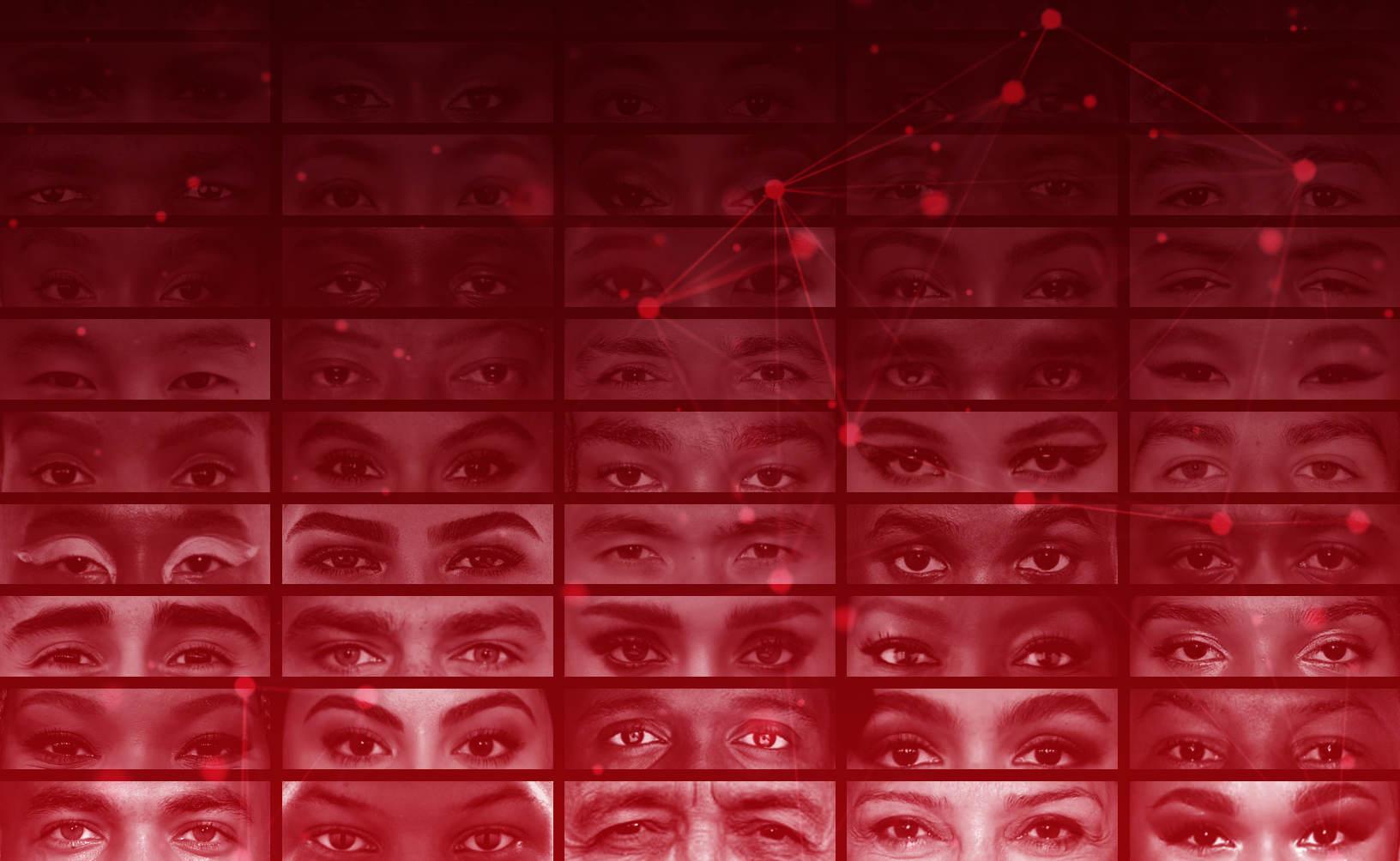
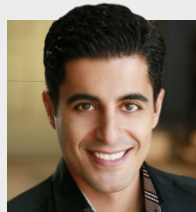


Measuring What Matters:

THE IMPACT OF TALENT DIVERSITY ON AUDIENCE DEMAND FOR TELEVISION



EXECUTIVE INTRO



Wared Seger
CEO & Founder
Parrot Analytics

Since its inception, Parrot Analytics has believed that embracing diversity results in more innovative ideas and a more prosperous industry.

Therefore, diversity and inclusion are not only at the center of our com-

pany's culture, but also at the center of our company's mission to unlock the magic of content. We believe embracing differences across race, ethnicity, gender, sexual orientation, age, religious beliefs, and physical abilities are crucial to thriving in the business of storytelling.

Using the world's only global measurement system of demand, we empower our partners to listen to the rich tapestry of audiences to nimbly respond to the challenges

and opportunities of an ever-changing entertainment industry. This report exemplifies why an empirical metric of observed behaviors is revolutionary.

We are proud to move the industry towards a more equitable future for all talent. We remain committed to our long-term objective to showcase the value of diversity and inclusion as we continue to unlock the magic of content for our partners around the globe.



Kevin Huvane
Co-Chairman
CAA

CAA has been working for years to accelerate the growth, value, and visibility of inclusion in our industry. Our commitment to this work has been foundational to providing the best opportunities for our clients and to elevating voices that have

not been represented in important cultural conversations.

We also believe in the power of data to help influence dialogue around the need for more accurate, authentic representation across media and its impact on audiences. The numbers in this report speak for themselves. As demographics continue to shift, it's important that we create and support content that reflects this new majority of diverse consumers.

We must listen to audiences, otherwise we miss out on reaching them by not telling the stories that they crave. We hope that showing the increasing success of shows with strong racially and ethnically diverse representation will encourage more creative decisions that will continue to shift the complexion of who we see on our television screens.

Our industry is at a turning point, and we are just beginning to scratch the surface.

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EXECUTIVE SUMMARY

In this section, we summarize our key findings about the impact of talent diversity on TV demand.



Building on CAA's Motion Picture Cast Diversity Index report published in June 2017, Parrot Analytics and CAA collaborated on this report to examine audience demand for television shows based on the racial and ethnic make-up of a show's series regular cast.

This report focuses on diversity among series regular cast in first-run, scripted television shows in the United States that premiered between 2017 and 2019. We evaluated 380 scripted television series debuts across broadcast, cable and streaming services for the racial and ethnic diversity of series regular talent and popularity after the show premiere. From these data we are able to draw the following primary conclusions:

1. Compared to 2017, 2019 showed a substantial increase in racial and ethnic cast diversity in scripted television.

In 2019, there were 1.4x more premiering shows with at least 40% cast diversity (i.e., nonwhites) compared to 2017. These diverse premieres at least resemble if not exceed the [U.S. Census estimate 40% of the U.S. is nonwhite in 2019](#).

2. Audiences are responding to and looking for content that is more racially and ethnically representative of the United States population.

The demand for shows with at least 40% cast diversity has more than doubled in the last three years (+112%), outpacing the growth in the number of shows with at least 40% cast diversity that have made it to air (+42%).



3. Cast diversity correlates with the immediate audience demand for a show.

In 2019, premieres that had at least 40% diversity among their series regular casts were 1.5x more in-demand than shows with less than 40% diversity. Furthermore, the demand for premieres that had at least 60% diversity more than tripled (+211%) since 2017, becoming the most in-demand shows in 2019.

4. Hispanic and Latino talent are significantly underrepresented, despite significant recent growth in their domestic population.

In 2019, Hispanic and Latino communities represented 18% of the U.S. population but only 5% of series regular talent in the shows we analyzed.

5. Streaming platforms showed the greatest growth in diverse cast representation since 2017.

Streaming platforms have increased their percentage of diverse talent in their premiere series regular cast from 30% in 2017 to 39% in 2019. Streamers have had the greatest increase in the number of diverse talent and in 2019 have double broadcast's and cable's number of diverse talent.



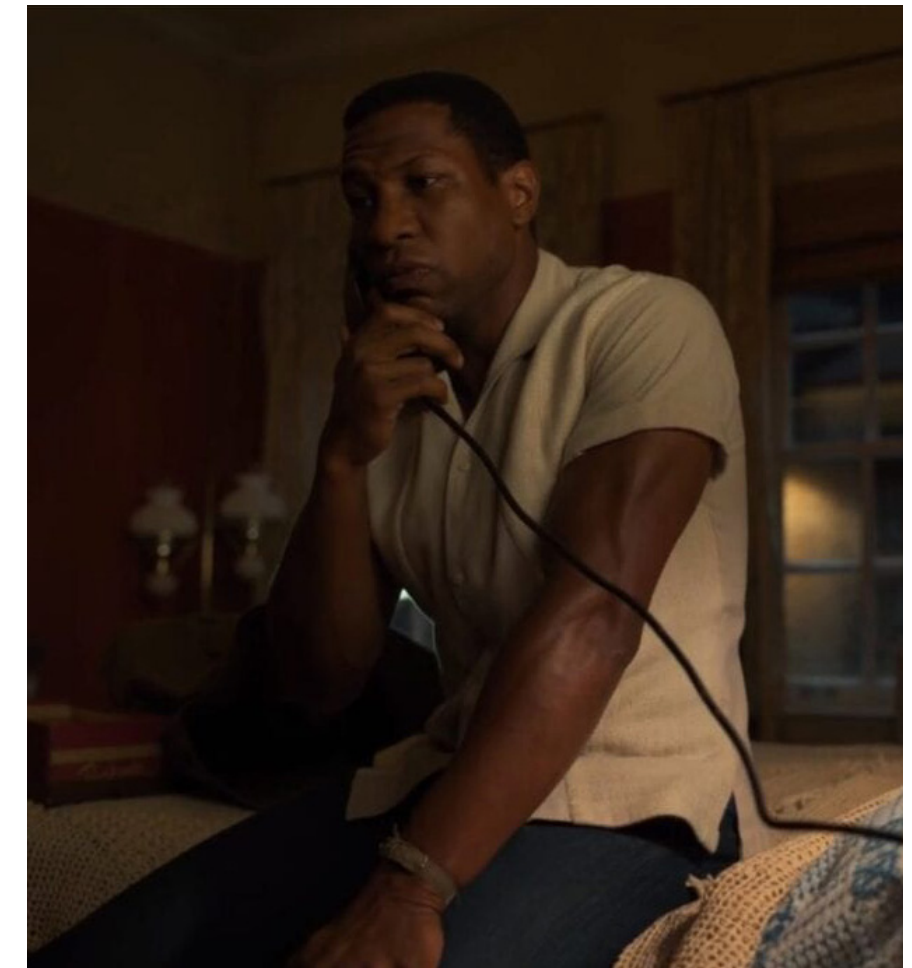
INTRODUCTION & METHODOLOGY

In this section, we share our reasoning, definitions, and procedures for conducting this study.



