



Seen, heard, valued

Engaging Asian Americans through media

In collaboration with



Diverse Intelligence Series 2023



Introduction

As *Everything Everywhere All At Once* dominated the Hollywood awards season this year, I could virtually hear the Asian American Native Hawaiian and Pacific Islander (AANHPI) community shout a collective “finally!” around the nation, for the long-overdue recognition from the media and entertainment industry.

When Michelle Yeoh’s name was called for best actress at the Academy Awards—the first by a self-identified Asian woman, and just the second woman of color to ever win the award—it felt like we all took a communal victory lap. At last, the industry sees us as winners. It’s about time our experiences are seen and heard. Actor Ke Huy Quan’s Oscar win that same night was also a tear-jerking moment because he started his journey as a child refugee who arrived in the U.S. by boat and ultimately reached a career pinnacle as an Academy Award winning actor. What an incredible story.

Now the red carpets are rolled up and the crowds are gone. The AANHPI community is left wondering—what happens now? Will the media industry increase AANHPI representation on screen and behind the camera?

It would certainly make good business sense. Asian Americans are the fastest growing population within the U.S., according to the U.S. Census, with almost 130% growth in buying power* in the last decade.

We’ve already proven our stories are powerful and attract global audiences – not just AANHPI viewers but all people. Consider *Squid Game*, *Never Have I Ever* and *Parasite*, the 2019 film that won six Oscars at the 92nd Academy Awards, including best picture and best director. My favorites include *Fresh Off the Boat*—which ran for six seasons—and *The Chair* starring Sandra Oh. These shows successfully capture the challenges—and the humor—in being true to oneself while meeting family and societal expectations. These are universal problems told through an Asian lens.

*Selig Center for Economic Growth, 2021

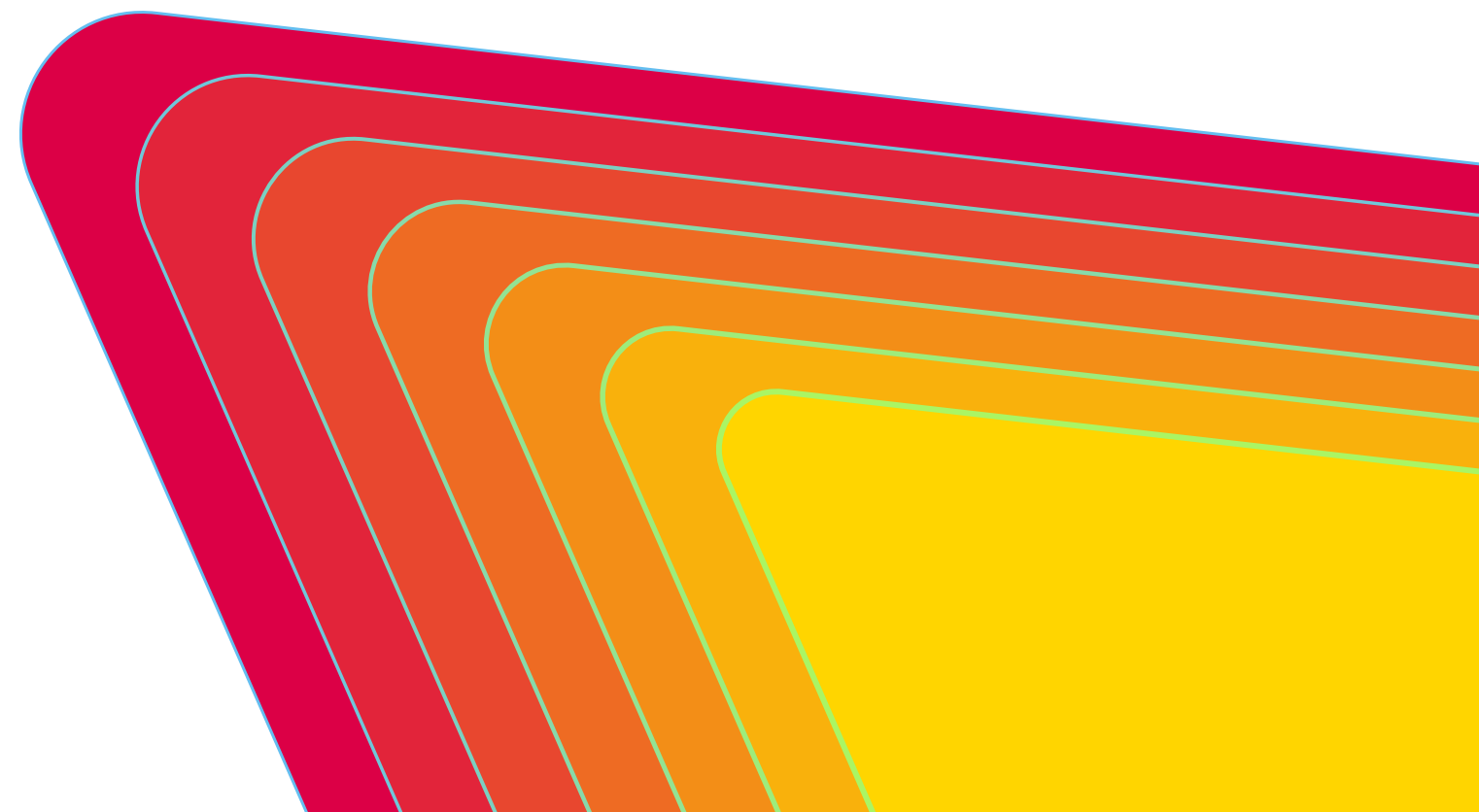
Representation isn’t just about being “woke” and pledging support when a community is under attack. The AANHPI audience wants media content that explores our culturally rich and diverse experience and features Asian actors, directors, producers and writers.

In this report, Nielsen explores all of these issues. For marketers, content creators and media publishers, we hope you’ll see there is value—and audiences—to be gained when you embrace our community.



Patricia Ratulangi

Nielsen Vice President, Global Communications
Diversity, Equity & Inclusion



Asian American representation in TV programs and films is certainly not new, as actors like Sessue Hayakawa and Anna May Wong were featured on screen as far back as Hollywood's silent film era. But its prominence has gained in recent years, most recently at the 2023 Academy Awards.

