%	60%
Interacted With a Brand	76%	80%	54%
Been Influenced re: Brands “I try, buy, use”	75%	63%	58%

2023 OV4: Have you shopped for something on a metaverse platform? OV5: Have you interacted with a brand in a metaverse virtual world (such as Walmart’s Walmart Land or West Elm’s virtual furniture store/merch boutique or any other brand)? OV6: Have your experiences in a metaverse virtual world influenced the brands you try, buy, or use in real life?
2023 BASE: THOSE SPENDING TIME IN A VIRTUAL WORLD: 1,987 13-49s (1,264 18-49s + 723 13-17s)

MCs & Teens Most Likely to Participate in Culturally Themed Metaverse Experiences

White adults the least, yet half do

81%	74%	72%	50%
MC	MC	Whites	Whites
13-17	18-49	13-17	18-49

Gen Z teens more likely to participate in cultural experiences not of their own segment v adults





TIME HAS RUN OUT

MC majority has matured into the 18-34 adult demo & soon, the <50 demographic

- If not already focused on MC marketing literacy, hurry...or risk your brand's relevancy

There's power in "in-culture" advertising, marketing & content...in diverse/inclusive content & marketing when done 'right'

The concept of an American/White mainstream & satellite in-culture content worlds is blurring as people expect access to all forms of cultural content

- Hispanics & Asians most shamefully underrepresented segments in film/tv industry

GenZ lives in the public spotlight

- Know it, adjust to it, use it & expect brands to do so as well

Growth of dumb phones, MP3 players, portable gaming devices reflects nostalgia trend + other factors

