In collaboration with
Accenture, Ipsos and Nielsen

World Economic Forum

Benchmarking Diversity and Inclusion in Media and Entertainment: The Audience Representation Index

INSIGHT REPORT

MARCH 2022

Cover: @RichVintage/Gettyimages

Contents

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Foreword

Cathy Li
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The ultimate, unforgiving judge of media and entertainment has always been the audience. It is audiences who invest their time, attention, money and emotions. It is audiences who rise to their feet or head for the door.

The voice of the audience has been heard only sporadically in the industry discourse on diversity, equity and inclusion (DE&I). In recent years, data on screen time, scripts and spokespeople, on hiring and funding, have contributed immensely. They paint a picture of an industry growing up in public, in a society in a state of change.

But do audiences see themselves? Are they portrayed authentically? Do they see media companies driving positive change in their communities and broader society?

This report, in collaboration with Accenture, Ipsos and Nielsen, amplifies the voice of the audience. Audiences in three countries shared their perceptions of the current state of DE&I in film and TV, news and magazine publishing, gaming and sport.

We polled across gender, race and ethnicity, heritage, ability, sexual orientation and age, and the intersections between these.

We heard that audiences expect more: more nuanced, fairer portrayals that they recognize, more efforts to build community and drive a dialogue on diversity and inclusion. But progress and concerted action are not going unnoticed or unrewarded. Doing a better job for society means doing a better job for all stakeholders. Companies that win the hearts and minds of diverse communities can expect greater trust and financial returns, and some of society's fastest-growing and highest-value groups are being overlooked.

By elevating diversity, equity and inclusion as creative, community and corporate priorities, media and entertainment companies can do well while doing good.

Executive summary

Audiences demand more of the media and entertainment industry in terms of diversity, equity and inclusion (DE&I) and will reward progress with trust and loyalty.

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Stories help us learn, dream and build common understanding within and across cultures. Media and entertainment companies are our modern storytellers, creating and distributing shared experiences that can bring us together. We, the audience, judge progress – whether we see ourselves portrayed and how, and whether companies are creating communities and leading conversations. To help media and entertainment leaders to understand where the gaps in representation exist today and what the stakes are, the World Economic Forum is proud to share a first-of-its-kind cross-media sector index that measures audience perceptions of representation.

The Audience Representation Index provides a benchmark of how well consumers of media and entertainment content see themselves represented in film and TV, gaming, news and magazines, and sport, and whether companies within these sectors are contributing to communities and society.

Data from this research, fielded by Ipsos, shows that diversity, equity and inclusion (DE&I) is good for business; for brands with a 10-point higher Audience Representation Index score, there was a 30% higher likelihood that consumers would trust the brand. While representation is important to everyone, it means even more to those who have historically been under-represented and this affects consumer habits. For example, 51% of women are more likely to trust brands that represent a diverse range of people, while 64% of Black respondents in the UK and 67% of Black respondents in the US tend to engage with brands more frequently if they are inclusive of diverse perspectives.

Audiences scored industry sectors against four dimensions: who they represent in content (equitable representation); how they are represented (authentic representation); whether the company builds community (community building); and whether companies drive broader DE&I impact through corporate action (societal impact). Participants across all sectors and geographies ranked societal impact as the most important of the four dimensions, underscoring that brand behaviour matters.

Each of these areas has been given a score on a 100-point scale based on responses, both for media and entertainment overall and by individual sectors. The results indicate that the media and entertainment industry has a clear need and an opportunity to improve across sectors and geographies (the US, UK and France). No sector yet demonstrates a leading level of maturity (scoring 75–100). The average composite score for the industry across all dimensions is 54.6. Gaming lags behind the rest of the industry on 49.1, while film and TV leads (on 58.5). Across all sectors and index components, older audiences (aged 55-plus) saw themselves as under-represented when compared to audiences aged 18–34, a pronounced gap that highlights opportunities to better serve ageing populations. LGBTQ+ audiences also struggle to see themselves in content, which presents real potential for increased brand loyalty as half of LGTBQ+ participants said they would stop using a product or service they deemed to be non-inclusive. The Ipsos research reinforces that persistent gender representation gaps exist within the gaming and sport sectors. Across all sectors and identity groups, it will be important to track progress over time to measure the audience and business impact of DE&I investments in the industry.

The Audience Representation Index also illustrates the audience impact of targeted action. Film and TV has made significant investments in in-content diversity and, correspondingly, many racial and ethnic minority respondents reacted positively regarding equitable representation within the sector. In gaming, focused efforts on accessibility correspond to more positive attitudes among people with disabilities.

Progress is possible within representation, and it is crucial when it comes to creating content in which everyone can see themselves. Based on findings from the 2022 Audience Representation Index we recommend that members of the media and entertainment industry:

– Use audience perceptions to identify shortcomings and set clear representation priorities within their organization

– Look holistically at efforts across content, community and corporate social responsibility

– Connect DE&I to clear business key performance indicators (KPIs) and measure progress over time

– Work collectively to develop talent and fund programmes that serve and include diverse groups

– Look thoughtfully at multiple identity groups and bring all of them on the journey equitably

This report provides data and insights for industry leaders to act and drive financial and societal benefits.

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1 Introduction

This first-of-its-kind cross-media sector index seeks to bridge the gap in measuring the perception of diverse representation.

Few industries shape the way we view the world around us more than media and entertainment. We believe that content should reflect the diversity in our society. Advancing diversity, equity and inclusion (DE&I) in media and entertainment is crucial to creating a more equitable, just society. Our previous report, *Reflecting Society: The State of Diverse Representation in Media and Entertainment*, highlighted the important roles that measurement and transparency play in holding organizations and leaders accountable for producing and distributing diverse and inclusive content, and the significant measurement gaps that exist today. But it is more than just the right thing to do. The data from our prior report suggests that greater diversity and inclusion in content translates to stronger revenue at the box office and trust in media and entertainment brands.

Audience behaviours and sentiment can help us measure success in representing society.

This new index, produced in collaboration with Accenture and supported by research from Ipsos, seeks to bridge the foundational gap in measuring progress in the perception of in-content diversity and corporate inclusion initiatives. Representative content is a product of increased in-content diversity (characters, players, actors), creative diversity (producers, developers, authors) and corporate diversity (company executives). While corporate diversity has evolved to provide some consistency in measuring companies' progress (including demographic breakdowns of employees, pay, retention and leadership), measurement of progress in representation in content diversity is less advanced. Valuable new solutions include Gracenote Inclusion Analytics, developed by Nielsen, which measures diversity in popular content. This new Audience Representation Index provides an independent measure of audience perceptions, benchmarking four media sectors in three countries: the United States, the United Kingdom and France.

1.1 Index components

The World Economic Forum's Power of Media Taskforce on Diversity, Equity and Inclusion in Media identified audience behaviours and sentiment as the ultimate arbiters of progress on DE&I. Inclusion and diversity experts from the World Economic Forum and Accenture identified four components to measure audience attitudes: equitable and positive representation (referred to in this report as equitable representation), authentic and nuanced representation (referred to in this report as authentic representation), community building and societal impact (see Figure 1).

FIGURE 1 **Index score components**

1

Equitable and positive representation (equitable representation) measures who is being represented and how positively they are being represented.

2

Nuanced and authentic representation (authentic representation) measures to what extent people are being represented in nuanced, non-stereotypical ways.

3

Community building measures to what extent people feel a sense of inclusion and belonging in relevant communities.

4

Societal impact measures to what extent a brand or sector emphasizes DE&I themes and social justice issues in their corporate social responsibility or directly in their content.

Each dimension is measured independently, and together they provide a composite index that is used to compare attitudes of different identity groups. Notably, across all four components societal impact was ranked most important. A key takeaway for the industry is that while authentic and equitable representation is crucial, nothing is as important to consumers as brands embodying equity and justice in their actions and content.

The index components may evolve in subsequent studies as the conversation about diversity and representation is increasingly nuanced and constantly developing.

1.2 Scope of research

This measurement framework was used by Ipsos to survey 7,201 participants' perceptions of how well their identities were being represented. The research focused on diversity across five identity attributes (race and ethnicity; gender; sexual orientation; disability; and age), covering four sectors: film and TV (e.g. TV channels, streaming services, film production companies), gaming (e.g. video games to be played on a console, PC, smartphone, tablet etc.), sport (e.g. major sporting leagues, major sport teams, sport broadcasts or services showing sport) and news and magazines (e.g. newspapers, news websites, news apps or any magazines). For more detailed information on the questions participants were asked, demographic definitions based on geography and how the index was constructed, please refer to the Methodology section.

FIGURE 2 **Identity attributes and sectors measured and examined within the index**

Geographies	Identity attributes	Sectors
United States, United Kingdom, France	Gender, race and ethnicity, sexual identity and orientation, age, disability status	Film and TV, gaming, sport, news and magazines

1.3 Sector scores

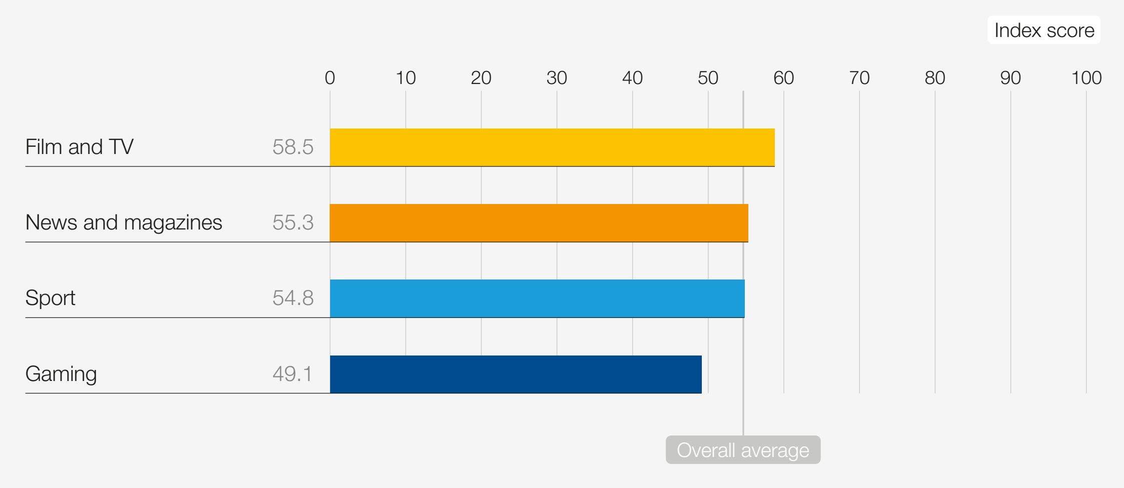
The index places film and TV ahead of other sectors, while gaming lags significantly behind.

The 2022 Audience Representation Index is based on research fielded by Ipsos between 15 November and 9 December 2021. The summary index data below (Figure 3) shows relative performance across sectors as well as sector-specific results, and the conclusion is clear: the media and entertainment industry has work to do to advance DE&I efforts to improve audience representation. The index places film and TV ahead of other sectors, while gaming is lagging significantly behind. The specific challenges and opportunities in each sector are highlighted, to put the data in context and direct leaders towards the most important issues for their audiences.

In film and TV and news and magazines, we also worked with Nielsen to show the data alongside Nielsen's Gracenote Inclusion Analytics data and compared audience perception to measured diversity in content.

The report also identifies examples where recent concerted action corresponds to positive perceptions among relevant groups.

FIGURE 3 **Sector index scores: film and TV outperforms the rest of the industry, gaming falls behind**



Source: (index score) – World Economic Forum, Accenture and Ipsos DE&I in Media and Entertainment Survey 2021; n = 7,201

Below: @TommL/
Gettyimages

2 Industry sector comparison

In this section of the report, we analyse each of the four industry sectors: film and TV, news and magazines, sport and gaming.

