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# From margins to mainstream:

## Asians and Pacific Islanders in media

Improving the representation and authenticity of Asians and Pacific Islanders in film and on TV could unlock billions of dollars for the film and television industry.



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# Foreword

The US film and television industry has an unmatched influence on popular culture and broader attitudes. The stories it tells and the trends it sparks reverberate in every corner of the country.

This report explores the representation within the industry of the Asian and Pacific Islander (API) population—both actors on-screen and professionals in roles behind the scenes. It builds on previous McKinsey research examining the experiences of Black and Latino professionals in the entertainment industry, as well as on research about the representation and experience of Asian American workers.<sup>1</sup>

Our in-depth analysis finds API representation has made significant gains over the past several decades. API stories on the big and small screens have become more prevalent, received critical accolades, and reached mainstream audiences. This progress is encouraging. But much work still remains before API actors and professionals catch up to their non-API peers on nearly all metrics.

Industry executives should take note: API consumers represent one of the fastest-growing segments in the United States, and capturing their attention and imagination could generate billions of dollars in additional spending in the coming years. However, our research finds API consumers don't perceive API representation in film and television to be authentic or to reflect their own stories, and this sentiment could be curbing their spending.

Understanding current consumer attitudes toward film and television is a critical first step toward ensuring the industry creates work that connects more powerfully with API audiences. The next step is taking action to close the gap in representation in the industry and tell more authentic stories. This report analyzes in granular detail where there are further opportunities for the industry to continue making progress on API representation in characters and stories in film and television.

McKinsey would like to thank Gold House—a leading not-for-profit organization that unites, invests in, and champions Asian Pacific leaders—whose contributions helped inform this report. We appreciate Gold House's collaboration throughout the research process to introduce key stakeholders, provide input, and support the amplification of the findings. In addition, we thank the more than 100 industry experts and leaders who provided their time through surveys and interviews during the research process, including Marya Bangee, Albert Cheng, Christina Chou, Nik Dodani, Iris Kim, Sarah Kim, Munika Lay, Angela C. Lee, Kevin Lin, Claudia Park, Krit Schmidt, Sanjay Sharma, Vinay Singh, Michelle Sugihara, Pamela Tom, Grant Torre, and Jeff Yang.

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Our ambition is that the insights in this report support a constructive dialogue across the film and television industry. Greater progress is possible, but it requires clear intention and close coordination.

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<sup>1</sup>Jonathan Dunn, Sheldon Lyn, Nony Onyeador, and Ammanuel Zegeye, "Black representation in film and TV: The challenges and impact of increasing diversity," McKinsey, March 11, 2021; "Latinos in Hollywood: Amplifying voices, expanding horizons," McKinsey, March 7, 2024; Michael Chui, Kweilin Ellingrud, Ishanaa Rambachan, and Jackie Wong, "Asian American workers: Diverse outcomes and hidden challenges," McKinsey, September 7, 2022.

# Introduction

By many outward measures, the Asian and Pacific Islander (API) influence on the film and television industry has never been greater. On-screen, for example, *Everything Everywhere All at Once* took top honors during the 2023 awards season, and Hong Chau is an ascendant star following her Oscar nomination for *The Whale*. Behind the camera, Chloé Zhao and Taika Waititi have both won Oscars and helmed Marvel Cinematic Universe films, putting them in the top echelon of Hollywood directors. Multihyphenates Mindy Kaling and Dwayne Johnson continue to create critically lauded projects. Meanwhile, a steady stream of overseas movies and TV shows over the past few years has included sensations such as *Parasite*, *Squid Game*, and *RRR*.

This recent success would seem to suggest that the entertainment industry has moved far beyond its history of API caricatures and stereotypes to champion real characters in front of the camera and greater representation behind it. But a look beneath the surface at the nuances of this progress reveals how far the industry still has to go.

New McKinsey research has found that despite the abundance of content from the United States and abroad featuring API characters and storylines, more than two-thirds of API consumers are dissatisfied with the authenticity of their representation. API on-screen representation is dominated by content produced outside the United States; in US-produced film, for example, API actors are 3 percent of all actors, which is half of the API share of the US population. The roles the API actors play in US-produced content are either in hyperstylized action movies or written as race-agnostic characters. Further, projects focused on API characters and storylines are less likely to get the promotional resources needed to reach a broader audience, so their impact on popular culture may thereby be limited.

Why is greater API representation a source of opportunity for entertainment executives? Simply put, the industry is missing out on a significant opportunity to boost its bottom line. The industry is in flux: streaming services are seeking new sources of revenue, and movie studios are weathering uneven box-office trends. Studios have an opportunity to cast a wider, more inclusive net to bring content to new audiences.

Asian American consumers<sup>1</sup> on average earn 30 percent more than White consumers, but they spend 35 percent less than the average non-Asian American consumer on media (an average of approximately \$526 for Asian American consumers compared with \$788 for their non-Asian peers). Our analysis pegged the current gap in spending at \$2 billion to \$4 billion per year, a figure set to double to approximately \$4 billion to \$8 billion annually by 2060 if the Asian American population continues to grow as projected and income and spend patterns continue.

This report examines the entertainment industry through multiple lenses to identify the factors contributing to the underrepresentation of API professionals in on- and off-screen roles across film and television. While the industry reflects some of the entrenched attitudes that APIs face in their daily lives, it also contains the seeds of a better path forward. This report offers a set of potential ideas the industry could pursue to expand opportunities for API professionals in film and TV, present more authentic portrayals of API characters, and motivate API consumers to spend more on entertainment.

We acknowledge there is no single solution—addressing representation and authenticity is nuanced, and talent casting relies on an ecosystem of stakeholders. However, we believe the steps in this report could also motivate API consumers to spend more on entertainment, creating a virtuous circle within the industry.

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<sup>1</sup> Consumer Expenditure Survey summary tables, US Bureau of Labor Statistics, 2022. This data set includes data for the Asian population; the Pasifika population was categorized in “all other races” and could not be split out. Spending categories analyzed were movie tickets; tickets to movies and other out-of-town admissions; cable and satellite television services; and rentals, streaming, and downloads.

# The evolution of API representation in media

**Examining the history** of the API population in film and television in the past century is a challenging exercise in that it highlights pervasive stereotypes. The industry has made significant progress over the past 20 years, but our research indicates that API consumers perceive a lack of authenticity in the API characters they see in films and on TV. (For more about our definition of “API” and other terms, see sidebar “Terminology.”)

## API representation has made progress through the decades, but stereotypes persist

For much of the 20th century, many API characters failed to rise above broad strokes or caricature. Often these roles were played by White actors, such as Mickey Rooney as a Japanese landlord in *Breakfast at Tiffany's*. API actors did break through from time to time—for instance, Sessue Hayakawa received an Oscar nod for his role in *The Bridge on the River Kwai* in 1958. But it wasn't until Bruce Lee gained acclaim for his martial arts films such as *Enter the Dragon* that the API community could point to a bona fide Hollywood star who looked like them. Still, API actors continued to be cast primarily in roles playing up stereotypes: male actors as action stars, their female counterparts as “hyperstylized and exoticized” characters—a pattern still present today.<sup>1</sup>

While the latter part of the 20th century saw some headway, progress was counterbalanced by films and television shows that either cemented these stereotypes or ignored the influence of Asian culture altogether. On a positive note, *The Joy Luck Club*, featuring an all-Asian cast, set a new precedent for API representation in media and grossed \$33 million in 1993 (more than \$71 million in today's dollars). Margaret Cho's *All-American Girl*, the first prime-time sitcom to focus on an Asian American family, premiered in 1994. In parallel, popular comedies such as *Caddyshack* and *Sixteen Candles* reinforced to an entire generation of moviegoers the perception that East Asian men were barely verbal fish-out-of-water comic relief.<sup>2</sup> *The Ring* became a runaway hit in 2002, but few audience members were aware it was a remake of a Japanese film. Its success sparked a wave of such adaptations in subsequent years.<sup>3</sup>

Since the turn of the century, API representation has increased steadily, though not without missteps. *Slumdog Millionaire* won eight Oscars in 2008 but was criticized for the Western lens it applied to India.<sup>4</sup>

**‘For such a long time, there was a total vacuum [of Asian and Pacific Islander stars], but now, there are actually people you can point to.’**

**—Film industry executive**

<sup>1</sup> Sonia Rao, “Asian women say Hollywood has failed them for decades. They're ready for meaningful change,” *Washington Post*, March 26, 2021.