- Increasing smartphone-free zones & mental health reasons



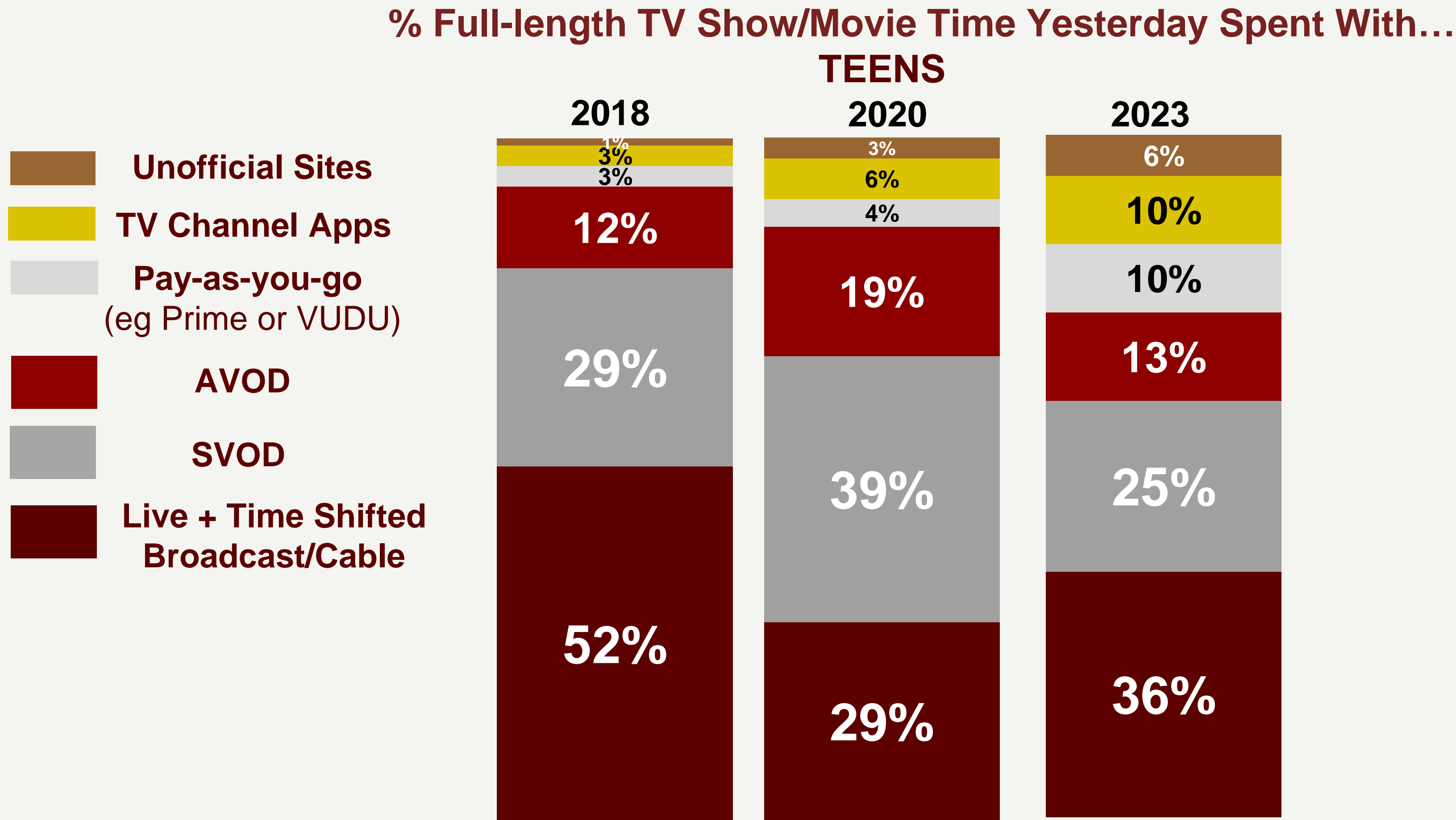
THANK YOU

For questions contact us at
info@hispanicmarketingcouncil.org

APPENDIX

Teen Broadcast/Cable Yesterday Viewing Up +24% v. '20

Teen SVOD & AVOD viewing down v '20 (-36%/-32% respectively) cannibalized by PAYG, channel apps & unofficial sites.



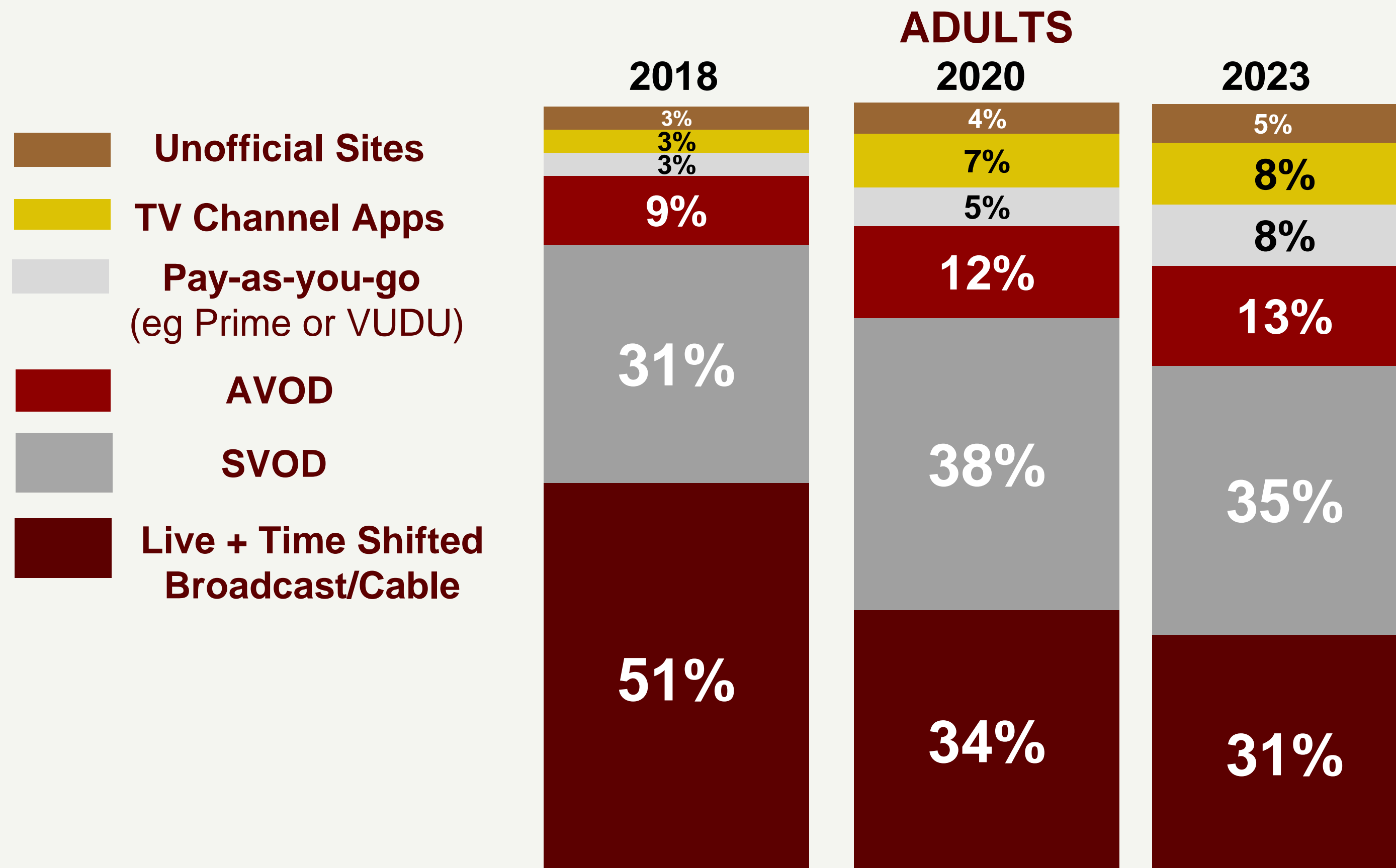
2023: TVM2/2020: TVM1a/2018: TVM8 Think about the full-length TV shows or movies you watched YESTERDAY, on any device. What % of your full-length TV show/movie time was spent with...
BASE: ALL RESPONDENTS: 2023: 4,600 13-49s (3,200 18-49s + 1,200 13-17s)/2020: 2,418 13-49s (1198 13-17s + 1220 25-49s)2018: 3,484 13-49s (2,393 18-49s + 1091 13-17s)