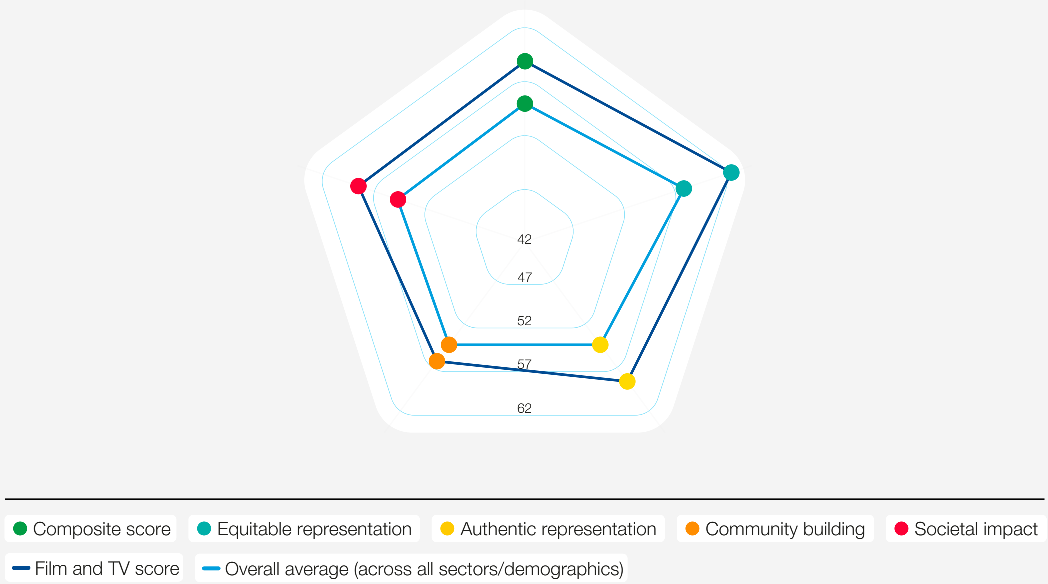
For each sector, we show its audience perception score across all four dimensions, and a composite score, relative to the entire industry. We show the ranking of importance of the four dimensions, according to that sector's audience. We then break down the scores across different identity groups and provide additional commentary.

2.1 Film and TV

While film and TV's composite score is higher than other sectors included in our 2022 Audience Representation Index, there is significant room for improvement with a score of 58.5/100.

FIGURE 4

Film and TV index (and component) scores



Source: Index scores for film and TV – World Economic Forum, Accenture and Ipsos DE&I in Media and Entertainment Survey 2021; n = 7,201

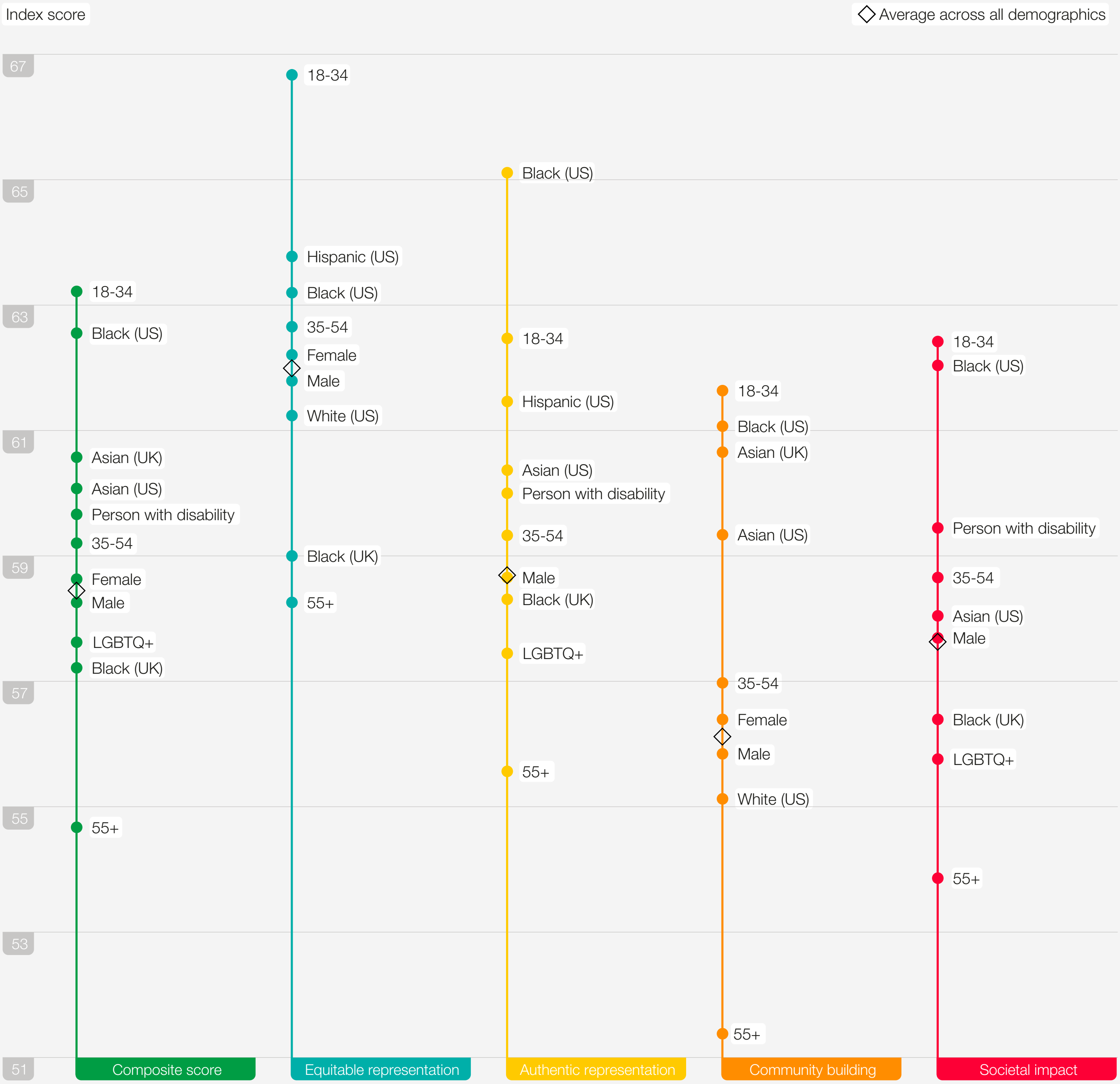
Film and TV outperforms the industry average in all dimensions, most significantly in equitable representation (who is represented) and in authentic representation (how they are represented) (Figure 4). Audiences rate societal impact as the most important dimension of the four (Figure 5).

FIGURE 5

Ranked importance of index components for film and TV

1	2	3	4
Societal impact	Equitable representation	Authentic representation	Community building

FIGURE 6 | **Index scores for film and TV across demographics**



Note: Scores for Hispanic respondents were limited to the US. Not all demographics are labelled.

Source: Index scores for film and TV across demographics – World Economic Forum, Accenture and Ipsos DE&I in Media and Entertainment Survey 2021; n = 7,201

Film and TV demographic scores

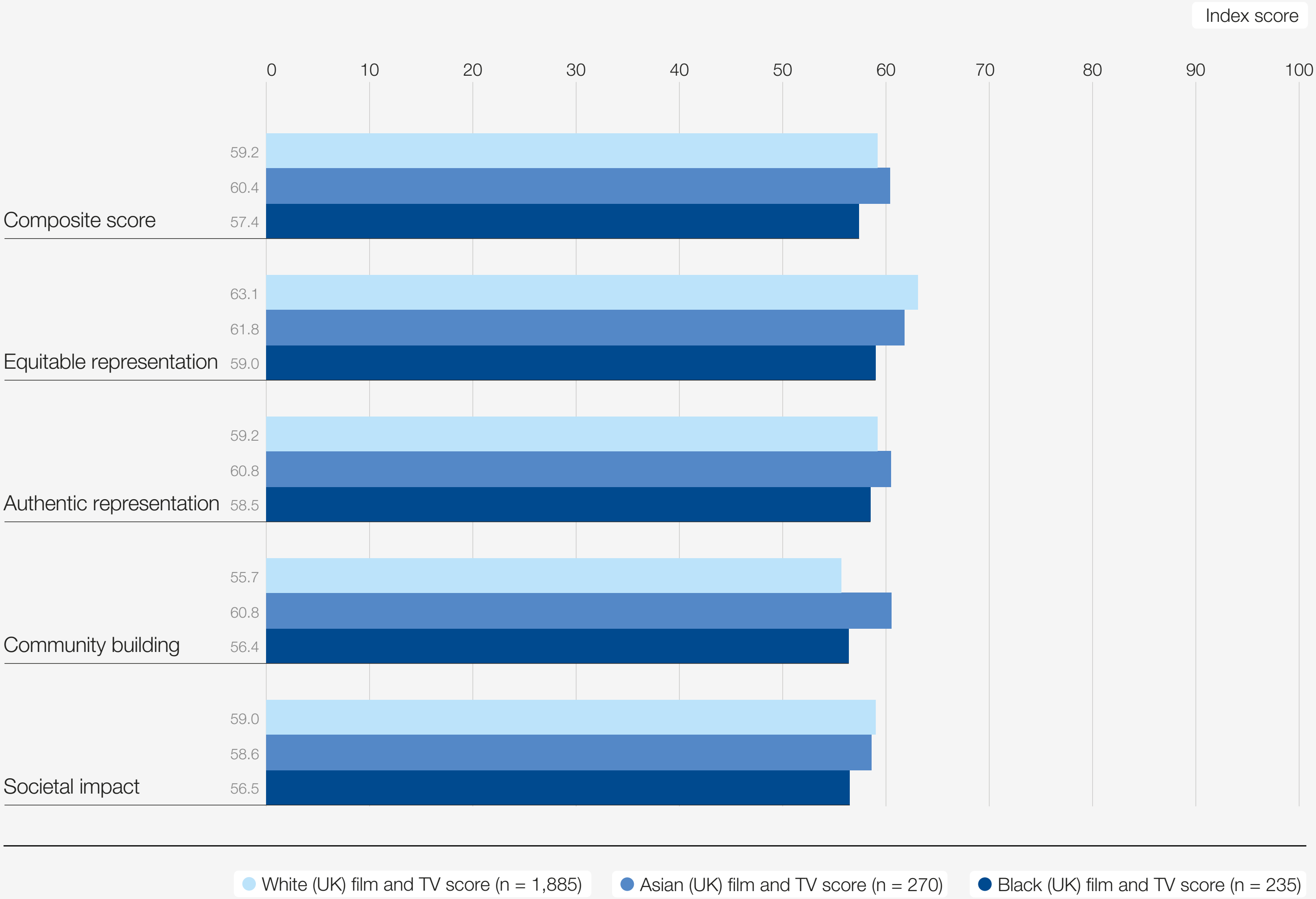
❝ **Results suggest that some of the relatively positive perception from racial and ethnic minority identity groups and women might be a reaction to the film and TV sector's targeted efforts to diversify casts and creative leads.**

Across all index components, there are substantial differences by age. Older participants (those aged 55-plus) felt far less represented by film and TV when compared to audiences aged 18–34. This more critical perception from older viewers reflects 2017 research from the University of Southern California that looked at more than 1,200 characters in films released between 2014 and 2017 and found that people aged 60-plus appeared in 12% of films released in the previous three years, yet represented 19% of the US population. Consumers of all ages felt that film and TV struggles to create inclusive communities, but the sentiment was felt particularly by older, 55-plus viewers (Figure 6).