Show Trivia!

U.S. demand for Euphoria is 27x greater than the average U.S. title as of October 2020, landing the title in the 99.7th percentile of all U.S. dramas.



INTRO TO DIVERSITY IN TV



Introduction

Global TV analytics firm Parrot Analytics and leading entertainment and sports agency Creative Artists Agency (CAA), both longtime leaders in the promotion of inclusion across the media industry, believe in the power of data to shape and drive business decisions that drive equity both in front of and behind the camera.

This report is a follow up to the CAA Motion Picture Cast Diversity Index, which CAA issued in June 2017. The primary goal of that research was to determine the correlative factors of diverse casting, diverse audiences, and box office success, and the broader implications on the business case for diversity in motion picture programming. The Index, which is updated and re-evaluated quarterly, currently includes 854 theatrical films released from January 2014 through December 2019 and focuses on cast race and ethnicity for 8,165 actors.

In order to provide industry leaders with insights into the value of investing resources in representative content and narratives, Parrot Analytics and CAA collaborated to publish their first, “Measuring What Matters” report that examines cast racial and ethnic diversity in domestic first-run scripted television premieres in the United States between 2017 and 2019.

In addition to measuring the racial and ethnic makeups of the series regular casts, this study examines the relative success of these shows by utilizing post-premiere U.S. domestic **audience demand as the primary metric.**

Why this study matters now?

The United States’ population is becoming increasingly Nonwhite at a rate that has outpaced previous estimates from the U.S. Census Bureau. Recent reports reveal that the proportion of Nonwhite populations in the country has nearly doubled in the last two decades, with this latest decade likely to be the first to show a decline among the White population.

Additionally, social movements are continuing to gain attention both within and outside the industry. Initiatives like **#OscarsSoWhite** and organizations like **Black Lives Matter** are calling for systemic change to advance racial and ethnic equity across business and society. They are recognizing the essential role that entertainment, **specifically television**, plays in creating a more empathetic society.

We also see an increase in demand for and viewership of racially and ethnically diverse content in direct response to the important social moments. For example, in the days following the murder of George Floyd in May 2020, **shows including *When They See Us* (Netflix) and *Dear White People* (Netflix) saw a tremendous surge** in viewership amidst calls for audiences to educate themselves on the history of racial inequality in this country.

As viewers seek out this content, we can also expect to see increased social conversation around the issues represented in these projects, causing audiences to be more aware and critical of content than ever before.

Online social networks and platforms like Instagram and Twitter allow audiences to be more directly connected to series regular casts, opening up dialogues around social issues, creative projects, and other critical topics. This presents an important opportunity for content creators to be especially aware of how their work is received and how their creative decisions impact audiences in real time.

From a business perspective, the rapid expansion of OTT distribution platforms, a market segment that is expected to continue **growing with a compound annual growth rate of 16.7%**, has provided audiences with increased

access to television content. Because of the rapid increase in the number of shows available to audiences, it is important for producers, studios and networks to identify the creative metrics that directly impact a show’s success.

We understand that the intersection of various issues can impact the success of a television series because:

- **Authentic stories resonate.** We continue to see research indicating that **audiences want to see themselves represented in the shows they watch.** Narratives that reflect lived experiences through authentic storylines, themes and characters are more relevant to audiences and drive more engagement, allowing these shows to outperform their competitors.
- **Audiences are socially conscious.** Television viewers are increasingly aware of the political nuances of the content they consume, often identifying what is wrong (inauthentic) versus right (authentic).
- **Content engagement is rising.** Executives, producers and series regulars are actively engaging audiences through new interactive opportunities like live-tweeting episodes or online viewing parties. In doing so, creators are also exposed to direct public criticism should audiences feel that their communities are misrepresented, mischaracterized, or simply invisible on screen.

While this study examines series regular cast talent, we also recognize that there are many points of influence within the creative process that impact a show’s creative direction, including but not limited to racial and ethnic representation among writers, showrunners, studio and network executives, casting directors and marketers.

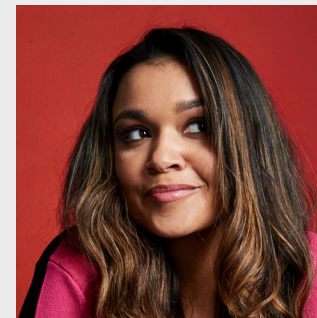


METHODOLOGY



This study evaluated 380 scripted television debuts (live-action n = 320; animation & children n = 60) in the U.S. between 2017 and 2019 across broadcast, cable and streaming services. We examined the racial and ethnic diversity of series regular actors and measured the audience demand after the show's premiere.

Series regular race and ethnicity data was sourced from Variety Insight, resulting in a dataset of 5,585 actors.



Scripted Series

We acknowledge that the impact of talent diversity in live-action scripted series differ from animation and children's programming. In live-action content it is difficult to differentiate between the race and ethnicity of a character and the actor playing that character. In animation and children's series, these do not always align. However, audiences today can easily research who voices their favorite animated characters and as a result, may feel a lack of authenticity when non-diverse actors voice diverse characters. In response, **two high-profile animated series recently recast actors in series regular voiceover roles** to better align with the characters they portray. While diversity among voice actors may impact audiences indirectly, they are included in this study of scripted series.

Other Pacific Islander, as well as Hispanic and Latino individuals. Therefore, "non-diverse" refers specifically to white, non-Hispanic or Latino individuals.

In categorizing a television series debut as "diverse" or "non-diverse," we reference the current percentage of nonwhite individuals in the United States, **which is approximately 40% of the population**. We recognize that in characterizing a series as "diverse," more than half of the series regular cast may still be white. Recent reports project **nonwhite individuals will become the majority in the U.S. population by 2045**. Therefore we further segmented diverse debuts into two subcategories: "moderately diverse" and "highly diverse." We defined diverse debuts with at least a 40% but less than 60% nonwhite cast as "moderately diverse" and diverse debuts with at least a 60% nonwhite cast as "highly diverse."

Key Definitions

Race and Ethnicity

As dialogue around racial and ethnic representation in entertainment and media continues to evolve, so does the terminology around describing groupings and sub-groupings of individuals in American society, including language such as "people of color" and "BIPOC" (Black, Indigenous and People of Color).

For the purposes of this report, and in line with recent studies from relevant organizations, we have chosen to use the term "diverse" to identify individuals from nonwhite racial and ethnic backgrounds. In accordance with racial and ethnic categories on the U.S. census, "diverse" includes Black or African American, Native American and Alaska Native, Asian American, Native Hawaiian and

• TALENT

On-screen as well as voice actor series regular cast members as defined by Variety Insight.

• DIVERSE TALENT

Series regular actors who are nonwhite, including Hispanic and Latino.

• NON-DIVERSE TALENT

Series regular actors who are white, non-Hispanic or Latino.

• SCRIPTED DEBUT

Scripted live-action (i.e., drama, comedy, action and adventure, and horror series) as well as children and animation first-run television series premiere.

• DIVERSE DEBUT

U.S. first-run television scripted series premiere in which at least 40% of the series regular cast is nonwhite. These debuts' casts at least mirror the percentage of nonwhites in the U.S. population **according to the U.S. Census 2019 estimates**.

• NON-DIVERSE DEBUT

U.S. first-run television scripted series premiere in which less than 40% of the series regular cast is nonwhite.

• MODERATELY DIVERSE DEBUT

U.S. first-run television scripted series premiere in which at least 40% but less than 60% of the series regular cast is nonwhite.

• HIGHLY DIVERSE DEBUT

U.S. first-run television scripted series premiere in which at least 60% of the series regular cast is nonwhite.

• DEMAND

The cross-platform popularity of content measured by audiences across various digital forms of interaction including video consumption (streaming and downloads), social media engagement (hashtags, liking, sharing) and research actions (reading about shows and writing about shows) via the global standardized metric of demand (**see here for more information**).

Average post-premiere U.S. audience demand was used as a standardized popularity metric for the shows in this report.

• DIVERSE TENTPOLES

Refers to the annual top 25 most in-demand U.S. first-run television scripted series premieres, typically at least 8x more in-demand than the average title.

FINDINGS

In this section, we share the primary insights from our study.



Show Trivia!

As of October 2020, *Grown-ish* is 6x more in-demand among U.S. audiences than the average U.S. title. The show is an even bigger hit among South African audiences, where it is 11x more in-demand than the average title.



SUPPLY

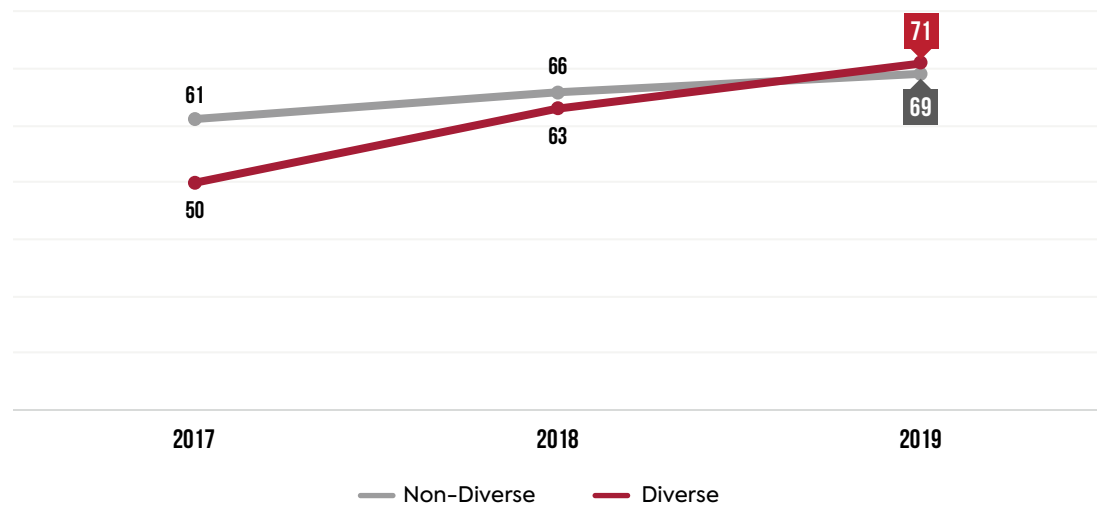
In 2019, the number (supply) of diverse debuts has surpassed non-diverse debuts.

