DECONSTRUCTING DIVERSITY TODAY
IDENTITY AND CULTURE TO STRENGTHEN CONNECTIONS
Introduction

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NBCU Ad Sales & Partnerships
NBCUniversal’s Investment In Understanding The Connection With Hispanic & Multicultural Consumers

Creative In-Language
Prove that CultureFirstTM Ads drive connection, brand sentiment, and purchase intent

Purchase Power
Prove the value of SLTV through viewership and transaction data

New Majority
Galvanize Group M clients and industry on multicultural growth

COVID-19 Exploration
Assess consumer response to the COVID-19 crisis and measure impact on media consumption

Media ROI
Prove that advertising in Spanish-language TV drives sales

Value of Culture
Measure the impact of culture in advertising and programming and its correlation to sales

nielsen

2017/2018

2018

2019/20

2019/20

2019/20

2020/21

2021

The Influence of Culture in daily life including viewing habits. Latinos celebrating and blending 2 cultures to live a life of 200%er. 200%ers purchasing behavior and influencers across key categories.

Deconstructing Diversity Today
Challenges the Traditional Diversity Paradigm and Uncovers the Role that Brands Should Play in Connecting with People Culturally
In 2018, we uncovered that the total market strategy is an oversimplification of marketing.

Ads tailored for the masses fall short for Hispanic/Latino audiences.

Ads customized for specific cultural groups have a powerful impact on brand KPIs.
Going Deeper

A SHARED COMMITMENT TO LEARNING

1. To truly connect with people on a cultural level, we need to understand identity and diversity among a broader audience.

2. We also wanted to understand what role, if any, brands should play in culture.
The Methodology

ONLINE SURVEY
Participants Recruited From a Nationally Representative Online Panel

Total: n=3,503
White: n=1,199
Hispanic/Latino: n=830;
Black/AA: n=988
Asian/Pacific Islander: n=486

Extensive Recruitment:
n=1,500 multicultural booster sample
n=697 who identify as LGBTQ+
n=833 who identified as having a mental/physical disability

Offered Survey in English & Spanish
(19% of Hispanic/Latino chose Spanish)

The Quantitative

DIGITAL INTERVIEWS
Recruited Participants For One-on-One Interviews and Focus Groups

Total: n=15
In-depth Interviews: n=9
Focus Groups: n=6

Moderator Self-identified as Key Cohort
Participants Were Either White, Mixed Race White, Black/AA or Hispanic/Latino
3 Identified As LGBTQ+
2 Identified As Having A Disability

The Qualitative
We challenged ourselves to learn more about diversity, beyond traditional paradigms.
Components of Self-Identity

INHERITED – A BUILDING BLOCK FOR CULTURE
HERITAGE: Range of culture, values, and traditions inherited or passed down from previous generations. It represents one’s history and identity.

INCORPORATES PERSONAL CHOICE
CULTURE: Set of beliefs, values, and practices of a particular group of people. Unlike heritage, culture does not need to be passed down between generations, and can change with time.

BEYOND ONESELF
CULTURAL CURIOSITY: Desire to learn more about cultures other than one’s own.
Identity today offers the freedom to choose

Identity isn’t just the traditional labels ascribed to us, it’s also what we decide we are.

<table>
<thead>
<tr>
<th>AUDIENCE</th>
<th>AVG # OF IDENTITY GROUPS</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total Population</td>
<td>8 identity groups</td>
</tr>
<tr>
<td>White</td>
<td>9 identity groups</td>
</tr>
<tr>
<td>Hispanic/Latino</td>
<td>9 identity groups</td>
</tr>
</tbody>
</table>

AGE GROUP
OCCUPATION
CLASS STATUS
DISABILITY
GENDER IDENTIFICATION
LANGUAGE(S)
NATIONALITY
REGION
PHYSICAL ABILITIES
COGNITIVE ABILITIES
POLITICAL VIEWS
RACE/ETHNICITY
RELIGION/SPIRITUALITY
SEXUAL ORIENTATION
HOBBIES
CULTURAL TRADITIONS
EDUCATIONAL BACKGROUND
HEALTH STATUS
MY FAMILY
etc.
Hispanic/Latino audiences have particularly strong attachments to people of their race/ethnicity.