<sup>2</sup> Alison MacAdam, “Long Duk Dong: Last of the Hollywood stereotypes?,” NPR, March 24, 2008.

<sup>3</sup> Daniel Kurland, “The Ring is the best Japanese horror remake,” *ScreenRant*, December 31, 2019.

<sup>4</sup> Nadine Chan, “*Slumdog Millionaire* and the troubled place of cinema and nation,” *Spectator*, fall 2010, Volume 30, Number 2.

More encouragingly, a string of films—*Life of Pi*, *Crazy Rich Asians*, *Parasite*, and *Everything Everywhere All at Once*—were lauded by critics and found wider audiences. On television, *Fresh Off the Boat*, which featured a Taiwanese American family as the main characters, ran for six seasons. *Beef* recently earned numerous accolades at the Emmy Awards for directing, writing, and acting, a reminder that well-executed storytelling has broad appeal.

### API consumers don't perceive their portrayals in media as authentic

Despite this recent progress, McKinsey's 2023 survey of API consumers in the United States found widespread dissatisfaction with the authenticity of API portrayals in film and television. This sentiment is consistent with findings from The Asian American Foundation's 2023 survey, which found about two-thirds of respondents across racial groups believe "Asian Americans are somewhat or highly inaccurately portrayed in film/TV."<sup>5</sup>

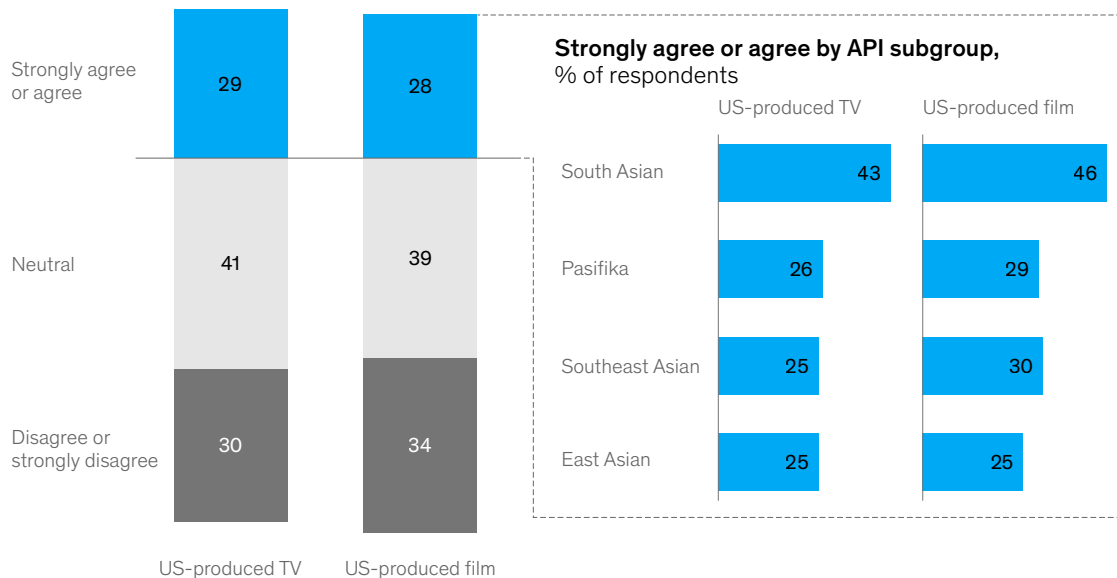
In our survey of API consumers, less than 30 percent of respondents agreed that their identity is authentically represented in film and television (Exhibit 1). The negative perception of authentic representation is more acute for East Asians, Southeast Asians, and Pasifika respondents. The results highlight an opportunity to move the large group of respondents who are neutral into the positive perception category.

<sup>5</sup> STAAUS Index 2023: Attitudes towards Asian Americans and Pacific Islanders, Asian American Foundation, 2023.

Exhibit 1

### Less than 30 percent of APIs feel they are authentically represented in US-produced media.

Views on representation,<sup>1</sup> % of respondents



Note: "API" stands for Asian and Pacific Islander. Figures may not sum to 100%, because of rounding.  
<sup>1</sup> Respondents were asked to rate their agreement with the statement "My racial/ethnic identity is authentically portrayed in film and television." Response options ranged from strongly disagree to strongly agree.  
 Source: McKinsey API Consumer Survey, Nov–Dec 2023 (n = 1,000; East Asian = 286; South Asian = 273; Southeast Asian = 272; Pasifika = 111; two or more API ethnicities = 42; no API subgroup identified = 16)

## Terminology

**Throughout this report**, we refer to the overall Asian and Pacific Islander (also Pasifika or Native Hawaiian and Pacific Islander) population as “API.” We use the term Pasifika to refer to the Pacific Islander or Native Hawaiian and Pacific Islander population. When appropriate (for example, if data is available only for certain segments of the population), we refer to specific subgroups.

**AANHPI:** Asian American, Native Hawaiian, and Pacific Islander, a subset of API; refers to people who identify as both Asian or Pacific Islander and American

**APAC:** Asia–Pacific; often used to refer to Asia and the Pacific Islands region of the world

**API:** Asian and Pacific Islander, a term used to refer to people who have ancestry from Asia or the Pacific Islands

**Asian American:** people of Asian descent who live in the United States; this group does not include Native Americans and Pacific Islanders

**East Asian:** people who are ethnically Chinese, Japanese, Korean, Mongolian, Okinawan, or Taiwanese

**South Asian:** people who are ethnically Asian Indian, Bangladeshi, Bhutanese, Nepalese, Pakistani, or Sri Lankan

**Southeast Asian:** people who are ethnically Burmese, Cambodian, Filipino, Indonesian, Laotian, Malaysian, Thai, or Vietnamese

**Pasifika:** also referred to as Pacific Islander or Native Hawaiian and Pacific Islander (NHPI); this group includes people who are ethnically Native Hawaiian, Samoan, or Chamorro

**Key off-screen roles:** directors, producers, showrunners, or writers

**Key on-screen roles or lead roles:** categorized in our data set as actor 1 and actor 2—roles often considered to be lead roles

**Supporting roles:** categorized in our data set as actor 3 through actor 10—roles often considered to be supporting roles

Such impressions are also shared by API entertainment industry experts. In a separate survey of Hollywood executives, we found that more than 80 percent of respondents do not believe API experiences are widely represented in US-produced media.

Our analyses of industry data and interviews with consumers and industry leaders found perceptions of inauthentic and inaccurate representation of the API population can be traced back to the combination of a few factors. In the next chapter, we will explore these factors as themes across both film and television.



# Examining API representation in film and television

**Although the industry** has made visible progress on API representation over the past several decades, this pattern has not convinced API consumers in the United States that their experiences and stories are being authentically portrayed. Getting to the root sources of this perception requires deeper examination.

Our analysis found while overall numbers appear strong, thanks largely to content produced outside the United States, they mask underrepresentation in US film and television productions. This theme of nuances in disaggregation was also reflected in our research into Asian Americans in the workplace.<sup>6</sup> As that report reinforced, the API population is not a monolith: understanding the real story requires a more granular examination of the data.

When determining root causes of API consumer dissatisfaction, we focused on what individuals are seeing on-screen. In our survey of API entertainment leaders, 87 percent of respondents agreed the limited on-screen presence of API actors in domestic film and television is a primary reason API experiences aren't better reflected in US media.

In this chapter, we explore trends in both film and television (multi-episode series) to highlight opportunities in API representation. Our findings are grouped into three themes: increases in API representation have been driven by content produced outside the United States, API actors are concentrated in certain genres in both film and television, and off-screen talent and on-screen representation appear to be mutually reinforcing.