Although the survey measures a single point in time, the results suggest that the relatively positive perception from racial and ethnic minority groups and women might be a reaction to the film and TV sector's targeted efforts to diversify casts and creative leads. According to UCLA's Hollywood Diversity Report, in the US women accounted for 48% of film lead actors in 2020, up from 44% in 2019 and nearly double 2011's levels. People who identify as being of a racial or ethnic minority identity group, in the US, accounted for 40% of film lead actors in 2020, up from 28% in 2019 and nearly quadruple their 2011 share (11%). In the UK, the figures also reflected an improvement, though much smaller. The total on-screen contributions by Black, Asian and minority ethnic (BAME) groups increased from 21.8% in 2017 to 22.7% in 2020 according to the Diamond Report.

Despite this relative strength across index components and demographic groups – and progress with racial and ethnic representation – inequities in film and TV still exist. Black participants in the UK scored the sector lower than white and Asian participants in most index components with the gap being particularly stark in equitable representation and societal impact. Overall, Black participants in the UK rated film and TV 7% lower on equitable representation than white participants (Figure 7).

FIGURE 7 **Sector index scores: film and TV outperforms the rest of the industry, gaming falls behind**



Source: Race/ethnicity (UK) index scores for film and TV – World Economic Forum, Accenture and Ipsos DE&I in Media and Entertainment Survey 2021; n = 7,201

2.2 Gaming

The gaming industry, with a composite score of 49.1/100, scored the lowest across all four index components compared to all other sectors.

Notably, across the index components, societal impact rated the most important, with community building emerging as an important dimension as well (Figure 8). Gaming scored highest in equitable representation and lowest in authentic representation (Figure 9). While consumers may see some depictions of themselves in the games they are playing, they may not feel these depictions are authentic.

The 55-plus age group scored its representation within gaming especially low. Considering that the Global Web Index's 2021 report, which gathers research from 15 countries, found that the number of gamers aged 55–64 increased by 32% from 2018–2020, the gaming industry can do more to represent one of its newest and fastest-growing segments. There was also a significant difference across markets in gaming, with French respondents rating the sector 8% lower overall in the index than UK respondents and 10% lower than US respondents.

Another prominent gap came from women, who rated gaming poorly across all four index components. The index component with the widest gender gap was equitable representation, where women rated gaming 9% worse at depicting them fairly and positively than men did (Figure 10).

Women's negative perception of representation in gaming validates our findings in *Reflecting Society: The State of Diverse Representation in Media and Entertainment*. While recent studies by Currys PC World indicate an increase in games featuring playable women characters (up by 189% in the past decade), only 18% of games launched in 2020 featured women characters. Game covers, a prominent visual cue of primary characters, predominantly feature men; only 4.2% of games analysed by TechTalk in a study of women and gaming feature a woman as the focal point on the front cover.

In contrast, gaming has managed to deliver a positive societal impact for people with disabilities – thanks to, for example, the availability of accessible controllers, colour-blind options and subtitles turned on by default. People with disabilities rated the sector 8% higher in societal impact than the average across all identity groups.

In the US, white and Black respondents scored gaming higher in equitable representation than in community building, while Asian respondents said the opposite – that gaming is further ahead in community building. In fact, Asian respondents in the US rated gaming 7% higher in community building than authentic representation. This indicates that, while they may feel included within the gaming community, there is still work to be done when it comes to how Asian characters are represented in games.

Ultimately, across all components, gaming scores are significantly worse for women than for men (Figure 11) – and are broadly more negative than the industry-wide averages. Although gaming has made some strides for people with disabilities, much work remains to be done, especially for the 55-plus age group.

While consumers may see some depictions of themselves in the games they are playing, they may not feel these depictions are authentic.

People with disabilities rated the sector 8% higher in societal impact than the average across all identity groups.

Below: @ Tanya-stock/ Gettyimages

FIGURE 8

Ranked importance of index components for gaming

1 Societal impact

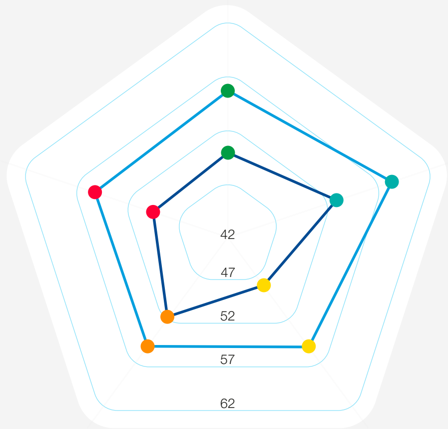
2 Community building

3 Equitable representation

4 Authentic representation

FIGURE 9

Gaming index (and component) score



Composite score · Equitable representation · Authentic representation · Community building · Societal impact

Gaming score · Overall average (across all sectors/demographics)

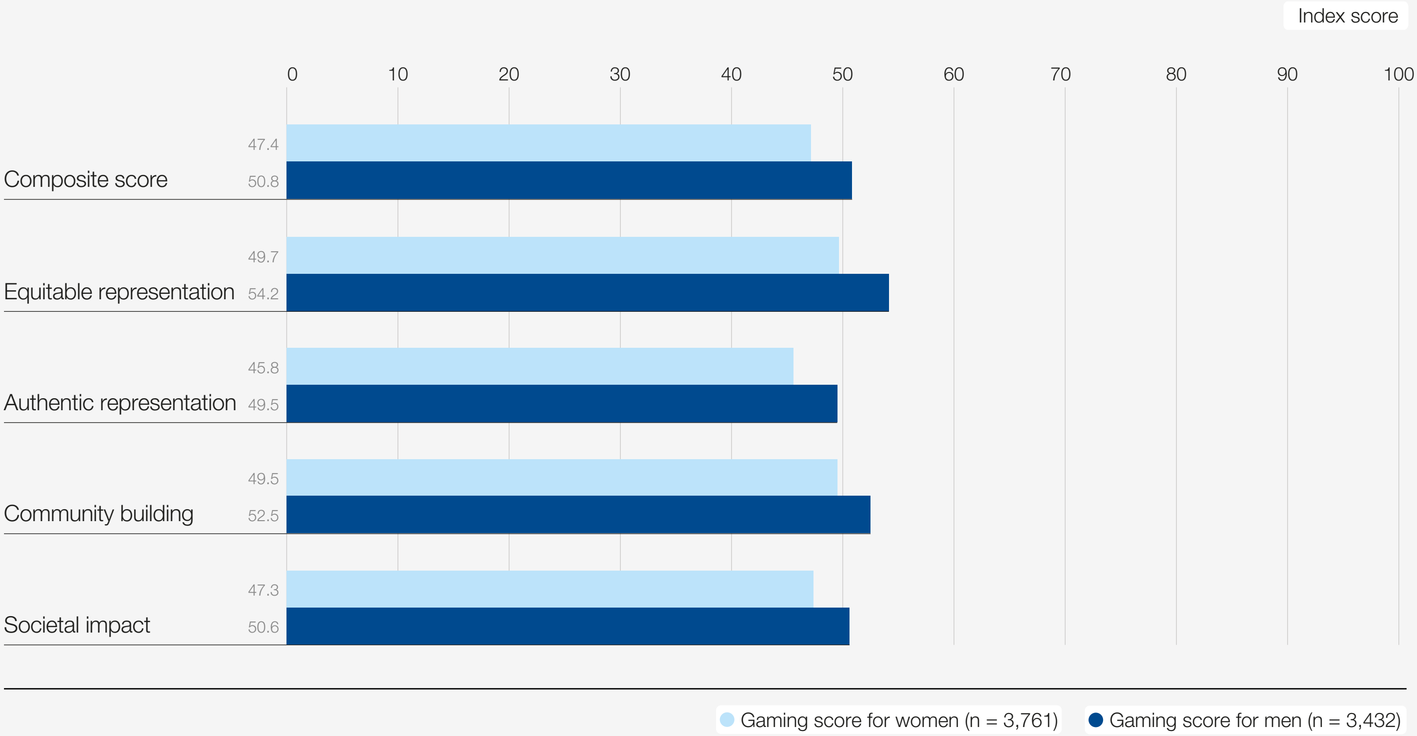
Source: Index scores for gaming – World Economic Forum, Accenture and Ipsos DE&I in Media and Entertainment Survey 2021; n = 7,201

FIGURE 10 | Index scores for gaming across demographics

Note: Scores for Hispanic respondents were limited to the US. Not all demographics are labelled.

Source: Index scores for gaming across demographics – World Economic Forum, Accenture and Ipsos DE&I in Media and Entertainment Survey 2021; n = 7,201

FIGURE 11 | Gender scores for gaming



Source: Gender index scores for gaming – World Economic Forum, Accenture and Ipsos DE&I in Media and Entertainment Survey 2021; n = 7,201

Below: @ wundervisuals/ Gettyimages

2.3 News and magazines

The news and magazine sector performed slightly below average for the media and entertainment industry, with an overall score of 55.3 out of 100. News and magazines proved relatively strong in authentic representation. However, the data shows significant room to improve in community building. Yet again, participants chose societal impact as the most important dimension for the news and magazine sector (Figure 13).

Across all markets surveyed, the LGBTQ+ community and those aged 55-plus were the most critical of news and magazines, especially in the categories of community building and societal impact.

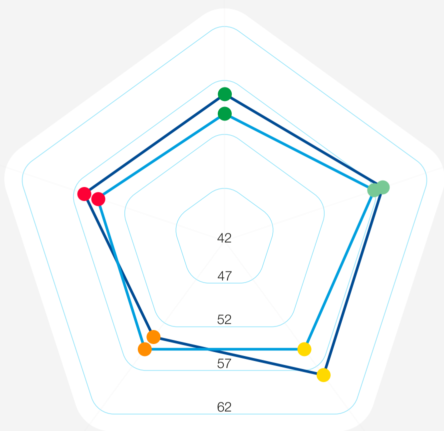
In contrast, younger (18–34-year-old) and racial and ethnic minority participants across markets were relatively positive about DE&I in the news and magazines sector across index components and overall (Figure 14). Interestingly, the outlook for racial and ethnic minorities becomes more nuanced when their scores are considered using an intersectional lens. Across the US and UK, Black men were significantly more positive about the performance of news and magazines on DE&I than white men (Figure 15).

On the other hand, Black women felt especially negative about the performance of news and magazines on DE&I. Black men scored the sector 13% higher than Black women did – a gap that is not replicated across other racial or ethnic groups. We expand on the possible reasons for this discrepancy in the Demographic overview section.

Black men scored news and magazines 13% higher than Black women did – a gap that is not replicated across other racial or ethnic groups.

