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Diverse by design:

Strategies for embracing diverse-owned and diverse-representative ad spending

Welcome

Reaching the right audience is at the core of every marketer's media planning strategy, but the explosion of content across platforms and channels poses advertising challenges that didn't exist when programming was centralized and linear. This is particularly true for media buyers looking to engage with specific audiences.

Diverse-owned media plays a critical role here, but premium original content presents new opportunities for media buyers looking to be more inclusive with their ad spending. Identifying specific opportunities can be challenging, however, as U.S. audiences had more than 1.1 million unique video titles[1] across linear channels and streaming services to choose from at the start of this year. That's up from just 656k at the start of 2020.

This abundance of content also tends to overshadow the increasing inclusivity that has taken place in recent years. The average inclusivity levels in new content, for example, don't change much across linear, cable and streaming programming on a year-over-year basis.

Progress is much easier to see at the individual channel level.

[1] Gracenote Global Video Data

The average share of cast[2] for Asian and Pacific Islanders in broadcast programming, for example, increased from 5% in 2022 to 5.2% in 2023. While informative, averages like these hide true ad buying opportunities. Within NBC programming, the share of cast for Asian and Pacific Islanders increased from 5% to just under 8% last year, which is higher than this group's percentage of the U.S. population (6.8%).

Media companies have an expanding realm of inclusive TV programming for the 97.5% of their budgets that is not spent on diverse-owned media

By itself, aggregated and averaged inclusion data doesn't specify how inclusive programming is with respect to the U.S. population. The share of cast among Black talent on Apple TV+ in 2023, for example, was just under 21%. While important as a stand-alone stat, this percentage becomes more impressive when you factor in that the U.S. Black population is just under 15%.
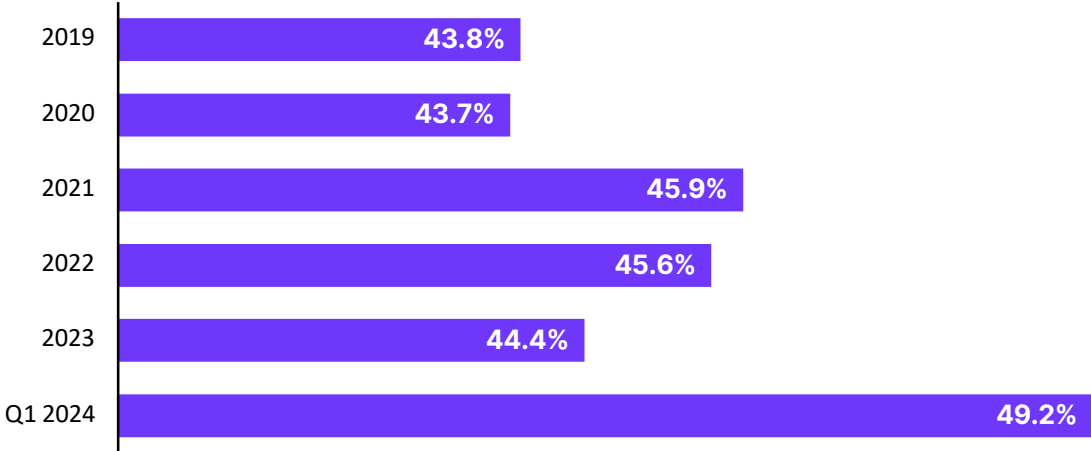
The correlation with the U.S. population is critical, as it forms the basis for representative inclusivity. And while we do see many examples of how popular TV programming has become more inclusive in recent years, inclusion data shows that representation levels of many identity groups remain lower than their U.S. population percentages. This is most noteworthy for women, who account for approximately 51% of the U.S. population. Across broadcast, cable and streaming TV, however, their share of cast is just 40%.

[2] The percentage of an identity group that is part of a program's recurring cast members.

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Importantly, there are many examples of programs that are more inclusive, and those insights can help ad buyers that are looking to be more inclusive of women with their spending. 2023 programming on Telemundo, HGTV, the Food Network and Disney, for example, boasts women-inclusive share of cast percentages that are above the average: 67%, 53%, 50% and 47%, respectively.

And despite the nominal year-over-year changes across all TV, content inclusive of women on broadcast channels has increased significantly since 2019.