## Overall API representation has increased thanks to content originating outside the United States

The past two decades have seen a dramatic jump in films distributed in the United States with API representation in on-screen lead roles.<sup>7</sup> From 2018 to 2022, API actors made up 14 to 20 percent of on-screen leads in US-distributed films, significantly higher than the API population's share of the US population, at 6.2 percent (Exhibit 2).<sup>8</sup>

On the surface, this surge in representation might suggest the film industry has addressed any lingering issues. However, films produced outside the United States, especially those from the Asia–Pacific region, account for 70 to 90 percent of US-distributed films with API lead actors. This trend of API films produced outside the United States entering the US market accelerated with the rise in popularity of streaming services in the mid-2010s. Some of these films, such as Oscar winner *Parasite*, told stories that connected with US audiences more broadly.

This influx has caused representation to skyrocket—from just 2 percent in 2002 to double digits two decades later. Meanwhile, API representation in lead roles in films produced in the United States increased from 2 percent to more than 3 percent during that period, meaning API actors are underrepresented by 50 percent in US-produced films when compared to the 6 percent API representation in the US population.

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<sup>6</sup> Michael Chui, Kweilin Ellingrud, Ishanaa Rambachan, and Jackie Wong, "Asian American workers: Diverse outcomes and hidden challenges," McKinsey, September 7, 2022.

<sup>7</sup> Lead roles are roles that are categorized as actor 1 or actor 2.

<sup>8</sup> Lindsay M. Monte and Hyon B. Shin, "Broad Diversity of Asian, Native Hawaiian, Pacific Islander Population," US Census Bureau, May 25, 2022.



This discrepancy contributes to a notable divergence: API content from other countries has boosted overall representation and connected with mass audiences, yet API consumers in the United States do not feel their stories are being authentically portrayed.

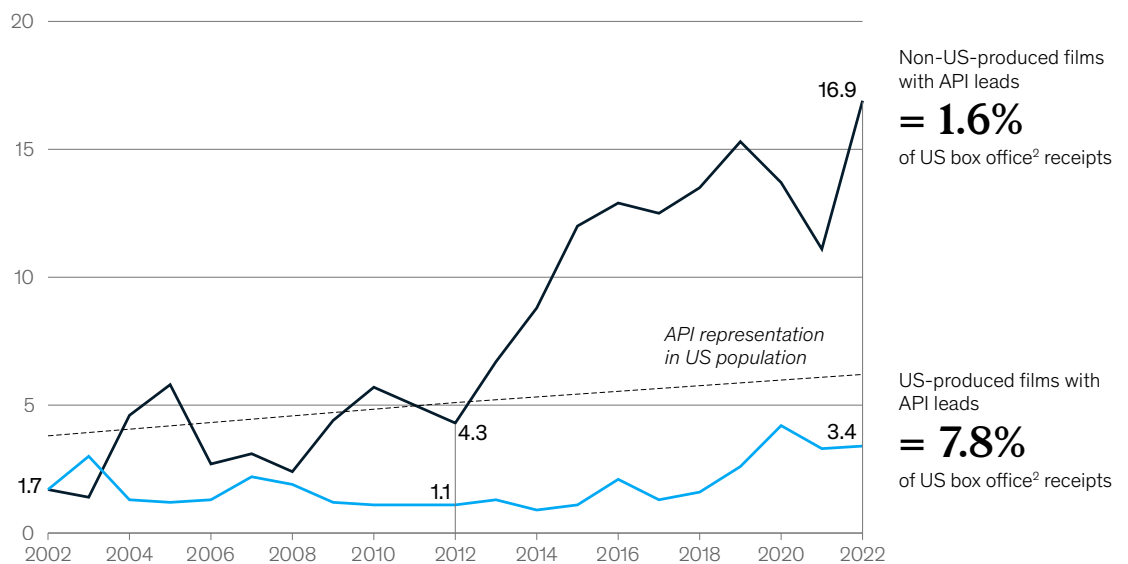
We see similarities in television, which has seen increased API representation—including some high-profile shows. *Beef* was a recent breakout success for US-produced content, both in popularity and among critics, while *Squid Game* became an unexpected sleeper hit for content that originated from outside the United States (see sidebar “Streaming and API inclusion”).

Another way to gauge the impact and influence of films is to examine their box office revenues. For movies released in the United States from 2018 to 2022, API actors made up 14 percent of lead roles in films produced outside the United States and 3 percent of lead roles in domestic films. However, box-office

Exhibit 2

## API on-screen representation in film has increased, propelled by films produced outside the United States.

On-screen representation of API lead actors<sup>1</sup> in US-distributed films, % of films with API leads



Note: “API” stands for Asian and Pacific Islander. Trends and representation are similar even when extrapolated to roles through actor 10. Includes data for 28,000 lead actors.

<sup>1</sup>Lead actor is defined as roles categorized as actor 1 or actor 2 in the Luminate Film & TV database.

<sup>2</sup>Calculated for films from 2018 to 2022.

Source: Luminate Film & TV data for films distributed in the US from 2002 to 2022, including films produced in the US and outside the US

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receipts highlight the differences in how US consumers take in US-produced and non-US produced content—during the same five-year period, films with API leads produced internationally made up 2 percent of total US box office receipts, whereas those produced in the United States accounted for nearly 8 percent (Exhibit 3).

As one industry executive noted, “We know foreign films don’t have a track record for big box-office returns, so it’s not like the sheer number of movies means people are going to see that representation.”

## Streaming and API inclusion

**Streaming services** greatly expanded the amount of programming in production and democratized access to decades' worth of content. They provide a platform with the potential for greater representation: in 2022, Asian and Pacific Islander (API) actors accounted for a 10 percent share of screen across the 462 most-watched titles on the top streaming platforms.<sup>1</sup> They have also opened the door to programs that might have been excluded when just a handful of channels acted as the gatekeepers of content in the United States.

API representation on YouTube and social media platforms may be a leading indicator

of future talent and streaming. Among the API entertainment leaders in our survey, 85 percent agreed US-produced API content is more readily available on social media (such as YouTube and TikTok) than in traditional film and on television.

Over the past decade, API talent and creators have found on YouTube the home they were seeking in mainstream media. A number of API stars have amassed millions of followers on YouTube, a platform that allows young Asian Americans—"who often can't find accurate depictions of themselves in mainstream media," as CNN News correspondent Ted Rowlands put it—to find content that resonates with them.<sup>2</sup>

Wong Fu Productions, for example, has become something of an incubator of API talent, working with actors and musicians such as Randall Park, Simu Liu, and Far East Movement before they achieved mainstream success. More recently, creators such as Drew Afualo, Alan Chikin Chow, and Bella Poarch have made names for themselves on YouTube and TikTok.

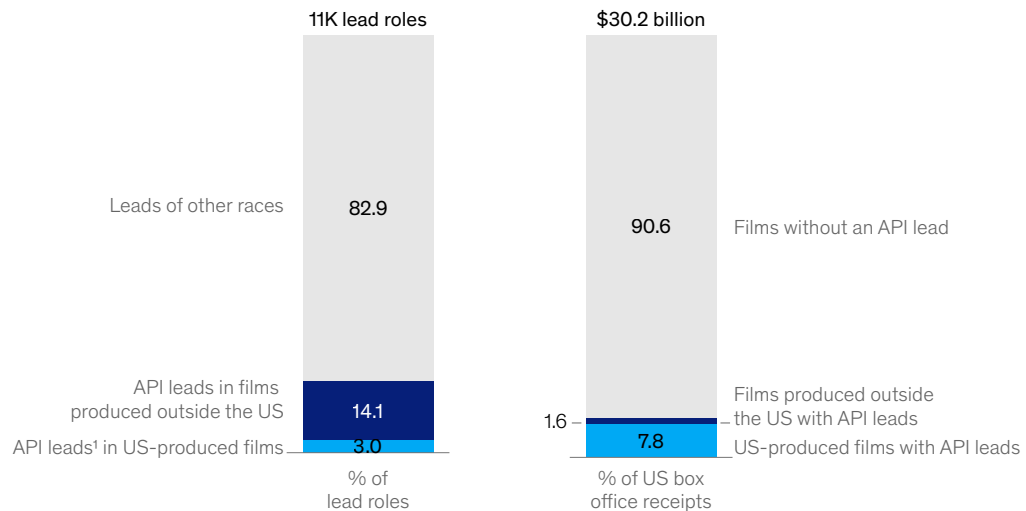
<sup>1</sup> *Seen, heard, valued: Engaging Asian Americans through media*, Nielsen Company (US), 2023.