Everything Everywhere All at Once's 10 awards were a landmark in Asian representation, highlighted by Michelle Yeoh's best actress award—the first by a self-identified Asian woman, and just the second woman of color to ever win the award. The movie's accolades add to a string of recent Asian representation breakthroughs with global audiences, including Netflix's *Squid Game* and *Parasite*, the 2019 film that won six Oscars at the 92nd Academy Awards, including best picture and best director.

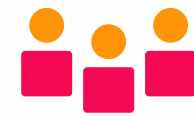
U.S. audiences watched more than 2.2 billion minutes of *Physical:100* in the first 6 weeks.



In just three-and-a-half months, U.S. audiences watched more than 16.4 million minutes of the survival drama series—enough to take the No. 2 spot on Nielsen's annual streaming unwrapped report for 2021. In addition to laying the foundation for a forthcoming second season of the show, the success of *Squid Game* opened the doors to other programs with similar themes. In early 2023, for example, Netflix launched *Physical: 100*, a reality competition series that sparked many comparisons to the fictional series. Audiences rallied, watching more than 2.2 billion minutes viewed between Jan. 23, 2023, and March 19, 2023.

As the [dominant TV option](#) among American TV audiences, streaming content has become a significant contributor in advancing Asian representation in TV and films, especially following the success of *Squid Game*. Compared with *Everything Everywhere All at Once*, which began its theatrical release in just 10 theaters, *Squid Game* became an instant favorite with audiences when it landed on Netflix in September 2021.





Among providers serving U.S. audiences, Netflix has led the charge in championing the development and distribution of content from Asia, starting with a commitment to spend \$500 million on Korean content in 2021. Then in 2022, Netflix subsidiary Scanline VFX announced a \$100 million investment in developing special effects facilities in South Korea. And just a few months ago, Netflix announced it will release **34 Korean titles** this year, its biggest lineup of Korean content to date.

The investment, awards and audience engagement certainly brighten the spotlight on the subject of Asian representation in media, but the few examples noted here represent a very small portion of a very large industry. For example, a little more than 23,600 titles¹ from nine Asia-Pacific countries² were available to audiences in 2021 and 2022, with approximately 60% coming from South Korea. In total, those titles represent just 2.4% of the 976,000² unique video titles across linear and streaming channels that audiences had to choose from as of January 2023.



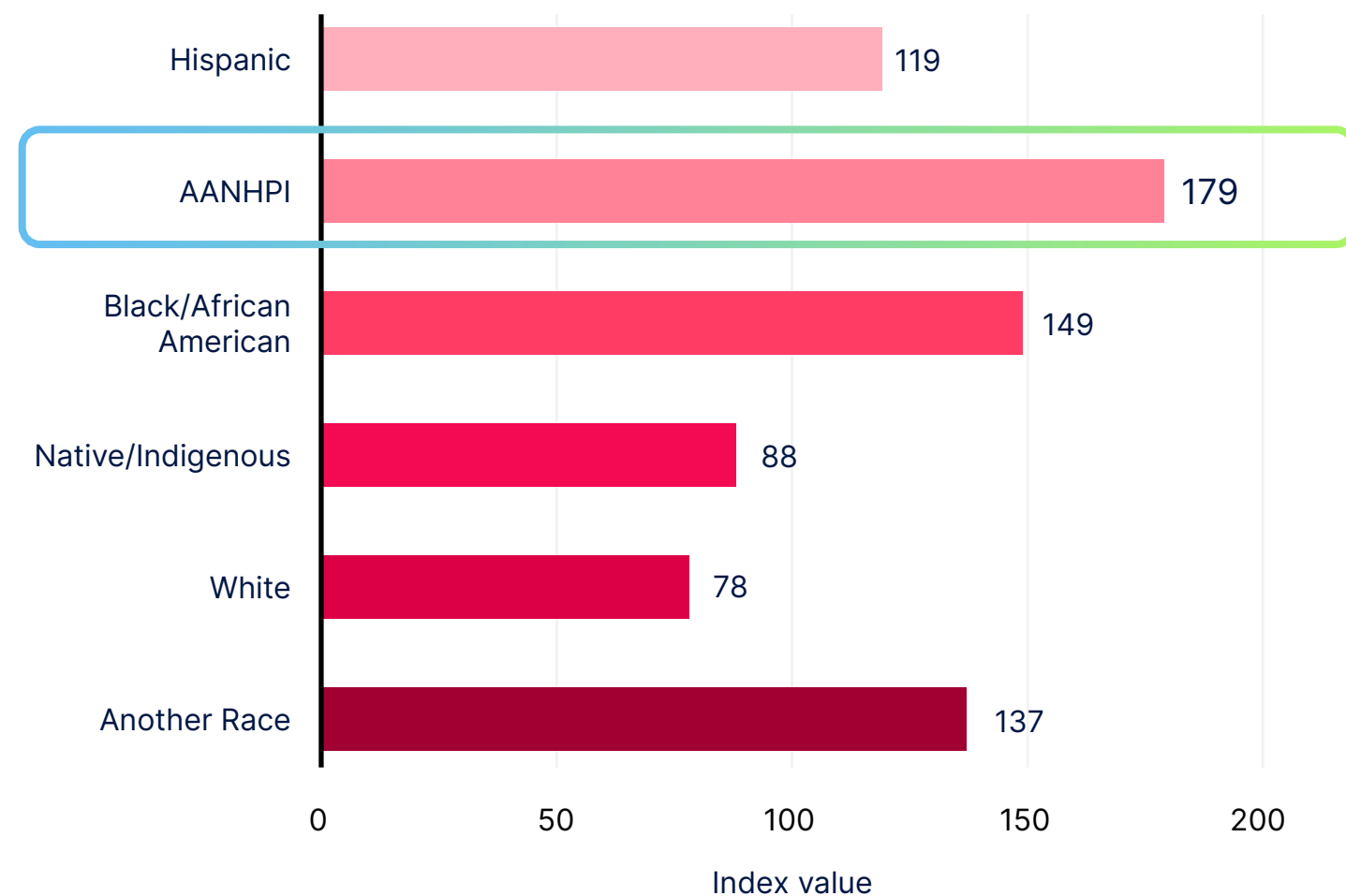
TV and movies from Asia-Pacific represent just 2.4% of the total video content that U.S. TV audiences have to choose from.

