



◀▶ Nielsen

Hispanic audiences in focus:

Trust in media -
the key factor driving
shift to streaming

Diverse Intelligence Series 2023

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Introduction

Building strong ties with Hispanic audiences goes beyond producing inclusive content and effective ads. It's about navigating an ecosystem where brands, creators and distributors can connect with the multifaceted Latino community. Latinos value quality media and trustworthy content—the factors that lend authenticity and affirm credibility, which influence content choices and how Latinos perceive the brands and platforms they encounter. Smart brands work within these ecosystems, boosting their standing and building loyalty among the community.

In the evolving media landscape, one truth stands out with absolute clarity: the burgeoning opportunity within the Hispanic market. With a purchasing power of more than \$2 trillion¹, the Hispanic community is not just a key demographic segment, but a dynamic force shaping the future of consumer behavior and brand engagement. The media landscape in 2023 reveals intriguing shifts for all consumers, but especially for Hispanics who are undeniably drawn to streaming and Spanish language- dominant Hispanics who continue to embrace broadcast television. There's a profound opportunity for brands to align with Hispanic consumers' consumption preferences, tailoring content and advertising strategies to meet the community's needs and values.

This report is more than a reflection of the current state of media consumption for Hispanics. The insights here provide an in-depth understanding of the unique authenticity signals and credibility markers that drive the Hispanic community's choices with media and brands. Our goal is to equip brands, agencies and publishers with strategies to effectively engage the community, mindful of the complexities impacting their brand loyalty, trust and overall media engagement.



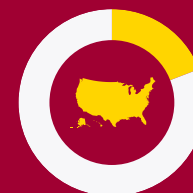
Stacie de Armas
SVP, Diverse Insights & Intelligence

Editor's note: There is a rapidly evolving conversation about the profound differences between the terms Latinos (descendants from Latin America) and Hispanics (descendants from Spanish-speaking countries). Within this report, Hispanic and Latino are used interchangeably, following the guidelines of the U.S. Census.

The Hispanic community



\$2.1 trillion buying power¹



19% of the U.S. population²



34% identify as two or more races²
▲ up 629% from 2010



58% are age 34 and younger²

¹ 2022 Selig Center for Economic Growth, Terry College of Business, The University of Georgia

² 2021 American Community Survey, U.S. Census Bureau

The Hispanic opportunity

When it comes to media, we vote with our eyes and our ears. And with an ever-expanding media landscape, audience preferences are pivotal. Creators and distributors want their content to stand out from a crowded field aiming to capture not just viewership or listenership but meaningful engagement. For their investments, brands want to appear where their desired audiences are spending the most time and where their messages can truly resonate. For Hispanic audiences however, engagement can be complex—even though this group has grown to account for one-fifth of the U.S. population.

That complexity stems from the inherent nuances within the community. Incredible diversity, characterized by varied socio-economic factors, different language preferences, a much younger demographic profile and an array of cultural experiences inhibits one-size-fits-all content or marketing strategies. Content that is representative of Latino values and perspectives are critical considerations for any creator, distributor or brand thinking about engaging with Hispanic audiences. **The challenge lies in recognizing the diversity within this community, and understanding that time spent with media is not just an indication of audience presence, but a measure of potential for message resonance and impact.**

The digital shift: Embracing new viewing trends

On average, U.S. Hispanic adults spend 8 hours and 41 minutes per day³ with media. Like all audiences, Hispanics spend the most time with television, but their engagement with TV differs from that of the general population.

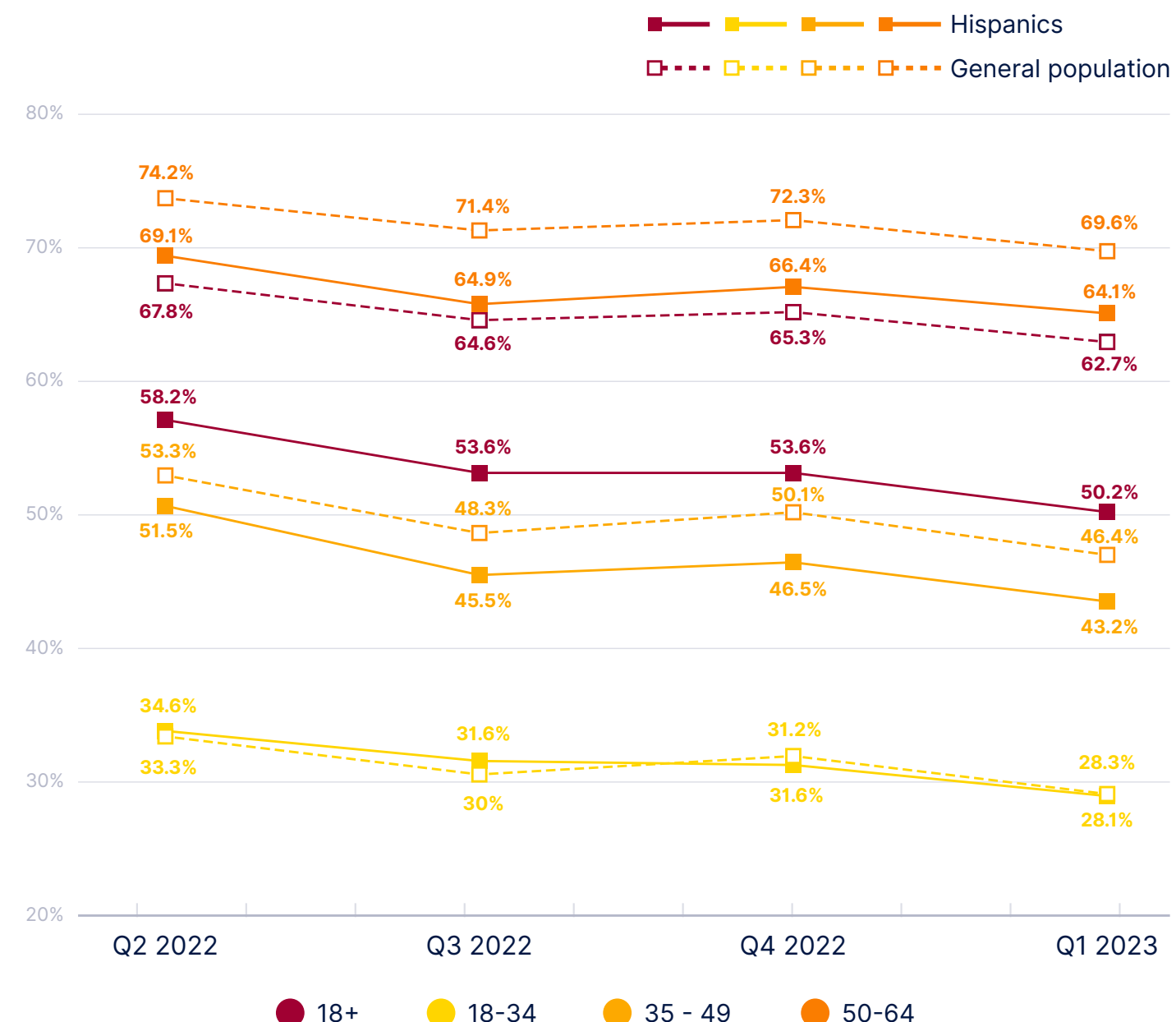


U.S. Hispanics spend just under **9 hours** with media each day

³ Nielsen National TV Panel, Q1 2023

That's because Hispanic audiences (especially younger people) remain at the forefront of cord-cutting*, a trend we see reflected in the amount of time spent with traditional TV programming. **In first-quarter 2023, among Hispanic adults 18+, live and time-shifted viewing accounted for slightly more than half of their total time with TV in first-quarter 2023, 22% less than the general population. This is even more pronounced for Hispanics 18-34, who spend just 28.1% of their time with live and time-shifted TV.**