The Diversity Supply Gap

Calls to resolve the gap in the supply of racially and ethnically diverse content on TV date at least back to 1999. Since then, entertainment companies have responded by appointing diversity executives and with initiatives to improve cast diversity. This study evaluates industry progress by comparing the number of diverse and non-diverse debuts.

How has the Diversity Supply Gap Changed Between 2017 and 2019?

Annual Count of All US Scripted Debuts



- Since 2017, the supply of debuts with diverse talent has increased by 42%.
- The supply of non-diverse debuts has only increased 16% between 2017 and 2019.
- In 2019, for the first time, there is a greater number of diverse debuts than non-diverse debuts.

DEMAND

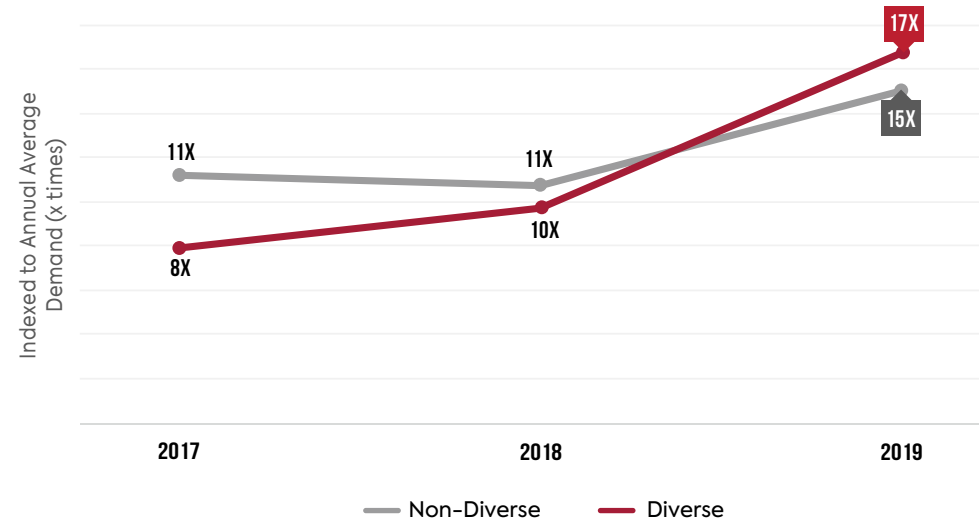
Diverse debuts outperform non-diverse debuts as of 2019.

The Diversity Demand Gap

The entertainment industry tends to respond to content that succeeds. Where previously no metrics could quantify the success of television debuts across distribution types, leveraging Parrot Analytics' global audience demand measurement system this study can examine the success of diverse debuts and it compare it to that of non-diverse debuts.

How has the Diversity Demand Gap Changed Between 2017 and 2019?

Average Demand of Annual Top 100 In-Demand US Scripted Debuts



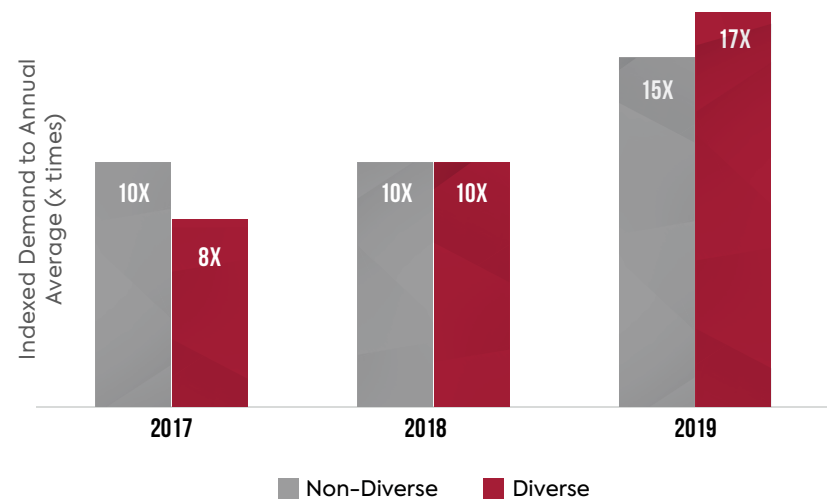
- Since 2017, demand for diverse debuts has more than doubled, increasing 112.5%, and outpacing the 42% growth in the number of (supply) diverse debuts.
- The demand for non-diverse debuts has only increased 36% since 2017.
- In 2019, for the first time, the demand for diverse debuts surpassed the demand for non-diverse debuts.

How has the Diversity Demand Gap Changed Among Live-Action Debuts?

When examining the demand of diverse debuts in the annual top 100 live-action debuts we find:

- In 2017, non-diverse live-action debuts were 25% more in-demand than live-action diverse debuts.
- Since 2017, demand for diverse live-action debuts had grown 112.5%, while demand for non-diverse live action debuts only grew 50% in the same period.
- In 2019, demand for diverse live-action debuts' surpassed that of non-diverse live-action debuts.

Average Demand of Annual Top 100 In-Demand US Live-Action Debuts

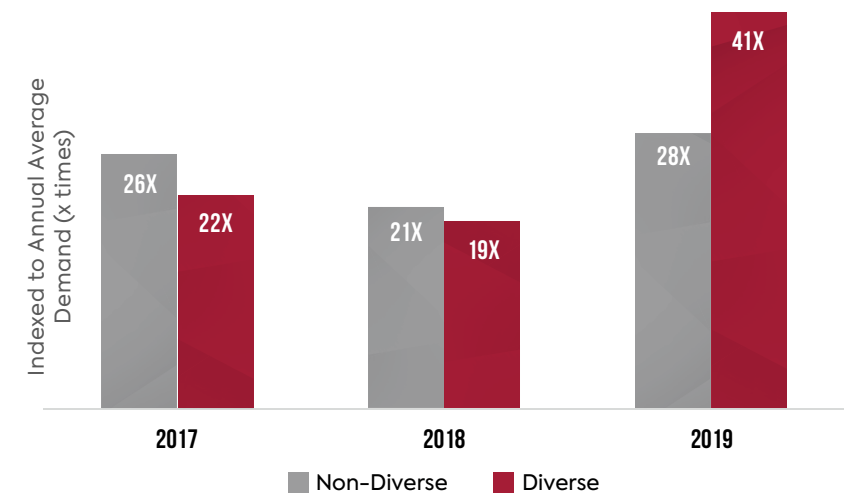


How has the Diversity Demand Gap Changed Between 2017 and 2019 Among Tentpoles?

Our findings reveal that as of 2019, diverse tentpoles (hit debuts) are more popular than non-diverse tentpoles.

- In 2019, for the first time, diverse tentpoles were 46% more in-demand than non-diverse tentpoles.
- Diverse tentpoles have almost doubled their demand in three years, increasing 86%.
- The demand for non-diverse tentpoles' has only increased by 8%, since 2017.

Average US Demand of Annual Top 25 In-Demand US Scripted Debuts

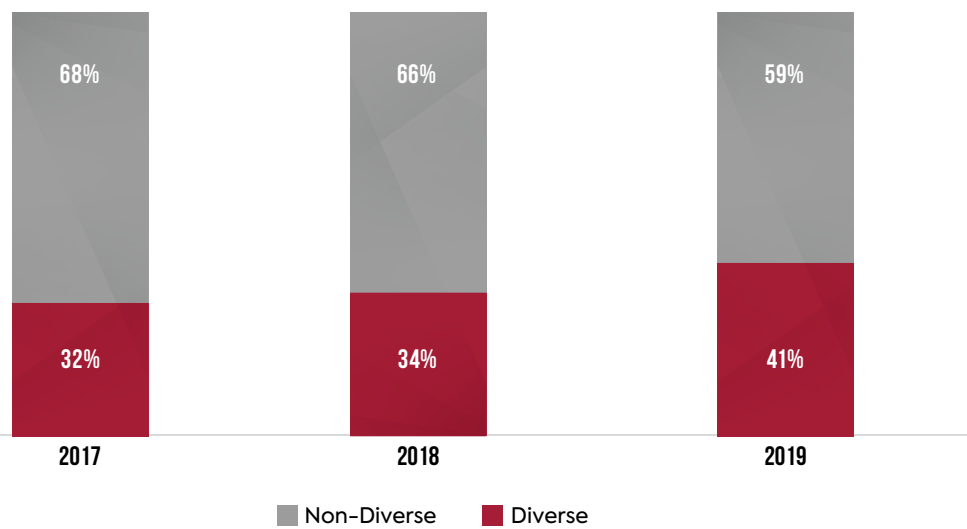


TALENT DIVERSITY TRENDS

Talent diversity has increased since 2017, primarily growing on streaming platforms.

How Has Talent Diversity Changed Between 2017 and 2019?

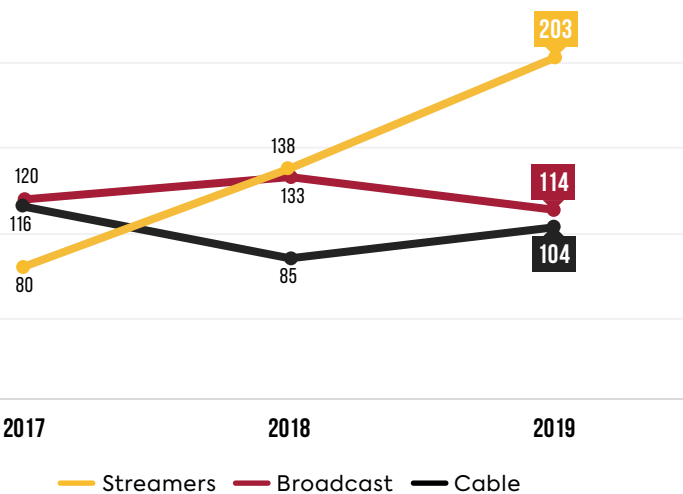
Percentage of Diverse Talent in US Debut Series Regular Casts



- In 2017, less than one in three series regular talent in debuts were diverse.
- In 2019, two in five series regular talent in debuts were diverse, matching the diversity in the U.S. population at 40%.
- The percentage of diverse talent has increased 9% between 2017 and 2019.