Inclusivity of women in broadcast TV programming
2019-Q1 2024

Year	Percentage
2019	43.8%
2020	43.7%
2021	45.9%
2022	45.6%
2023	44.4%
Q1 2024	49.2%

Source: Gracenote Inclusion Analytics.

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Perhaps more notable than inclusion, however, is the strikingly low investment from brands in content that's inclusive of women. In 2023, for example, only 2.4% of brands invested in linear TV programming in which women accounted for at least 51% of the primary cast (i.e., at parity with the U.S. population).

Investing in women-inclusive content

	Female
Percent of brands that spend above UE	2.4%
Female share of cast on linear TV	38.2%
No. of brands that spend above share of cast	230
Percent of brands that spend above share of cast	15.07%
Total brands	1,526

Read as: 2.4% of brands invest in content that is inclusive of women (i.e., the share of cast is equal or higher than the U.S. population percentage for women)

UE: Universe estimate.
Share of cast: The percentage of an identity group that is part of a program's recurring cast members.
Source: Inclusive Ad Spend (Gracenote Inclusion Analytics and Nielsen Ad intel), 2023

Brand investment in women-inclusive TV content is lowest among all identity groups

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Tracking media investments and identifying new inclusive opportunities

From a more traditional inclusive spending perspective, investment in diverse-owned media is on the rise. The ANA's Alliance for Inclusive Multicultural Marketing (AIMM) reported investment of 2.5% from the largest media holding companies in 2023, up from 2.2% in 2022. Percentage allocations aside, however, the reality is that the $1.9 billion in diverse-owned media spending[3] last year falls far short of any level that would be representative of the increasing diversity of the U.S. population.

> Brands that deeply resonate with diverse audiences through a dual strategy of investing in diverse-owned targeted media and diverse-featured content don't just win hearts; they lift returns by tapping into the power of affinity and culture. For brands, it's not just about reaching; it's about forging authentic connections that lift brand opinion, trust, and impact.
>
> **--Carlos Santiago, Co-founder ANA AIMM**

Given the increasing diversity of creators, writers, directors and talent, however, media buyers can approach their diverse spending more holistically to both enhance their reach and connect more meaningfully with broader audiences. By increasing their investment in diverse representative media, brands can maximize their engagement and fulfill their commitments to diversity and inclusivity at scale.

[3] Diverse-owned media ad spend research; AIMM in partnership with MAVEN and Media Framework (formerly Standard Media Index)

When programming is both popular and diverse (e.g., NBC's *Chicago Fire*, FX's *Shogun* and FOX's *9-1-1*), it becomes both reflective of the broader society we live in and appealing from a media investment perspective. While no single network or streaming service features programming that is fully representative of the U.S. population, data from Gracenote Inclusion Analytics highlights where inclusivity for individual identity groups is highest.

Across networks and services, the ones that feature the most representation for individual identity groups are also the ones that increased their inclusion of the groups on a year-over-year basis. Disney+, for example, increased its inclusion of Hispanic/Latinx talent by more than 103% year-over-year. Similarly, Hulu increased its inclusion of Asian and Pacific Islander talent by 18.7% from 2022.

Inclusivity across streaming services and TV networks
Highest levels of inclusivity across streaming services by identity group

Identity group	Service	Share of cast
AAPI	Hulu	32.2%
Black	Paramount+	26.4%
Hispanic	Disney+	31.2%
LGBTQ	Paramount+	9.2%
Disability	Apple TV+	9.6%

Disney+ increased its inclusion of Hispanic talent in its programming by 103% over the past year

Highest levels of inclusivity across TV networks by identity group

Identity group	Network	Share of cast
AAPI	ABC & NBC	7.9%
Black	NBC	30%
Hispanic	CBS	10.7%
LGBTQ	CBS	9%
Disability	FOX	11.3%

Share of cast: The percentage of an identity group that is part of a program's recurring cast members.
Source: Gracenote Inclusion Analytics

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# Advertisers' role in expanding the inclusivity of TV programming

Advertisers play a huge role in shaping the inclusivity of the media landscape, and data can highlight ways for advertisers and agencies to be more inclusive with the 97.5% of media spending that is not allocated to diverse-owned companies.

To highlight where brands can lean in, Gracenote recently conducted an analysis of the 2023 ad spend that was invested in TV programs that exhibit high levels of diversity and inclusivity[4] as measured by Gracenote Inclusion Analytics.