Percentage of time spent with live and time-shifted TV 2022-2023



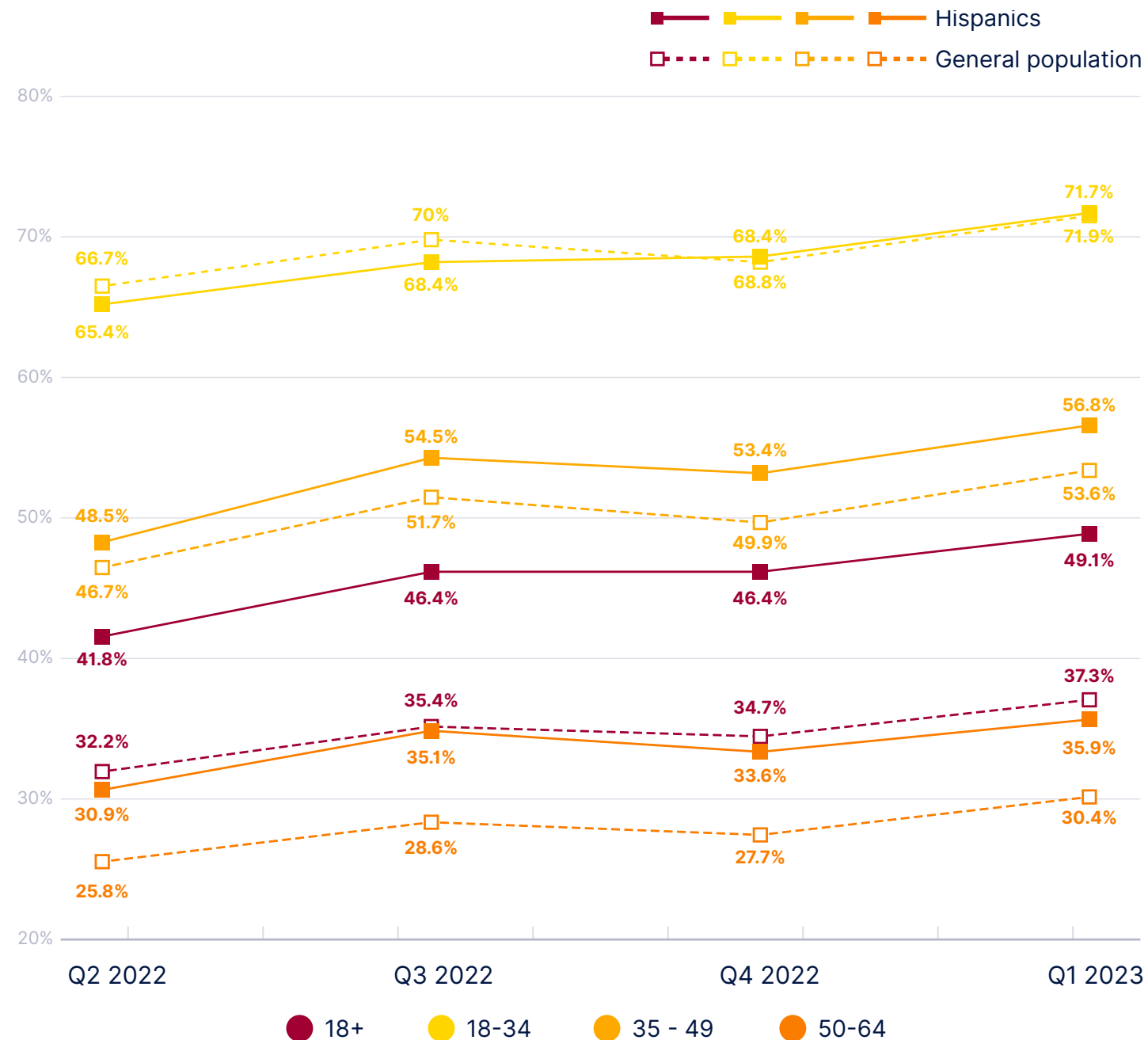
Source: Nielsen National TV Panel

*Cord-cutting: The practice of canceling or forgoing a traditional cable television subscription or landline telephone connection in favor of an alternative Internet-based or wireless service. Many consumers "cut the cord" to reduce costs and gain access to streaming services through platforms like Netflix, Hulu, and Amazon Prime.

Streaming's new majority: Hispanics

Given their preference for streaming content, it's not surprising that Hispanic audiences spend a significantly larger portion of time accessing content through connected TV (CTV)⁴ devices. In the first quarter of this year, Hispanic adults age 18-49 spent the majority of total time with TV with content they accessed from the internet.

Percentage of time spent with connected TV



Source: Nielsen National TV Panel

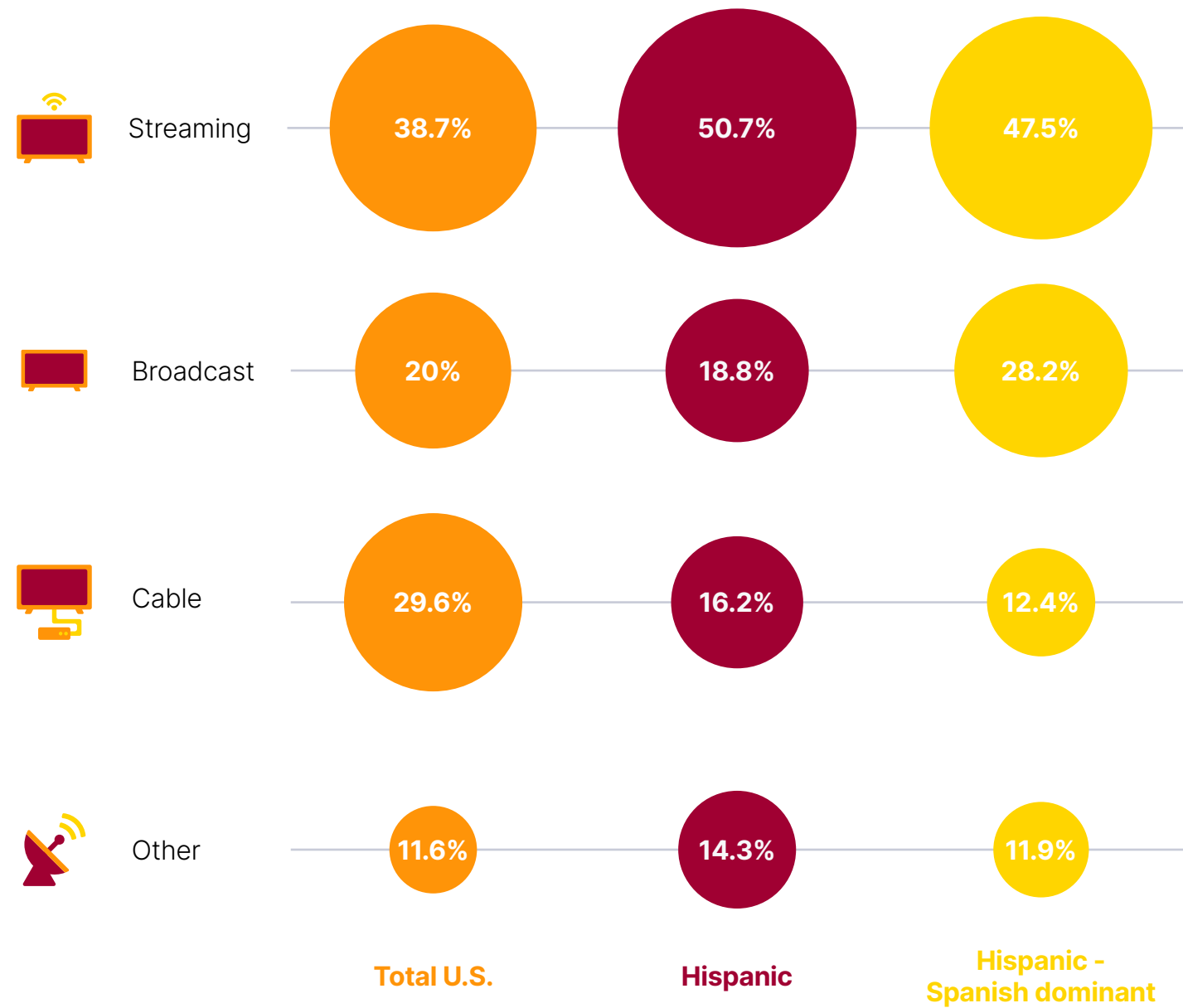
⁴ CTV refers to any television that is connected to the internet. The most common use case is to stream video content.



U.S. Hispanics spent more than **30 billion** minutes with connected TV in the first quarter of 2023

The gravitation to CTV is partially due to the perceived authenticity of the programming available on streaming services. With so much choice available, these services have the ability to provide diverse, representative and accessible content that Hispanic audiences are looking for, thereby earning their engagement over other options. Traditional broadcast TV continues to command significant engagement among Hispanics who primarily speak Spanish—highlighting the enduring role of broadcast media as not just a source of entertainment, but also a vital cultural touchstone for Spanish-dominant Latinos.

Broadcast: significant engagement with Spanish-language dominant Hispanics

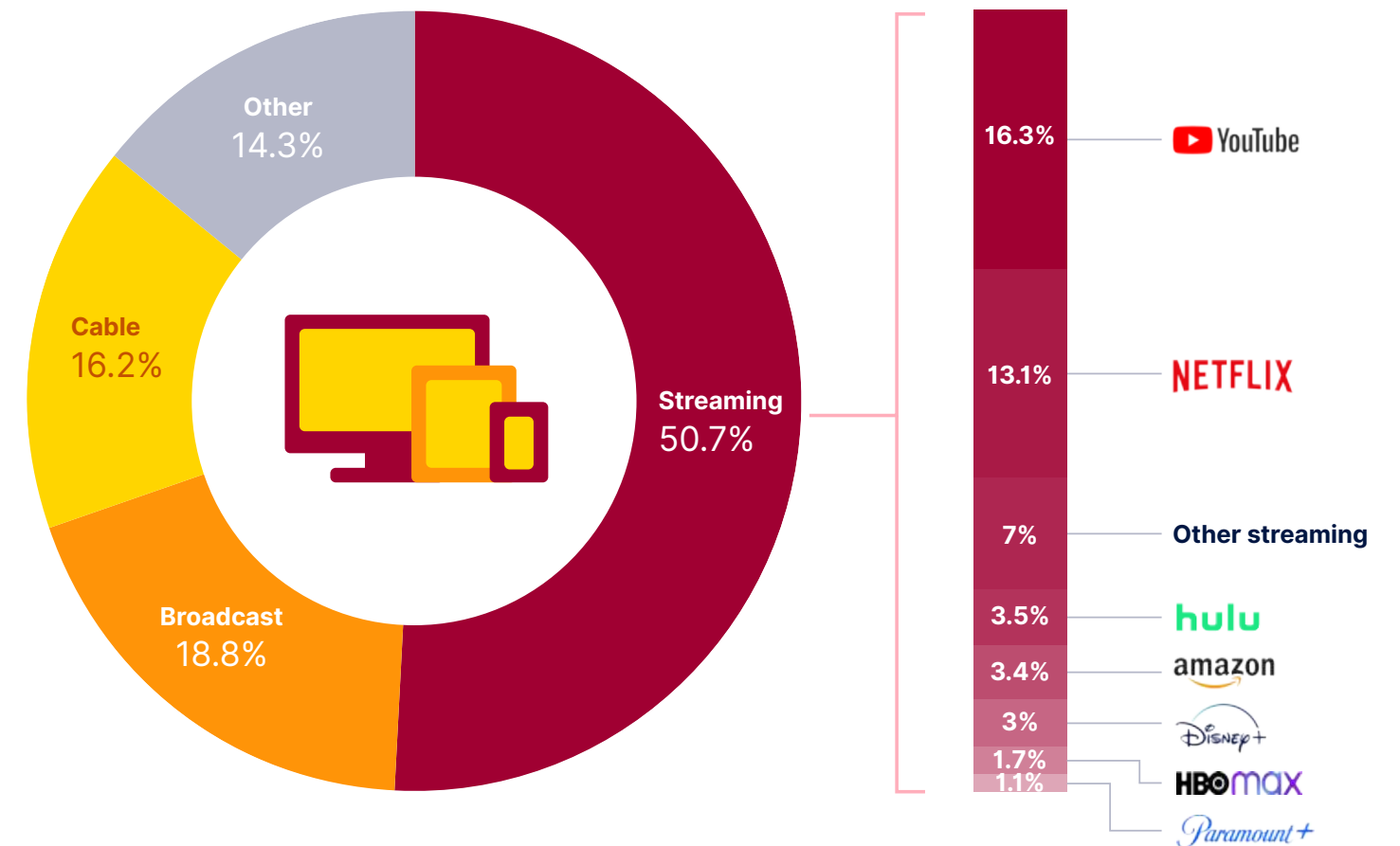


Source: National TV Panel and Streaming Platform Ratings, July 2023

74% of Hispanics say they use one or more streaming services in a day in any typical week

Source: Nielsen Attitudes on Representation Supplemental Study, 2022

Streaming dominates Hispanics' TV viewing



Notes: Hulu does not include Hulu Live. YouTube does not include YouTube TV; "other streaming" includes any high-bandwidth video streaming without MVPD/vMVPD on television that is not individually broken out. Providers with less than 1% share of viewing are included in "other streaming."