FIGURE 12

News and magazines index (and component) scores



Composite score · Equitable representation · Authentic representation · Community building · Societal impact

News and magazines score · Overall average (across all sectors/demographics)

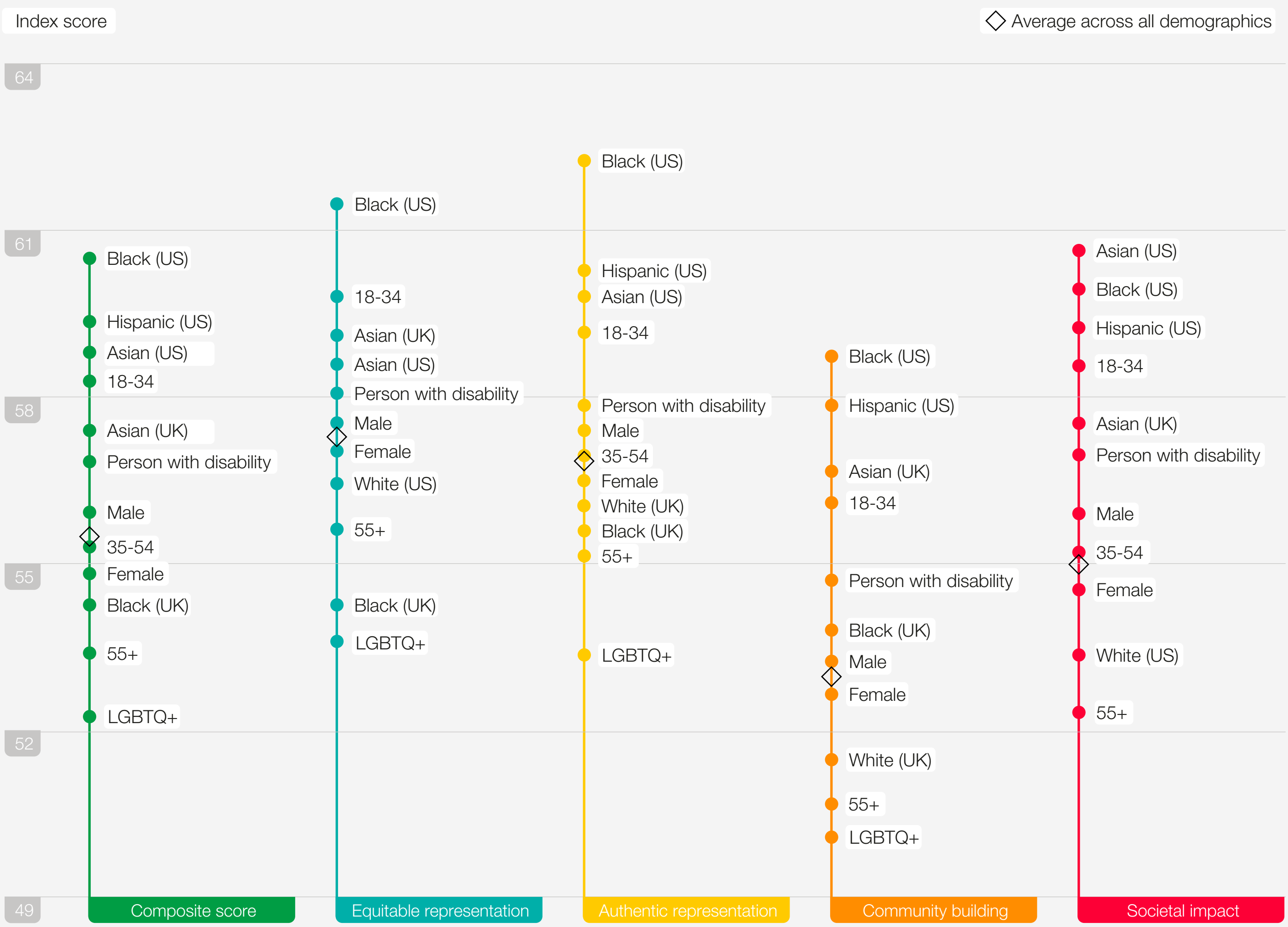
Source: Index scores for news and magazines – World Economic Forum, Accenture and Ipsos DE&I in Media and Entertainment Survey 2021; n = 7,201

FIGURE 13

Ranked importance of index components for news and magazines

1	2	3	4
Societal impact	Equitable representation	Authentic representation	Community building

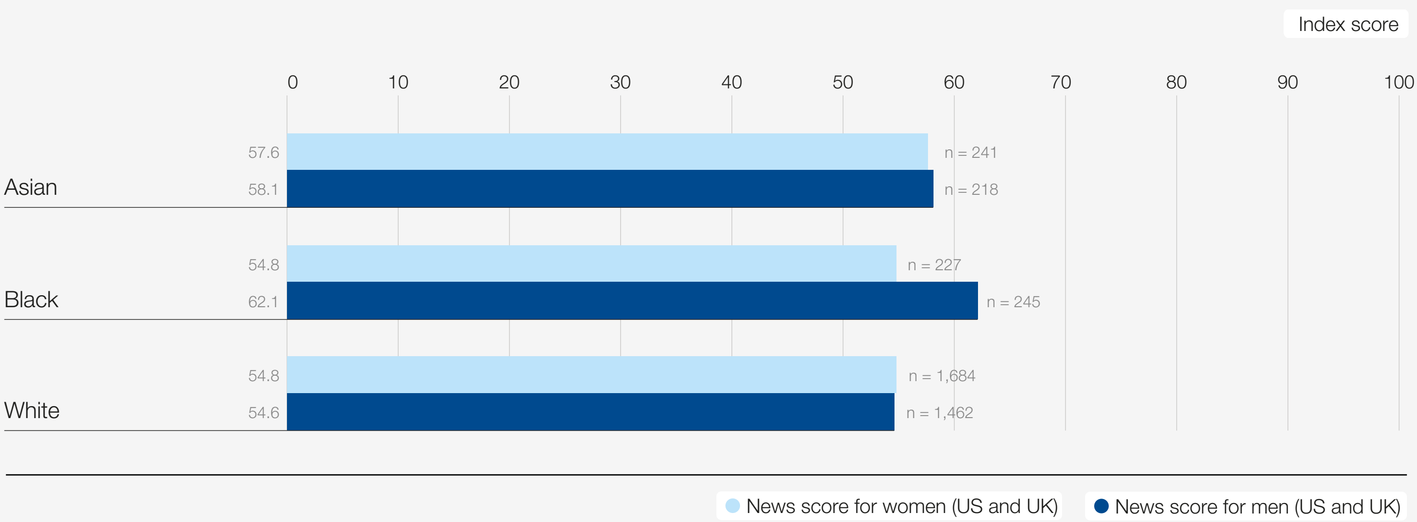
FIGURE 14 | Index scores for news and magazines across demographics



Note: Scores for Hispanic respondents were limited to the US. Not all demographics are labelled.

Source: Index scores for news across demographics – World Economic Forum, Accenture and Ipsos DE&I in Media and Entertainment Survey 2021; n = 7,201

FIGURE 15 | Gender/race index score for news in the US and UK



Note: Gender/race index score for news in the US and UK

2.4 Sport

Sport performs broadly in line with the average across all sectors – with a composite score of 54.8/100 – but is weaker when it comes to equitable representation and authentic representation. At the same time, sport is above industry-wide averages in community building and societal impact, the two most important dimensions for this audience (Figures 16 and 17).

Sport performs poorly in representing women and LGBTQ+ people, with women rating the sector with a 7% lower composite score than men, and LGBTQ+ participants giving the sector a composite score 16% lower than the composite across all demographics.

Within racial and ethnic minorities, Black respondents in the US, US Hispanic audiences and Black respondents in the UK felt most well-represented, with Asian audiences seeing less of themselves within the sector (Figure 18). However, each of these identity groups were relatively positive about the state of community building in sport today.

The LGBTQ+ participants ranked sport lower than any other demographic group, with an especially low score for authentic representation (Figure 18). Across all index components, the LGBTQ+ participants ranked sport significantly below the average score across all demographics, with the most room for improvement in authentic representation (Figure 19).

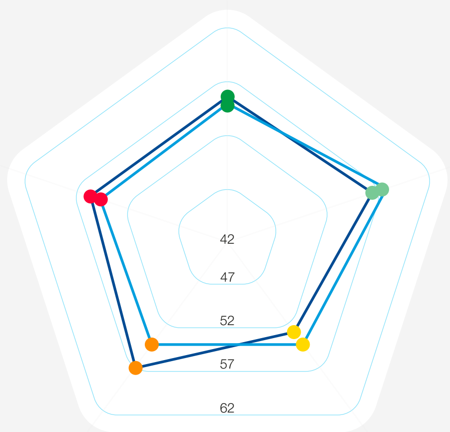
Professional sport is often dubbed “the last closet” for its lack of LGBTQ+ representation. As of summer 2021, there were only two openly gay male athletes in the four major sport leagues (baseball, basketball, hockey and American football) in the US (CNN). Notably, the culture of women’s sport has enabled far more professional female athletes to come out. A 2020 BBC survey of elite British female athletes reported that 68% of respondents said they can be more open about their sexuality than men. Overall, though, there is significant room for increased LGBTQ+ representation; the Tokyo Olympics in 2020 saw the most LGBTQ+ athletes ever, albeit only 168 of the 11,000 Olympians (CNN).

Sport is above industry-wide averages in community building and societal impact, which are most important to fans.

Sport performs poorly in representing LGBTQ+ people, who gave the sector a 16% lower composite score than the composite across all demographics.

FIGURE 16

Sport index (and component) score



Composite score · Equitable representation · Authentic representation · Community building · Societal impact

Sport score · Overall average (across all sectors/demographics)

Source: Index scores for sport – World Economic Forum, Accenture and Ipsos DE&I in Media and Entertainment Survey 2021; n = 7,201