> **Women account for more than 50% of the U.S. population, but only 29% of inclusive ad spending in 2023 was matched to women-inclusive content**

Out of the $11 billion in spending allocated to linear programs, 46% was in racially/ethnic inclusive content (i.e., BIPOC[5]), which includes spend in diverse-targeted channels like Spanish-language broadcast. When we mapped ad spending to inclusive content for specific audiences, however, the percentages are lower. The spending matched to programming inclusive of women, for example, was only 29%.
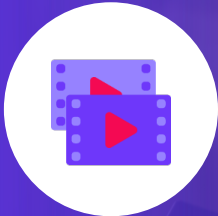
46% of spending on inclusive linear programming in 2023 was invested in BIPOC-inclusive content
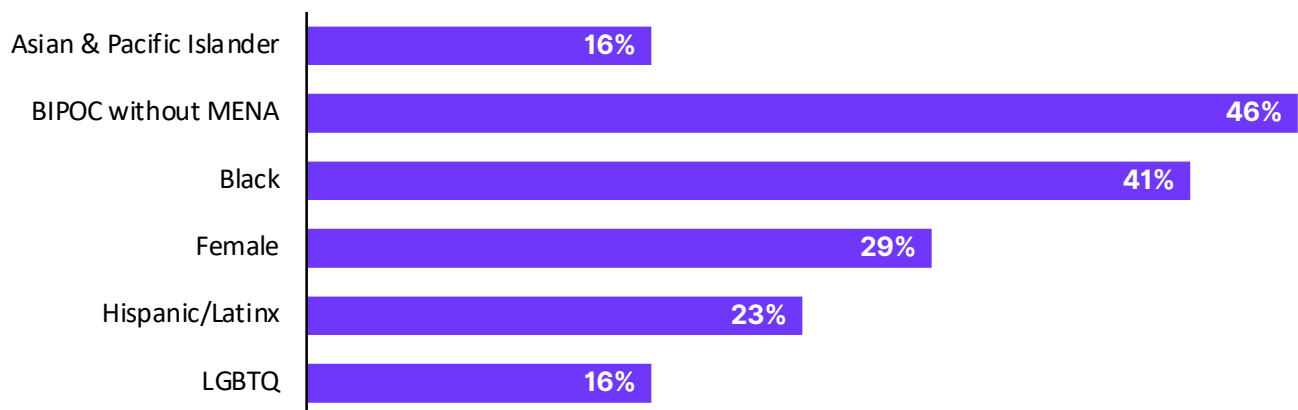
[4] Programming was deemed to be inclusive if the share of cast for individual groups was at or above the U.S. population estimate for that group.
[5] Black, indigenous and other people of color.

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Diverse programming is in much greater supply than diverse ad spending
Brand ad spending in 2023

Category	Percentage
Asian & Pacific Islander	16%
BIPOC without MENA	46%
Black	41%
Female	29%
Hispanic/Latinx	23%
LGBTQ	16%

Source: Inclusive Ad Spend (Gracenote Inclusion Analytics and Nielsen Ad intel), 2023. Programs are considered "inclusive" if the share of screen is at or above the U.S. population estimate for that group.

Given their role in helping shape the inclusivity of the media landscape, advertisers can help advocate for forward progress

[4] Black, indigenous and other people of color.