How Has the Casting of Diverse Talent Shifted Between 2017 and 2019 by Distribution Type?

Number of Diverse Talent Cast as Series Regular in a US Debut



When evaluating the annual number of diverse talent cast in U.S. scripted debuts by broadcast, cable, and streaming platforms, we found:

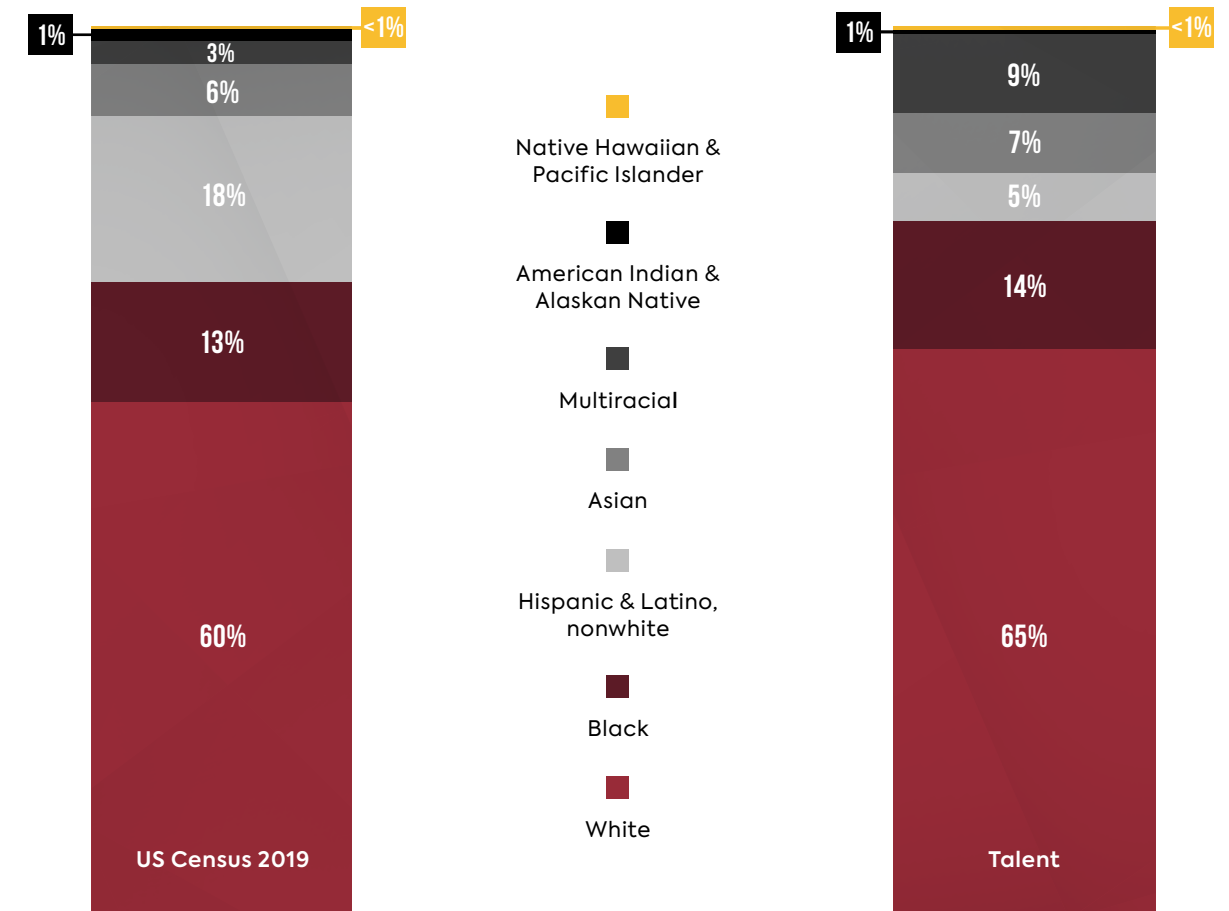
- Streaming platforms (streamers) have shown the greatest increase and the overall highest number of diverse talent in 2019, nearly doubling the number of diverse talent on cable and broadcast series.
- In 2017, broadcast had cast more diverse talent than streamers. Broadcast tied with streamers in 2018, then fell behind by 2019.
- In 2017, cable rivaled broadcast, but in 2018 and 2019, cable cast the lowest number of diverse talent.

TALENT DIVERSITY TRENDS

How Do the Ethnicities and Races of Series Regular Talent in Debuts Between 2017 and 2019 Compare to That of the U.S. Population?

While diverse representation is on the rise, examining equity in representation requires evaluating the casting of various ethnic and racial groups as compared to their proportion of the U.S. population.

Racial and Ethnic Composition of US Population vs. US Debut Series Regular Talent in 2017-2019



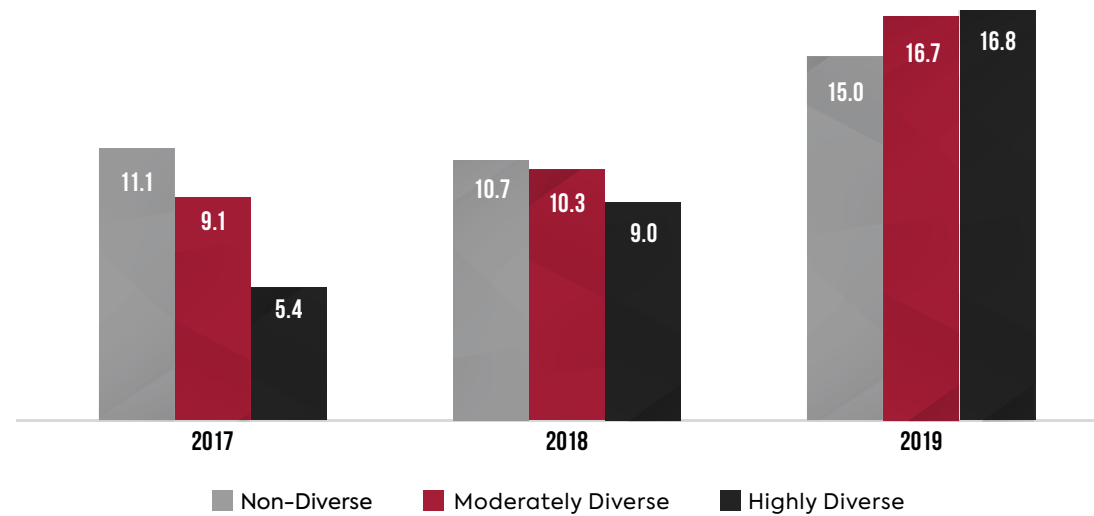
- Hispanics & Latinos are severely underrepresented. Compared to their proportion of the U.S. population, Hispanics and Latinos have been represented by debuts series regular talent less than one-third as often.
- American Indian & Alaskan Natives are also severely underrepresented; they are 10 times more common in the U.S. population than in the debuts series' regular talent.
- Native Hawaiians & Pacific Islanders are underrepresented as well; they make up 0.2% of the U.S. population but only 0.08% of the debut series' regular talent.
- The multiracial demographic is overrepresented. Multiracial talent has three times the representation among debuts' series regulars as this demographic's proportion of the U.S. population.

HIGHLY DIVERSE DEBUTS

Highly diverse debuts (60%+ cast diversity) are growing more in-demand every year.

How has the Demand for Highly Diverse Debuts Changed Between 2017 and 2019?

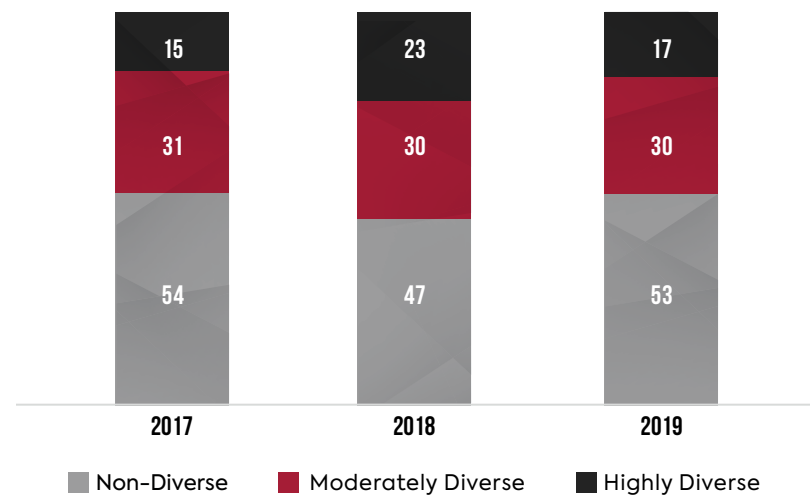
Average Demand of Annual Top 100 US Scripted Debuts



- Since 2017, the demand for highly diverse debuts' has more than tripled, increasing 211%.
- The demand for non diverse debuts was 106% greater than highly diverse debuts in 2017, and shrunk to only 19% greater in 2018.
- In 2019, highly diverse debuts are more in-demand than non-diverse debuts and perform as well as moderately diverse debuts (40-60% cast diversity).

How Has the Supply of Highly Diverse Debuts Changed Between 2017 and 2019?