FIGURE 17

Ranked importance of index components for sport

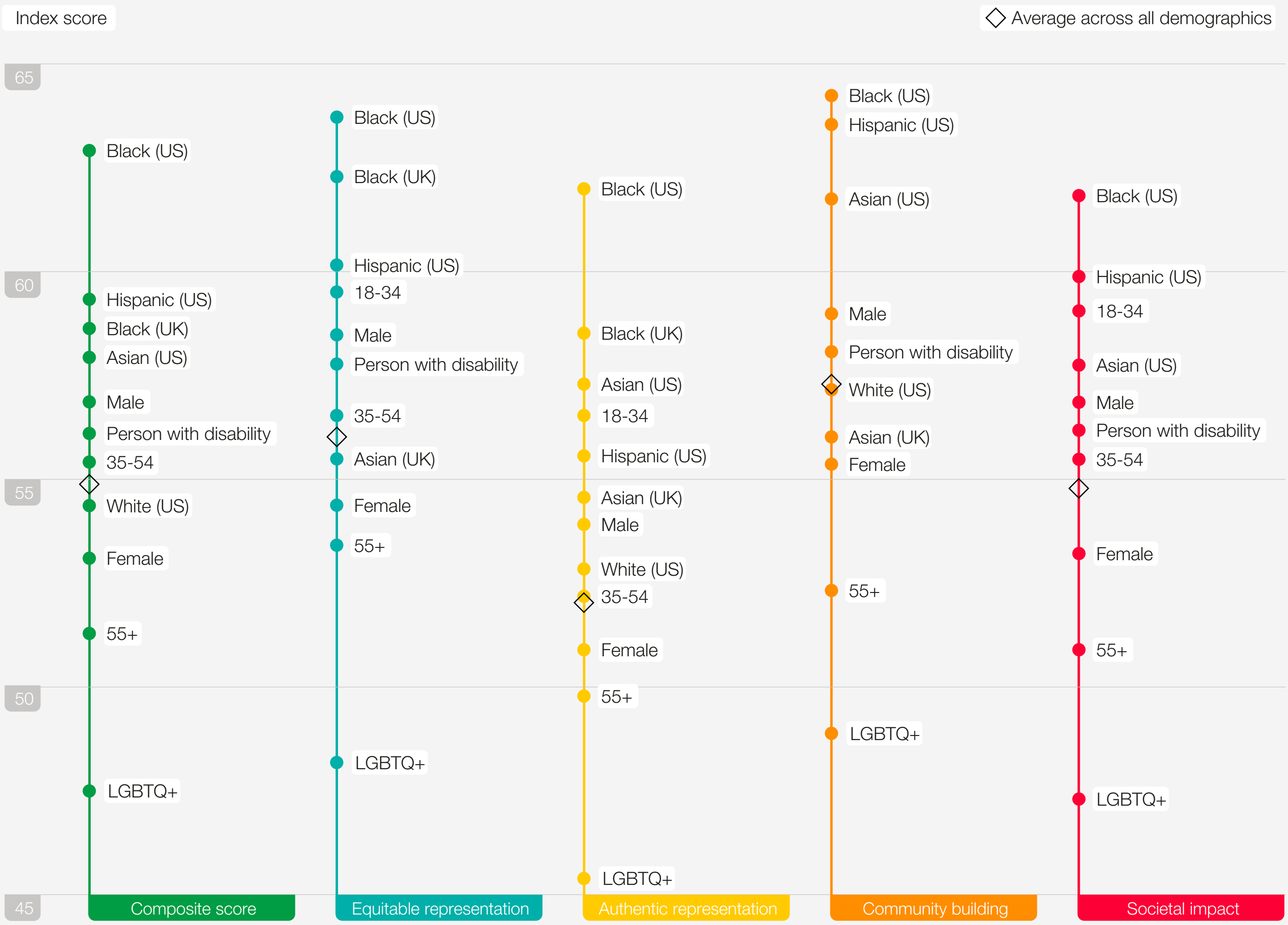
1 Societal impact

2 Equitable representation

3 Authentic representation

4 Community building

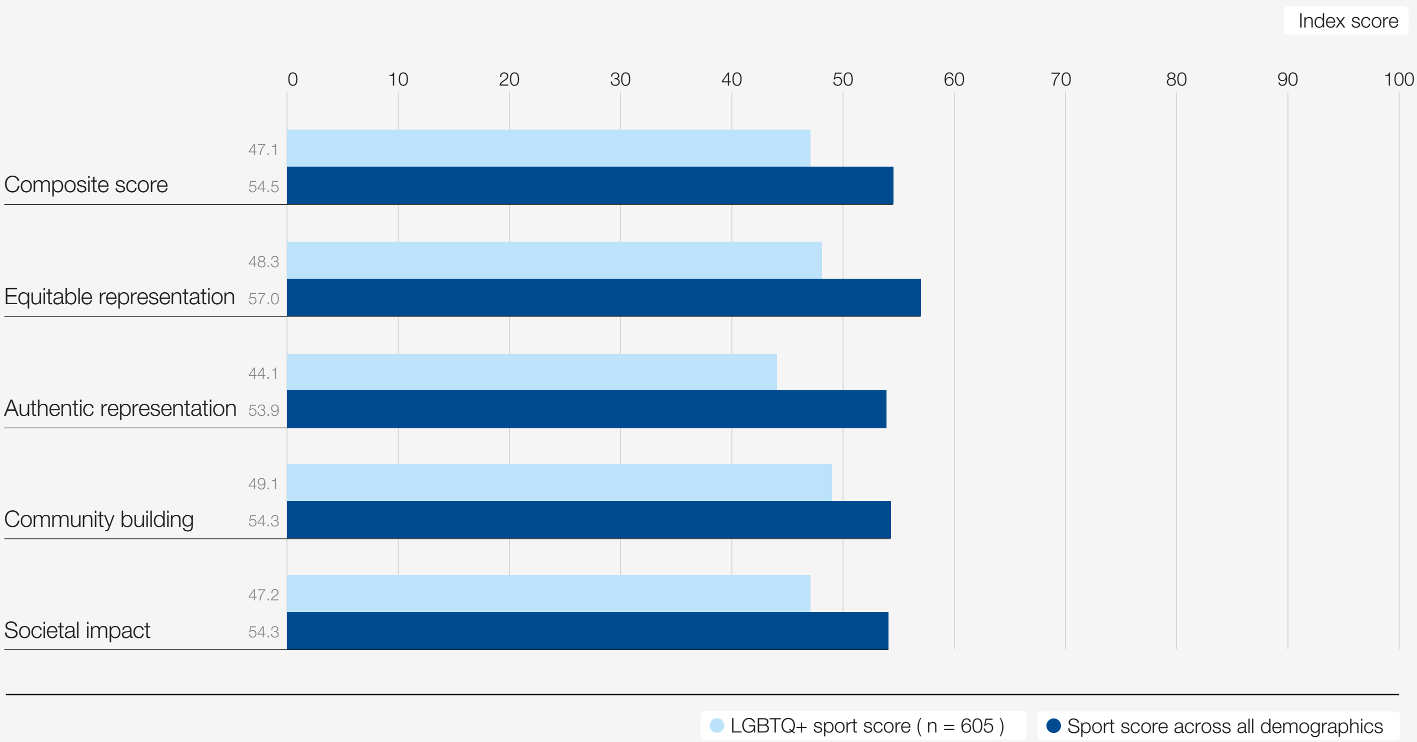
FIGURE 18 | Index scores for sport across demographics



Note: Scores for Hispanic respondents were limited to the US. Not all demographics are labelled.

Source: Index scores for sport across demographics – World Economic Forum, Accenture and Ipsos DE&I in Media and Entertainment Survey 2021; n = 7,201

FIGURE 19 | **LGBTQ+ scores for sport**



Note: LGBTQ+ index scores for sport – World Economic Forum, Accenture and Ipsos DE&I in Media and Entertainment Survey 2021; n = 7,201

Below: @Izabela Habur/ Gettyimages

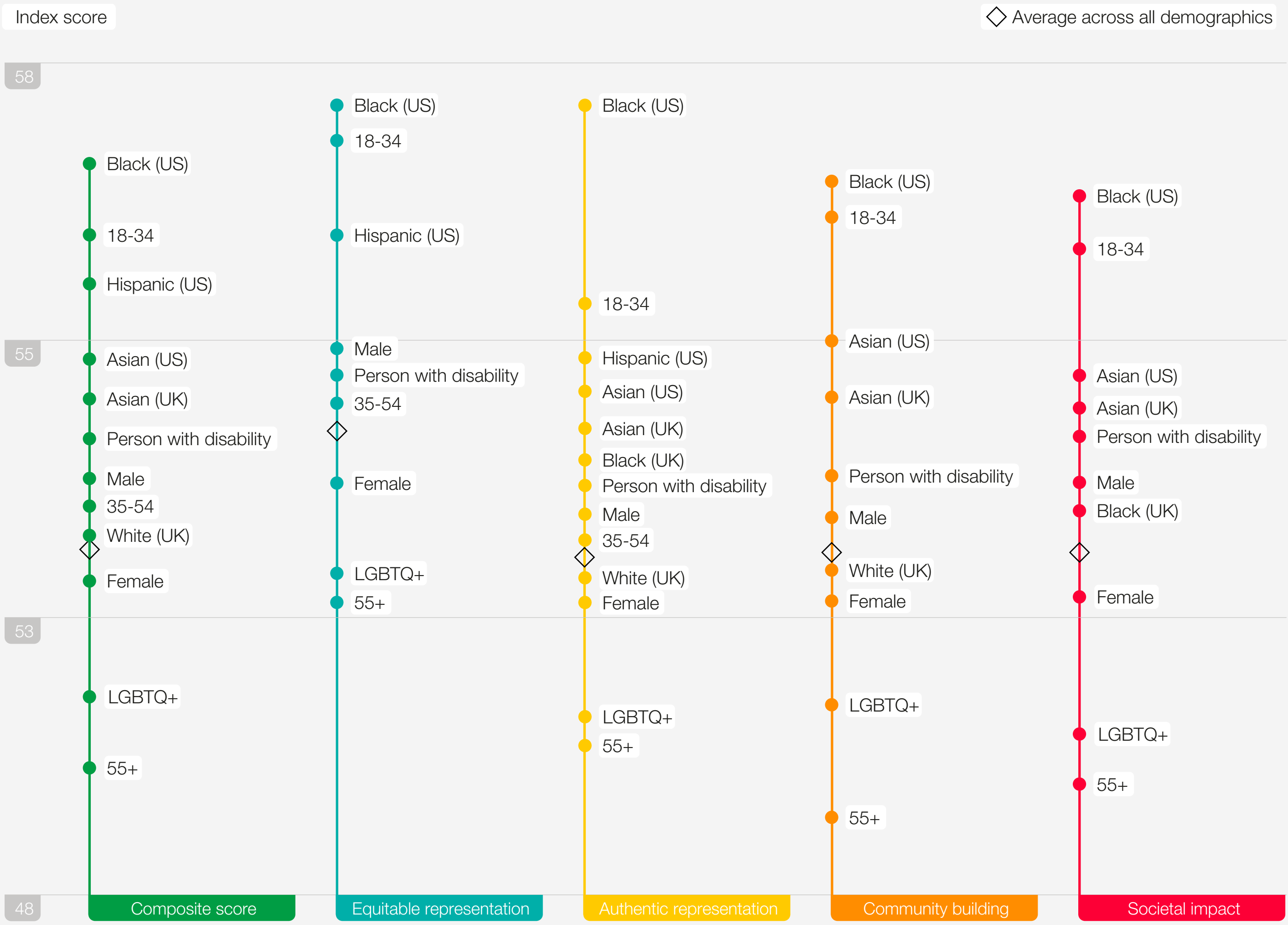
3

Demographic overview

In this section, we provide further analysis on the audience perspectives and explore how they compare to the demographic profiles of the audiences consuming the content.

This section highlights those trends and offers some potential explanations. Responses in the Audience Representation Index are compared to the actual percentage of time on screen relative to the population for identity groups captured by Nielsen. Nielsen's Gracenote Inclusion Analytics solution combines audience measurement data and content metadata to capture representation of diverse identity groups in popular US programming. One propriety measure calculated by inclusion analytics is the Inclusion Opportunity Index (IOI), which compares the share of screen for different identity groups to their representation in US population estimates. We segmented the programmes measured as they compare to film and TV and news and magazines sectors.

FIGURE 20 **Index scores for media and entertainment across demographics**



Note: Scores for Hispanic respondents were limited to the US. Not all demographics are labelled.

Source: Index scores for media and entertainment as a whole, across demographic – World Economic Forum, Accenture and Ipsos DE&I in Media and Entertainment Survey 2021; n = 7,201

3.1 The age representation gap

Across all demographic groupings, age highlights the greatest difference in terms of how well represented participants felt. The youngest age group surveyed, 18–34-year-olds, scored the industry at 60 out of 100 across all components and sectors, which was almost 10 points higher than the 55-plus age group (Figure 20).

The secondary research detailed below uncovered multiple explanations for why this may be the case for the oldest age group. The responses of older consumers may reflect their perception of change over time. Minority racial and ethnic groups tend to be younger, while the average age for someone who identifies as white in the US is 58 and 41 in the UK. So, while straight, able-bodied white men, for example, are still strongly represented on-screen, reports such as UCLA's Diversity in Hollywood show that their share of screen time is falling.

Older viewers across all demographic groups may feel under-represented because they consider age strongly in their perception of self.

There is additional evidence that suggests older viewers across all demographic groups feel under-represented because they consider age strongly in their perception of self. Given the lack of representation of older people across the industry, this gap may be weighing down their scores overall. The advertising sector is a case study in how strongly older consumers feel about their representation in various forms of media. In a 2021 American Association of Retired Persons (AARP) survey, 62% of consumers aged 50-plus agreed with the statement: "I wish ads had more realistic images of people my age"; and nearly half (47%) shared that "Ads of people my age reinforce outdated stereotypes". Those aged 50-plus represent only 15% of adults in online media images and are seven times more likely than younger adults to be portrayed negatively, according to a 2019 AARP study. Low scores for authentic representation suggest that there is demand for more nuanced, less stereotypical portrayals of people aged 55-plus.