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At a more granular level, Gracenote's syndicated inclusive ad spend report highlights areas of potential over- and under-investment across industries. Financial services, for example, is the fourth-largest industry in terms of spending, but it under-invests in content that's inclusive of women and the BIPOC community. Comparatively, pet care over-spends in content that's inclusive of Asian and Pacific Islander talent, but under-invests in Hispanic-inclusive content.
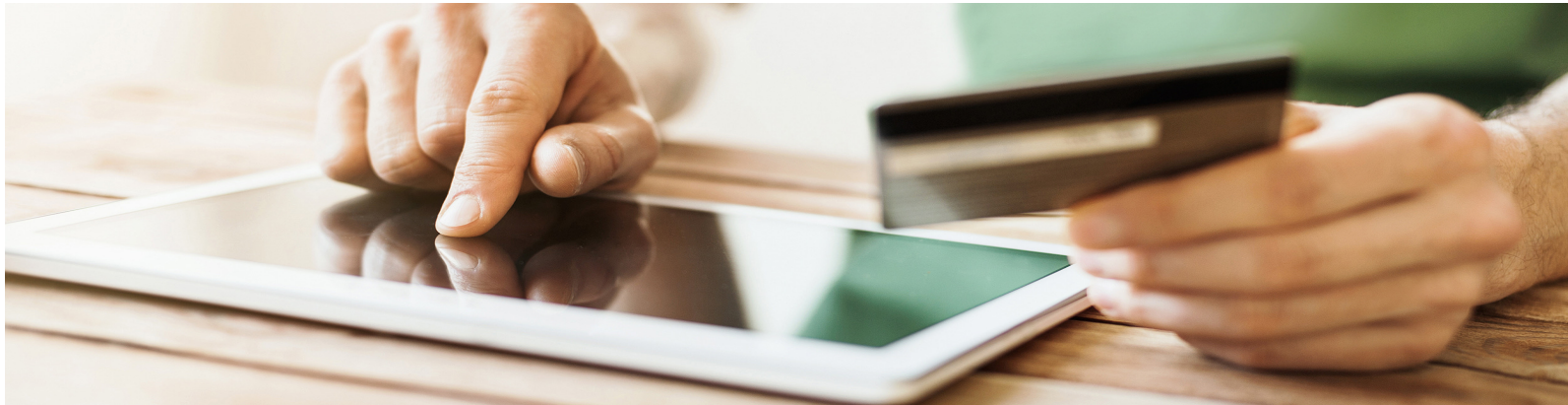
Inclusive ad spend by industry

Percentages reflect the portion of ad spending matched to inclusive content by identity group

	Identity group					
	Asian American & Pacific Islander	BIPOC without MENA	Black	Female	Hispanic/ Latinx	LGBTQ
Share of cast on linear TV	**5%**	**43%**	**20%**	**38%**	**17%**	**4%**
Industry						
Alcoholic bev	8.5%	56.3%	25.4%	23.0%	42.6%	8.6%
Automative	15.7%	46.0%	37.4%	26.5%	26.4%	15.1%
CPG food & bev	15.7%	50.1%	35.2%	31.7%	29.2%	14.0%
CPG non-food	16.5%	55.5%	39.7%	33.2%	34.7%	15.7%
Dining	12.2%	49.4%	35.3%	26.6%	31.9%	11.6%
Electronics	21.0%	44.5%	50.4%	23.9%	23.5%	21.1%
Fashion	15.3%	40.9%	34.3%	29.8%	20.6%	17.0%
Financial serv	13.2%	37.9%	38.8%	24.1%	17.1%	14.5%
Media & entertainment	19.6%	44.0%	42.1%	23.6%	25.8%	16.6%
Pet care	24.0%	41.2%	54.5%	29.8%	14.9%	21.0%
Retail	16.4%	49.0%	36.7%	31.3%	28.9%	15.0%
Telecom	16.4%	49.6%	41.9%	26.4%	29.2%	15.3%
Travel	22.4%	37.2%	45.0%	25.4%	16.1%	22.4%

Percentages in red reflect spending levels that are lower than identity group share of cast percentages in linear TV programming.

Read as: 8.5% of alcoholic beverage ad spending was in content inclusive of Asian and Pacific Islanders.
Source: Inclusive Ad Spend (Gracenote Inclusion Analytics and Nielsen Ad intel), 2023

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Inequitable ad spending is even greater at the brand level. Only 45% of brands, for example, spend equitably in content inclusive of the BIPOC community. That means that 55% of brands are not investing equitably in BIPOC-inclusive content. To be considered BIPOC-inclusive, a program's BIPOC share of cast needs to be at or above 41.9%, which is the U.S. Census' population estimate for this group. Comparatively, almost 80% of brands spend equitably (i.e., 6.8% of their spending) in content that's inclusive of Asian Americans and Pacific Islanders.

Investing in inclusive content

	AAPI	BIPOC without MENA	Black	Female	Hispanic/ Latinx	LGBTQ
Percent of brands that spend above UE	79%	45%	91%	2.40%	35%	78.5%
Share of cast on linear TV	5.3%	42.5%	19.8%	38.2%	17%	3.8%
No. of brands that spend above share of cast	1,245	655	1,300	230	582	1,359
Percent of brands that spend above share of cast	81.6%	42.9%	85.2%	15.1%	38.1%	89.1%
Total brands	1,526					

Read as: 79% of brands invest in content that is inclusive of the AAPI community (i.e., the share of cast is equal or higher than the U.S. population percentage for this identity group).