¹ Gracenote Global Video Data

² China, India, Indonesia, Japan, South Korea, the Philippines, Qatar, Thailand and Vietnam

Given the limited amount of content developed across Asia-Pacific within the context of all available titles and such fast-paced audience demand for that 2.4%, it's not surprising that the Asian American and Native Hawaiian/Pacific Islander (AANHPI) audience feels least represented among all ethnic groups in media. Hollywood has an opportunity to further meet audience demand by continuing to invest in content that broadens how AANHPI people are represented on screen.

AANHPI audiences feel the most underrepresented in TV and films



Read as: AANHPI viewers are 79% more likely than the general population to say they feel underrepresented in TV and films.

Source: Nielsen's 2022 Attitudes on Representation on TV Study

Asian Americans' time with TV lags the general population

It's not possible to explicitly correlate perceptions of low representation with media consumption, but we do know that Asian Americans spend significantly less time with television—including the time they spend with TV connected devices³—than other ethnic groups and the general population.

Daily time with TV

By ethnicity

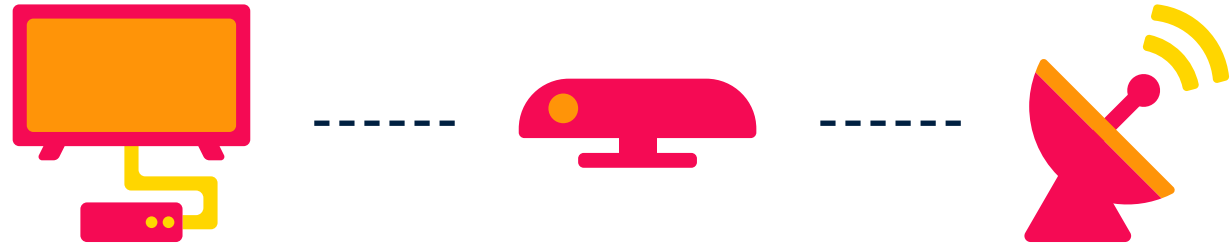
| Q4 2021 | General population | Asian | Black | Hispanic |
|------------------------|--------------------|-------------|-------------|-------------|
| Live TV | 2:58 | 1:22 | 3:58 | 1:56 |
| DVR playback | 0:35 | 0:16 | 0:38 | 0:17 |
| TV-connected devices | 1:24 | 1:16 | 1:53 | 1:22 |
| Total use of TV | 4:58 | 2:55 | 6:30 | 3:36 |

| Q4 2022 | General population | Asian | Black | Hispanic |
|------------------------|--------------------|-------------|-------------|-------------|
| Live TV | 2:43 | 1:15 | 3:42 | 1:42 |
| DVR playback | 0:37 | 0:16 | 0:41 | 0:16 |
| TV-connected devices | 1:46 | 1:24 | 2:25 | 1:42 |
| Total use of TV | 5:07 | 2:56 | 6:49 | 3:41 |

Source: Nielsen National TV Panel

³ TV connected devices refer to any device, including smart TVs, that bring content from the internet to the TV glass. The most common use case is to stream video content.

Streaming: Where Asian American audiences spend most of their TV time



Total TV usage aside, Asian American audiences allocate the most TV time to streaming content—26.9% more than the general population⁴. From a pure choice perspective, streaming platforms offer far more variety than traditional broadcast and cable options: More than 76% of the titles available to U.S. audiences are on streaming platforms; the other 23.6% are on traditional linear channels⁵. As a result, it's not surprising that 68% of audiences typically start their search for content on streaming platforms⁶.

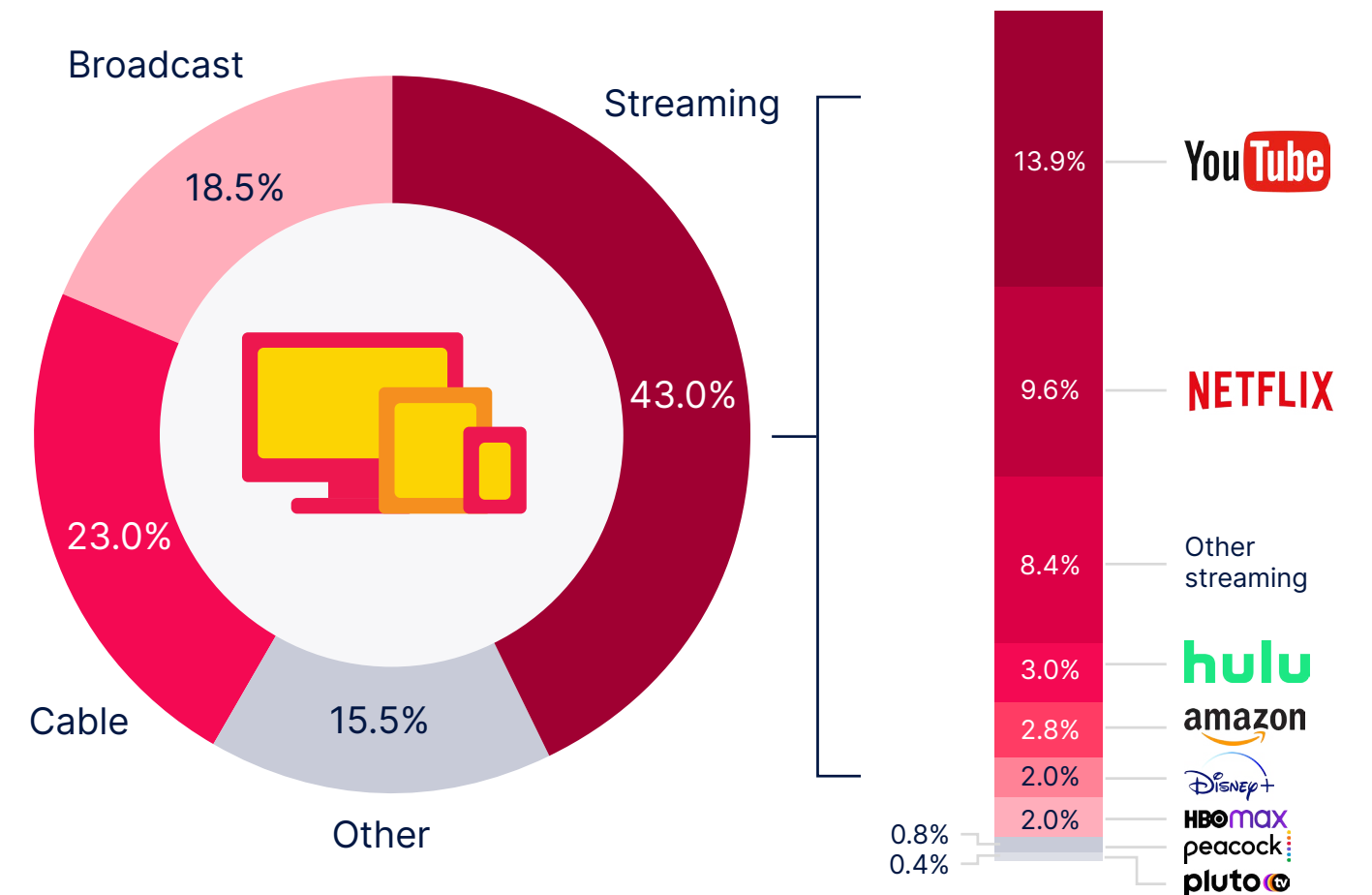
⁴ Nielsen National TV Panel Data and Nielsen Streaming Platform Ratings; Dec. 26, 2022 - Jan. 29, 2023