Source: National TV Panel and Streaming Platform Ratings, July 2023

Hispanic viewing shifts: Cable declines, broadband connections surge

The viewing trends among Hispanics largely reflect their TV household profiles. As of May 2023, only 42% of Hispanic TV homes were traditional cable homes, down from 49% a year earlier⁵. And as engagement with cable has declined, accessing TV content through an internet connection has increased. As of May 2023, 27% of Hispanic homes accessed TV content using a broadband internet connection, which is up nearly 20% in just one year.



The percentage of Hispanic homes that access TV content through a broadband connection increased **20%** in the last year

Source: Nielsen National TV panel, May 2023

Content availability and trust affect viewing choices

Despite the current enthusiasm for streaming, the streaming landscape is not static. Shifts in the availability of diverse content libraries and the current industry strike could significantly alter the quality of the streaming experience for Hispanic viewers. Downstream, these factors could further inhibit the supply of Latino-created content.

Although the strikes undeniably disrupt all content production, they may disproportionately impact underrepresented communities, like Latinos. A resultant drop in relevant content could inspire Latinos to look elsewhere, including social media and user-generated videos. Any shift like this could mean the industry loses their valuable contributions as creators and their critical votes as viewers.

To understand how to maintain momentum with these viewers, we must examine the factors that build trust and create resonance within the Hispanic community.

⁵ Nielsen National TV Panel



Subscription video on demand* penetration among Hispanic households is **89%**

Source: Nielsen National TV panel, May 2023

*A service where users pay a regular subscription fee to access unlimited streaming content. Examples include Netflix and Hulu.

Uncovering trust: The Latino connection to content

The key to establishing connections with Hispanic audiences? Understanding the factors that lend authenticity and affirm credibility, inform content choices and how Hispanics perceive the brands and platforms they engage with.

In the recent We Are All Human and Nielsen Hispanic Sentiment Study, powered by Toluna, over half of Hispanic respondents indicated that quality and trust in media content are very or extremely important. This highlights the importance that this demographic places on the credibility and relevance of their media consumption.

The Latino community has a unique connection with their chosen content. It's driven by trust, recommendations from friends and family, and social influence. In fact, 67% of Latinos⁶ say they find content to watch primarily based on recommendations from friends and family.

Over **50%** of Hispanic respondents value media quality and trust

Source: 2023 Hispanic Sentiment Study by WeAreAllHuman and Nielsen, powered by Toluna

Despite the ubiquity of social media, however, it plays a less significant role in shaping Latino viewing choices. In fact, 72% of Hispanics say that social media does not factor into their content selection process, underscoring the power of trust and personal connections within the community.

⁶ Nielsen Attitudes on Representation in Media Supplemental Study, 2022

Word of mouth: A powerful player in Hispanic video engagement

How do you find representative programming you enjoy watching?



Note: The percentages reflect responses to this question: How do you find representative programming you enjoy watching?

Source: Nielsen Attitudes on Representation in Media Supplemental Study, 2022

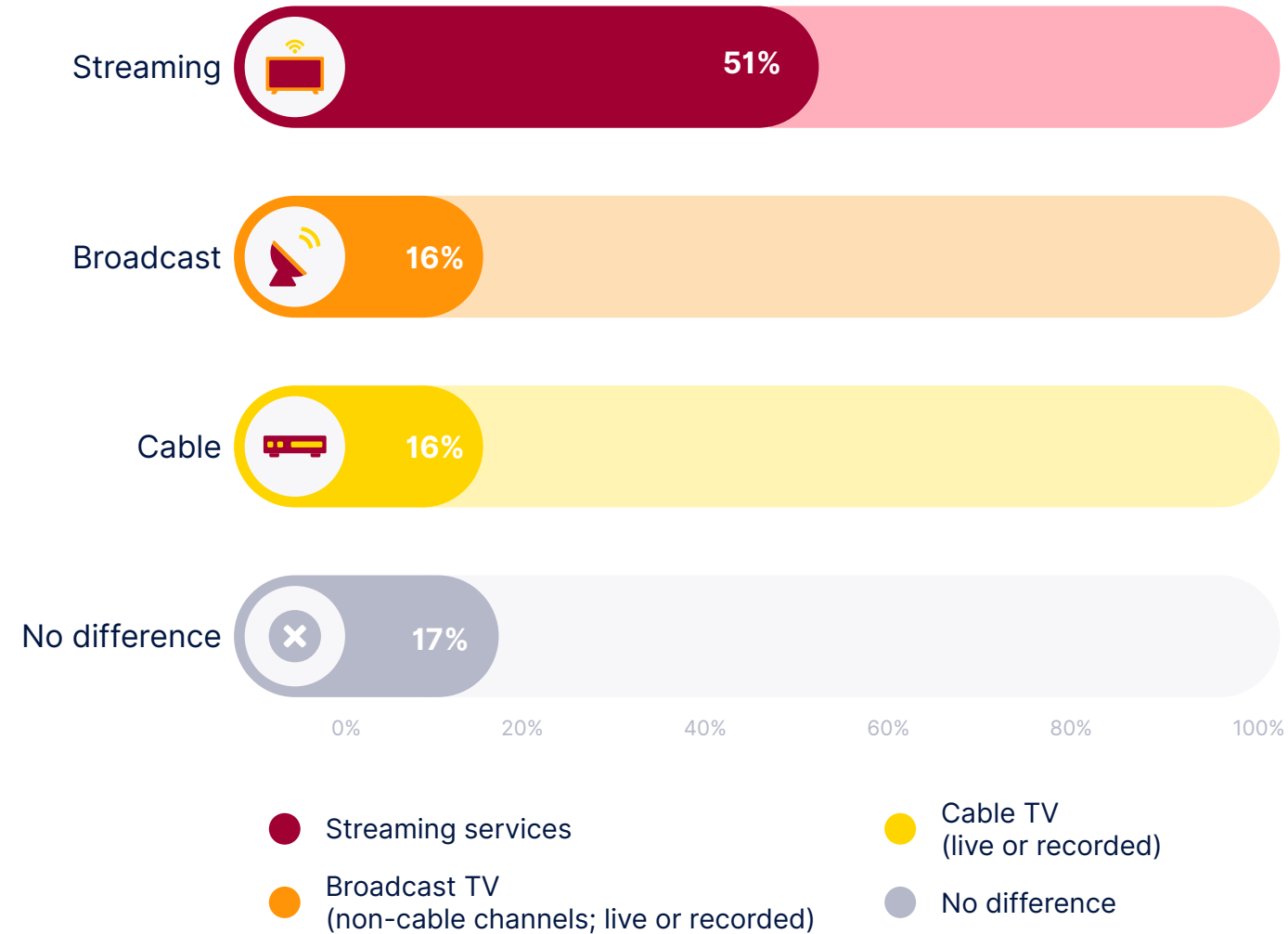


Where Latinos see themselves

Hispanic audiences still feel that streaming platforms, which offer so much more choice than traditional TV, provide the most relevant content.

Hispanic audiences believe streaming content is most relevant for them

Which TV option is most relevant to you?