UE: Universe estimate.
Share of cast: The percentage of an identity group that is part of a program's recurring cast members.
Source: Inclusive Ad Spend (Gracenote Inclusion Analytics and Nielsen Ad intel), 2023

Finding inclusive advertising opportunities in TV content

The opportunity for brands and agencies is the wealth of content to invest in from an inclusivity perspective. The key is leveraging the right data to identify the right programming opportunities.

Some of the most popular TV programming of 2023, for example, provided an array of titles that feature diversity at higher levels than what we see in the U.S. population. CBS' *NCIS*, for example, was the most-watched broadcast show of the year (average audience of 9.9 million) and boasts average share of cast percentages for Asian and Pacific Islander, Black and LGBTQ cast members that were higher than the U.S. population percentages for these identity groups.

Similarly, NBC's *Chicago Fire* garnered an average audience of 9.1 million in 2023 and boasted average share of cast percentages for Black and Hispanic cast members that are higher than the U.S. population percentages for these identity groups.

[5] The percentage of an identity group that is part of a program's recurring cast members.

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In the past, Publicis Media would analyze viewership across different multicultural segments to determine where we could capture these audiences. Now, we can marry that with actual on-screen representation in addition to multicultural audience viewing to optimize our efforts. This allows us to find content areas that are more inclusive and representative of the audiences we are trying to reach.

-- Jennifer García, SVP, Data & Research Strategy, Publicis Media

On cable, the Hallmark Channel's *The Way Home* was the third-most viewed series of 2023 and features share of screen percentages for Asian and Pacific Islander and LGBTQ cast members that are higher than the U.S. population percentages for these identity groups.

Among the most-watched streaming programs of 2023, *The Night Agent* was the second-most viewed original series, as audiences watched 14.4 billion minutes of the show's first season on Netflix. This show features a 55.6% share of cast for women. Additionally, Black and Asian and Pacific Islander talent each have a 22.2% share of cast percentage, which is higher than the U.S. population percentages for these identity groups.

Fire Country was among the top 10 most-watched broadcast shows of 2023 and boasts high share of screen and share of cast percentages for Black, Hispanic and LGBTQ cast members.

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Inclusive TV

Popular TV programming is becoming increasingly inclusive

BIPOC talent on Netflix's *3 Body Problem* accounts for **80%** of the program's cast

Black talent on ABC's *Abbott Elementary* accounts for **71.4%** of the program's cast

Asian and Pacific Islander talent on FOX's *The Cleaning Lady* accounts for **68.7%** of the program's cast

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Hispanic/Latinx talent on NBCs *Lopez vs Lopez* accounts for **74%** of the program's cast

Female talent on Netflix's *Queen Charlotte: A Bridgerton Story* accounts for **60%** of the program's cast

LGBTQ talent on Paramount+'s *Star Trek: Discovery* accounts for **64%** of the program's cast

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In addition to engaging with inclusive TV programming, audiences view brand advertising more favorably when it features people they can relate with. This is particularly true among Asian and Pacific Islander audiences.
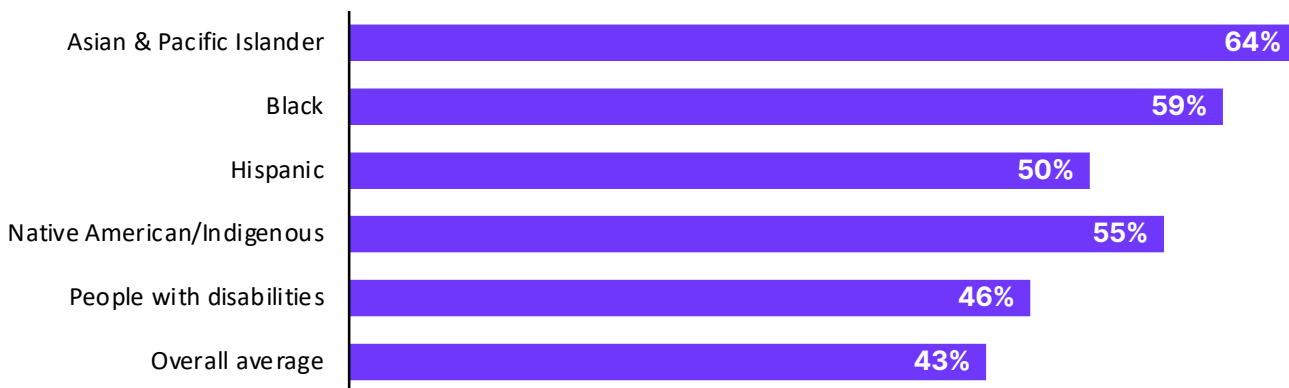

In aggregate, 42% of all audience members say they're more likely to buy from brands when their ads feature someone from their identity group.