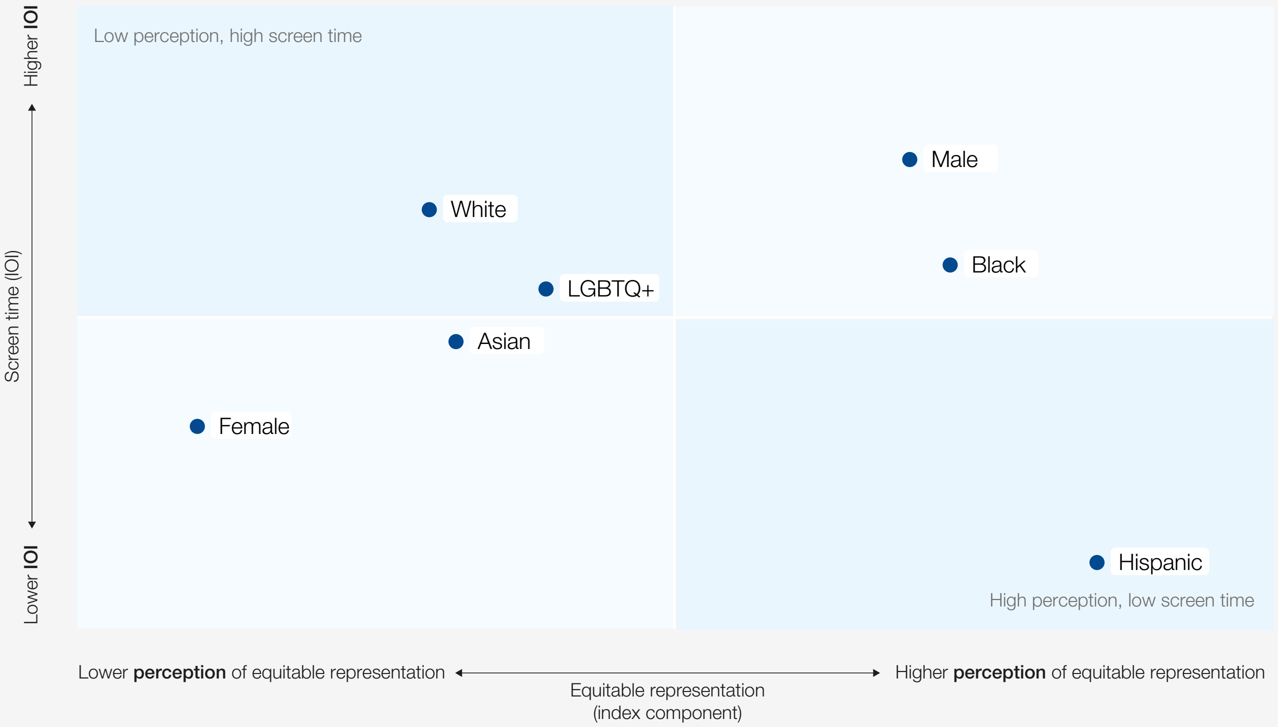
3.2 The perception of progress

One of the most challenging trends to emerge from the 2022 Audience Representation Index is the relatively positive scores that racial and ethnic minority identity groups provided across sectors. In the US, for example, Black participants rated the state of authentic representation in film and TV 13% higher than white respondents (Figure 21). We know from Nielsen's Inclusion Opportunity Index (IOI) that certain perceptions of equity measured in the index do not reflect the under-representation of women, Asians and Hispanic Americans (Figure 21).

We know that certain perceptions of equity measured in the index do not reflect the under-representation of women, Asians and Hispanic Americans.

A potential explanation for this more positive perception is the relative increase of representation that has occurred over the past 50 years. Many older people who identify as being of a racial and ethnic minority grew up with little expectation of representation as they rarely saw people who looked like themselves on screen. In contrast, white viewers across markets were accustomed to routinely seeing themselves on screen. As the media and entertainment industry has moved towards diversifying, racial and ethnic minority audiences see progress, while white audiences may see such change more negatively. Evidence for optimism and pessimism along racial lines has been shown in research on economics in the aftermath of the 2016 US election. A 2018 Brookings study showed that racial and ethnic minorities have much higher levels of optimism. While audience perception is a valuable tool for measuring progress, it does have inherent limitations; for instance, the inability to control for the many societal external factors, such as a political cycle, as seen in this example, may influence perception. To better adjust for these effects, it will be critical to track trends over time for each identity group to isolate its experience and control for external differences in the relative perceptions between groups.

FIGURE 21 | **Film and TV perception vs. screen time comparison (US only)**

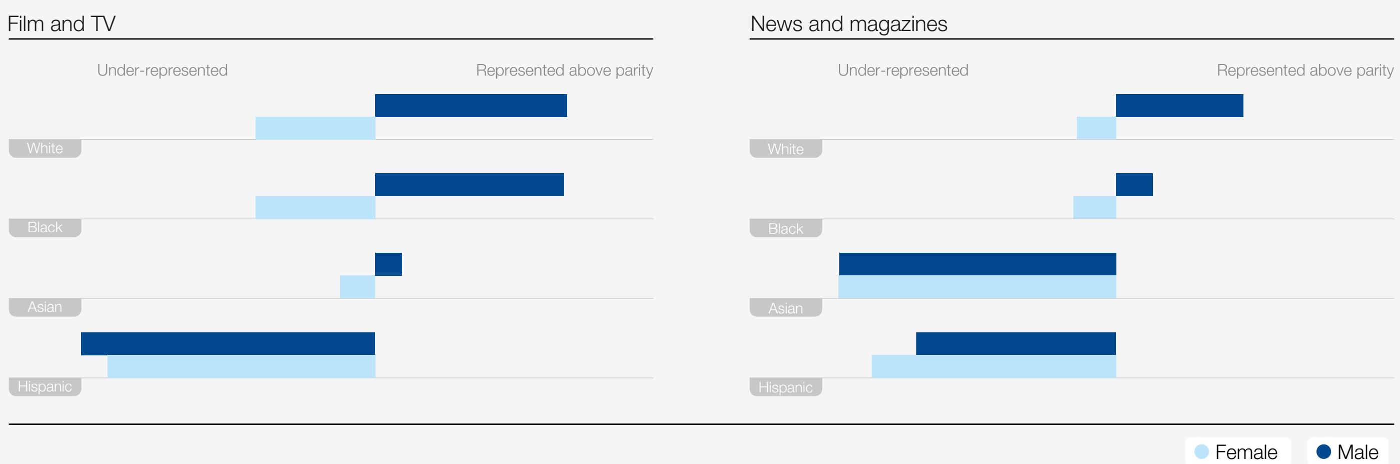


Source: Film and TV perception compared to reality of equitable representation (US only) – World Economic Forum, Accenture and Ipsos DE&I in Media and Entertainment Survey 2021; n = 7,201; Nielsen Gracenote Data 2021

A significant gender gap persists among white and Black actors.

We see a similar trend in news and magazines, where the relatively positive perception of Black male representation in the index results reflects a complex situation. The dialogue about race, justice and crime is changing. A Pew Research Centre survey taken at the height of the 2020 US racial discrimination protests concluded that seven in 10 American Black adults (72%) said the media was doing a good or excellent job covering the demonstrations in the wake of the killing in police custody of George Floyd, a 46-year-old African American in Minneapolis, Minnesota, on 25 May 2020. However, research conducted by The Opportunity Agenda reviewing hundreds of studies over several years found that media depictions disproportionately represent Black boys and men in stories of violence, crime and poverty; under-report important dimensions of Black males' lives, such as fatherhood and work; and lack coverage of the systemic barriers facing members of this group. Research from Nielsen revealed that Black audiences were 2.4 times more likely to feel that the representation of their identity group was completely inaccurate. The data suggests that a study of attitudes at a more granular level is merited.

FIGURE 22 | **Race and gender intersectional screen time (US only)**

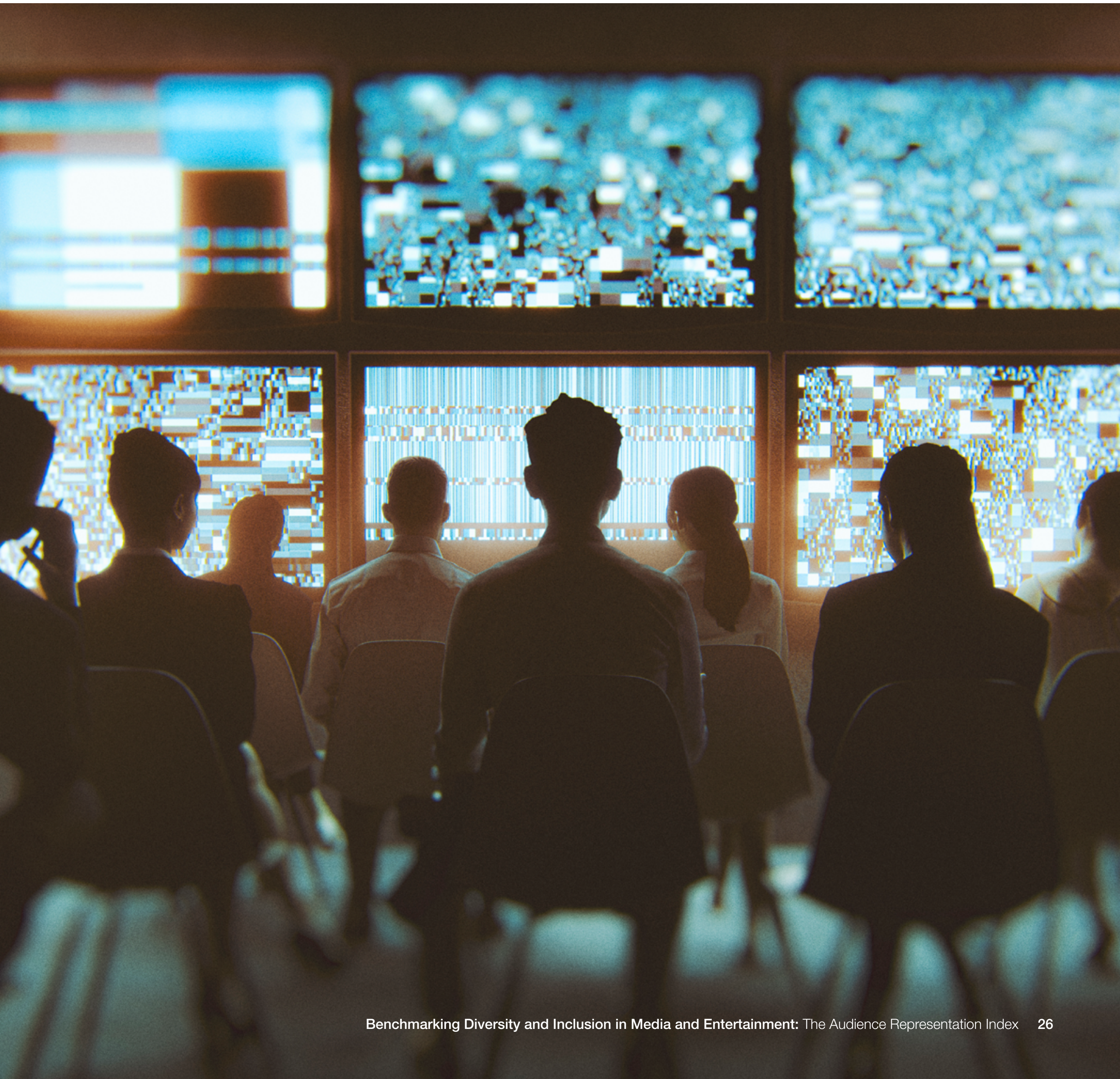


Source: Intersectional Nielsen IOI view across race and gender for film and TV and news and magazines – Nielsen Gracenote Data 2021

The Nielsen IOI demonstrates the nuance of the gender gap at the intersection of race and ethnicity. In the US film and TV sector, white and Black men are well represented (relative to their share of population), whereas white and Black women are under-represented. Asian men and women see roughly proportional screen time, while Hispanic men and women are both heavily under-represented.