Annual Top 100 US Scripted Debuts



When evaluating the supply of highly diverse debuts in the top 100 U.S. scripted debuts across broadcast, cable, and streaming platforms, we found:

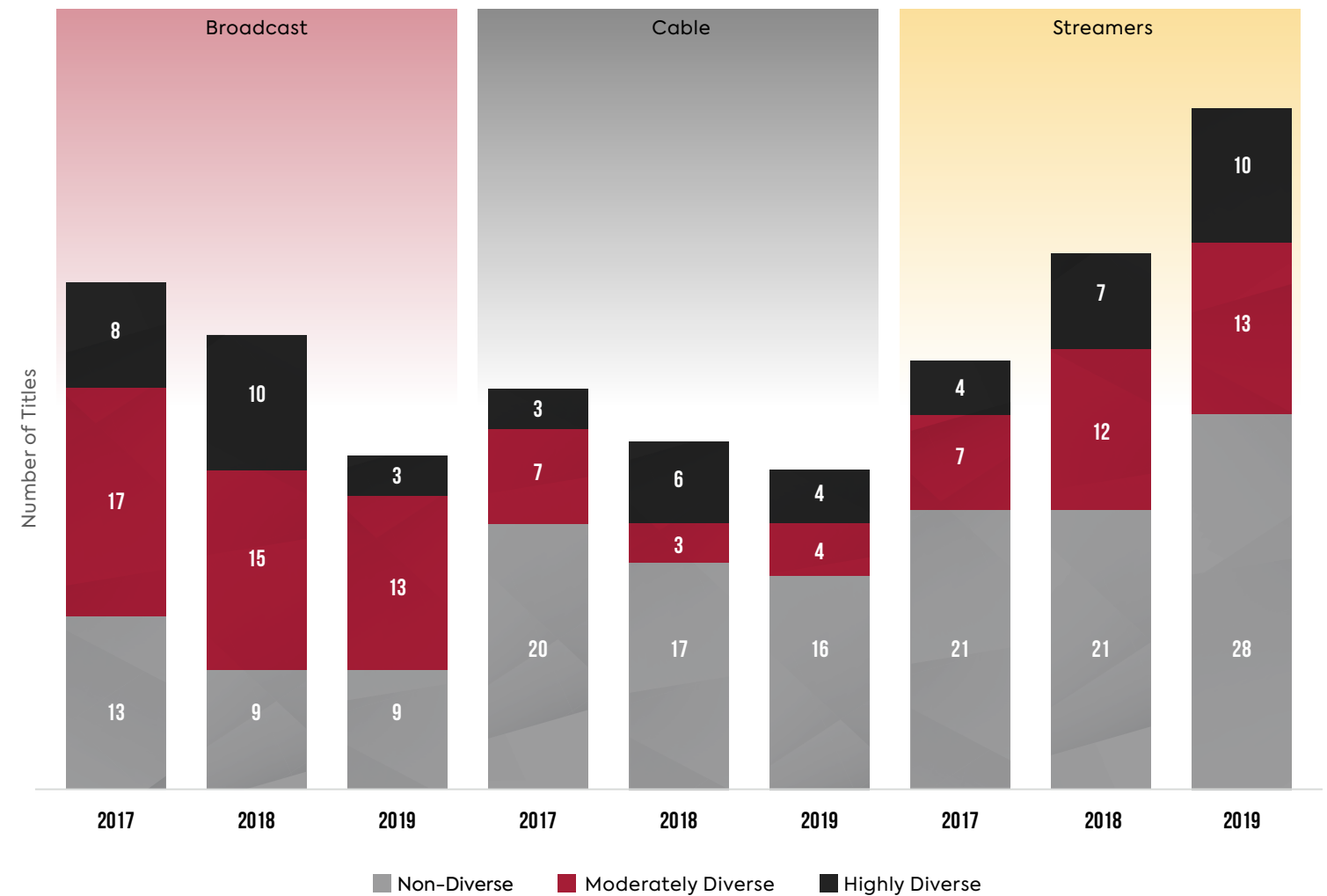
- The number of moderately diverse debuts has remained consistent in the last three years.
- In 2018, the number of highly diverse debuts peaked. While there was a decline in 2019, the number of highly diverse debuts still increased 13% since 2017.

HIGHLY DIVERSE DEBUTS

How Does the Supply of Highly Diverse Debuts Between 2017 and 2019 Compare Across Distribution Types?

Highly diverse debuts have increased their demand, but supply has not kept up with audiences desires. In this section, we examine the supply of highly diverse debuts across the three years for broadcast, cable, and streaming platforms.

Diversity in Annual Top 100 US Debuts Between 2017-2019 by Distribution Type



- Streamers' increasing number of highly diverse debuts corresponds with a greater share of streaming titles in the top 100 debuts. Streamers released 2.5x more highly diverse debuts in 2019 than 2017.
- Broadcast, on the other hand, has dropped its share of debuts in the annual top 100 by 32%, while decreasing the share of highly diverse debuts by 62%.
- In 2018 and 2019, the overall number of cable debuts in the annual top 100 decreased by 20%, and the number of highly diverse debuts decreased by 33%.

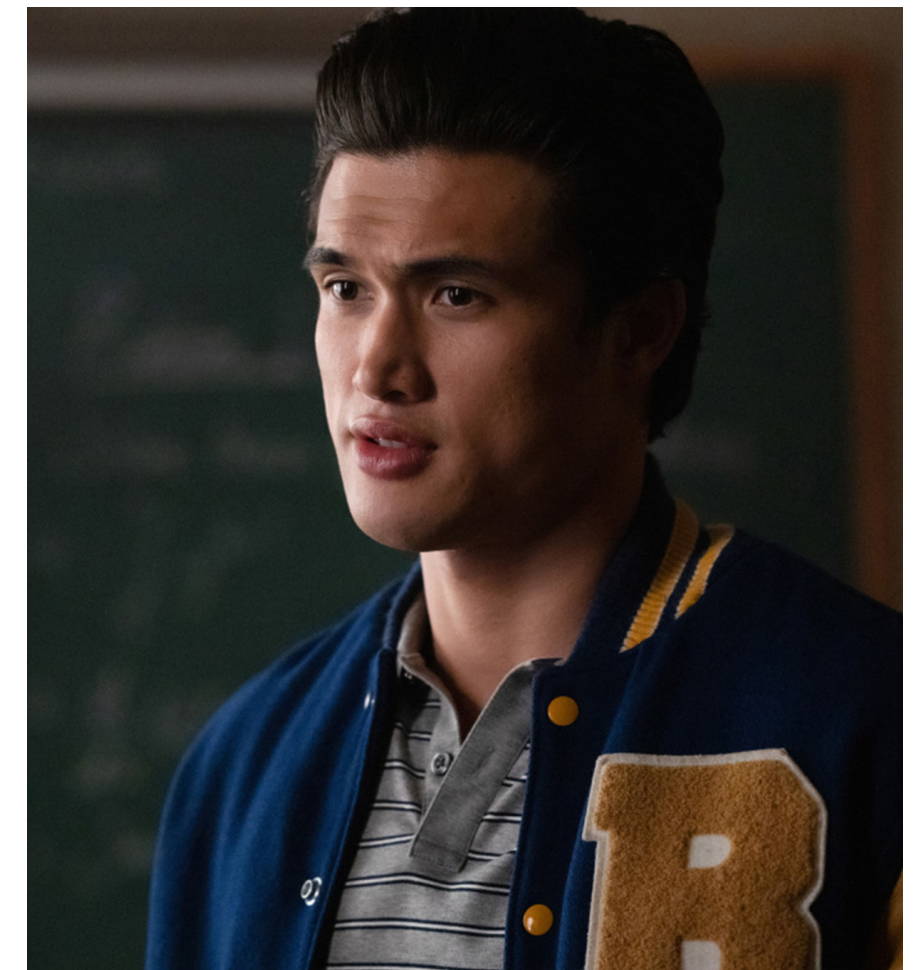
PLATFORM SNAPSHOT

In this section, we provide a deep dive into diversity on broadcast, cable, and streaming platforms.



Show Trivia!

Pose is categorically an “outstanding” show. As of October 2020, Pose’s U.S. audience demand is 10x greater than the average U.S. title. The show also travels well to Brazilian audience, with which it is 14x more in-demand than the average title.



BROADCAST

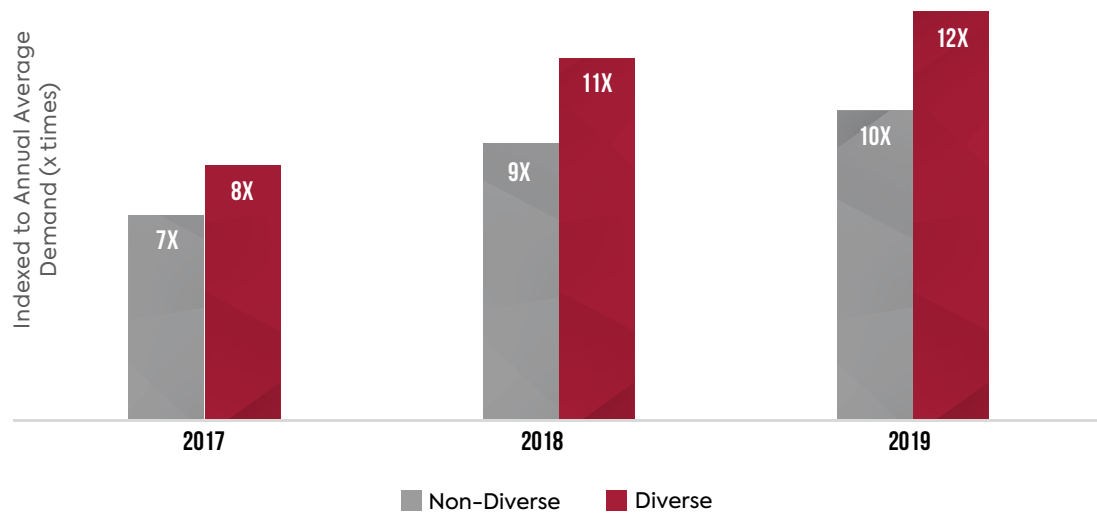
Broadcast's diverse debuts have steadily grown more in-demand and more popular than its non-diverse debuts.

Broadcast's Diversity Demand vs Supply Gap

How has Broadcast's Diversity Demand Gap Changed Between 2017 and 2019?