**Identification with “People of My Race/Ethnicity”**

Scale (0-5) - Rated 4 or 5

<table>
<thead>
<tr>
<th>Group</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>White</td>
<td>47%</td>
</tr>
<tr>
<td>Hispanic/Latino</td>
<td>58%</td>
</tr>
<tr>
<td>Total Pop</td>
<td>50%</td>
</tr>
</tbody>
</table>
There’s naturally more to identity than race/ethnicity, including family, language and beyond

Family is the most common identity group across all races/ethnicities

**TOP 10 SELF-IDENTIFIED GROUPS (Scale 0-5 - Rated 4 Or 5):**

<table>
<thead>
<tr>
<th>Category</th>
<th>WHITE</th>
<th>HISPANIC/LATINO</th>
</tr>
</thead>
<tbody>
<tr>
<td>Family</td>
<td>65%</td>
<td>68%</td>
</tr>
<tr>
<td>Language</td>
<td>57%</td>
<td>61%</td>
</tr>
<tr>
<td>Disability</td>
<td>56%</td>
<td>58%</td>
</tr>
<tr>
<td>Hobbies</td>
<td>55%</td>
<td></td>
</tr>
<tr>
<td>Gender</td>
<td>51%</td>
<td></td>
</tr>
<tr>
<td>Sexual Orientation</td>
<td>50%</td>
<td></td>
</tr>
<tr>
<td>Age</td>
<td>50%</td>
<td></td>
</tr>
<tr>
<td>Cognitive Abilities</td>
<td>49%</td>
<td></td>
</tr>
<tr>
<td>Political Views</td>
<td>48%</td>
<td></td>
</tr>
<tr>
<td>Race/Ethnicity</td>
<td>47%</td>
<td></td>
</tr>
</tbody>
</table>

Hispanic/Latino n=830

0: On a scale of 0 to 5, how strong would you say your attachment is to the following groups? (0: I don’t identify with people from this group at all; 5: I identify with people from this group very strongly)
Cultural curiosity is ubiquitous and largely driven by the desire for personal growth.

People not only want to connect with their own identity groups, but also with other cultures.

OVER
9 in 10
HAVE A STRONG DESIRE
TO CONNECT WITH
OTHER CULTURES

DRIVERS OF CULTURAL CURIOSITY: TOTAL POP - % Selected

<table>
<thead>
<tr>
<th>Personal Growth</th>
<th>Total Pop</th>
<th>White</th>
<th>Hispanic/Latino</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>60%</td>
<td>61%</td>
<td>63%</td>
</tr>
</tbody>
</table>

*Traditional Culture: Food, history, traditions, certain activities (e.g. dancing)
**Personal Growth: General fascination, to understand the world, my career/job, to expand my mind, to make the world better, to understand myself, lack of diverse community, my civic duty

Total Pop n=3,503
Q: Which of the following drives your curiosity to connect with cultures other than your own? Select all that apply.
MEDIA AS A CULTURAL RESOURCE
People are actively connecting with their identity, and in many different ways.

WAYS PEOPLE CONNECT WITH SELF-IDENTITY – Size based on % selected

I connect with my personal identity through...

“

music  events/celebrations
traditions  arts
movies  fashion
language  sports
clubs/organizations  family
religion  literature
literature  work/job
classrooms/school  travel
friends  food
TV shows  social trends
workshops/training  social media

Total Pop n=3,503
Q: In what ways do you connect/engage with your personal identity? I connect with my personal identity through...
Media serves as an important source of inspiration for cultural curiosity as well

DRIVERS OF CULTURAL CURIOSITY: % Selected
Based on responses to broad types of media

61%, Hispanic/Latino
53%, Total Pop
51%, White

NET SCORE

DRIVERS OF CULTURAL CURIOSITY: HISPANIC/LATINO - % Selected

<table>
<thead>
<tr>
<th>Media Content</th>
<th>% Selected</th>
</tr>
</thead>
<tbody>
<tr>
<td>Music</td>
<td>42%</td>
</tr>
<tr>
<td>Movies</td>
<td>35%</td>
</tr>
<tr>
<td>Arts</td>
<td>28%</td>
</tr>
<tr>
<td>Sports</td>
<td>22%</td>
</tr>
</tbody>
</table>

*Traditional Culture: Food, history, traditions, certain activities (e.g. dancing)
*Media Content: Music, movies, arts, sports
Total Pop n=3,503
Q: Which of the following drives your curiosity to connect with cultures other than your own? Select all that apply.
Media also serves as a resource to satisfy cultural curiosities