Comparison of Gracenote Inclusion Analytics IOI scores with the 2022 Audience Representation Index highlights instances in which identities are better represented than they perceive themselves to be. For example, LGBTQ+ respondents score all sectors low within the 2022 Index but are represented above parity in film and TV (Figure 21). The group's perception may be a reaction to negative or stereotyped portrayals even if they do show up on screen frequently. Another factor relates to methodology. More than for other identity groups, there is no unified consensus on the percentage of the population identifying as LGBTQ+. A 2020 Gallup Poll estimates that 5.6% of the population identifies as LGBTQ+; a comparison can be made with the 11.7% of respondents to the 2021 US Census who did not select "straight" as their sexual orientation. Nielsen based its analysis on a Williams Institute at UCLA School of Law figure of 4.7% population incidence of LGBTQ+ individuals in the US. If the US-based LGBTQ+ population is undercounted in the IOI score, the community may show as relatively over-represented.

Below: @gremlin/ Gettyimages



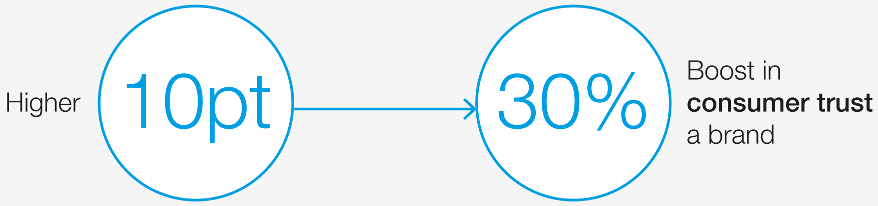
Below: @ 5xinc/Gettyimages

4 Key takeaways

The entire industry has room to grow as none of the sectors yet qualifies as leading under the Audience Representation Maturity Framework.

FIGURE 23 | The representation and trust relationship

Our results show that a 10-point improvement in our Audience Representation Index is linked to a 1.3x boost in how likely consumers are to trust a brand.



Source: The representation and trust relationship – World Economic Forum, Accenture and Ipsos DE&I in Media and Entertainment Survey 2021; n = 7,201

DE&I has business implications

Ultimately, in a world with ever more issue-conscious consumers, building successful diversity, equity and inclusion programmes is not just the right thing to do – it is good business. The research conducted for this report showed that a 10-point higher score in the Audience Representation Index is linked to a 30% boost in how likely consumers are to trust a brand (Figure 24).

FIGURE 24 | Business outcomes of DE&I for racial and ethnic minorities

59% Engage

of ethnic and racial minorities and 49% of all participants prefer to **engage with brands** who represent and include different groups in society.

48% Retain

of ethnic and racial minorities and 38% of all participants would **stop using a brand** they felt was not representing and being inclusive of different groups in society.

52% Promote

of ethnic and racial minorities and 40% of all participants tend to **recommend brands** that they feel represent and are inclusive of different groups in society.

Source: Business outcomes of DE&I for racial and ethnic minorities – World Economic Forum, Accenture and Ipsos DE&I in Media and Entertainment Survey 2021; n = 7,201

Notably, racial and ethnic minority identity group participants value diverse representation even more highly: 64% of Black respondents in the UK and 67% of Black respondents in the US tend to engage with brands more frequently if they are inclusive of diverse perspectives (Figure 24). Likewise, in the US, 65% of Asian respondents and 60% of Hispanic respondents say they are more likely to trust brands that represent a diverse range of people. Some 51% of women are more likely to trust brands that represent a diverse range of people. One demographic with a high potential for increased brand loyalty is LGBTQ+ consumers: one out of every two participants said they would stop using a product or service they deemed to be non-inclusive.

There is room for growth everywhere, and signs indicate audiences are taking note

The film and TV as a sector is notably ahead of other sectors in including the equitable (score of 61.9) and authentic (score of 58.8) representation of a wide range of demographic identities. The news and magazines sector is relatively strong in this area, too, but gaming lags behind. However, there are signs that efforts already made are having an effect: gaming has seen some success at driving DE&I impact through targeted action (such as designing accessible controllers, increasing colour-blind options, defaulting to subtitles on, etc.) which resonates with people with disabilities. Similarly, positive perceptions among racial and ethnic groups in film and TV reflect the growing diversity in casting and commissioning.

The gender gap is a business opportunity

A significant gender gap persists in perceived representation between men and women, especially in gaming and sport, where there is significant opportunity for women to be better represented. In gaming, men scored the sector 9% higher in seeing equitable representation than women did. Similarly, in sport, men ranked the sector 6% higher in promoting inclusive communities than women did. Better representing women in sport has clear financial benefits – for sport and for other sectors. After Under Armour's campaign launched featuring Misty Copeland, the first Black principal ballerina at the American Ballet Theatre, the brand's women's business saw 60% year-over-year growth to $600 million. Some potential avenues for sport to pursue to close its gender gap might include increased athlete compensation and greater media coverage of women's sport.

Older and LGBTQ+ groups do not see themselves

While each sector can stand to improve the representation of all identity groups, the LGBTQ+ community and 55-plus age groups feel the most marginalized and least authentically represented in media depictions. Every sector has a unique role to play in increasing the positive representation and inclusion of older individuals and members of the LGBTQ+ community, from increasing the authenticity of their portrayals in film and TV and gaming to intentionally implementing anti-discrimination policies in sport. As we increasingly see larger LGBTQ+ and 55-plus populations, effectively catering to them is becoming a business imperative. Furthermore, a wide spectrum of identities is grouped under the LGBTQ+ banner, so this is an area that can be expanded in further studies.

The toughest hurdle

Media and entertainment sectors are struggling to build inclusive communities and portray groups authentically.

Across all four sectors, building inclusive communities and portraying authentic representation are the elements where audiences feel there is the most room for improvement in terms of diverse representation. These areas require diversity in the creative and corporate workforce and working directly with their communities to listen and adapt. Every company has the opportunity to evaluate its own creative diversity to ensure it represents its audience.

Actions speak louder

Notably, when audiences were asked which component of diverse representation was most important, societal impact came out on top in all four sectors. This shift in priorities has borne itself out in practice – e.g. several sport leagues have recently taken intentional steps to highlight racial equality movements during their sporting events, and the index results show clearly that sport is ahead of the pack in driving societal impact. Even though media and entertainment have an outsized role to play in crafting inclusive narratives, there is no replacement for brands taking a public stance on the social justice issues audiences value the most.

It's a journey – and it's early

FIGURE 25 Audience Representation Maturity Framework

Index components	Description	Lagging	Foundational	Leading
Authentic representation	To what extent does a sector include the **lives and experiences** of under-represented groups in a nuanced way vs. stereotype?	A **lagging** sector relies heavily on stereotypes to include the lives and experiences of people from under-represented groups in its content	A **foundational** sector sometimes relies on stereotypes in its inclusion of the lives and experiences of people from under-represented groups in its content	A **leading** sector is multidimensional and nuanced in its inclusion of the lives and experiences of people from under-represented groups in its content
Equitable representation	To what extent does a sector centre the lives and experiences of under-represented groups in a **positive light**?	A **lagging** sector includes the lives and experiences of people from under-represented groups in a marginal and/or negative light	A **foundational** sector includes the lives and experiences of people from under-represented groups neutrally and/or in mostly supporting roles	A **leading** sector includes the lives and experiences of people from under-represented groups in a positive and affirming manner that highlights their stories
Community building	How well does a sector **promote an inclusive and belonging community** within its audience?	A **lagging** sector does little or nothing to foster an inclusive and belonging community within its audience	A **foundational** sector somewhat fosters an inclusive and belonging community within its audience	A **leading** sector excels at promoting an inclusive and belonging community within its audience
Societal impact	To what extent does a sector **prioritize DE&I themes and social justice issues** in its CSR?	A **lagging** sector rarely or never highlights DE&I themes and social justice issues in its CSR	A **foundational** sector sometimes highlights DE&I themes and social justice issues in its CSR	A **leading** sector frequently highlights DE&I themes and social justice issues in its CSR

In addition to scoring media and entertainment sectors relative to one another, the World Economic Forum's Power of Media Taskforce seeks to determine the overall maturity of sectors in terms of their ability to effectively include diverse representation. The original Audience Representation Maturity Framework places sectors on a spectrum from lagging to leading to see where each has the most room for growth and opportunity for impact. The scale of the index ranges from 0 to 100, where 0 is the least mature on DE&I (lagging maturity level) and 100 is the most mature on DE&I (leading maturity level). As is clear from the current landscape of media and entertainment, where film and TV and news and magazines are considered foundational, and gaming and sport are considered to be lagging, the industry has much room to grow as no sector qualifies as leading.

Conclusion

Representation matters.

> Diverse representation is not only fundamental to the future of media, but also a key business indicator."
> – Alexandra Wallace, Executive Vice-President, Head of Media and Content at Yahoo

The 2022 Audience Representation Index supports the position that audiences prefer to engage with brands that reflect diverse groups within society, while also making it clear that work remains to be done across the sectors to truly represent the diversity of society. Furthermore, audiences emphasized the importance of brands driving societal impact through corporate social responsibility activities, ranking this as the most important aspect of representation across all sectors.

With the insights and data from this report in hand, media and entertainment leaders should:

Set concrete representation priorities: The index provides a common framework for measuring where media and entertainment companies can focus on diversifying content and societal impact based on what matters to their audiences and where the greatest gaps exist today. Leadership should baseline their audience perceptions, set measurable targets and align projects and content investments to these goals.

Assess which actions have the most impact with audiences: The early data shows that sectors whose leaders put in processes and business practices oriented towards inclusion, such as in film and TV, see increased positive perception from audiences. By tracking audience perception over time, the results of industry efforts to translate action and investment into measurable progress can be shown. Furthermore, the data in this report, tying audience representation to business metrics such as trust, usage and promotion, can be used to build clear business cases for DE&I investments.

Encourage cross-industry and company-wide conversations: Ensuring that everyone feels represented is not the responsibility of any one sector or brand and this report recognizes that not every brand can or should be mass media-oriented. Rather, there is a collective industry responsibility and business opportunity to create a space for all groups and identify where gaps exist in reach and representation. The hope is that this report will serve as the basis for more achievable conversation across companies within sectors to ensure all identity groups have strong representation.

Invest in additional measurement research and tools: While the 2022 Audience Representation Index is a necessary first step in equipping the industry with mechanisms to understand the current state of DE&I in media and entertainment, further analysis is needed. Future research could examine specific demographic groups, brands and intersectionality in more depth. We encourage the industry to fund the continued assessment of this topic over time and to build on the frameworks here by applying them to additional geographies.

The World Economic Forum's Power of Media Taskforce on Diversity, Equity and Inclusion is bringing together leaders from across the industry, including creative leadership roles, independent non-profits focused on DE&I, corporate executives, creators and DE&I professionals, to answer the call for transparency and drive change as a community. The following initiatives are the first steps in a journey to support change:

- **Cross-sector industry report:** Our previous report, *Reflecting Society: The State of Diverse Representation in Media and Entertainment*, as the first of a planned annual series, established the baseline and laid out the best practices

- **Metrics and industry index:** The 2022 Audience Representation Index serves as an initial coordinated industry contribution to align on a common set of metrics to measure progress over time, identify trends and hold all players accountable

- **Industry-wide commitment:** The taskforce intends to define a set of high-level principles and commitments from organizations to work together on change, based on shared experience and effort

The Power of Media Taskforce supports media companies and platforms to drive social good and achieve tangible results in improving health, equity and cohesion in society. It looks at DE&I through a societal and economic lens, emphasizing "doing well by doing good". The taskforce serves to shine a light on progress through the voice of the audience and will be driven by the adoption of leading practices and new cross-industry initiatives for content and creative production.

Appendix

Research methodology

Scope and timeline

The World Economic Forum, in collaboration with Accenture Research, developed the measurement framework that was fielded by Ipsos to survey 7,201 internet users in the US, UK and France from 15 November to 9 December 2021 to measure their perceptions on how well content in each media and entertainment sector reflects the diversity of society and themselves. In each market, the initial sample surveyed was nationally representative, with additional boosts for certain identity groups to ensure a robust sample for analysis purposes.