Examining the 25 most in-demand debuts on broadcast yearly, we found:

Average Demand of Annual Top 25 In-Demand US Broadcast Scripted Debuts

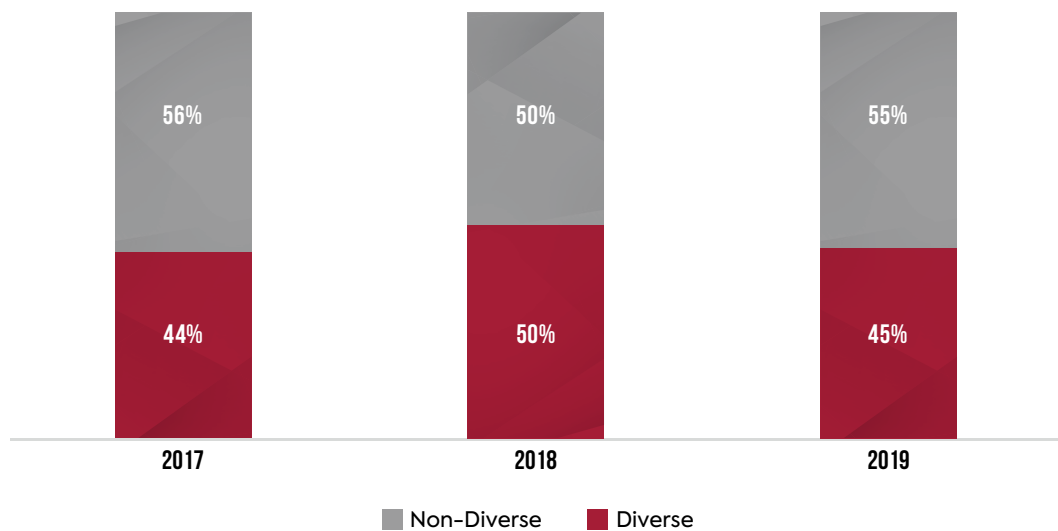


- Since 2017, diverse broadcast debuts have consistently outperformed non-diverse debuts.
- Diverse and non-diverse debuts from broadcast are both one-and-a-half times more in-demand in 2019 than they were in 2017.
- In 2019, diverse debuts are 20% more in-demand than non-debuts.

How has Talent Diversity in Broadcast's Debut Series Regulars Changed Between 2017 and 2019?

Annual Percentage of Diverse Talent in US Broadcast's Scripted Debuts Series Regulars

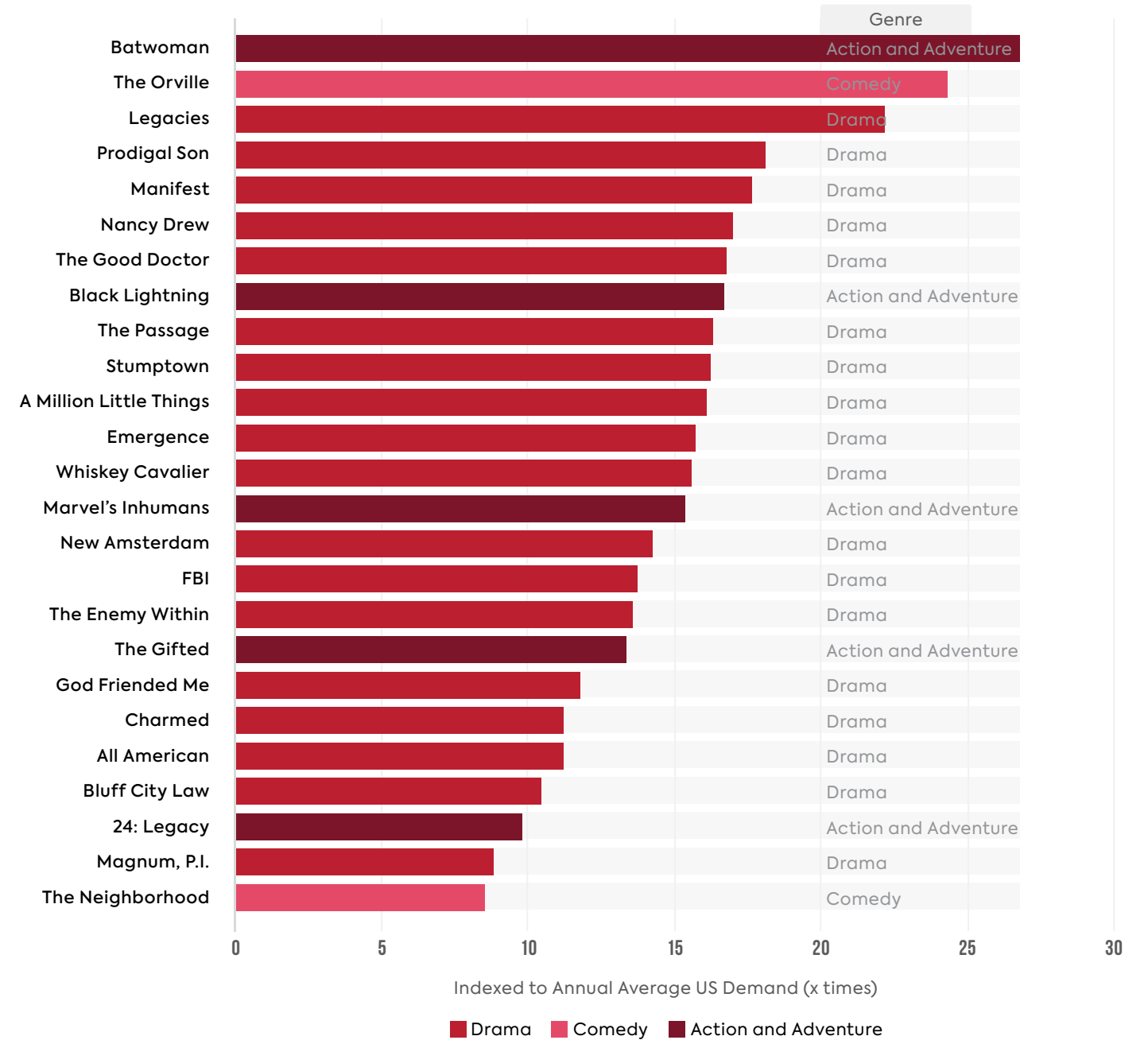
- The share of broadcast debuts' diverse series regular talent has steadily remained above 40%, the highest of any platform type.
- Diversity in broadcast debuts' series regular talent peaked in 2018 at 50%, decreasing to 45% in 2019.



BROADCAST

What are the 25 Most In-Demand Diverse Broadcast Debuts Between 2017 and 2019?

Genre Breakdown of Top 25 In-Demand Diverse US Broadcast Scripted Debuts 2017-2019



- 72% of the 25 most in-demand diverse broadcast debuts were dramas.
- 20% of the 25 most in-demand diverse broadcast debuts were action and adventure series.

CABLE

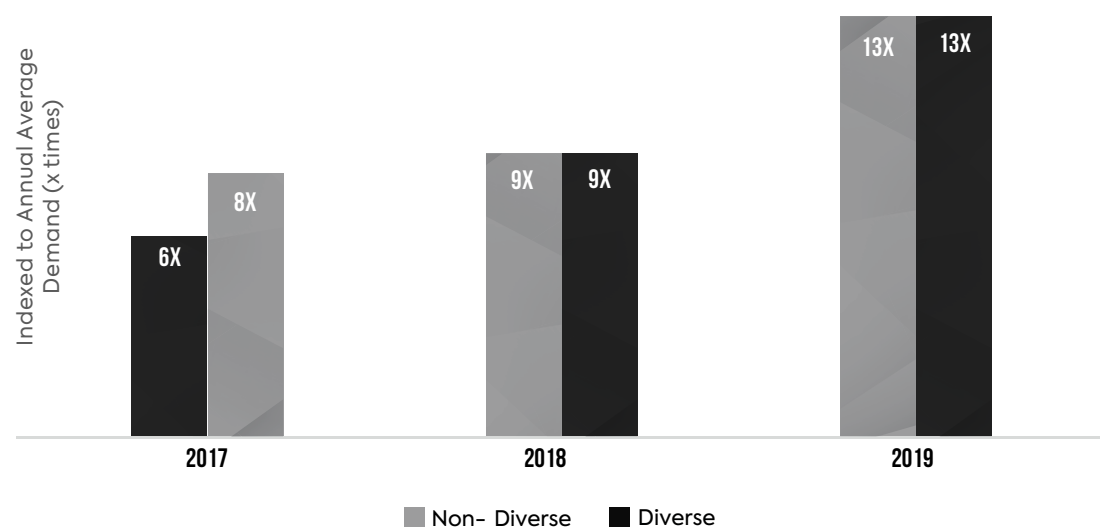
Cable's debuts talent diversity has stagnated. In 2019, cable's diverse debuts still perform as well as its non-diverse debuts.

Cable's Diversity Demand vs Supply Gap

How has Cable's Diversity Demand Gap Changed Between 2017 and 2019?

Examining the 25 most in-demand debuts on cable yearly, we found:

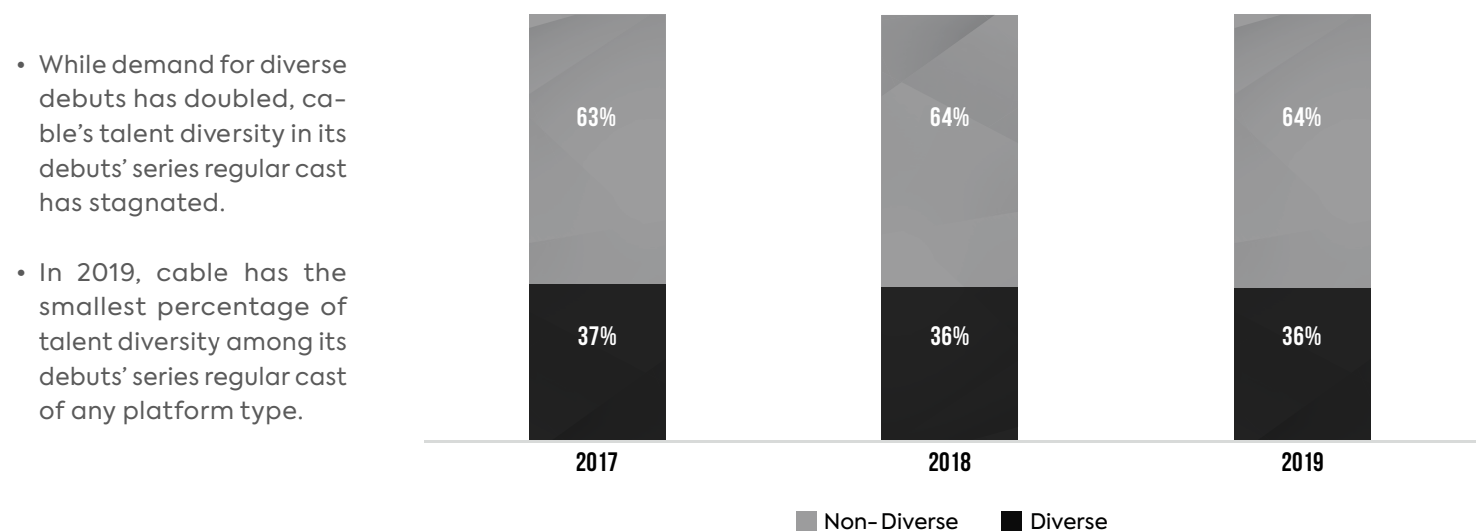
Average Demand of Annual Top 25 In-Demand US Cable Scripted Debut Series



- Since 2017, cable's diverse debuts have more than doubled their demand, in creasing 117%.
- Non-diverse debuts demand only increased 62%.
- In 2018 and 2019, cable's diverse and non-diverse debuts are equally popular.