USE OF MEDIA TO AS WAY TO SATISFY CULTURAL CURIOSITY - % Selected

61% Total Pop
Top media-related way to satisfy cultural curiosity is listening to music, followed by watching TV shows and movies

60% White

66% Hispanic/Latino

*Media Ways: Following influencers, Following blogs or channels, listening to music, sharing content online, watching TV shows/films/documentaries, watching news. Total Pop n=3,503
Q: How do you satisfy this curiosity to connect with cultures other than your own? Select all that apply.
Using media to connect with the building blocks of culture – their personal heritage – is most prevalent among Hispanic/Latino audiences.

**USE OF MEDIA TO CONNECT TO PERSONAL HERITAGE**
BASED ON RESPONSES TO SPECIFIC TYPES OF MEDIA (SHORT VIDEO CLIPS, FULL EPISODES OF TV SHOWS, SOCIAL MEDIA, PHOTOGRAPHY ETC.)

- **Visual Media**: Short video clips, music videos, full episodes of TV shows, movies, photography, social media
- **Non-visual Media**: Books, articles, podcasts, digital radio, traditional radio

Total Pop n=3,503

Q: How much do you agree or disagree that you watch, view, read, or listen to the following to connect with your heritage? Select one for each option.

- **White**
  - 72%

- **Hispanic/Latino**
  - 89%

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*Visual Media*: Short video clips, music videos, full episodes of TV shows, movies, photography, social media

**Non-visual Media**: Books, articles, podcasts, digital radio, traditional radio

Total Pop n=3,503

Q: How much do you agree or disagree that you watch, view, read, or listen to the following to connect with your heritage? Select one for each option.
And Spanish Language Content Plays an Essential Role for Hispanic/Latino Audiences

8 in 10 Bilingual Hispanics Are Choosing In-Language Culturally Relevant Content

200%ers® Rely on Telemundo and Endemic Media to Keep Themselves and Their Families Informed, Educated and Connected

200%ers® is a term established by NBCUniversal Telemundo Enterprises. Hispanics 200%ers® are 100% American and 100% Hispanic. They share the values of both cultures, are bilingual, and flawlessly jump between cultures.

BRANDS x CULTURE

THE OPPORTUNITY
Brand involvement in satisfying strong cultural curiosities is an expectation

Brand involvement is especially important for those who have the strongest attachments with their own race/ethnicity

PERCEIVED ROLE OF BRANDS IN SATISFYING CULTURAL CURIOSITY
% Strongly/Somewhat Agree

- Identifies Strongly With Their Race/Ethnicity

White n=1,199, Hispanic/Latino n=830, Black/AA n=988, Asian/Pacific Islander n=486

Q: How much do you agree or disagree that companies should play a role in satisfying people’s curiosity about cultures in general?
Plenty of opportunity for brands to play a role in satisfying the need for culture

**BRAND PERCEPTIONS**

<table>
<thead>
<tr>
<th>Companies Aren’t Doing This At All</th>
<th>Bad Job</th>
<th>OK Job</th>
<th>Good Job</th>
</tr>
</thead>
</table>

**How are most companies in general doing when it comes to...**

<table>
<thead>
<tr>
<th>Helping you connect to groups you identify with</th>
<th>Helping you connect with your heritage</th>
<th>Helping you connect to/understand other cultures/groups</th>
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<tr>
<td>39%</td>
<td>42%</td>
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<tr>
<td>39%</td>
<td>41%</td>
<td>32%</td>
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<tr>
<td>41%</td>
<td>43%</td>
<td>41%</td>
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<td>42%</td>
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White n=1,199, Hispanic/Latino n=830, Black/AA n=988, Asian/Pacific Islander n=486

Q: How are most companies in general doing when it comes to (helping you connect to groups you identify with, helping you connect to/understand other cultures/groups, helping you connect with your heritage)?
Brands should focus on media representation just as much as company positioning

WAYS BRANDS SHOULD GET INVOLVED: % Very/Somewhat Important

- Media Representation
- Company Positioning

Race/Ethnicity

<table>
<thead>
<tr>
<th></th>
<th>Tot Pop</th>
<th>White</th>
<th>Hispanic</th>
</tr>
</thead>
<tbody>
<tr>
<td>Media Rep.</td>
<td>80%</td>
<td>79%</td>
<td>82%</td>
</tr>
<tr>
<td>Co. Pos.</td>
<td>84%</td>
<td>81%</td>
<td>89%</td>
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Media Representation

1. Avoid stereotypes
2. Ensure an authentic image is portrayed
3. Ensure proper representation of diverse actors/actresses
Margie

“I think it’s so important to be represented everywhere and in every aspect of this place, this world, because representation matters.”