⁵ Gracenote Global Video Data

⁶ Nielsen Streaming Content Consumer Survey, October 2022

Streaming dominates Asians' time spent with TV

January 2023



"Other" includes all other TV usage that does not fall into the broadcast, cable or streaming categories.

Source: Analysis of January 2023 (12/26/2022 - 1/29/2023) Nielsen National TV Panel Data augmented by Streaming Platform Ratings. Note: Streaming of linear content has been removed from streaming (but does count toward broadcast and cable)

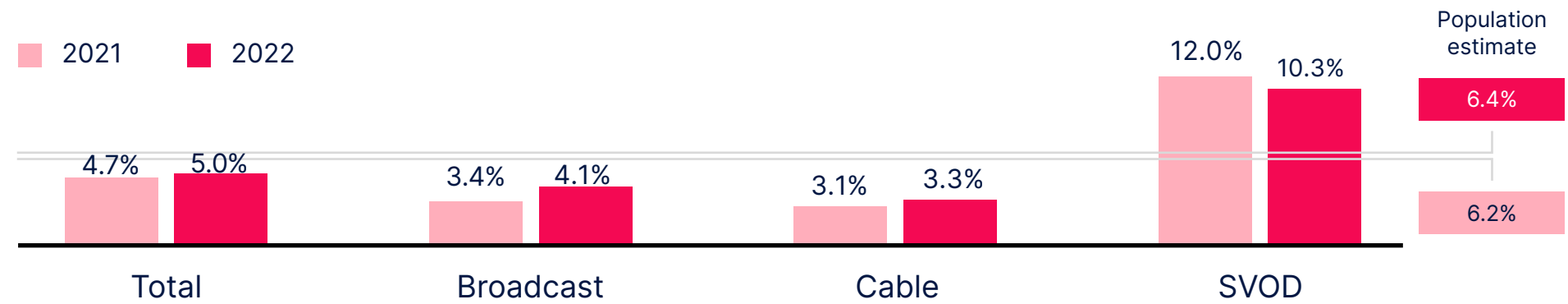


Asian American audiences watch **27%** more streaming content than the general population



In addition to offering the most content, streaming services are significantly more inclusive of people who identify as AANHPI than other TV options. That may be why Disney's *Moana* remains one of the most-streamed movies despite being released seven years ago⁷. In 2022, people who identify as AANHPI had a 10.3% share of screen⁸ among the 462 most-watched titles on streaming platforms. What's more, AANHPI people remain underrepresented in broadcast and cable programming, which combined, account for the majority of viewing among U.S. audiences.

AANHPI Share of screen



AANHPI total TV share of screen ranking by platform

| | Broadcast | | Cable | | Streaming | | Pop estimate |
|----------------------------------|-----------|------|-------|------|-----------|-------|--------------|
| | 2021 | 2022 | 2021 | 2022 | 2021 | 2022 | 2022 |
| Asian & Pacific Islander | 3.4% | 4.1% | 3.1% | 3.3% | 12.0% | 10.3% | 6.5% |
| East Asian | 1.7% | 1.9% | 1.3% | 1.3% | 5.7% | 4.2% | 2.1% |
| South Asian | 0.4% | 0.4% | 1.0% | 0.4% | 2.2% | 2.2% | 2.4% |
| Southeast Asian | 0.5% | 0.9% | 0.2% | 0.8% | 1.0% | 1.8% | 1.7% |
| Native Hawaiian/Pacific Islander | 0.3% | 0.3% | 0.1% | 0.2% | 0.5% | 0.6% | 0.3% |

⁷ U.S. audiences 2+ watched more than 8.6 billion minutes in 2022

⁸ Share of screen, from Gracenote Inclusion Analytics, is the percentage of an identity group that appears on screen

Source: Gracenote Inclusion Analytics

Connecting with content

Given the amount of content that audiences have access to, as well as all that will become available in the future, it's no surprise that audiences are spending more time searching for something to watch. Nielsen's most recent streaming content consumer survey found that adults 18 and older now spend 11 minutes and 16 seconds looking for something to watch, which is up 52% from March 2019.

What makes representative content more engaging?