How has Talent Diversity in Cable's Debut Series Regulars Changed Between 2017 and 2019?

Annual Percentage of Diverse Talent in US Cable's Scripted Debuts Series Regulars

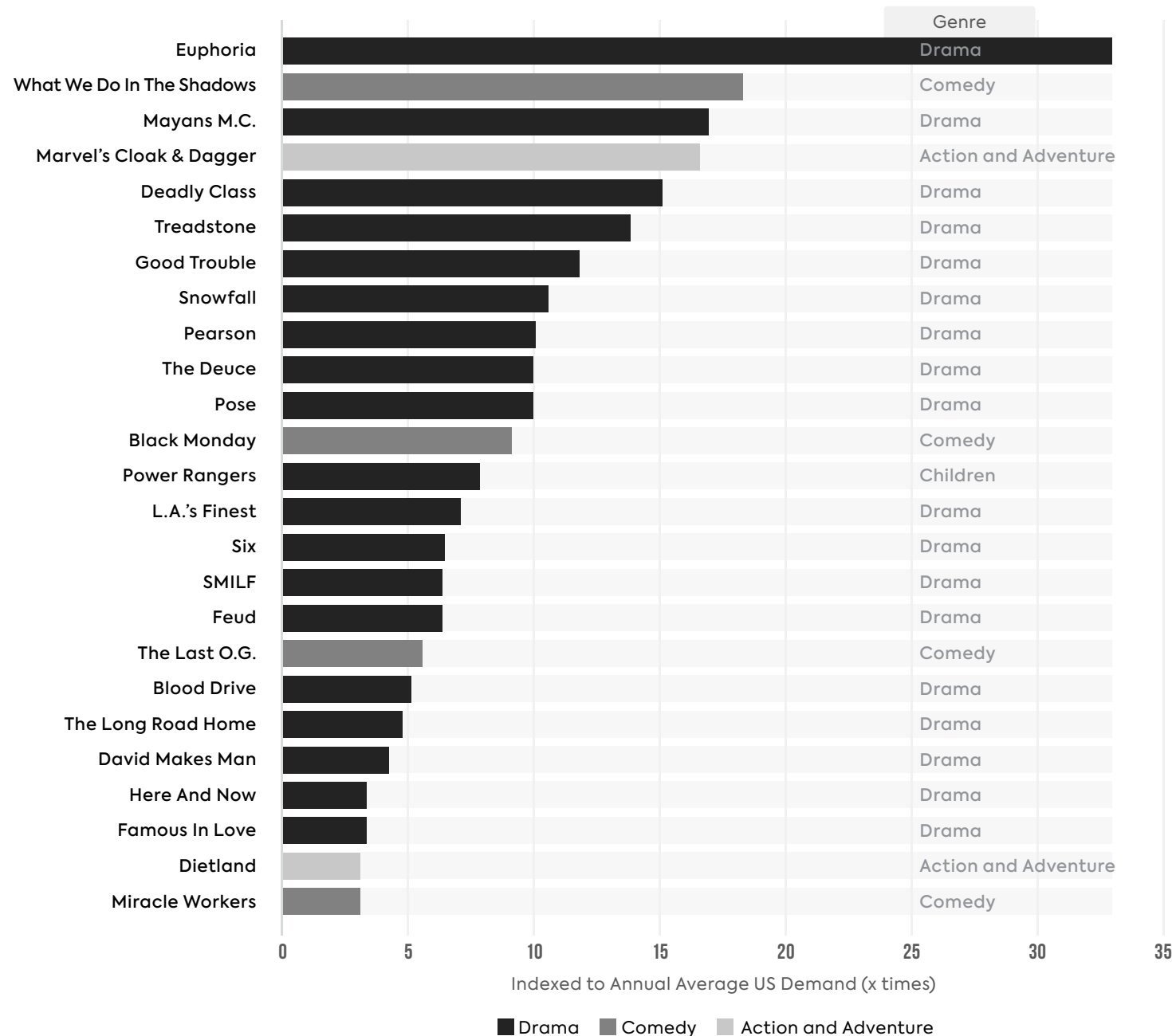


- While demand for diverse debuts has doubled, cable's talent diversity in its debuts' series regular cast has stagnated.
- In 2019, cable has the smallest percentage of talent diversity among its debuts' series regular cast of any platform type.

CABLE

What are the 25 Most In-Demand Diverse Cable Debuts Between 2017 and 2019?

Genre Breakdown of Top 25 In-Demand Diverse US Cable Scripted Debuts 2017-2019



- 72% of the most in-demand diverse cable debuts were dramas.
- 16% of the 25 most in-demand diverse cable debuts were comedies.

STREAMING PLATFORMS

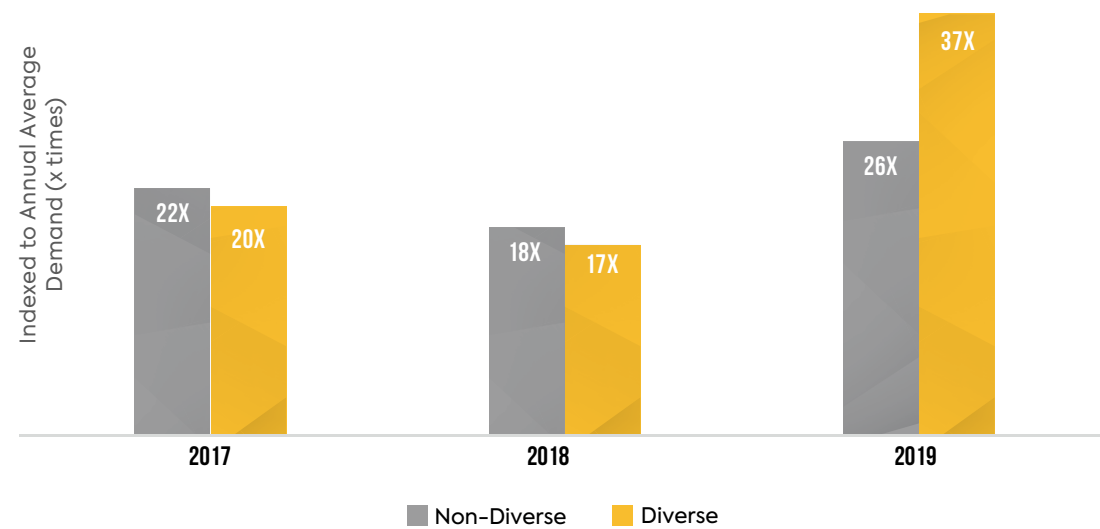
Streamers have made consistent progress in talent diversity. In 2019, their diverse debuts outperform their non-diverse debuts.

Streamers' Diversity Demand vs Supply Gap

How has Streamers' Diversity Demand Gap Changed Between 2017 and 2019?

Examining the 25 most in-demand debuts on streamers yearly, we found:

Average Demand of Annual Top 25 In-Demand US Streamers' Scripted Debut Series

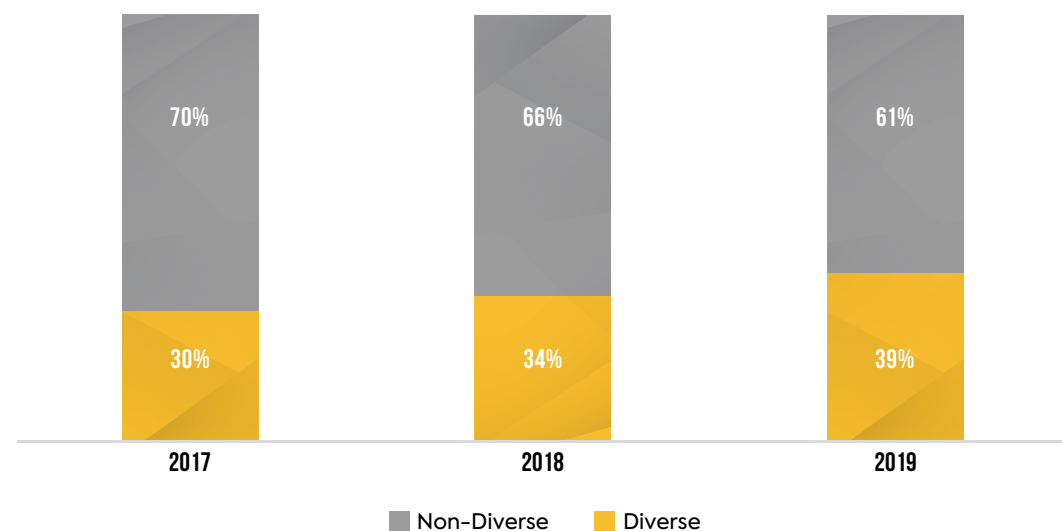


- Over the last three years, the demand of streamers' diverse debuts has nearly doubled, increasing 85%.
- In 2019, for the first time, streamers' diverse debuts were more in-demand than their non-diverse debuts, leading in demand by 42%.
- The demand for streamers' non-diverse debuts has increased less than 20% in the last three years.