Jacob

“When they stopped portraying Latino & Black people as criminals, it was a breath of fresh air... It makes you feel a bit better.”

Vince

“Don’t just harp on the oldest stereotype...we all know a little better, whether it’s an old stereotype or a new one. Have them be individuals and have it be more natural.”

Being seen and heard in media has the power to make people feel good

Qualitative Interviews n=15
NBCU/Telemundo Proprietary 200%ers Study, 2020
When brands get it right, people are more open to brand messages.

**OPENNESS TO ADS DURING TV SHOW/MOVIE CONSUMPTION**
% Strongly/Somewhat Agree

- **Brands are doing a “bad job” in helping you connect to groups you identify with**
- **Brands are doing a “good job” in helping you connect to groups you identify with**

**MORE OPEN TO ADS**

81%

**LESS OPEN TO ADS**

41% +40% pts.
CultureFirst™ ads connect to Hispanic consumers’ identity far beyond total market ads

Culture Enhances Brand Perceptions / Opinion - Audience | Impact of Ad Strategy on Cultural Connection

The following types of ads “connect to my heritage / culture” - % of Hispanics who agree that

- 40% Total Market Ad
- 50% CultureFirst™ Ad on English-Language
- 63% CultureFirst™ Ad on Spanish-Language

Source: Proprietary NBCUniversal and MAGNA Media Lab Study, The Total Market Fallacy: Using In-Culture Marketing To Drive Your Growth With Hispanics, March 2018
And These connections drive stronger emotions for CultureFirst™ ads

AUDIENCE | Impact of Ad Strategy on Emotion

Indexed to Emotional Response of General Population to Total Market Ads (Lift %)

Stronger emotional response to ads

Source: Proprietary NBCUniversal and MAGNA Media Lab Study, The Total Market Fallacy: Using In-Culture Marketing To Drive Your Growth With Hispanics, March 2018
Gen Pop Audience: Total Market Ad n=79, Hispanic Booster: Total Market Ad n=194, CultureFirst™ Ad n=82
And These connections drive stronger emotions for CultureFirst™ ads

AUDIENCE | Impact of Ad Strategy on Emotion

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<th>AUDIENCE</th>
<th>Impact of Ad Strategy on Emotion</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total Market Ad Among Gen Pop</td>
<td>Total Market Ad Among Hispanics</td>
</tr>
</tbody>
</table>

Indexed to Emotional Response of General Population to Total Market Ads (Lift %)

Stronger emotional response to ads

13% STRONGER
Hispanics have a stronger emotional response to CultureFirst™ ads compared to Total Market ads

INDEX 100%  INDEX 100%  INDEX 100%

Source: Proprietary NBCUniversal and MAGNA Media Lab Study, The Total Market Fallacy: Using In-Culture Marketing To Drive Your Growth With Hispanics, March 2018
Gen Pop Audience: Total Market Ad n=79, Hispanic Booster: Total Market Ad n=194, CultureFirst™ Ad n=82
Leading to greater brand impact

Path Model For CultureFirst™ Ads

STEP 1
Exposure to CultureFirst™ Ad

+17%

STEP 2
Ad is “Connected to my Culture”

+27%

STEP 3
Improved feelings toward the brand – “Brand I Trust”

+27%

STEP 4
Purchase Intent

Source: Proprietary NBCUniversal and MAGNA Media Lab Study, The Total Market Fallacy: Using In-Culture Marketing To Drive Your Growth With Hispanics, March 2018
Estimates from linear probability model multivariate regression models with covariates indicated. Arrows indicate independent correlations. All relationships statistically significant at >=95% confidence. N=2,413
WHAT NOW?

Keys to driving cultural engagement

Brands should invest in celebrating the richness of multicultural audiences

To succeed, share this research with your clients and creative agencies to ensure accountability

Confirm that your advertising content authentically portrays multicultural audiences

Ensure clients do not appear in environments that are furthering stereotypes