Features geographic location associated with my identity group(s)



Features a cast member closely associated with my identity group(s)



■ % of AANHPI audiences agree ■ % Overall audiences agree

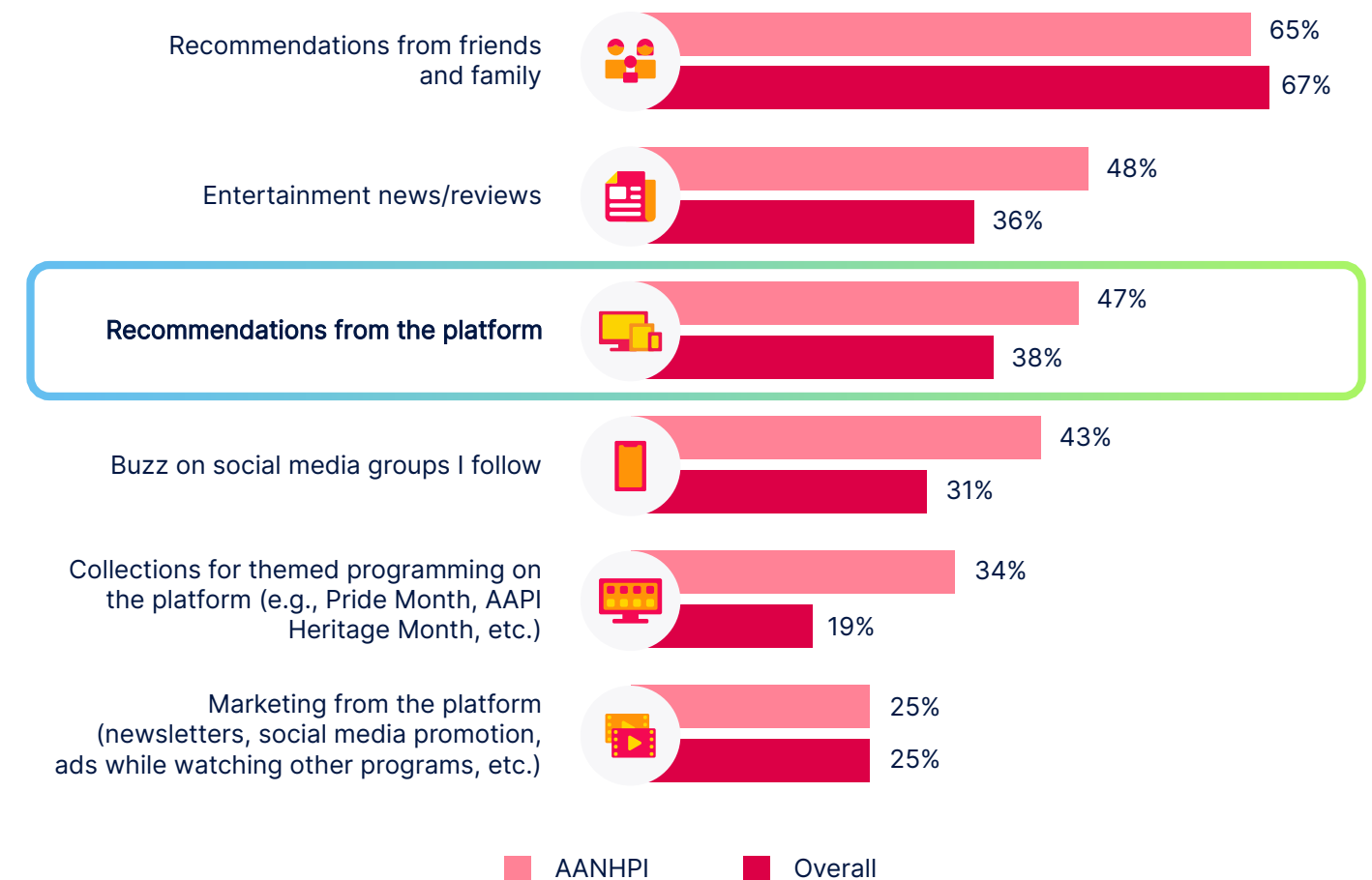
Source: Nielsen Attitudes on Representation Supplemental Study, 2022

Once audiences find the content they're interested in, inclusivity and representation can help keep them engaged. Just as we've seen with [Hispanic representation](#), AANHPI inclusive content has an impact on how "bingeable" it is.

Finding the right content

Metadata, which is the data about a specific program, will be critical in fulfilling audiences' content discovery journeys as the wealth of available content grows. When video content has detailed metadata, platforms and services can better recommend titles based on interest, inclusion, theme, topic, etc. And while all audiences look to recommendations from friends and family above all other sources, AANHPI viewers consider recommendations from streaming platforms significantly more than the general population.

How do you find representative programming?



Source: Nielsen Attitudes on Representation Supplemental Study, 2022

The Summer I Turned Pretty

on Amazon has an AANHPI share of screen of 62.5% and a bingeability score of 6.2



In looking at a selection of programs across traditional and streaming channels with high AANHPI share-of-screen scores, we also see that they have high bingeability scores. Nielsen Gracenote's bingeability scores provide a metric for how many episodes of a program audiences watch in a given day. On the bingeability scale, programs with a score of 3 or higher are considered highly bingeable.

| Program | Genre(s) | AANHPI share of screen | Bingeability Score |
|----------------------------|---------------------------------|------------------------|--------------------|
| The Summer I Turned Pretty | Drama, romance | 62.5% | 6.2 |
| Emily in Paris | Comedy drama | 11.1% | 6.1 |
| Resident Evil | Action, horror, science fiction | 33.3% | 5.7 |
| Dollface | Sitcom | 50% | 5.2 |
| Surviving Summer | Drama, surfing | 28.6% | 4.8 |
| The Pentaverate | Dark comedy | 14.3% | 4.5 |

Source: Gracenote Inclusion Analytics, 2022 TV season



Asian-inclusive content attracts more than AANHPI audiences

With these selected program case studies, we see that quality content inclusive of Asians draws new, valuable audiences. In fact, it attracts all audiences. And what's more, these audiences stay once they came for what attracted them in the first place.



Never Have I Ever

On Aug. 11, 2022, Netflix released 10 episodes *Never Have I Ever* (season 3), a coming-of-age drama about a first-generation Indian-American teenager navigating school, friends and family. The show has been lauded for breaking South Asian stereotypes. This third season attracted about 1 million new viewers who did not watch any content on Netflix the week of August 4-10, of which only about 10% were Asian.

The Company You Keep

On Feb. 19, 2022, *The Company You Keep* launched on ABC to an audience of 2.9 million people. The series is based on South Korean series *My Fellow Citizens* and features Asian female lead Catherine Haena Kim. About 1.1 million of that audience were new viewers who did not watch any content on ABC the week of February 12-18: 142,000 Asians or 5% of those new viewers were Asian.