How has Talent Diversity in Streamers' Debut Series Regulars Changed Between 2017 and 2019?

Annual Percentage of Diverse Talent in US Streamer's Scripted Debuts Series Regular

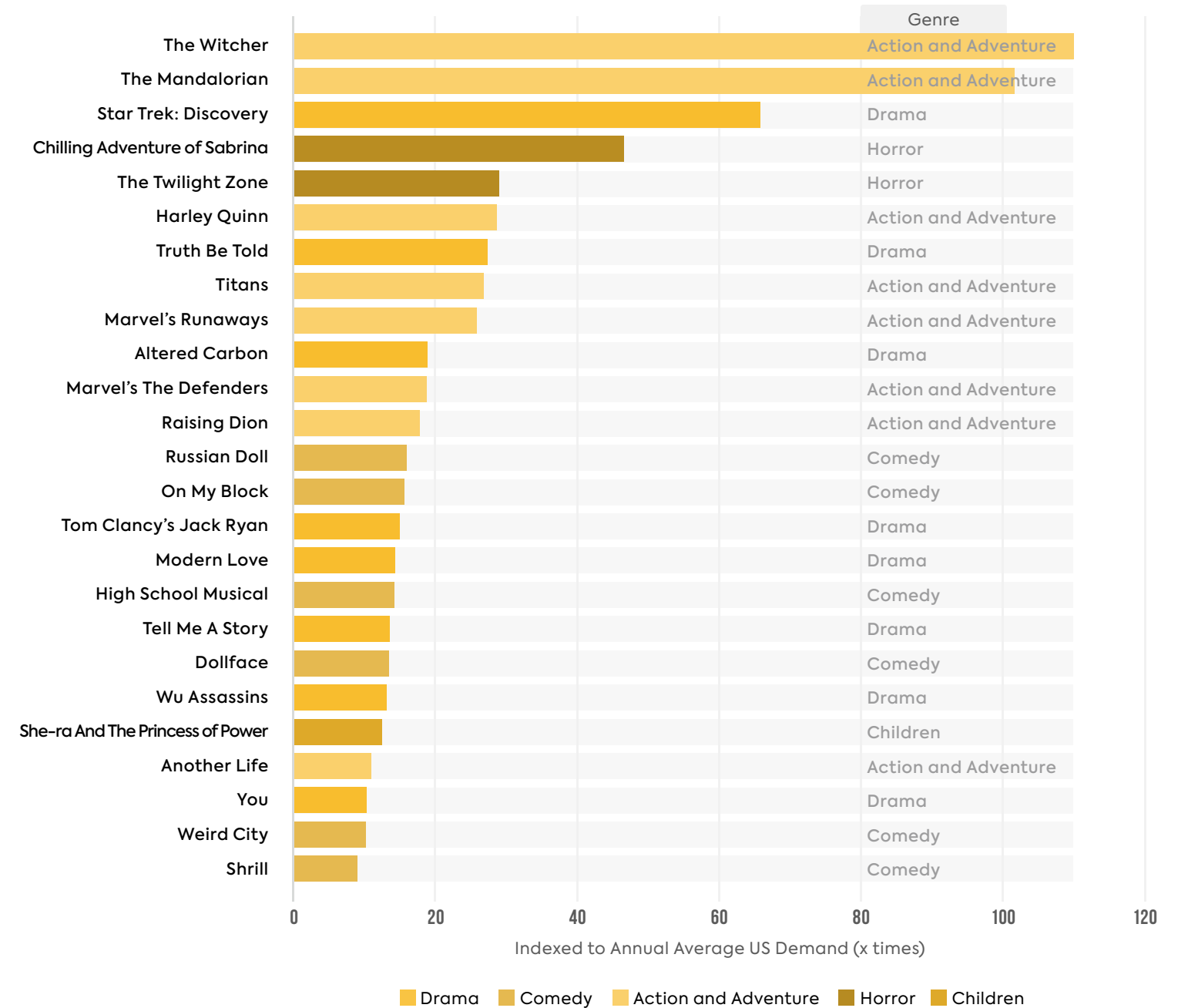
- Streamers have steadily increased their percentage of talent diversity in debut series regular cast.
- In 2017, less than one in three of streamers' debut series regular talent was diverse.
- In 2019, nearly two in five of streamers' debut series regular talent were diverse.



STREAMING PLATFORMS

What are Streamers' 25 Most In-Demand Diverse Debuts Between 2017 and 2019?

Genre Breakdown of Top 25 In-Demand Diverse US Streamers' Scripted Debuts 2017-2019



- 33% of the most in-demand diverse streamers' debuts were action and adventure series, often including themes of fantasy and science-fiction.
- 33% of the most in-demand diverse streamers' debuts were dramas, diverging from broadcast's and cable's debut trends.

INDUSTRY VOICES

Executives from the industry reflect on the report's findings and the future of diversity in TV.



"At Gaumont, inclusion and diversity is at the core of our culture and we strive to reflect this within our internal organization, in the stories we choose to tell and the talent we work with to bring those stories to life. Through our highly acclaimed films and with 18 series across 8 languages, we have made great strides toward contributing to an industry standard which offers representation for all. Through our partnership with Parrot Analytics, we have the ability to access real time data and insights across global audiences allowing us to remain agile in our continued efforts to serve the needs of our global partners and their audiences."

- **Christophe Riandee**, Vice-CEO, *Gaumont*



"Richard Pryor, Eddie Murphy, and Will Smith were topping the charts decades before a Black actor was entrusted a starring role in a blockbuster-budgeted film. The demand for more diversity is not just large, it has existed for decades and will continue to grow for decades more. The ability to better assess this demand is good for audiences, for talent, for Hollywood, Bollywood, Nollywood and more."

- **Matthew Ball**, Managing Partner, *Epyllion Industries*



"We know that our success is dependent on nurturing and maintaining a principle of inclusion. This led to defining one of Quibi's core values as 'Be The Audience' -- which inherently puts diversity and inclusion as a central tenet in all of our operations -- from the team members we hire to the creators we work with and the stories they tell."

- **Jim O'Gorman**, Head of Talent & Organization, *Quibi*



"As a multi-media company dedicated to the power of art, we strive to raise awareness and celebrate all forms of arts and culture. To be a true reflection of our community, all voices should have a platform regardless of race, gender, sexual orientation or religion. This study underscores the value proposition of diverse programming, and highlights the fact it's also a good business strategy."

- **Liz Janneman**, EVP Network Strategy, *Ovation*



"It's incredibly important for us as a company to use data to help inform clients' decisions across film, TV, music, sports, and more. We have had a longtime focus on diversity backed with real data, which is why we are excited that this first-of-its-kind study led by CAA and Parrot Analytics will help guide the agency and industry as a whole as we continue to push for greater diversity onscreen."

- **André Vargas**, Head of Data, *CAA*



"Growing up, I was drawn to content that reflected the faces of my family and community, whenever it was available. For so long audiences have craved true representation on their television screens. More recently, the opportunity has emerged to showcase what so many have known to be true, with data. Unsurprisingly, the numbers prove that investing in authentically diverse content isn't just the right thing to do, but actually a solid business investment."

- **Karina Dixon**, Global Insights Director, *Parrot Analytics*

RECOMMENDATIONS

Based on our findings, we propose the following guidelines for cultivating diversity:

1. **Evaluate casting breakdowns and avoid language that encourages implicit bias.**
When specifying a role as diverse, be sure to check for language that could feed into harmful stereotypes. Consider removing negative identity markers and avoid using prototypes that might affect how people imagine the character on the page. Focus on highlighting traits and qualities that support the narrative and character development in an authentic way.
2. **Set casting goals that reflect the world we live in.**
According to recent data for the U.S. Census Bureau, 40% of the population identifies as racially or ethnically diverse. Set strategic casting targets that are reflective of the audiences watching and think about how casting decisions can be complimentary to the show.
3. **Be flexible with systems that measure and define a show's success.**
It's important that executives look beyond hard viewership data. Analyzing audiences demand more holistically, including social conversations, can be critical to illustrating a show's value and should be considered in decisions around future seasons or other projects that are being developed.

4. **Integrate culturally specific themes or storylines throughout the show.**

Explore opportunities to build in themes or storylines that authentically reflect the character's experience. Even subtle cultural representations can have a tremendous impact on viewers and deepen their engagement with the show. Be cautious of playing into negative or harmful stereotypes with new storylines that may arise as a result of your casting choices.

5. **Proactively source, acquire and greenlight material where diverse talent can be central to the narrative.**

Exercise your influence to identify material that elevates underrepresented communities and voices. Be careful to maintain the cultural integrity of these projects and to bring in the right creatives and consultants that can ensure that you represent specific communities and cultures with care.

6. **Challenge unfair stereotypes that have influence over creative decisions.**

Seek out reliable data to use in any conversations during the decision-making process. Be sure to call out specific instances where individual opinions are being used to direct decisions on the future of a show or on specific creative choices. Whenever possible, bring in appropriate "comps" that strengthen the case for racial and ethnic diversity in your project.



Nicole Zamanzadeh, PhD

Insights Analyst
Parrot Analytics

POSTFACE

Our study demonstrates that audiences' demand for shows with diverse casts has grown faster than the industry's supply of shows with diverse casts. Our study reflects the industry's progress thus far, and growing opportunity in the future.

Yet, diversity extends far beyond the quantity of diverse actors or of diverse people. Diverse representation includes the type and variety of roles that marginalized people play in the creative process of TV.

Talent diversity is foundational, yet it is far from an all-encompassing measure of inclusive storytelling in TV. I hypothesize the impact of diverse representation evidenced here becomes magnified by the participation of diverse voices in content creation.

When diverse voices make meaningful contributions to the creative process of content, they expand the reach, power, and relevance of representation because they reflect authentic lived experiences.

I believe the diversity in U.S. audiences and our global society is fundamental to the fabric that builds and sustains our industry. Storytelling is and has been cherished by people across time, culture, and geography for much needed relief from and information about our world. As we evidence the value of representing the diversity in our experiences, we see the new possibilities ahead for TV creatives and audiences alike.