<sup>2</sup> CNN Newsroom, August 15, 2009.

Exhibit 3

### Compared with the US API population, API actors in US-produced films are underrepresented by more than 50 percent.

#### API lead role representation<sup>1</sup> and box office receipts in US-produced films, 2018–22, %



Note: "API" stands for Asian and Pacific Islander. The data covers approximately 11,000 lead roles in 2,998 films.

<sup>1</sup>Lead roles are categorized as "Actor 1" or "Actor 2."

Source: Luminate Data for Film and TV for films distributed in the US from 2018 to 2022, including films produced in the US and outside the US

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The success of productions with API actors tells just part of the story. The types of movies and shows featuring API professionals also have a significant impact on their reach, societal influence, and consumer perceptions.

### API content faces genre challenges in both film and television

API actor appearances are not all equal. A closer examination of the nature of lead roles and the representation of API actors in them can provide a more accurate view. As noted earlier, API actors account for about 3 percent of both lead and supporting roles in films produced in the United States—roughly half the level of API representation in the US population.<sup>9</sup>

The story becomes even more nuanced when we dig into consumer perception of authenticity. Our analysis categorized films with at least one API lead from 2018 to 2022 by whether they were race-agnostic (films that do not have a storyline specific to the API experience but with API actors in roles that can generally be played by anyone) or API-specific (films with a storyline specific to the API experience or API actors playing characters whose API backgrounds and experiences contribute to the film’s overall story).

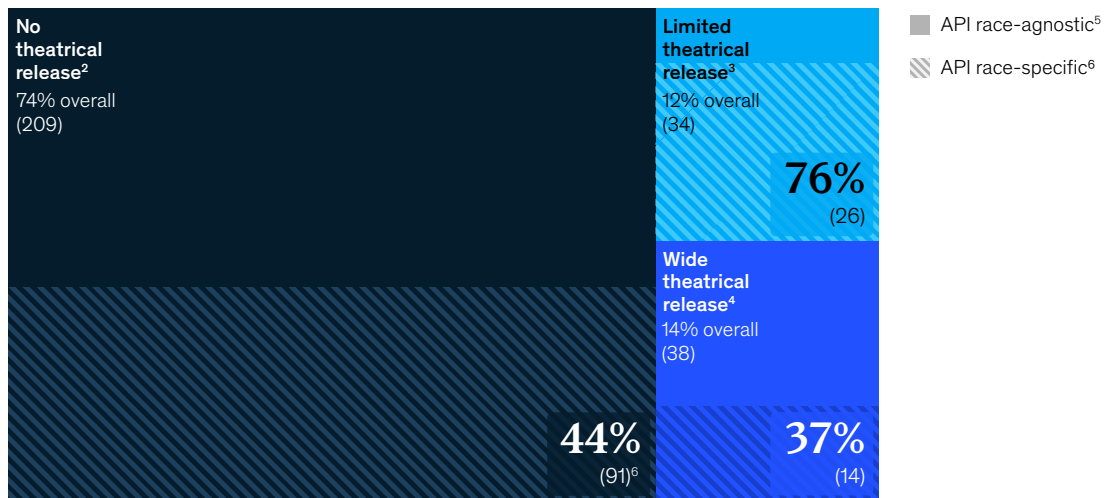
During the 2018–22 period, about 280 films had at least one API lead, and just over half of those were API race-agnostic (Exhibit 4). The percentage of API race-agnostic films was even greater when considering

<sup>9</sup> Supporting roles are roles categorized as actor 3 through actor 10.

Exhibit 4

### Almost two-thirds of major films with API leads do not tell API race-specific stories.

Release and race-specific storytelling in US-produced films with at least one API lead,<sup>1</sup> 2018–22, % (number of films)



Note: "API" stands for Asian and Pacific Islander.

<sup>1</sup>Lead roles are categorized as actor 1 or actor 2.

<sup>2</sup>Film is available only on streaming.

<sup>3</sup>Film was released in <600 theaters.

<sup>4</sup>Film was released in 600 theaters or more.

<sup>5</sup>Films in which API actors are cast into roles that could be played by any race (eg, *Deadpool*).

<sup>6</sup>Film in which API actors are cast into roles that could not be any other race in film (eg, *Crazy Rich Asians*) or are nonfiction biographies or documentaries based on API figures.

Source: Luminate Film & TV data for films distributed in the US from 2018 to 2022 and produced in the US

only the films with a wide theatrical release (more than 600 theaters). Almost two-thirds of these films were API race-agnostic; fewer films seen by larger audiences told API stories or featured characters with API backgrounds. We found a similar pattern in television episodes. From 2018 to 2022, more than 55 percent of the approximately 903 episodes with API leads were race-agnostic.

More than 80 percent of respondents to our survey of API industry leaders do not believe API experiences are widely present in US-produced media, a level in line with API consumer sentiments on authenticity. While our analysis didn't attempt to define an "optimal" balance of race-agnostic and race-specific films, the low share of API race-specific stories in major releases could contribute to the low perception of authenticity for API consumers.

Notably, this trend is not seen across all underrepresented racial groups. For instance, McKinsey's 2021 report on Black representation in Hollywood found that Black films were twice as likely to be race-specific than race-agnostic.<sup>10</sup>

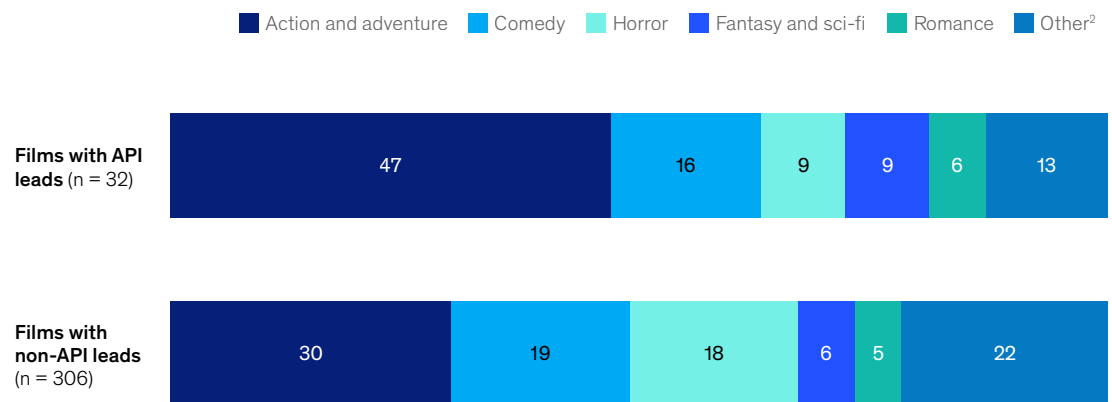
Further, examining API films by genre tells another story. In the same 2018–22 period, out of the 32 wide theatrical releases with at least one API lead, almost half were action and adventure films, compared with 30 percent of films with no API leads (Exhibit 5). The percentage of action and adventure films rises to 71 percent for films grossing more than \$50 million in the United States that have at least one API lead. While the reach and popularity of such films is welcome, API actors have fewer opportunities to portray the full breadth of authentic experiences reflected in their communities and upbringing.

<sup>10</sup> "Black films" are categorized as films with significant Black representation in off-screen roles. Jonathan Dunn, Sheldon Lyn, Nony Onyeodor, and Ammanuel Zegeye, "Black representation in film and TV: The challenges and impact of increasing diversity," McKinsey, March 11, 2021.