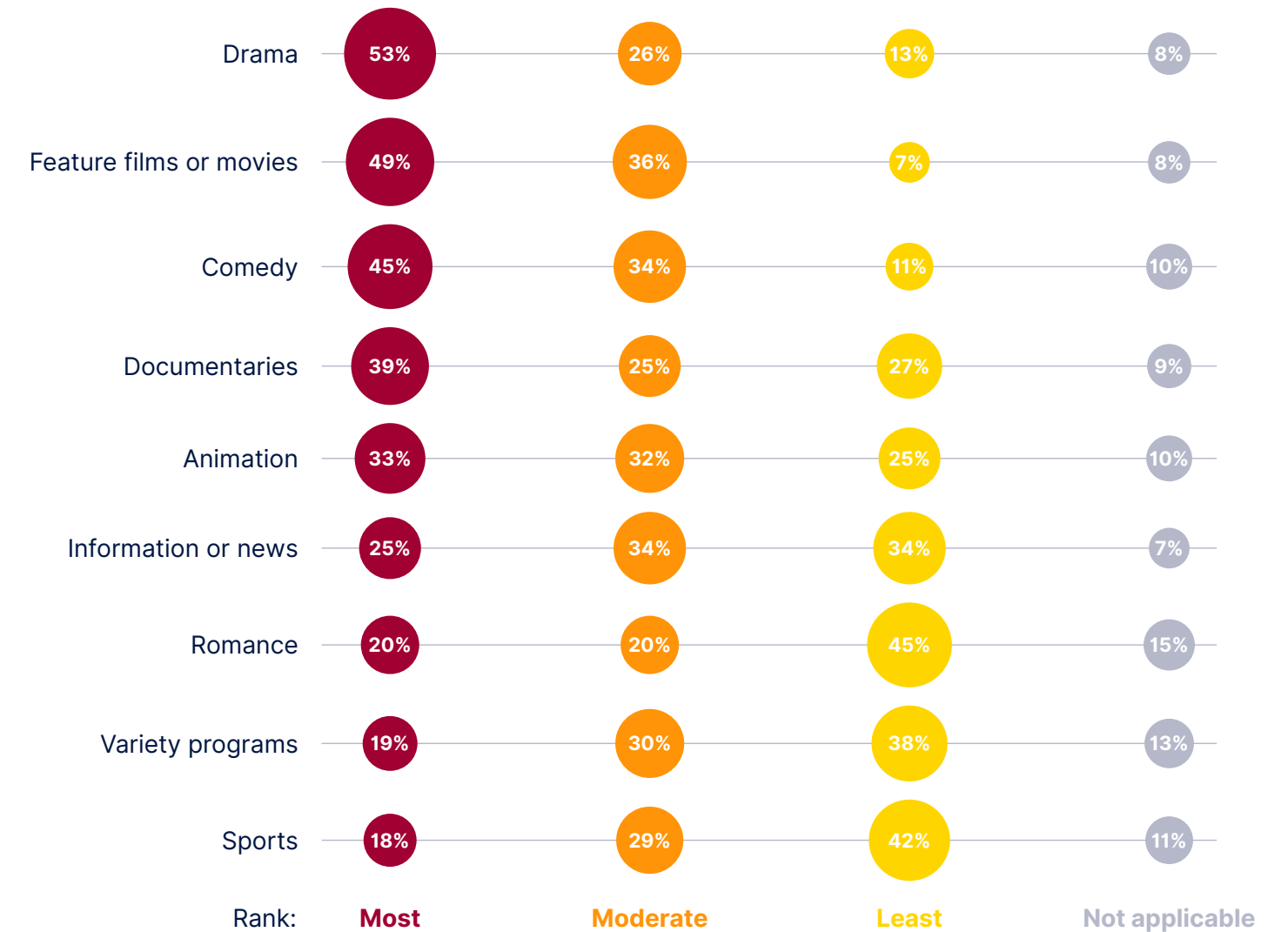


Note: The percentages reflect responses to this question: Which TV option is most relevant to your identity group?
 Source: Nielsen Attitudes on Representation in Media Supplemental Study, 2022 Android Users

When it comes to feeling represented in media, **Latinos primarily find representation within dramas and feature films⁷, highlighting a perceived lack of authentic Latino portrayals in many of television's most-watched genres, including reality/variety, news and sports.** This disparity illuminates an opportunity for greater, more authentic representation within these popular genres both on and off the screen.

Hispanic representation is limited across genres

Which genres do you find most representative?



Note: The percentages reflect respondent rankings about the most-representative genres.
 Source: Nielsen Attitudes on Representation in Media Supplemental Study, 2022 Android Users

⁷ Nielsen Attitudes on Representation in Media Supplemental Study, 2022

SPOTLIGHT

How Hispanics interact with news

Within the Hispanic community, trust in news media is a bit more complex, especially considering the influence of Spanish-language programming, which younger generations view as more trustworthy than mainstream English language options⁸.



Younger generations of Hispanics find Spanish language programming more trustworthy

Source: 2023 Hispanic Sentiment Study by We Are All Human and Nielsen, Powered by Toluna

The higher trust in Spanish-language media among younger generations highlights the crucial role of representation and authenticity. These factors can either build or break trust. A full 39% of Hispanic adults agree that they trust most news sources, yet 73% report they don't trust news on social media. However, 69% agree that local news is a reliable source. Hispanics are discerning news consumers, with many actively seeking varied perspectives while valuing local news.



More than two-thirds of Hispanics say local TV news is a reliable source of information

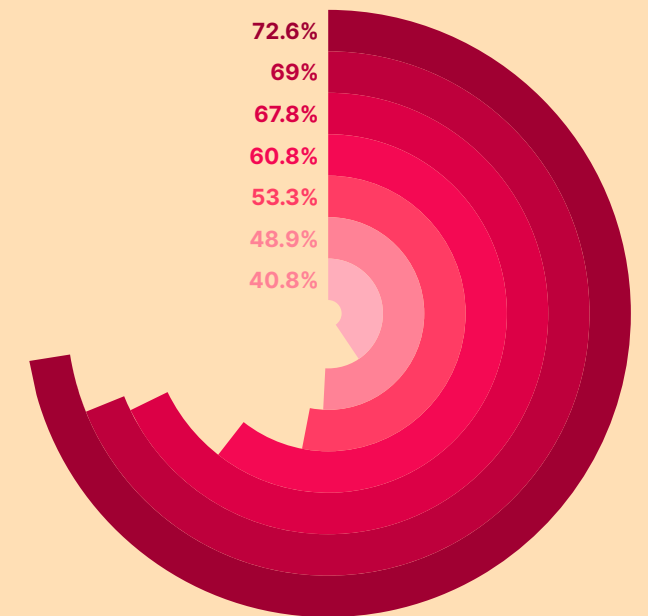
Source: 2023 Hispanic Sentiment Study by We Are All Human and Nielsen, Powered by Toluna

⁸ We Are All Human and Nielsen Hispanic Sentiment Study, powered by Toluna

U.S. Hispanics have a complex relationship with news

Trust in news sources among Hispanics

- I don't trust news on social media
- Local TV news is a reliable source
- I get most of my news online
- I don't trust most news sources
- I don't watch the news because it is too negative
- I get most of my news through social media
- I get all of my news from TV programming

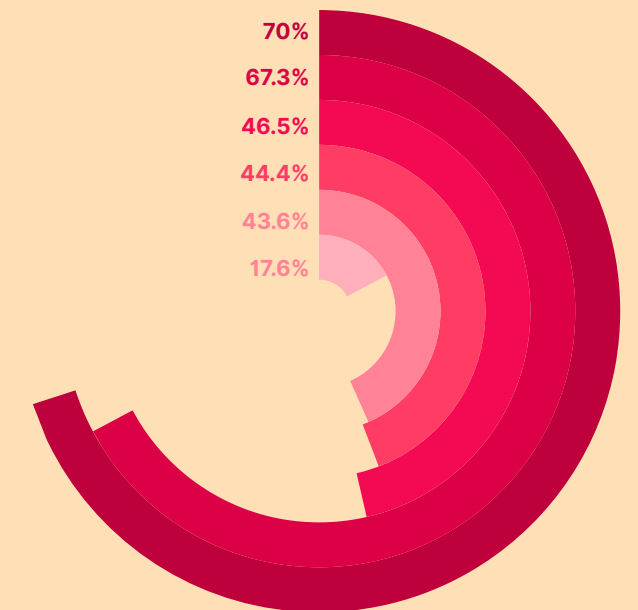


Read as: Hispanics are 15% more likely than the general population to agree that they get all of their news from TV programming.
Source: Scarborough USA+; 2022 Release 2

Hispanics have different perceptions of media depending on birthplace

Trust in news sources among Hispanics: Born outside of the united states

- I pay close attention to local news
- I pay close attention to the national news
- I get all of my news from TV programming
- I get most of my news from international sources
- I avoid watching or listening to the news
- I have paid subscriptions to many sources of digital and printed news



Read as: Hispanics who were not born in the U.S. are 31% more likely than the general population to agree that they get all of their news from TV and are less likely to have digital or printed news sources.

Source: Scarborough USA+; 2022 Release 2

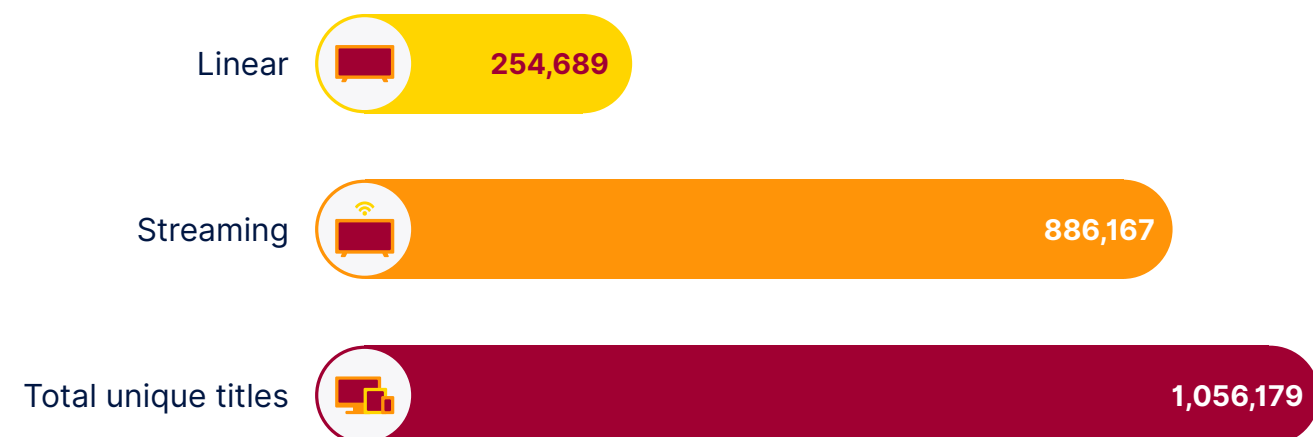
Hispanic audiences find more of what they're looking for on streaming platforms

The preference for content on streaming platforms among Hispanics extends beyond convenience and variety. Younger generations of Hispanics find that their personal values are better echoed in the TV shows and movies on streaming platforms. This alignment between content and cultural values translates to a higher level of trust with these content options—and ultimately, engagement time, especially among younger viewers⁹.

Despite the rise of streaming, it's important to note that broadcast TV still plays a pivotal role among Latino viewers. High-profile events like the Women's World Cup or the Super Bowl attract large Hispanic audiences, especially Spanish-language broadcasters who have developed strong ties with viewers over the years. In fact, **Hispanic viewers are most likely to consider broadcast TV relevant to their identity group, with 16%¹⁰ affirming this importance.**

With seemingly endless options, the appeal of streaming services is clear. In the U.S. alone, approximately 84% of the 1 million video titles available to audiences are on streaming services.