64% of Asian and Pacific Islander audiences say they're more likely to buy from a brand when its ads feature someone from their identity group

The importance of diversity in advertising
Likelihood of buying based on inclusion of identity group

Asian & Pacific Islander	64%
Black	59%
Hispanic	50%
Native American/Indigenous	55%
People with disabilities	46%
Overall average	43%

Note: Percentages reflect "more likely" responses to this question: Are you more or less likely to buy from brands whose ads feature someone from your identity group?
Source: Nielsen Attitudes on Representation in TV Study, 2022

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Looking ahead to the fall 2024 TV season

With an understanding that TV audiences 18 and older spend approximately 54% of their total time with TV watching live programming[6], the upfront period is a critical time for ad buying decisions. And in looking at the programming slated to premiere this fall, the outlook for diverse content looks promising.

More than 68% of TV programming premiering in 2024 features BIPOC representation in their main cast

To identify diverse ad opportunities in programming scheduled to premiere this year, Gracenote conducted an analysis of 124 new series premiering this year. Of these, 85, or 68.5%, have BIPOC representation in their main cast.

2024 series premiere inclusivity highlights:

- BIPOC representation is above 50% across all major U.S. streaming services.
- Netflix has the most streaming originals in 2024, and more than 30 have BIPOC representation.
- All Disney streaming services have BIPOC represented across the company's premiering content on Disney+, Hulu and Freeform.
- Apple TV+ and Amazon each have more than 75% BIPOC representation in their new 2024 series.
- New programming across traditional TV networks remains low following the strikes that took place in 2023, but NBC, FOX and Paramount all have programs debuting in 2024 that feature BIPOC representation in their top cast lineups.

[6] Nielsen National TV Panel; Q4 2023

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While streaming services will have more new programming than traditional, linear channels, the pivot among streaming publishers to offer ad-supported tiers and subscription plans means that advertisers and agencies have ample opportunities for their fall TV spending across all TV programming. This is particularly relevant now that 75% of U.S. audiences 18 and older[7] have connected TV (CTV[8]) devices to stream video on.

Diversity in TV programming premiering in 2024

	All TV	Streaming TV	Linear TV
No. of programs analyzed	124	89	35
No. of programs with BIPOC representation	85	67	19
Percentage of programs with BIPOC representation	68.5%	75.3%	54.3%

Read as: 68.5% of the programs with identified casts premiering in 2024 have BIPOC representation in their main cast.

BIPOC: Black, indigenous and other people of color.
Source: Gracenote custom analysis

Meeting audiences through relevant content

Marketers have been pledging to be more inclusive with their ad spending in recent years, and most efforts have been largely reliant on finding media that's owned by minority, LGBTQ or women owners. In addition to advancing investment in diverse-owned media, brands and agencies have access to datasets that can increase the inclusivity of their broader spending. These datasets can be particularly useful in programmatic buying as audiences continue to increase their CTV usage.

While much of this report has focused on the visibility of on-screen talent, representation in media spans much wider, including the people behind the camera, the people developing stories and the audiences who make time to watch the programming once it's released. All of these should be considered as advertisers and brands strive to create meaningful connections with their target audiences.

Additionally, progress in diversity is only effective when it keeps up with technology. As CTV usage and programmatic spending rise, advertisers can leverage new and emerging datasets to better reach and engage with specific audiences through relevant content. And that will help foster a greater sense of inclusion across the broader media landscape.

Click here to learn more about Gracenote Inclusion Analytics, which can help you make intelligent, informed inclusive media investment decisions.

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About Gracenote

Gracenote is the content data business unit of Nielsen, providing entertainment metadata, content IDs and related offerings to the world's leading creators, distributors and platforms. Gracenote technology enables advanced content navigation and discovery capabilities helping individuals to easily connect to the TV shows, movies, music and sports they love while delivering powerful content analytics making complex business decisions simpler.

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