Adult Broadcast/Cable Yesterday Viewing Continued Decline '20 to '23 (-9%)... However, Slowing vs. -33% '20 v '18

Pay as you go options had biggest growth '20 to '23 (+60%)

SVOD -8% v '20 & TV channel apps, AVOD + unofficial sites relatively flat.

% Full-length TV Show/Movie Time Yesterday Spent With...



2023: TVM2/2020: TVM1a/2018: TVM8 Think about the full-length TV shows or movies you watched YESTERDAY, on any device. What % of your full-length TV show/movie time was spent with...
BASE: ALL RESPONDENTS: 2023: 4,600 13-49s (3,200 18-49s + 1,200 13-17s)/2020: 2,418 13-49s (1,198 13-17s + 1,220 25-49s) 2018: 3,484 13-49s (2,393 18-49s + 1,091 13-17s)

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4 in 10 Black & Hispanic 13-49s Visit Online/Virtual In-Culture Spaces (3 in 10 Asians)

Those visiting, spend about ½ their online/virtual time there, Hispanics slightly more:

Hispanics	Blacks	Asians
56%	51%	49%

*excluding long form TV/movie content

2023 OV10, OV13, OV15 Do you visit online, virtual or Metaverse spaces [NOT including long-form TV/Movies] with content specifically for... (OV10: Hispanics in Spanish, English or a mix of languages?) (OV13: Blacks such as BET, Huff Post's Black Voices , The Root or The Grio?) (OV15: Asians or Native Pacific Islanders in any language...Asian language, bilingual or English?)

BASE: ALL RESPONDENTS: 4,600 13-49s (3,200 18-49s + 1,200 13-17s)

2023 OV11, OV14, OV16 What % of your online/virtual space time in the last week, across any device was ...? (OV11: In Hispanic, Spanish, bi-lingual or English language Hispanic content) (OV14: in Black content?) (OV16: In Asian or Native Pacific Islander content, in any language...Asian language, bilingual or English?) NOT including streaming long-form TV/Movie content) - Average Allocation Summary UNWEIGHTED BASE: THOSE THAT VISIT IN-CULTURE SPACES: 1,271 MC 13-49s (562 Hispanics, 522 NHBs, 187 AAPIs)

NETFLIX

**While Influencers #1
Way to Discover New
TV/Movie Content...
There Are Other
Popular Ways, Too!**

**#2: TV/Movie Trailers
#3: YouTube**

SEASON 2 TRAILER

N SERIES
WEDNESDAY

Pic Credit: YouTube

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