Distinct video titles: the U.S.



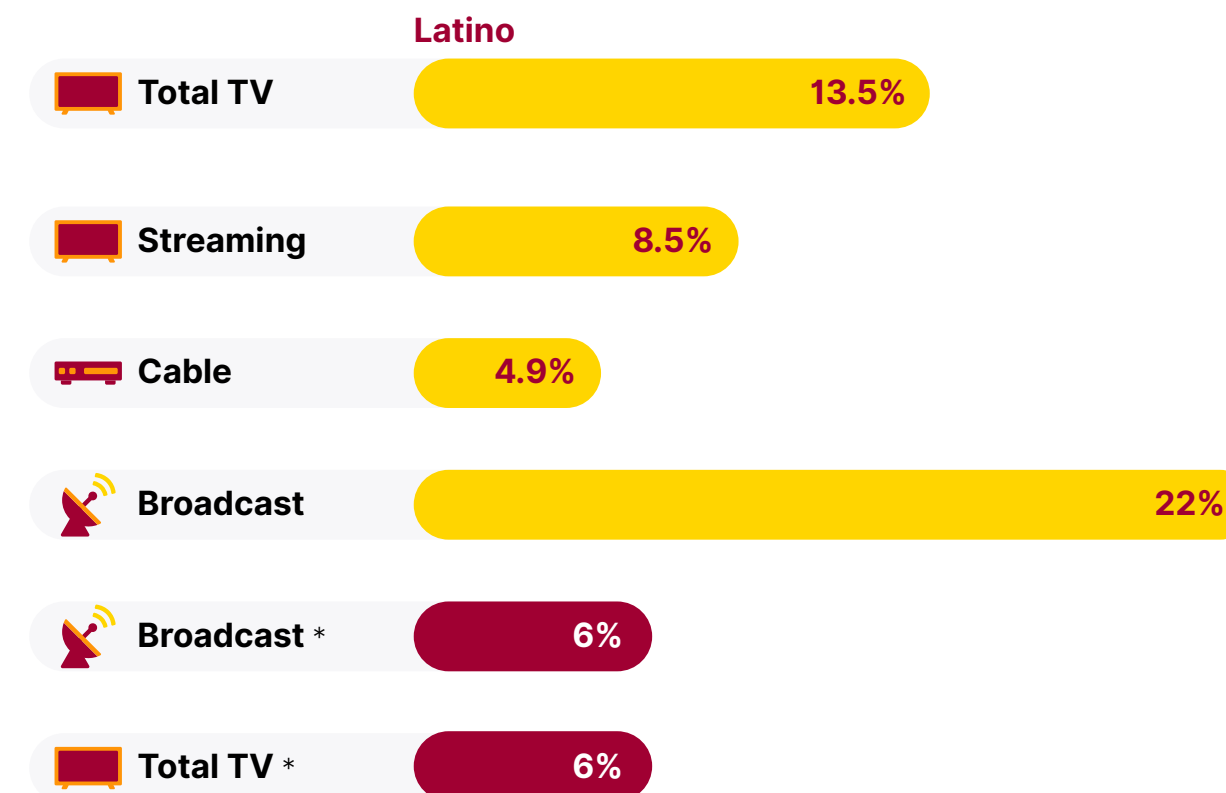
Note: Some titles are available on linear and streaming services.
Source: Gracenote Global Video Data; June 2023

⁹ 2023 Hispanic Sentiment Study by We Are All Human and Nielsen, Powered by Toluna

¹⁰ The Nielsen Attitudes on Representation in Media Survey, April 2022

Hispanic share of screen

Q1 and Q2 2023



*Without Spanish-language networks
Source: Gracenote Inclusion Analytics

Despite the wealth of choice across streaming services, Hispanic audiences still believe there's not enough representative TV content for them. Hispanic audiences are 19% more likely than the general population to say they feel underrepresented in TV and films. Given the amount of time Latinos spend with CTV, this sentiment has merit, as Hispanics had just a 8.5% share of screen¹¹ in streaming content in the first two quarters of 2023. Progress is being made, however, as Hispanic share of screen and share of cast¹² have increased in streaming content on a year-over-year basis.

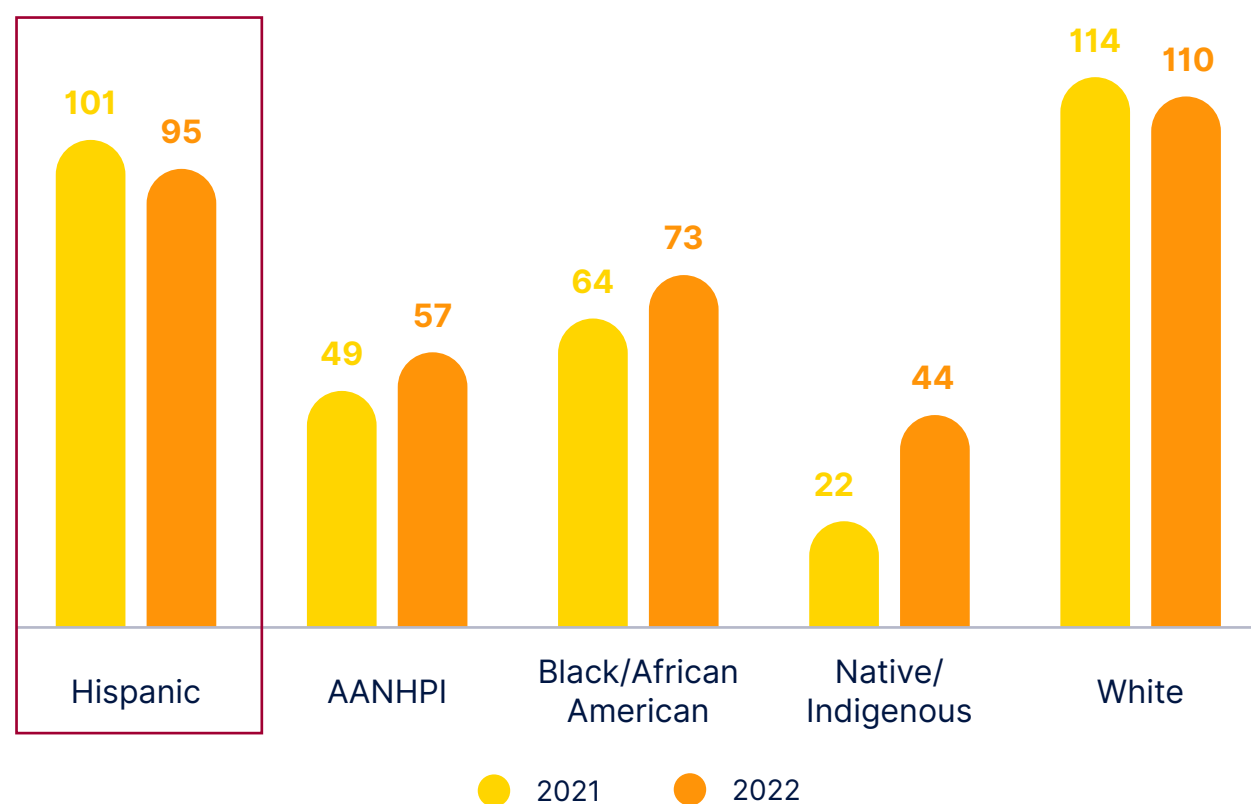
¹¹ Share of screen, from Gracenote Inclusion Analytics, is the percentage of an identity group that appears on screen.

¹² Share of cast is the identity group cast count divided by the total cast count weighted by episode occurrence

More content, less connection: Where to watch?

With representation across streaming services below parity¹³—even amid the nearly 800,000 titles originally produced in Spanish¹⁴—nearly 30% of Hispanics say they have trouble finding something on TV to watch¹⁵. In fact, our latest Attitudes on Representation on TV Study found that Hispanic audiences were the most likely to say that representation has declined in accuracy since 2021. This suggests that even though representation is increasing, especially on traditional TV, Hispanics aren't always finding accurate representation.

Hispanic audiences believe accurate representation has declined in 2022



Read as: Perceptions about accurate representation among Hispanics declined 6 points between 2021 and 2022.

Source: Attitudes on Representation in Media Study, April 2022

¹³ Below parity means that representation in content is less than the U.S. Hispanic population.

¹⁴ Gracenote Global Video Data

¹⁵ Nielsen Scarborough USA+ 2022, Release 2; 29.5% of Hispanics say they mostly or completely agree with this statement: "I have trouble finding something to watch on TV."