Young Rock

NBC released season 3 of *Young Rock* on Nov. 4, 2022. A sitcom based on the life of wrestler and actor Dwayne Johnson, "The Rock", it has a 61% share of screen for Native Hawaiian and Pacific Islanders. Two million people tuned in to the show, and about 92,000 of them were AANHPI.

Source: Custom Analysis of Nielsen National TV Panel and Streaming Content Ratings data based on available measurable content across platforms. Images sourced from Gracenote view.

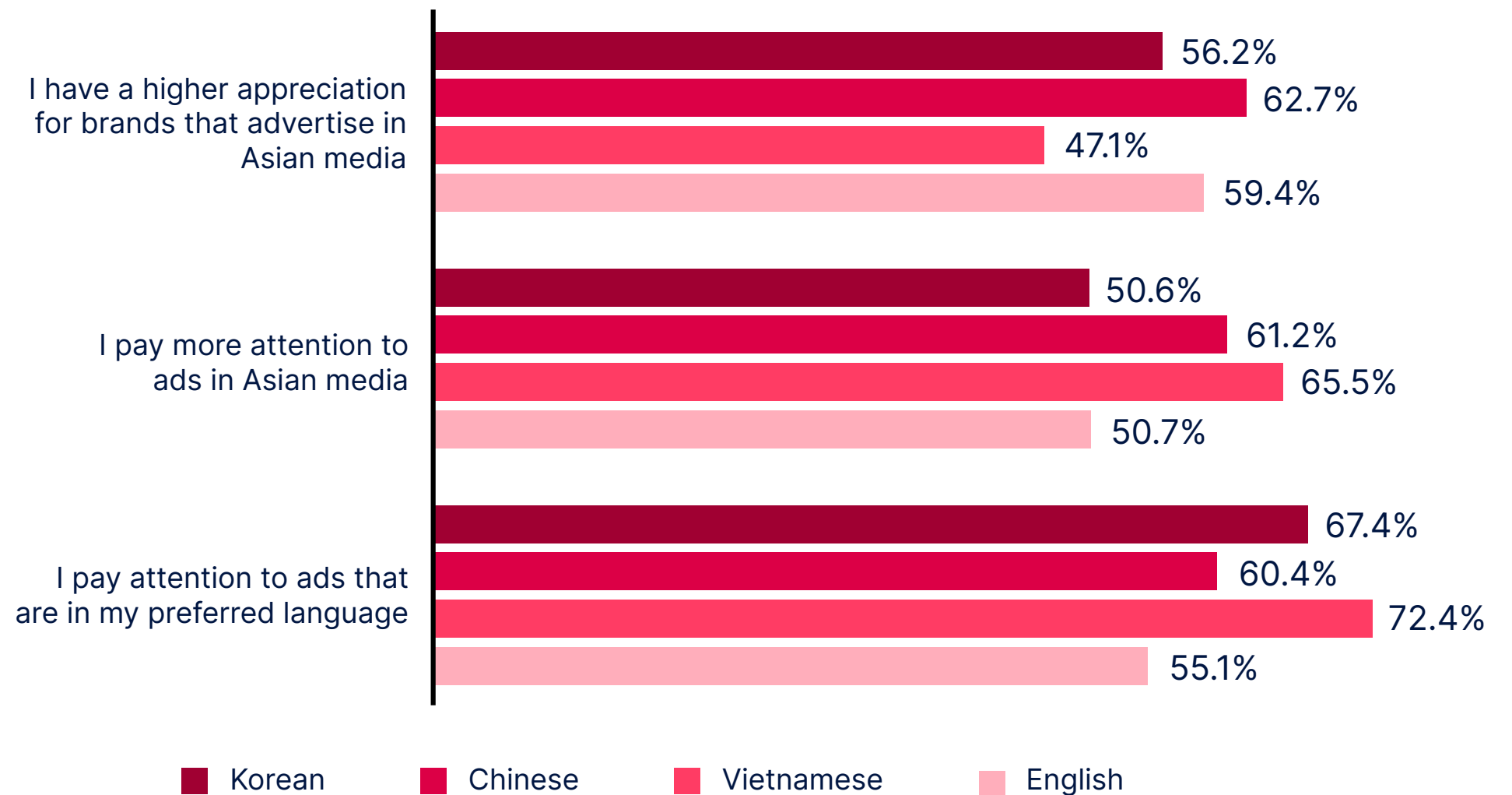


AANHPI audiences are
46%
more likely to buy from
brands that advertise in
inclusive content

Asian-inclusive advertising increases brand affinity

When brands embrace traditionally overlooked populations, they don't just drive high levels of purchase intent among Asian Americans; they improve their brand with the fastest-growing consumer group in the U.S.⁹ For example, a recent Nielsen custom Asian media consumption study found that more than 62% of people who consume media in Chinese say they have a higher appreciation for brands that advertise in Asian media.