Exhibit 5

**Almost half of wide-release films with API leads are action and adventure films, compared to 30 percent of films without API leads.**

Top US-distributed domestic films by wide theatrical release and genre,<sup>1</sup> 2018–22, %



Note: "API" stands for Asian and Pacific Islander.  
<sup>1</sup>Films considered to be a part of multiple genres are categorized by the main genre.  
<sup>2</sup>"Other" includes crime, documentary, drama, sports, war, musical, mystery, thriller, and Western.  
 Source: Luminata Film & TV data for films released from 2018 to 2022 and produced in the US

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Industry leaders have pointed to the concentration of API stories and characters in films with limited theatrical release as the result of market forces. “Films based around [API] stories may feel limited to specific audiences; as successful as *Everything Everywhere All at Once* was, it is still an anomaly,” one leader noted. Investing in more of these independent films to broaden their reach may help to bring more API race-specific content to consumers. But as some shows demonstrate, API race-specific content doesn’t have to center entirely on the API experience; for example, *Beef* reflected the experiences of its characters’ ethnicities without feeling “the need to contextualize or overexplain itself for viewers outside the Asian American community.”<sup>11</sup>

As in film, the representation of API actors in television varies considerably by genre. Fully 35 percent of the 903 episodes with API leads were part of animated series, compared with 12 percent for shows without an API lead (Exhibit 6). The greater percentage of animated shows is driven by a smaller percentage of dramas and nonscripted shows (for example, reality TV).

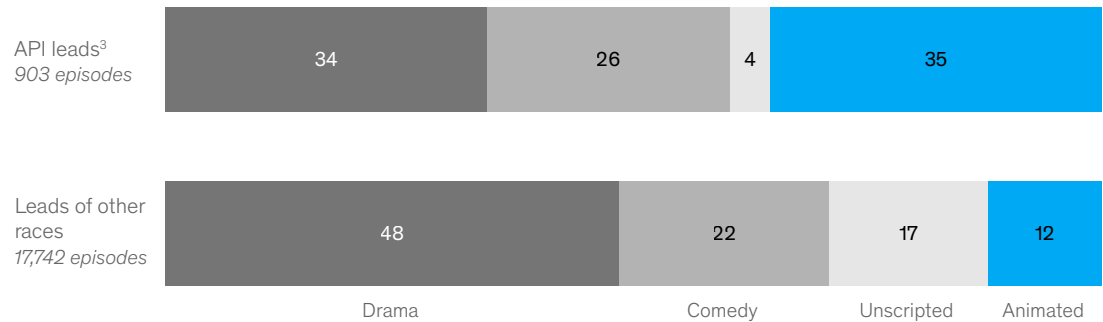
These genre challenges make a difference when it comes to the perception of authenticity among API consumers. Industry experts highlighted the need for specificity in the portrayal of API characters (see sidebar “An imbalance across API subgroups”). One film executive noted, “It is really important to understand how multifaceted the community is and how important it is for our films and TV shows to represent that.” Another media executive said, “I worry about APIs being told as a single story. It hurts us, and it hurts the bottom line. We need to see the diversity within our community.”

<sup>11</sup> Brahmjot Kaur and Angela Yang, “Asian Americans are over just being included—they’re defining mainstream culture,” NBC News, May 12, 2023.

Exhibit 6

**More than one-third of TV episodes with API leads are animated shows, compared to one-eighth of TV episodes with leads of other races.**

US-distributed TV episodes by genre,<sup>1</sup> 2018–22, % of episodes<sup>2</sup>



Note: “API” stands for Asian and Pacific Islander. Figures do not sum to 100%, because of rounding.  
<sup>1</sup> Drama (half hour and one hour), comedy (half hour), unscripted (documentary, reality, sketch, variety: half hour and one hour), and animated (15–30 minutes); genres excluded from analysis: long-form, news, and talk shows (73 total episodes).  
<sup>2</sup> TV episodes analyzed have a running time of 15 minutes to 2 hours; are on US broadcast, cable, and digital platforms; and have available actor data.  
<sup>3</sup> Leads are categorized as actor 1 and actor 2 roles.  
 Source: Luminate Film & TV data for TV series released from 2018 to 2022, episode count = 18,645

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## An imbalance across API subgroups

The Asian and Pacific Islander (API) population includes many distinct subgroups, each with its own culture. The low perception of authenticity among API consumers could therefore be related to the disproportionate representation of certain subgroups (exhibit). For instance, in all films from 2018 to 2022, 230 distinct API actors

appeared in 310 lead roles. However, 50 percent of these roles were played by actors of East Asian descent.

The 17 Pasifika lead roles were played by five men, and approximately 80 percent of them were antagonists or protagonists in action films (such as Jason Momoa in *Aquaman*). Given this distribution, some

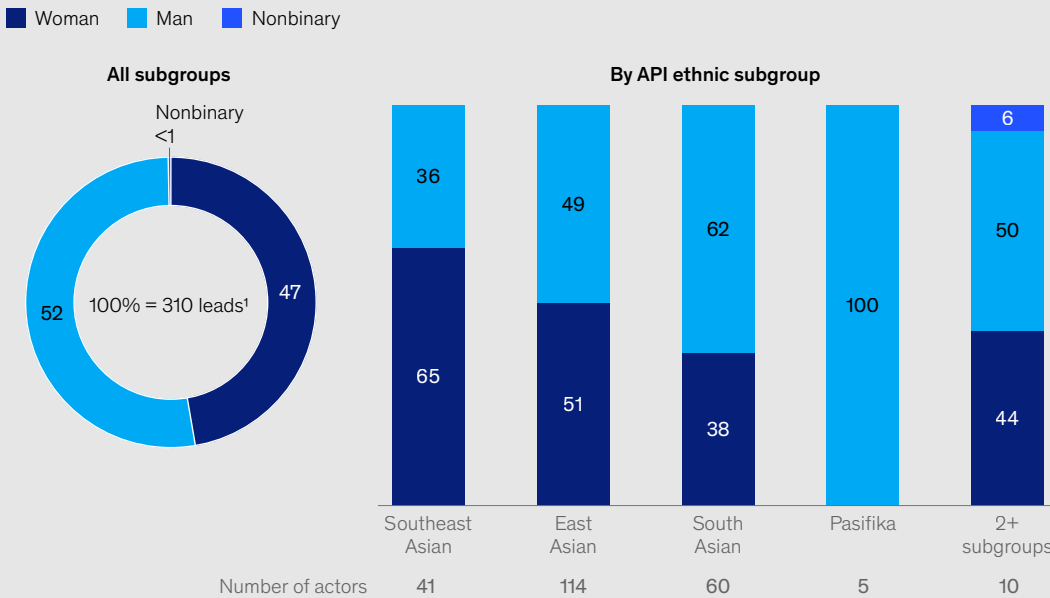
subgroups of API consumers could feel overlooked by the film industry.

As one Pasifika entertainment executive put it, “Many API efforts still ignore the ‘PI’ in the acronym. PIs are not pulled into spaces, but we are starting to see slow shifts and acknowledging this is an important first step.”

Exhibit

### Gender representation for API leads in US-produced films varies across ethnic subgroups, with all 2018–22 Pasifika leads being men.

API leads in US-produced films, by gender and API ethnic subgroup, 2018–22, %



Note: “API” stands for Asian and Pacific Islander. Figures may not sum to 100%, because of rounding. Data for 310 API leads; 28 leads did not have identifiable subgroup data (ie, ethnic background not published).

<sup>1</sup>Includes only actors with a self-identified API subgroup in the Luminate database.

Source: Luminate Film & TV data for films distributed in the US from 2018 to 2022 and produced in the US

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## Off-screen talent and on-screen representation appear mutually reinforcing

In our interviews with experts in the entertainment industry, we delved into how off-screen talent and on-screen representation appear to reinforce each other. Executives sounded a common refrain: people in key off-screen roles (directors, writers, producers, and showrunners) have influence on who gets cast in on-screen roles, and lead actors often request to work with specific people or profiles. The cycle is mutually reinforcing.