SPOTLIGHT

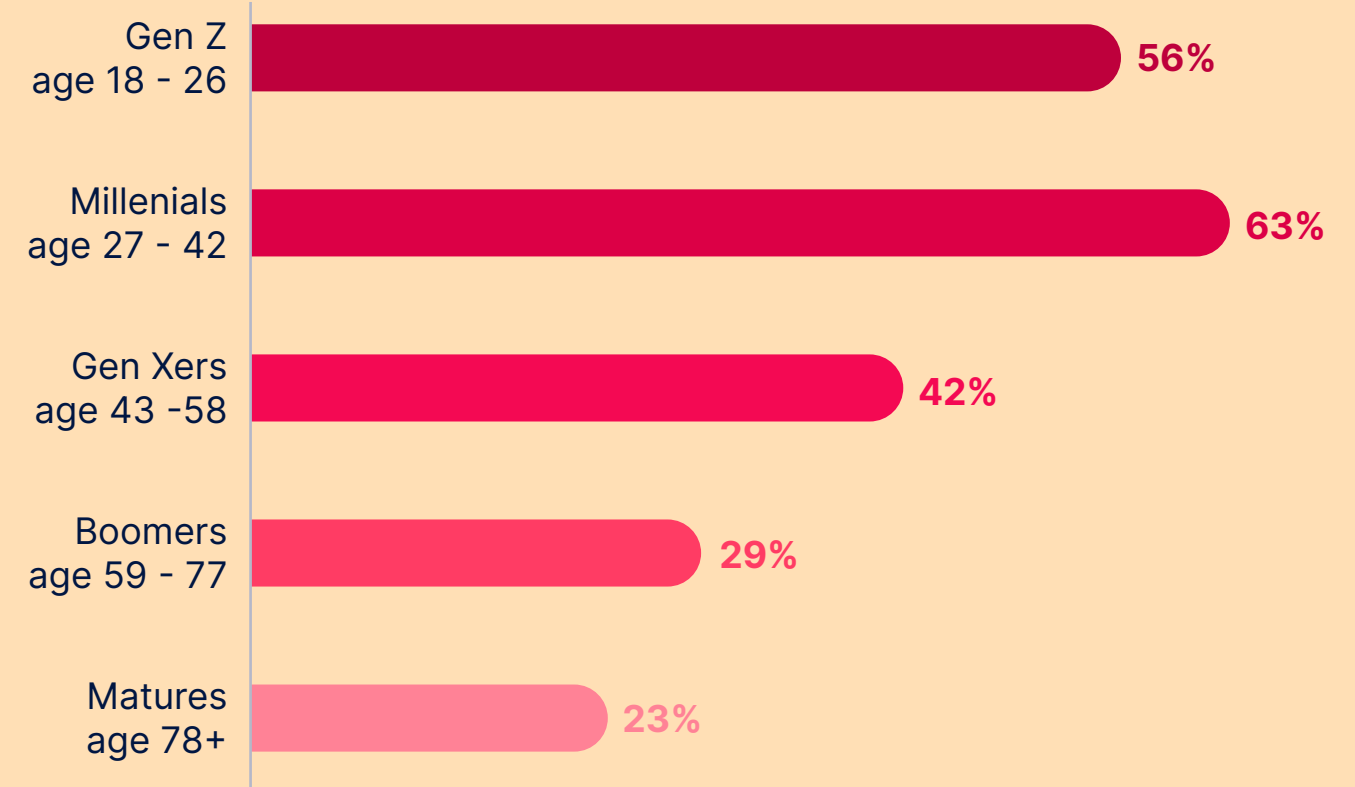
Reflections and divides: How Hispanic generations see themselves in media

There is a divergence in media choices among different generations within the Hispanic community. While younger Hispanics are more drawn to streaming services—where they perceive their values to be more accurately reflected—older generations lean more toward news and broadcast programming. This preference mirrors the trust that older Hispanics have in more established platforms.

This generational difference is further amplified in the recent study. Younger Hispanics display higher trust levels in Spanish-language news and media over mainstream outlets, a clear testament to their search for content that resonates with their cultural identity and values. This is not to suggest, however, that all Hispanics believe their values are sufficiently mirrored in these media forms. Just over one-third of younger Hispanics and around 40% of those with higher education feel that TV shows and movies aptly reflect their values.

Interestingly, this perception varies among different cultural backgrounds and socio-economic classes. Those of Mexican heritage and urban Hispanics find their values best echoed in TV shows, movies and news media. Yet, less than half of higher-income Hispanics and those of Cuban heritage believe their values are well represented. The contrast is stark with older Hispanics, **where almost half feel that their values are not mirrored in media.**

My values are largely shared and reflected in popular TV shows and movies (Strongly/somewhat agree)



Source: 2023 Hispanic Sentiment Study by We Are All Human and Nielsen, Powered by Toluna



Latinos aged 43 years and up feel that their values are not reflected in popular TV shows and movies

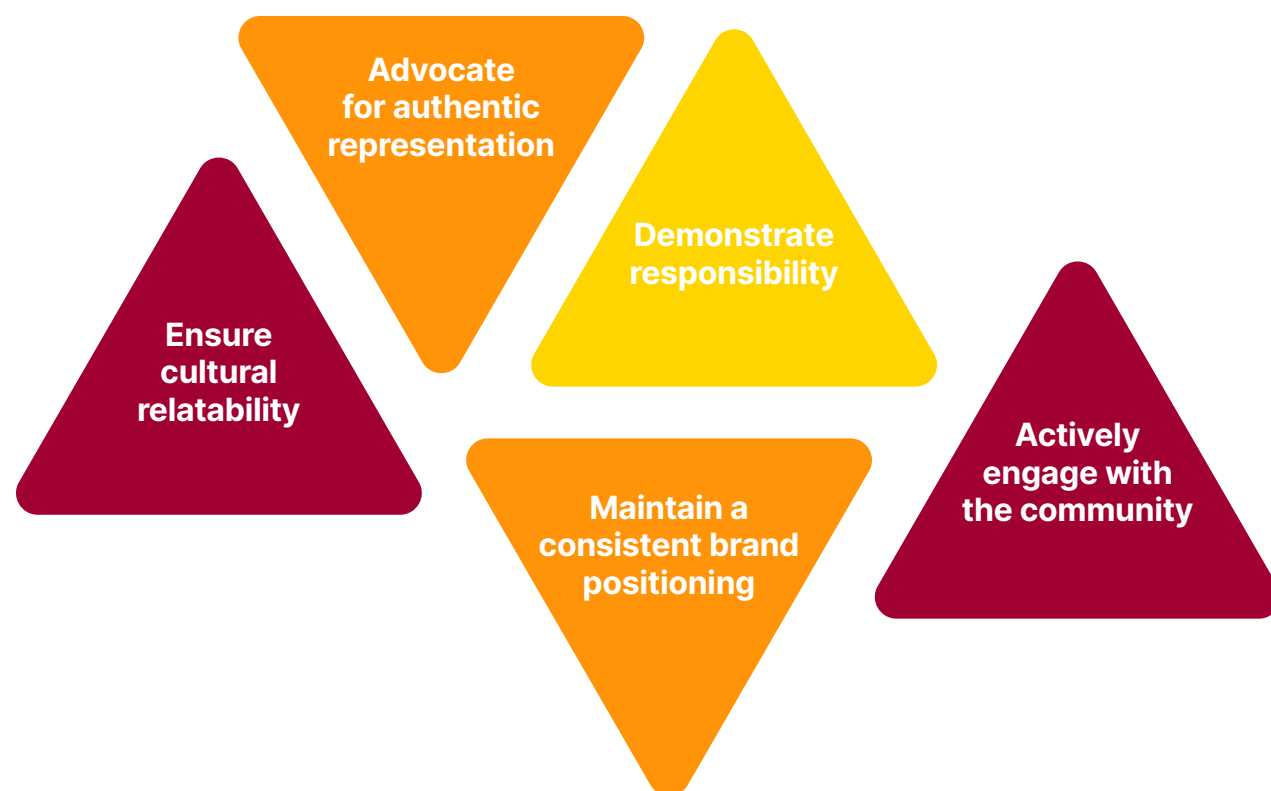
Source: 2023 Hispanic Sentiment Study by We Are All Human and Nielsen, Powered by Toluna



Unlocking trust: Building authentic relationships with Hispanic audiences

The key to effectively engaging the Hispanic community depends on understanding the critical nuances within this rich tapestry of cultures. A potent mix of cultural relatability, authenticity and inclusion will be the touchstones of successful interactions. Trust building is not an abstract concept; it demands a deep understanding of the individuals that make up the community.

Brands and media companies can turn these insights into action by adhering to several key authenticity signals:



These principles, when thoughtfully executed, can foster loyalty and patronage within the influential Hispanic demographic—a demographic that stands ready to reward authentic inclusion.



63% of Hispanics say they're more likely to buy from brands that represent people like them in their advertising

Source: 2023 Hispanic Sentiment Study by We Are All Human and Nielsen, Powered by Toluna

In essence, understanding and respecting the diverse dynamics within the Hispanic community is not just a social responsibility; **it's a pathway to success**. To build trust, improve representation and forge stronger connections with this growing community, brands and media companies must invest time and effort in understanding and meeting the unique needs of the Hispanic audience.



Building trust through community

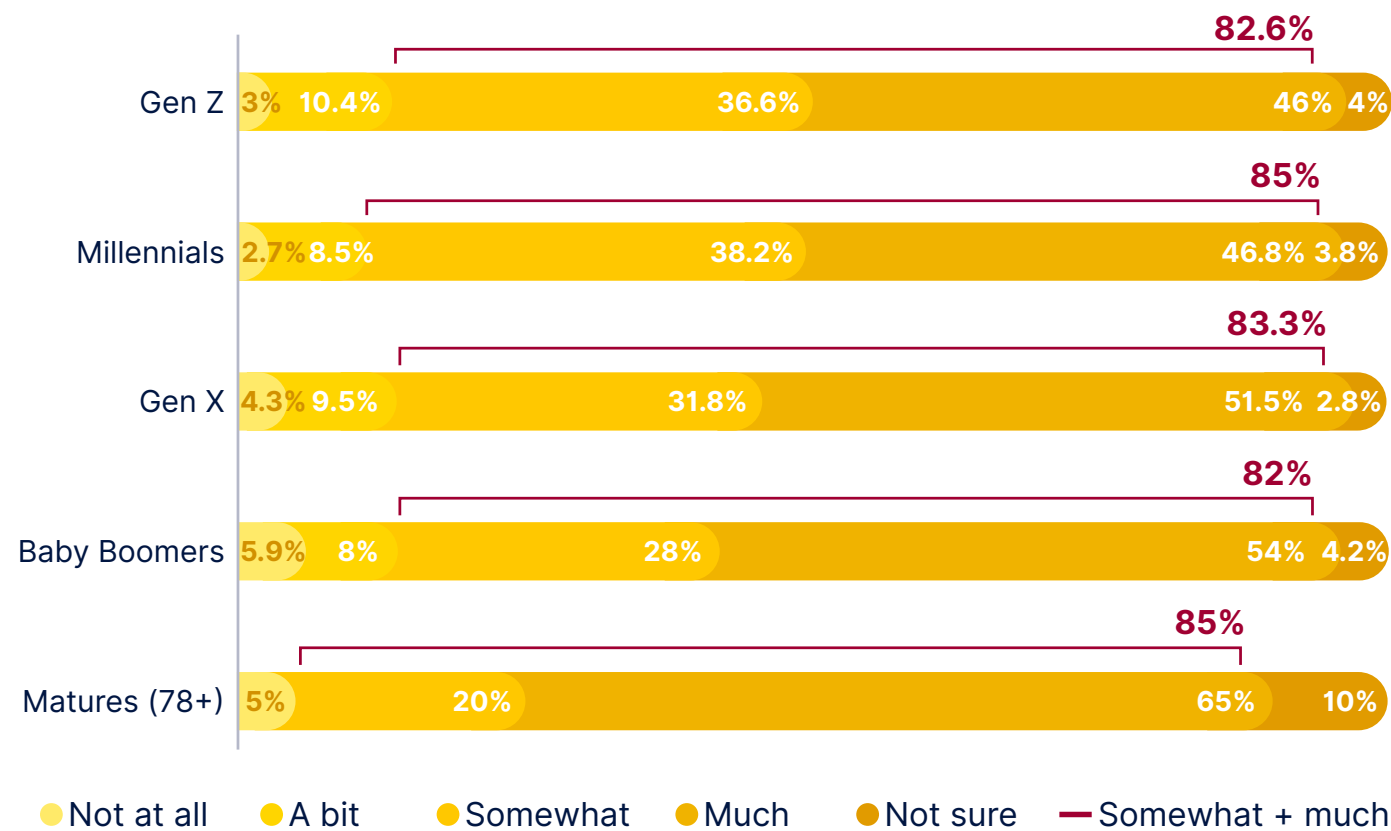
Importantly, representation, inclusion and cultural relevance are important well before consumers make purchase decisions. People are constantly exposed to brand messaging, and consumers recall brand messages even when they're not considering a purchase. That's why building strong brand sentiment, via authentically engaging with the community, is a critical step, regardless of where a person is within a purchase cycle.