Asian Americans appreciate inclusive brands



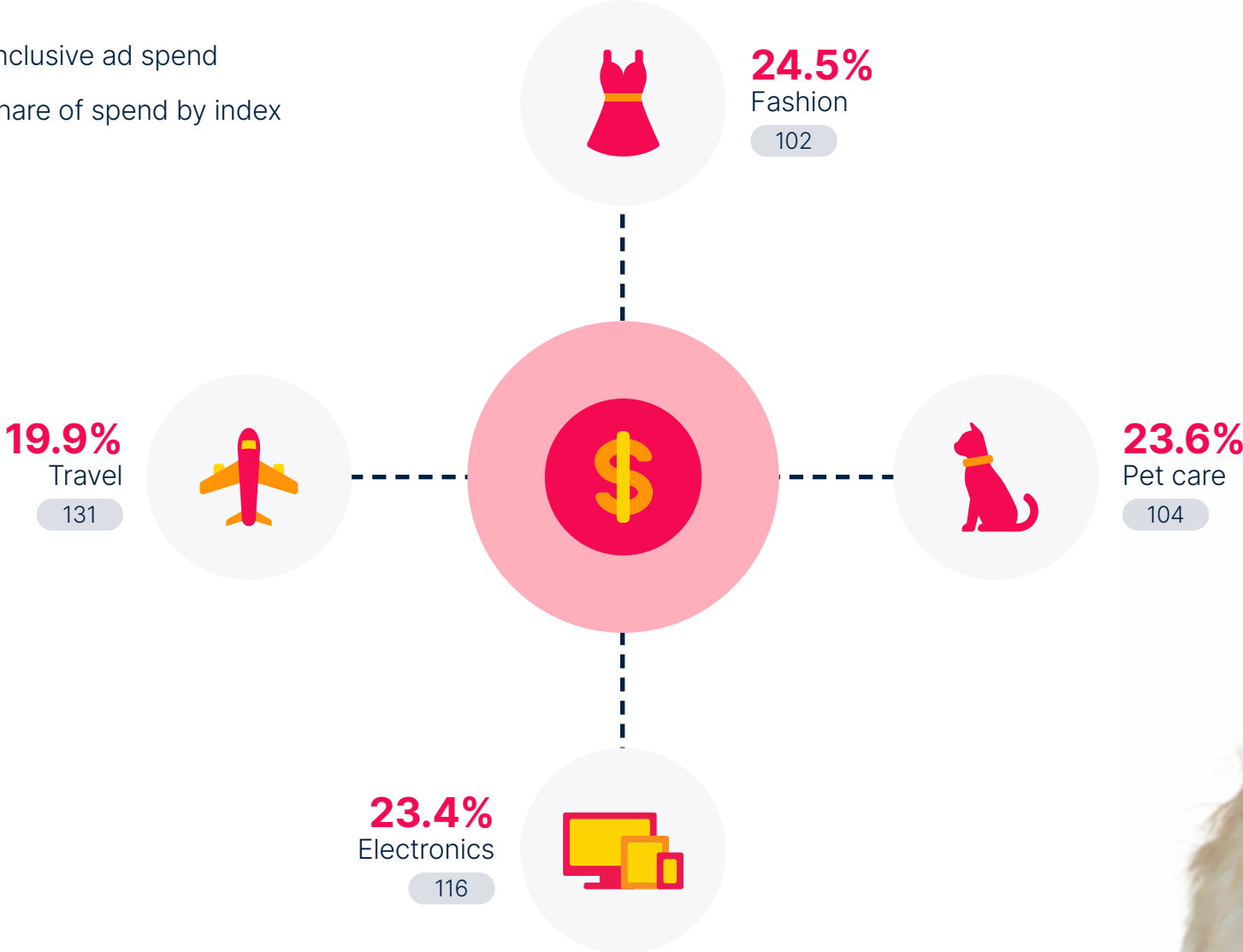
⁹ U.S. Census
Source: Custom Asian media consumption study, Fall 2022

In today's diverse and global marketplace, brands that invest in content that features and resonates with various ethnicities and cultures can experience considerable benefits. Given that Asian American audiences spend less time with TV than other audiences, brands have a smaller window of opportunity to engage with them on this medium. But with an audience driven to buy when inclusivity is considered, the opportunity to engage Asian Americans through ads is notable.

Last year, brands in the categories of fashion, pet care, electronics and travel allocated a significant portion of their advertising budget toward content that features and appeals to the AANHPI community. These are also the categories where Asian Americans are spending more than the general population.

More ad spend, more impact

- Asian-inclusive ad spend
- Asian share of spend by index



Source: Nielsen Scarborough USA+ 2022 Release 1 Total (Dec 2020 - Apr 2022), Nielsen Ad Intel and Nielsen Gracenote Inclusion Analytics



Compelling content drives audience engagement

Representation and inclusion are critical components of compelling content. And above all else, the success of Asian-inclusive titles like *Love is Blind*, *Physical: 100* or *Extraordinary Attorney Woo*—among Asian audiences and the general population—speaks to the power of compelling content.

Good content appeals to all audiences, and our latest Attitudes on Representation on TV study found that 87% of audiences are open to content featuring people outside of their identity group. Among AANHPI audiences, the percentage is 91%.

But as we saw in the case of the very limited initial theatrical release of *Everything Everywhere All at Once* and the minimal amount of video content from Asian countries, audiences don't always have access to the content they're looking for—or there isn't enough of it. But we know from recent trends that when audiences have access to what they're looking for, they will engage with it.

Love is Blind

In 2022, Netflix's reality dating show made the top 10 most-watched streaming programs list for all U.S. audiences. It featured diverse participants and 50% Asian share of screen.



| Audience | Viewing minutes (billions) |
|----------|----------------------------|
| AANHPI | 0.8 |
| Black | 1.9 |
| Hispanic | 2.3 |
| White | 8.0 |

Source: Nielsen Streaming Content Ratings, Nielsen National TV Panel, US Viewing through Television

SPOTLIGHT

Understanding the importance of in-language content in media

In addition to seeking out and engaging with content in which AANHPI audiences see themselves represented, these viewers also gravitate to content in their native languages. In the U.S., the three most prominent languages among Asian Americans are Chinese, Vietnamese and Korean.

Nielsen conducted a survey in the fall of 2022 to understand the importance of content in these three languages among Asian American audiences. Importantly, the majority of survey respondents who took the survey in Chinese, Korean and Vietnamese, believe in-language media is the most trusted source of information.

Asian Americans trust In-language media

Read as: Among respondents, being able to watch TV in Chinese, Vietnamese and Korean is very important.

Strongly agree / agree

- 66.3% Korean
- 62.0% Chinese
- 56.4% Vietnamese
- 40.0% English

How important is it for you to watch TV in your native language?

Read as: 78.8% of Korean respondents feel that it is very important/important.