Our analysis found the presence of API talent off-screen is correlated with higher API representation on-screen. Among US-distributed television shows with no API talent in key off-screen roles, about 3 percent had at least one API lead.<sup>12</sup> But more than 21 percent of shows with at least one API person in a key off-screen role had an API lead (Exhibit 7). The pattern is even more pronounced in US-produced films. Among movies with no API talent in key off-screen roles, just under 6 percent have at least one API lead.<sup>13</sup> But when an API professional is in an off-screen role, the share of films with an API lead goes up to 37 percent.<sup>14</sup>

This dynamic highlights the question of cause and effect: are API lead actors getting roles because API off-screen professionals advocate for them, or the other way around? Further, are API professionals more likely to take off-screen roles on productions that feature API stories, or vice versa? Regardless, the correlation of these factors demonstrates the need for greater API visibility in media.

Digging deeper into off-screen roles in film, our analysis found films with API writers and directors are more strongly correlated with API leads than those with API producers (Exhibit 8). This discrepancy may be explained by the different influence of off-screen roles on creative decisions. Directors and writers have the primary decision-making authority in areas such as storylines and casting, while producers typically serve more as business partners. Accordingly, directors and writers may be able to more effectively advocate for on-screen talent.

For television shows, the presence of API leads is more highly correlated with API showrunners and producers than with writers and directors. In television, showrunners and producers exert influence over full seasons or even a program's entire run, giving them greater impact on productions.

<sup>12</sup> Key off-screen roles in television shows are categorized as director 1, director 2, producer 1, producer 2, writer 1, writer 2, showrunner 1, and showrunner 2.

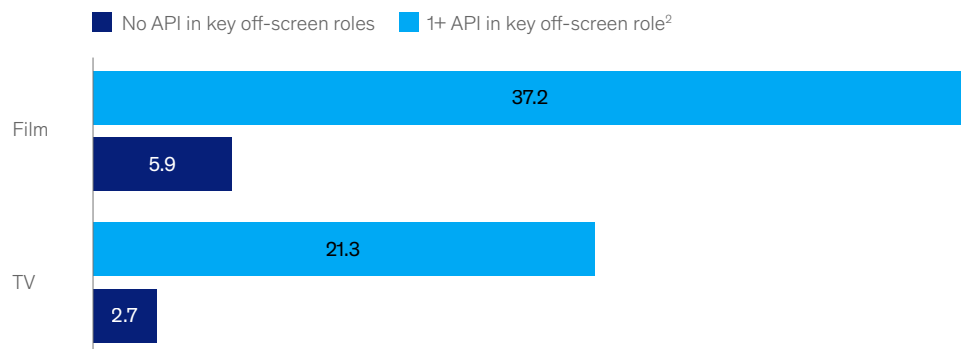
<sup>13</sup> Key off-screen roles in film are categorized as director 1, director 2, producer 1, producer 2, writer 1, and writer 2.

<sup>14</sup> Luminate Film & TV data for films distributed and produced in the United States from 2018 to 2022.

### Exhibit 7

## The presence of API talent in key off-screen roles is consistent with higher on-screen API representation.

**On-screen representation of at least one API lead actor by presence of key off-screen talent,<sup>1</sup>**  
% of media with APIs in lead roles



<sup>1</sup>Lead roles are categorized as actor 1 or actor 2.

<sup>2</sup>Key off-screen roles are categorized as follows: in film, director 1, director 2, producer 1, producer 2, writer 1, and writer 2; in TV, director 1, director 2, producer 1, producer 2, writer 1, writer 2, showrunner 1, and showrunner 2.

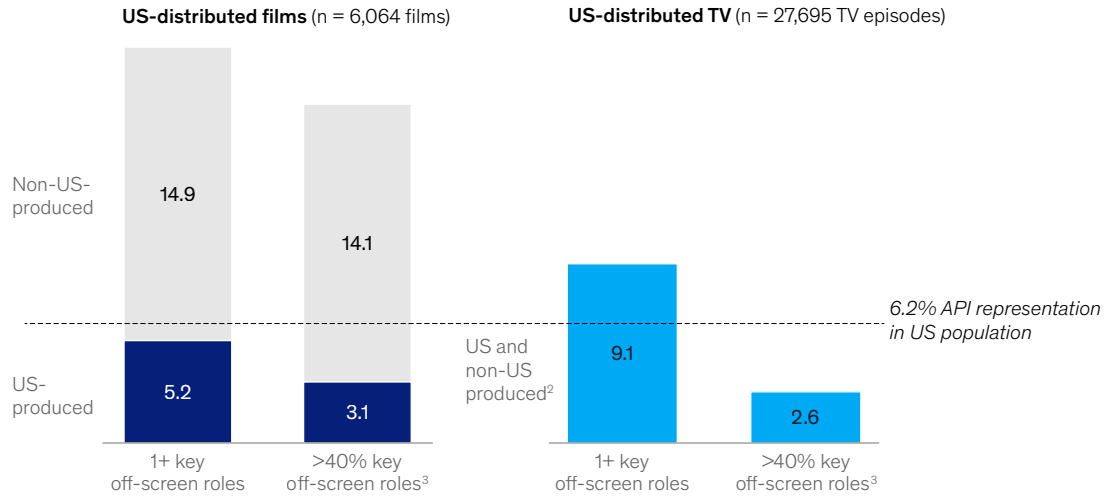
Source: Luminate Film & TV data for film and TV series distributed in the US from 2018 to 2022; includes films and TV shows produced in and outside the US



Exhibit 8

**API talent is underrepresented in key off-screen roles in both film and television.**

**API representation in key off-screen roles<sup>1</sup> in film and TV, 2018–22, % of films and TV episodes**



<sup>1</sup>Key off-screen roles are categorized as follows: in film, director 1, director 2, producer 1, producer 2, writer 1, and writer 2; in TV, director 1, director 2, producer 1, producer 2, writer 1, writer 2, showrunner 1, and showrunner 2.

<sup>2</sup>Disaggregation of US- and non-US-produced TV episodes not available or incomplete.

<sup>3</sup>Calculated as more than 40% of available slots in key off-screen roles (eg, not all films and TV series have two directors).

Source: Luminate Film & TV data for films and TV series released from 2018 to 2022

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Ultimately, API professionals who build a proven track record in off-screen roles can attract investors to future API projects. Understanding the root causes behind the career barriers for API professionals in media will be crucial to increasing representation. Everyone in the ecosystem, from educators to senior executives, has a role to play. As one streaming industry executive said, “You bet on projects and who is behind them. When you have successful creators, studios won’t blink at investing in them.”

# A multibillion-dollar opportunity for the industry and ideas for API representation

**A closer look** at spending habits reveals a significant disparity among consumers. Our research found Asian American consumers<sup>15</sup> earn more income and spend less on film and television than other groups. Their lower spending could be attributed in part to the perceived inauthenticity API consumers see in film and television.

Our analysis found that Asian American consumers earn approximately 30 percent more in annual income, on average, than their peers of other races,<sup>16</sup> and they spend less of their income (70 percent for Asian consumers versus 78 and 81 percent for White and Black consumers, respectively). And they spend even less of their income on film and television—just 0.42 percent versus 0.87 percent for White consumers and 0.94 percent for Black consumers (Exhibit 9).<sup>17</sup>

The differences in spending habits are particularly pronounced in cable, satellite, and streaming services. Asian American consumers spend 0.30 percent of their income, compared with 0.74 percent for White consumers and 0.74 percent for Black consumers.

<sup>15</sup> Disaggregated data for the Asian American population from Consumer Expenditure Survey summary tables, US Bureau of Labor Statistics, 2022. The Pasifika population was combined into “all other races.”