More than **83%** of Hispanic respondents said they would think more favorably of a brand if they felt it was playing a positive role in the community. Among Millennials and Hispanics 78 and older, the percentage rises to **85%**.

Source: 2023 Hispanic Sentiment Study by We Are All Human and Nielsen, Powered by Toluna

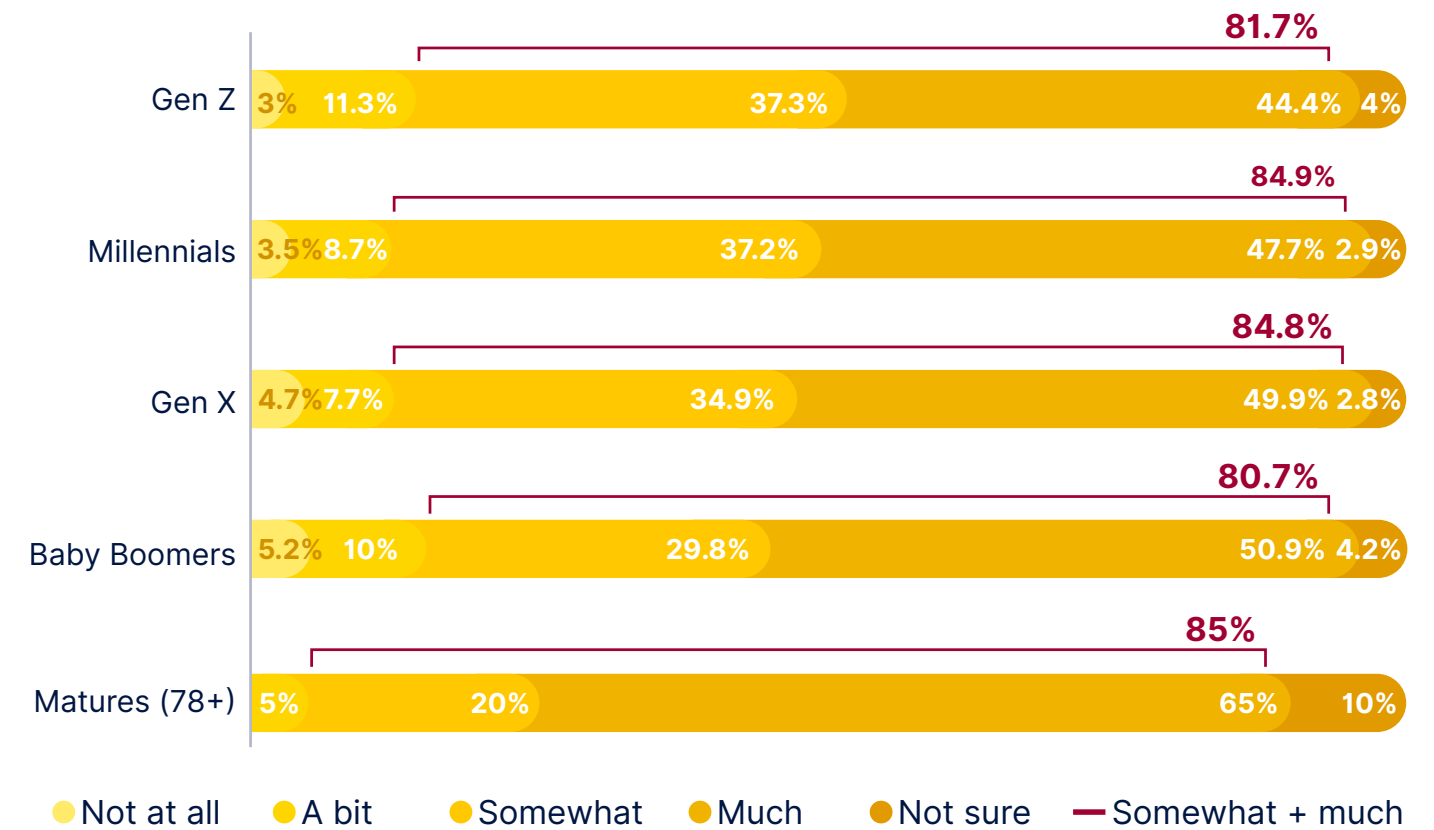
Sentiment toward brands that make a positive impact on the community



Source: 2023 Hispanic Sentiment Study by We Are All Human and Nielsen, Powered by Toluna

When brands build positive sentiment with consumers, the consumers are more likely to become a customer when they ultimately seek to make a purchase.

Likelihood of becoming a customer when a brand has a positive impact on the community



Source: 2023 Hispanic Sentiment Study by We Are All Human and Nielsen, Powered by Toluna



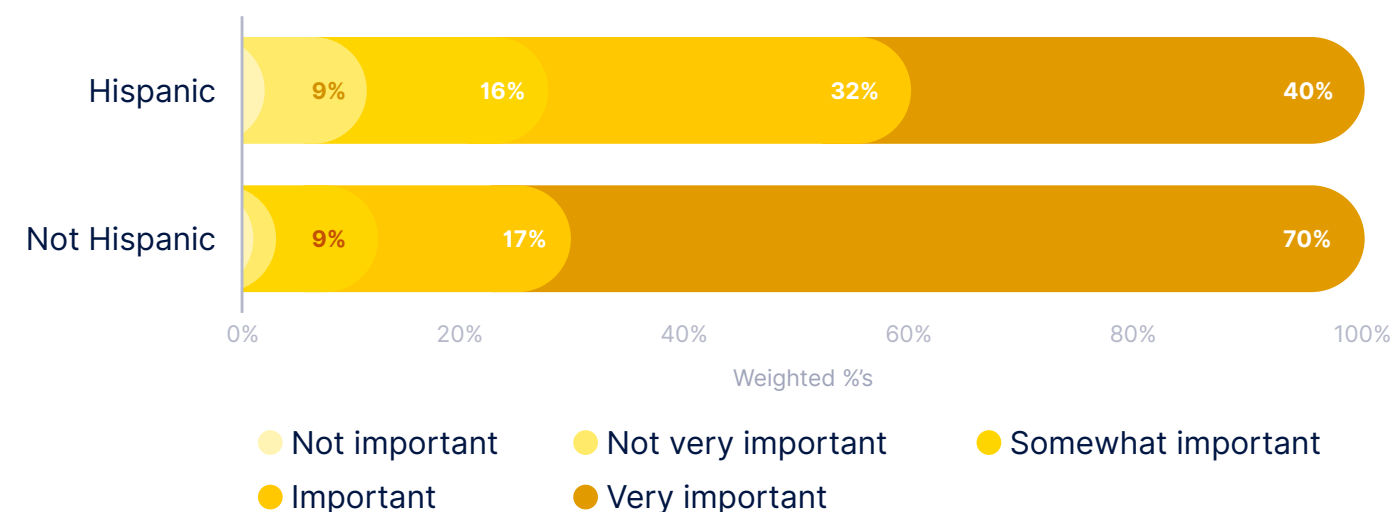
Cultural connection: Balancing language and relevance in media choices among Hispanics

Watching TV shows or consuming other forms of media holds different layers of significance for different audiences. For Hispanics, the focus isn't solely on language proficiency or the language in which the content is delivered. Instead, it's about striking a balance between language preference and the relevance of the content.

Our data highlights this complex relationship. Forty percent of Hispanics state that it's important for shows to be in their preferred language, while an additional 32% find it somewhat important. Interestingly, this contrasts with 70% of non-Hispanic whites who find language an important factor in their media choices.

These numbers challenge a common perception because they show that Hispanics are highly adaptable when it comes to language; they are open to consuming content in either Spanish or English, provided the content is culturally meaningful and resonant, demonstrating that shared experiences can be more pivotal than language itself. The finding for media and advertisers is clear: Focus not just on the language of delivery, but also on creating content that fits seamlessly into the cultural tapestry of Hispanics' lives.

Importance of watching shows in a preferred language



Data reflects responses to this question: When thinking about TV shows you watch, how important is it for you to watch shows in your preferred language?