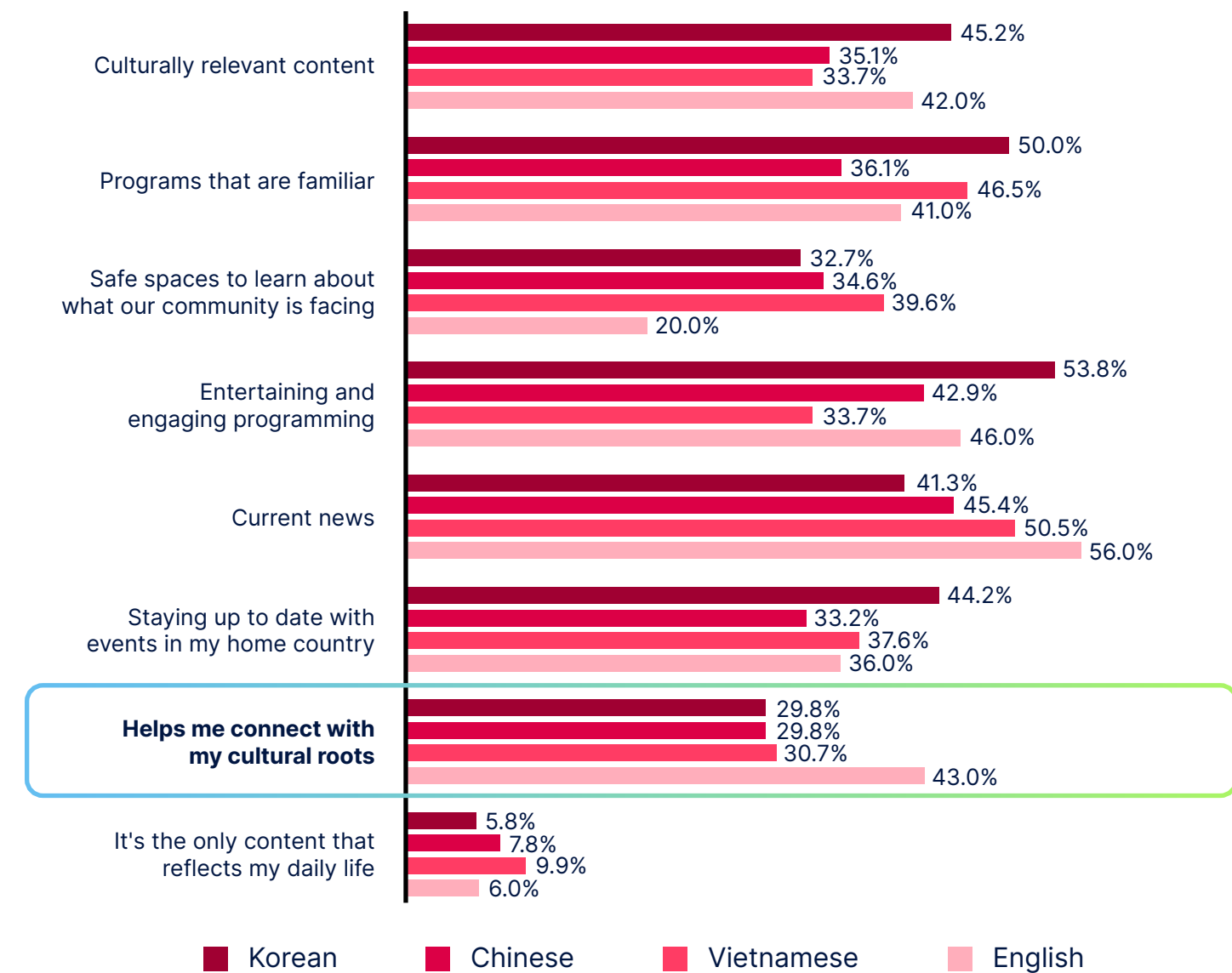
Very important / important

- 78.8% Korean
- 70.8% Chinese
- 80.6% Vietnamese
- 90.0% English

"Media" includes radio, TV, cable TV, newspapers, social media, podcasts

As content choices expand, in-language media is an important way to stay connected, especially for AANHPI consumers. Among all respondents, those who took the survey in English were the most likely to say that in-language media "helps me connect with my cultural roots." As brands look for ways to connect with the AANHPI population, in-language media is a powerful way to meet them where they're at.

How does media in your preferred language serve your community?



Source: Custom Asian media consumption study, Fall 2022

Methodology

Television methodology

Television data is derived from Nielsen's National TV Panel that is based on a sample of over 41,000 homes that are selected based on area probability sampling. Data used in this report is inclusive of multicultural audiences and based on scaled installed counts for Jan 1 - Dec 31, 2022 via Nielsen NPOWER/National Panel.

The Nielsen Attitudes on Representation on TV Survey (and supplemental survey 2022)

Survey of over 2,000 Android and iOS users fielded by Nielsen Electronic Mobile Meter (EMM) Panel weighted for age, gender, race, ethnicity and income for Android and iOS users mobile phone users conducted in Fall 2022.

Nielsen Asian Language Media Consumption and Attitudes Survey 2022

Online survey of over 1000 respondents conducted in Simplified Chinese, Korean, Vietnamese and English language.

Nielsen Scarborough

Nielsen Scarborough USA+ 2022 Release 1 Total (Dec 2020 - Apr 2022). Scarborough measures the unique shopping patterns, product usage, demographics, lifestyles and cross-media behaviors of the American consumer at a local, regional or national level, giving the ability to profile over 2,000 measured categories and brands.

Gracenote Inclusion Analytics

Designed to accelerate diversity and equity in media, Gracenote Inclusion Analytics illuminates representation of on-screen talent compared with audience diversity. The solution empowers content owners, distributors and brands to make better informed decisions around inclusive content investments. www.nielsen.com/inclusionanalytics

Gracenote Video Descriptors

Video descriptors are a comprehensive set of descriptors bound by a unified hierarchical Video Descriptors Taxonomy. The descriptors are used to comprehensively describe a program across the various Video Descriptor Types like Theme, Character, etc. The data set is created by specially trained Gracenote editors using a rigorous tagging process to ensure a high-quality and consistent metadata product. Each video descriptor assigned to a program has a Video Descriptor Weight associated with it. The weights give the degree of importance of the descriptor for the program.

Nielsen Ad Intel

The most comprehensive source of local, national and international advertising spend data. Covers ad activity across media, company, category or brand.

Nielsen Streaming Media Consumer Survey

Custom Nielsen study conducted in English only from September 22, 2022 - October 5, 2022 via an online survey. It is based on a representative sample of 937 U.S. adults 18+ who currently use streaming video and/or audio services.

Nielsen Streaming Platform Ratings

Audience measurement data that details the amount of time consumers spend streaming and on which platforms.

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About Nielsen

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