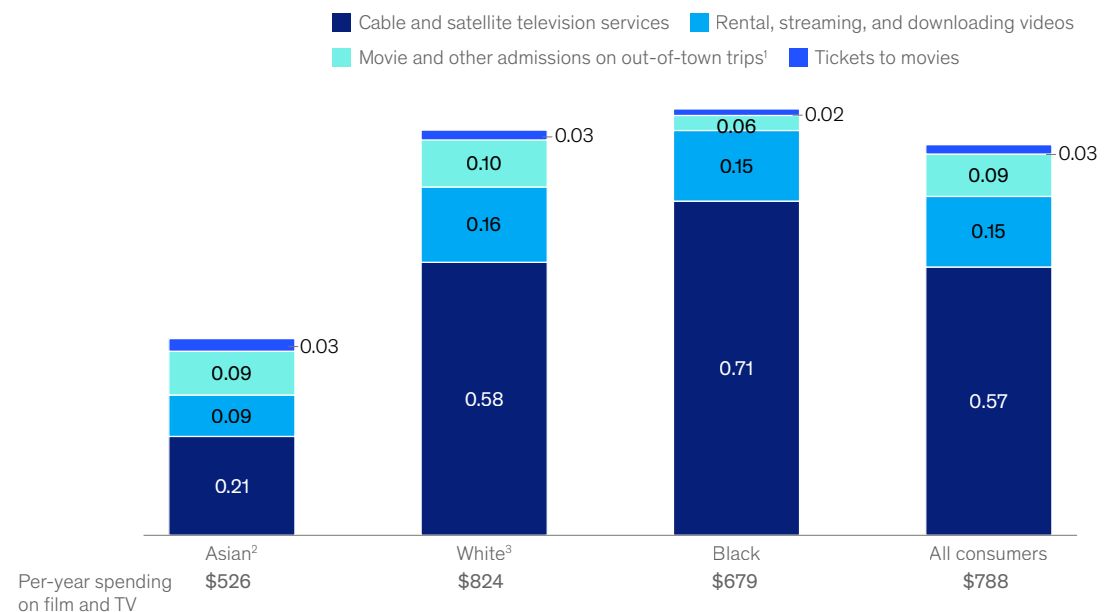
<sup>16</sup> Ibid.

<sup>17</sup> Ibid.; categories analyzed were tickets to movies; movies and other admissions on out-of-town trips; cable and satellite services; and rental, streaming, and downloading videos.

Exhibit 9

## Asian Americans spend significantly less of their income on film and television than other groups.

Spending on film and TV, 2022, % of consumer income



<sup>1</sup>Other admissions\* includes nonfilm and non-TV expenditures (eg, tickets to museums).

<sup>2</sup>The Asian consumers category in the Bureau of Labor Statistics Consumer Expenditure Survey data set does not include the Pasifika population.

<sup>3</sup>The White consumers category in the Bureau of Labor Statistics Consumer Expenditure Survey data set also includes “all other races.”

Source: Annual expenditure means, shares, standard errors, and coefficients of variation, Consumer Expenditure Survey summary tables, US Bureau of Labor Statistics, 2022

Asian American consumers' lower spending on film and television is consistent with our consumer survey, which found API consumers believe they are not portrayed authentically in media. (Although the Pasifika population is not reflected in the spending data, our survey found just 26 percent of Pasifika consumers believe their racial and ethnic identity is authentically represented in US-produced television. The figure for US-produced film is 29 percent.)

Our survey also explored perceptions of authenticity and willingness to spend both money and time on media. Nearly half of API respondents living in the United States indicated they would spend more money on film and TV and spend more time consuming content if their own experiences were more authentically represented (Exhibit 10).<sup>18</sup> This sentiment was especially pronounced among consumers aged 18 to 44, who represent a large portion of the rapidly growing population of API consumers.<sup>19</sup>

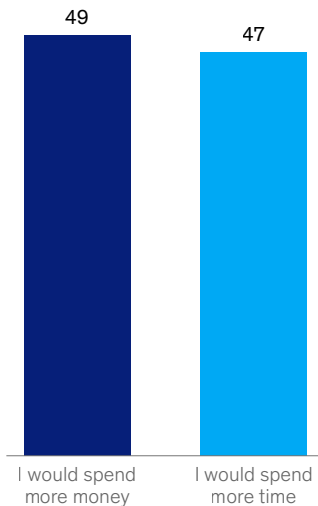
<sup>18</sup> In our survey, 33% of respondents noted they would spend 1–50% more money, 13% would spend 51–100% more money, and 3% would spend more than 100% more money.

<sup>19</sup> Luis Noe-Bustamante, Neil G. Ruiz, and Sono Shah, "Appendix: Demographic profile of Asian American adults," Pew Research Center, May 8, 2023; "Sex by age (Native Hawaiian and Other Pacific Islander alone)," American Community Survey, US Census Bureau, accessed April 18, 2024.

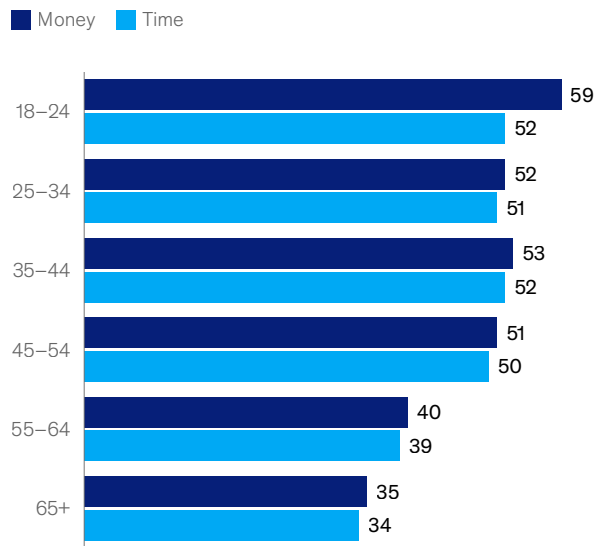
Exhibit 10

### Nearly half of API consumers would spend more money or time on more API-authentic film and TV, especially those in younger age brackets.

Willingness to spend more time or money on film and TV,<sup>1</sup> % of respondents



Willingness to spend money and time by age, %



Note: "API" stands for Asian and Pacific Islander.

<sup>1</sup>Question: If your racial or ethnic experiences were more authentically represented, would you spend more money and time on film and TV?

Source: McKinsey API Consumer Survey, Nov–Dec 2023 (n = 1,000; East Asian = 286; South Asian = 273; Southeast Asian = 272; Pasifika = 111; two or more API ethnicities = 42; no API subgroup identified = 16)

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## Estimating the opportunity for the industry

We used different methods to estimate the opportunity in revenues that the industry could achieve by increasing API representation and authenticity in film and television:

1. a survey asking API consumers how much more they would be willing to spend on film and TV if they were more authentically represented
2. raising film and TV spend by API consumers to the same percentage of income as non-API consumers (for example, White consumers)

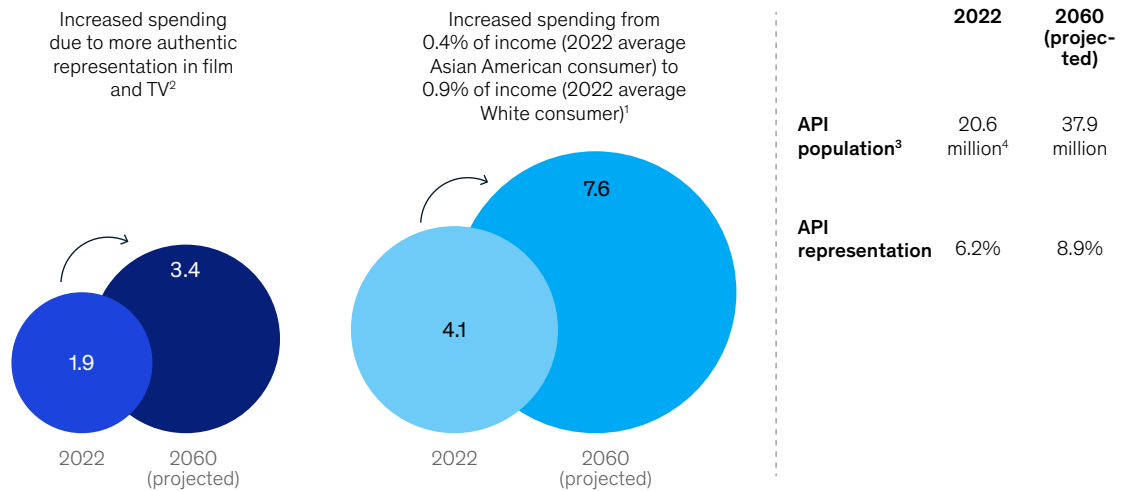
Respondents who strongly disagreed that current API representation is authentic indicated they would increase their spending the most if the portrayal of API characters and stories were more authentic. The industry could improve service to these consumers by creating films and shows featuring portrayals that are more authentic to the API experience.