Source: Attitudes on Representation in Media Supplemental Study, 2022 Android users

Hispanics tune in and turn up the volume

Hispanics are avid audio consumers. Radio, for example, reaches 94% of Hispanic adults¹⁶, higher than its 90% reach across the general population. Radio's reach among the 18-49 demo is just as high, also at 94%.

The importance of Spanish language media is very clear through the lens of radio, as Mexican regional, Spanish contemporary/Spanish hot adult contemporary are the top two formats among Hispanic adults 18 and older.



Top 2 radio formats for Latinos:
Mexican regional and Spanish contemporary

Monthly radio reach and top formats

Hispanic 18+	Hispanic adults 18-34	Hispanic 18-49
Monthly reach (000) 40,666 94% of population	Monthly reach (000) 16,536 91% of population	Monthly reach (000) 28,846 94% of population
Top 3 formats (audience share)	Top 3 formats (audience share)	Top 3 formats (audience share)
<ol style="list-style-type: none"> Mexican regional 14.7% Spanish contemporary + Spanish Hot AC 10.5% AC 8.5% 	<ol style="list-style-type: none"> Mexican regional 12.9% Pop CHR 9.4% Spanish contemporary + Spanish Hot AC 8.9% 	<ol style="list-style-type: none"> Mexican regional 15.6% Spanish contemporary + Spanish Hot AC 10.6% Pop CHR 8.3%

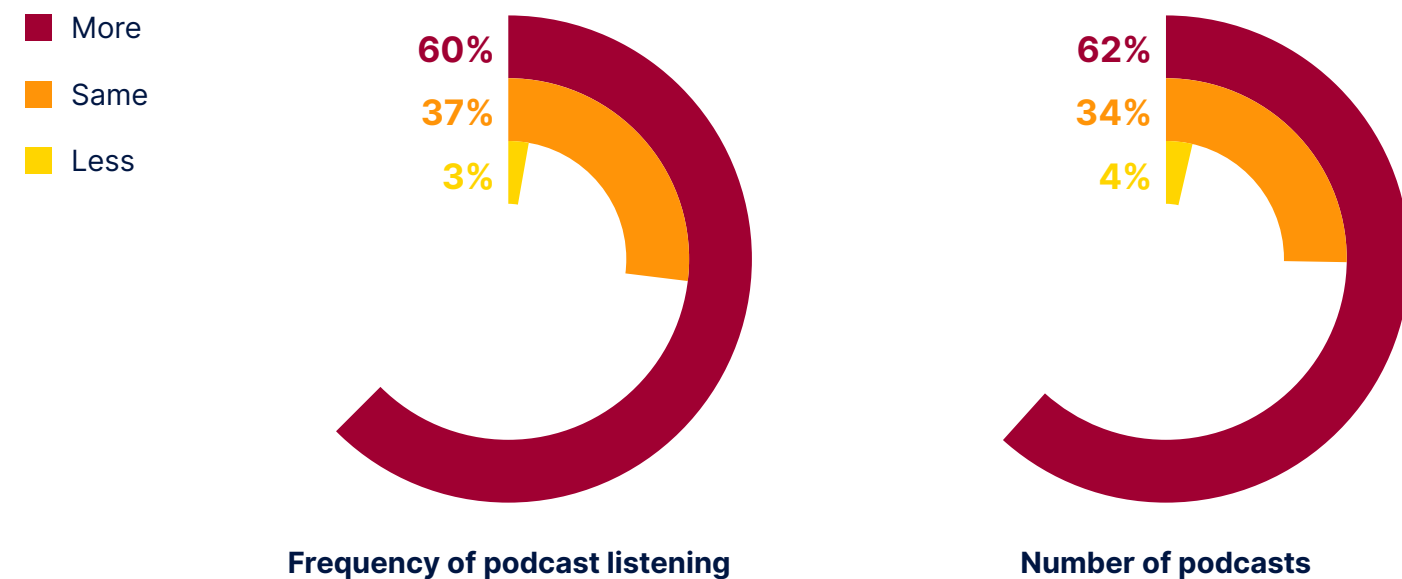
Source: Nielsen RADAR March 2023

¹⁶ Nielsen RADAR, March 2023

But when it comes to news, Hispanics are **13% more likely than the general population to listen to podcasts**. Much like streaming video, the podcast landscape offers significantly more choice than traditional channels, and more than 3.5 million Hispanics are avid podcast news listeners¹⁷.

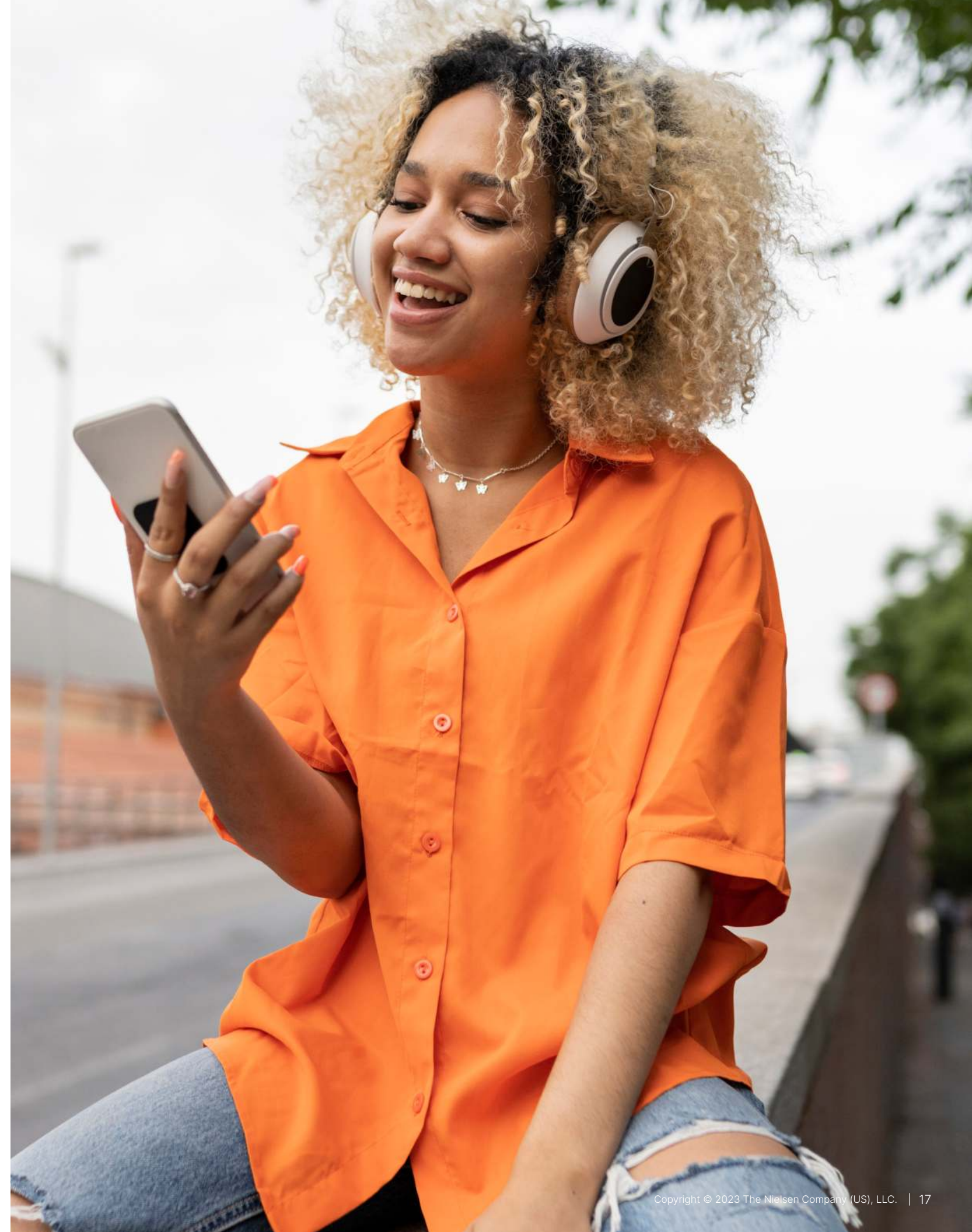
The growth in podcast listenership within the Hispanic community has come from relatively recent engagement. In fact, our latest consumer sentiment study found that 49% of Hispanic podcast listeners started listening within the past two years. And what's more, **more than 60% of Latino listeners are listening more often and to more titles**.

Latinos are listening more frequently and to more titles



Source: Nielsen Custom Consumer Sentiment Study, March 2022

¹⁷ Source: Nielsen Scarborough Podcast Buying Power



Conclusion

In an ever-changing media landscape, the Hispanic community's diverse preferences and behaviors offer rich opportunities for meaningful connection. From seamless language flexibility to a desire for authenticity and positive community impact, these insights reveal key pathways to resonating with one of the most influential communities in the U.S.

Understanding and embracing these findings can foster a deeper, more inclusive connection with Hispanic culture and media. The channels are open, and the potential for engaging, relevant content is abundant; it's time to tune in, listen and connect.

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.

The Nielsen Attitudes on Representation in Media (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.

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.

<https://www.nielsen.com/solutions/content-metadata/inclusion-analytics/>

Nielsen Scarborough

Nielsen Scarborough USA+ 2022 Release 2. 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.

Streaming Platform Ratings

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

We Are All Human and Nielsen Hispanic Sentiment Study, powered by Toluna

Nationally representative online survey in English and Spanish among 2,500 U.S. Hispanics conducted April 19-May 12, 2023.

Nielsen RADAR

RADAR reports national and network radio listening across all Nielsen Audio markets (both PPM and Diary) and is based on a rolling one-year average of 400k respondents.

Acknowledgments

Sandra Sims-Williams

William Quinn

Stacie de Armas

Suzanne Alexander

Pat Ratulangi

Charlene Polite Corley

Brian Fuhrer

Chris Quick

Brian Campbell

Veronica Hernandez

Claudia Romo Edelman

Ethnifacts

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Audience Is Everything®