This research measures diversity across five identity categories: race and ethnicity (in the US and UK only), gender, sexual orientation and identity, disability and age (all three countries). The sectors analysed include film and TV (e.g. TV channels, streaming services, film production companies), gaming (e.g. video games to be played on consoles, PCs, smartphones, tablets etc.), sport (e.g. major sporting leagues, major sport teams, sport broadcasters or services showing sport) and news and magazines (e.g. newspapers, news websites, news apps or any magazines). These four sectors encompass the majority of company-produced (rather than individual creator-driven sectors such as social media or music) content we consume. Advertising was excluded from this research given that few consumers can attribute an ad to the advertising firm that produced it.

On-screen inclusion data was provided by [Nielsen's Gracenote Inclusion Analytics] tool, which combines audience measurement data and content metadata to capture representation of diverse identity groups in popular US programming. This data illuminates the diverse representation of on-screen talent compared with the diversity of the general population for more than 60 identity groups based on characteristics including race, ethnicity, gender and sexual orientation.

In any study – but particularly a study on DE&I – it is useful to share how each of these identity groups were delineated in areas where it may not be clear. In the US, race and ethnicity groups were delineated as follows: anybody of Hispanic, Latino or Spanish-speaking origin was represented as Hispanic (regardless of race), and non-Hispanic white, Black or Asian respondents were represented as white, Black and Asian, respectively. Responses from other smaller racial and ethnic groups in the US were also received, but none reached reportable sample sizes.

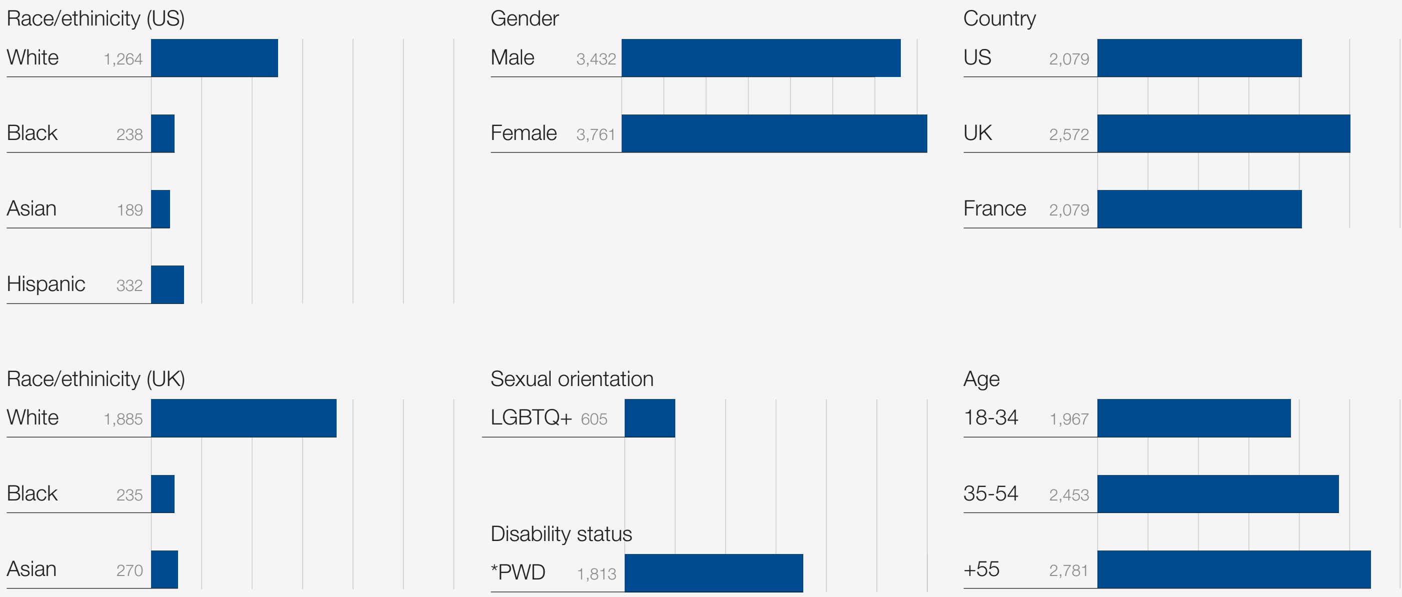
In the UK, race and ethnicity were delineated into three reportable groups – white, Black and Asian. As was the case in the US, responses were received from other smaller racial and ethnic groups, but none reached reportable sample sizes. Asian respondents in the UK were grouped as people whose ethnicity was Indian, Pakistani, Bangladeshi, Chinese or any other Asian background. Black respondents in the UK were grouped as people whose ethnicity was African, Caribbean or any other Black, African or Caribbean background.

Generally throughout the report, race and ethnicity groups were analysed by country, as experiences for these groups – and delineations for them – can vary from country to country. Race and ethnicity were aggregated across the US and UK only when necessary. For example, when looking at the intersection between race and ethnicity, where otherwise there would not be a robust sample.

Within the category of gender identity and sexual orientation, LGBTQ+ respondents were delineated as people who identified as either transgender or gender non-conforming or people with a sexual orientation other than heterosexual/straight (including gay, lesbian, bisexual, pansexual, asexual, etc.).

Globally, people with disabilities were delineated as people who have some or significant difficulty performing day-to-day activities due to a mental, intellectual, sensory or physical health condition.

FIGURE 26 | **Survey sample breakdown**



Note: *PWD = persons with disabilities

Source: World Economic Forum, Accenture and Ipsos DE&I in Media and Entertainment Survey 2021; n = 7,201

Limitations and future areas of research

While this research lays a foundation, there is an opportunity to expand into other dimensions of diversity, such as socioeconomic status, religion and region (rural vs. urban), and diversity within ethnic groups. Additionally, there remains a need to collect and analyse data on those categories in markets beyond the US, UK and France, such as Asia and Latin America, which have large media footprints. A great opportunity also exists in continuing to explore intersectionality, both in the data collected and the way in which identities in terms of self-image are shaped. As researchers, we acknowledge it is difficult for participants to isolate why they do or do not feel represented; there is an opportunity to investigate how a Black woman aged 55-plus perceives and weighs the representation of people aged 55-plus as well as that of Black people or women, and how the Black women aged 55-plus demographic as a category is represented.

Another key limitation of the research used to conduct this index was the lack of shared “stimuli” among participants: there was no measurement of what content (games, TV programmes, news channels etc.) each respondent engaged with most frequently. Certain identity groups may be disproportionately consuming content that caters to their demographic and, as such, feel better represented than they are within a sector overall. Future research can match content consumed with perceived representation to counteract this effect.

Further analysis behind the cause of perceived under-representation is also needed to test the findings of this report, such as why white participants on average have a negative perception of their own representation, and what drives the apparent representation above parity of LGBTQ+ people while still leaving them feeling under-represented.

Index components

The Audience Representation Maturity Framework was created to develop a clear, well-defined structure around the components that constitute effective diversity and inclusion in the media and entertainment industries. Inclusion and diversity experts from the World Economic Forum, Accenture and Ipsos distilled performance in terms of diversity and inclusion into four key components: equitable representation, authentic representation, community building and societal impact. Combined, these four index components constitute the holistic perception audiences have of the content they are consuming and capture the feelings of inclusivity a company may or may not inspire.

Each of the four index components consists of one or two relevant survey questions, which are averaged together (with sample weights) to generate component scores. Below are the questions that comprise each index component.

FIGURE 27

Index component survey sample questions

Questions concerning
equitable representation

To what extent, if at all, do you think the following sectors are good or bad at showing people like you in the content and services they provide?

To what extent, if at all, do you think the following sectors are good or bad at showing positive examples of people like you in the content and services they provide. This could be by highlighting your stories, your achievements or your values, for example.

Questions concerning
authentic representation

To what extent, if at all, do you think the following sectors are good or bad at showing people in a way that reflects their lived experiences? By this we mean showing real lives and experiences, rather than stereotypes that may be inaccurate.

To what extent, if at all, do you think the following sectors are good or bad at showing the lives and lifestyles of people like you in the content and services they provide? For example, through the themes, stories or culture references that they use.

Questions concerning
community building

To what extent, if at all, do you think the following sectors are good or bad at creating a sense of community that encourages people like you to feel like they belong and are welcome to engage with content and services? For example, this could be achieved through community outreach to under-represented groups, accessibility features or content moderation that promotes safety for all.

Questions concerning
societal impact

To what extent, if at all, do you think the following sectors are good or bad at encouraging fairness and equality for everyone through their corporate actions?

To what extent, if at all, do you think the following sectors are good or bad at showing themes related to fairness and equality in the content they produce? For example, by introducing topics around social justice or diversity into their content.

Note: This is an indicative set of sample questions that were fielded in the World Economic Forum, Accenture and Ipsos DE&I in Media and Entertainment Survey 2021

Index weightings

Two layers of weightings were used within the index calculations: one – the sample weights – applied throughout the index calculations; and another – the importance weights – applied only when calculating composite scores.

The **sample weights** adjust for sample imbalances present in the interlock of certain demographic groups, including:

– Age + race/ethnicity

– Age + gender

These weights allow us to control for any demographic imbalances that could be confounding results and limiting the accuracy of the comparisons across groups. Demographic imbalances can arise in sampling when surveying a nationally representative audience – for example, in our sample, white respondents in the US tended to be older than Black, Asian and Hispanic respondents. The sample weights mitigate these imbalances.

The **importance weights**, applied at an individual, respondent-by-respondent level, affect how the different components are weighted in the composite score. The weights are calculated based on the respondent's evaluation of the importance of each of these DE&I components within each sector.

For example, broadly, it was found that respondents answering for the gaming sector placed a higher importance on community building than authentic representation – and thus composite scores in gaming were more strongly affected by ratings in community building.

The average order of importance weights by sector were as follows (from highest importance to lowest importance):

– Film and TV: societal impact, equitable representation, authentic representation, community building

– Gaming: societal impact, community building, equitable representation, authentic representation

– News and magazines: societal impact, equitable representation, authentic representation, community building

– Sport: societal impact, community building, equitable representation, authentic representation

Framework, index construction and maturity

Finally, the index is constructed in two steps – an initial weighted average of component scores based on survey responses and sample weights, and a secondary weighted average of those component scores with importance weights combined into a final, composite index score.

The index determines the maturity of sectors on a scale from 0 to 100, where 0 is the least mature and 100 is the most mature on DE&I. Of course, in addition to the composite index score, scores were also calculated for these individual components and demographic identities to effectively measure sectors on different dimensions of DE&I.

The index results are also contextualized with a maturity scale, ranging from lagging to intermediate to leading. These maturity levels can be mapped directly to the respondent scoring on the questionnaire via the chart below.

FIGURE 28 **Audience Representation Maturity Framework**

Description	Lagging	Foundational	Leading
Average respondent sentiment	A **lagging** brand or sector was ranked as Exceptionally Bad, Bad or Neutral on average	An **intermediate** brand or sector was ranked as Neutral or Good on average	A **leading** brand or sector was ranked as Good or Exceptionally Good on average
Likert scale mapping	On a 5-point Likert scale, a lagging brand or sector would receive an average score of between 1 and 3.2	On a 5-point Likert scale, an intermediate brand or sector would receive an average score of between 3.2 and 3.8	On a 5-point Likert scale, a leading brand or sector would receive an average score of between 3.8 and 5
Index scale mapping	Thus, on our index, a lagging brand or sector would receive a score of **between 0 and 55**	Thus, on our index, an intermediate brand or sector would receive a score of **between 55 and 70**	Thus, on our index, a leading brand or sector would receive a score of **between 70 and 100**

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