API leaders in the entertainment industry echo consumer perceptions. More than eight in ten respondents to our executive survey agreed that increasing on-screen API representation in US-produced content would result in higher spending by API households on film and television. As one entertainment executive said, “I spent years understanding what our consumers wanted, and they want authentic and nuanced stories about their community and other communities.”

Exhibit 11

## There is currently a \$2 billion to \$4 billion annual opportunity for the industry in increasing API representation.

Estimated opportunity per year, \$ billion



Note: "API" stands for Asian and Pacific Islander.

<sup>1</sup>Data from the Consumer Expenditure Survey breaks out Asian Americans only (with Pacific Islanders in an "other" category). Does not include the Pasifika population, because of data limitations; estimated opportunity underestimates the full API population in the US.

<sup>2</sup>Takes only money spent into account; does not include time spent on media, which would increase the estimated opportunity (eg, advertising on social media and streaming).

<sup>3</sup>Includes people who identify as Asian alone and Native Hawaiian and Other Pacific Islander alone; does not include people who identify as Asian and other races.

<sup>4</sup>Population from the 2020 US Census.

Source: US Bureau of Labor Statistics Consumer Expenditure Survey, 2022; 2020 US Census

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By considering these factors in tandem—the underrepresentation of US-produced and API race-specific content, the perceptions of API consumers about the authenticity of API stories and characters, and API consumers' lower spending on film and television—we can calculate the value of the opportunity in achieving greater visibility for and more authentic portrayals in API content.

Our API consumer survey found that about half of API consumers would spend more on film and television if the content were more authentic to their race and ethnicity.<sup>20</sup> To size this opportunity, consider that increasing the willingness of API consumers to spend on API-authentic content could generate about \$2 billion in additional spending a year on film and television (Exhibit 11).<sup>21</sup> In an alternative scenario, if API consumers spent the same share of their income on film and television as White consumers do, the opportunity rises to \$4 billion annually.

This potential broadening of the market for API consumers would help studios and streaming services as they find their way through a shifting consumer landscape. A Nielsen study found that streaming, including YouTube, has the greatest share of screen for API actors compared with broadcast and cable.<sup>22</sup> Asian Americans allocate 27 percent more time to streaming than the general population—a signal that increased representation could be key to greater engagement.

These figures likely underestimate the impact of greater and more authentic representation: more time spent on consuming content can result in higher advertising revenue in streaming and social media, and this indirect effect is not reflected in the Consumer Expenditure Survey.

Our analysis highlights two important takeaways for the industry. First, authenticity and quality are crucial. Second, spending marketing dollars to capture a greater proportion of this growing, high-income population segment may generate even more revenue.

**‘If you have an API person at the top,  
you are far more likely to see API folks  
in other roles.’**

**—Entertainment industry association leader**

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<sup>20</sup> One in three said they would spend 1 to 50 percent more, one in ten would spend 51 to 100 percent more, and the remaining 4 percent would spend more than double.

<sup>21</sup> Our consumer survey asked API consumers who indicated they would increase spending on more-authentic API content what their willingness to spend would be. The choices were 1 to 50 percent more than their current level, 51 to 100 percent more, and more than double. Our sizing methodology then used the Consumer Expenditure Survey data, divided the API consumer population into their respective categories of spending based on the survey results, and increased their spending using these factors as averages: 25 percent higher for the 0–50 percent group, 75 percent higher for the 51–100 percent group, and 125 percent higher for the more-than-double group.

<sup>22</sup> *Seen, heard, valued: Engaging Asian Americans through media*, Nielsen Company (US), 2023.

The total value at stake will likely only increase in the future, given demographic trends. The US API population grew from 10.8 million in 2000 to 19.5 million in 2019, a jump of more than 80 percent.<sup>23</sup> It is projected to almost double to 37.9 million—nearly 10 percent of the US population—by 2060.<sup>24</sup> Our projections indicate that by 2060, the total opportunity to capture additional spending could rise to approximately \$4 billion to \$8 billion a year in today’s dollars, depending on the scenario.

## **Five potential ideas could help the industry to unlock the multibillion-dollar opportunity**

Addressing the visibility and authenticity of API representation in film and television could unlock significant rewards. One challenge is the breadth of stakeholders who must be mobilized: every film and television production involves scores of people making multiple decisions a day. As our analyses and surveys uncovered, the challenges for API representation span the industry’s entire ecosystem.

External trends could create additional hurdles. For example, although API representation has experienced a noticeable increase over the past five years, industry experts are bracing for a potential decline. In our interviews, industry leaders pointed to the recent negative rhetoric in diversity, equity, and inclusion efforts in the United States; the industry strikes of 2023; and the waning sense of urgency about API representation since the peak of the “Stop AAPI Hate” era during the pandemic.

There is no magic bullet available to the industry. Instead, improving API representation in media requires real change in how the production ecosystem operates—from decision making to pipeline development to how potential API projects are evaluated. Although we don’t have all the answers, we have distilled our analyses and discussions with industry leaders into a few big ideas that could help the film and television industry tap into this multibillion-dollar opportunity for API content:

**1. Increase the likelihood that API projects will be approved and distributed.** Promoting API representation in leadership positions with decision-making authority can help authentic stories make it from the page to the screen. Industry leaders cited the lack of API professionals in key decision-making roles as one of the biggest barriers to greater and more authentic API representation in media. These roles include studio heads as well as acquisition and sales leads who decide what independent films to buy and distribute. Such decisions are crucial for emerging API creatives.

In addition, studios and investors could consider establishing funds to promote the development and production of API stories. For example, our analysis found that US-produced API films generated 8 percent of US box office receipts while accounting for just 3 percent of all US-distributed films, making a compelling business case for investment. Tracking and sharing these results on a consistent basis could help to inform decision makers.

An industry association leader said, “If you have an API person at the top, you are far more likely to see API folks in other roles. The traditional executives and buyers are not from our community, and it will be hard to make changes until we see more API professionals greenlighting shows and heading departments.”

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<sup>23</sup> Abby Budiman and Neil G. Ruiz, “Asian Americans are the fastest-growing racial or ethnic group in the U.S.,” Pew Research Center, April 9, 2021.

<sup>24</sup> David M. Armstrong, Lauren Medina, and Jonathan Vespa, “Demographic turning points for the United States: Population projections for 2020 to 2060,” US Census Bureau, February 2020.

**2. Increase financial support for API projects and creators.** As we noted, just a small number of API films receive broader distribution and promotional resources. In addition to securing marketing funds to successfully promote projects, studios need to invest in specialized resources to reach all audiences. Recently, multicultural marketing agencies and organizations have rallied influencers, press, and local grassroots organizations to promote API projects. Securing marketing funds can not only increase the possibility of commercial success but also boost the revenues and reach of successful films. A different approach, such as social media campaigns targeting influential groups, might help elevate API content on streaming platforms and reach the broadest possible audience.

In addition, greater visibility into the performance of API content would require increased rigor and analytics capabilities to measure ROI, enabling the industry to adapt and adjust where needed. An industry executive noted, “Investors are looking for a unicorn, and they have so many projects and people to evaluate for their investments. Sometimes, they don’t know whom to invest in because it’s hard to measure success. They often take their money somewhere else, like Silicon Valley.”

**3. Invest in API off-screen talent.** Across film and television, providing API talent with the skills to become producers, directors, writers, and showrunners will be instrumental in improving API representation in front of the camera and sharing more authentic stories with audiences. Providing API professionals with the same opportunities as their peers calls for a greater emphasis on hiring and promotion for off-screen roles as well as investments in skill development. Expanding apprenticeships, internships, and other industry programs can give promising API talent new paths into the profession.

In our interviews, industry experts mentioned the lack of early and midcareer opportunities for API off-screen talent as an obstacle to career advancement (a trend also found in the non-entertainment corporate world<sup>25</sup>). Our analysis found three-quarters of limited theatrical release films with API leads were API race-specific films; many are independent films featuring a pipeline of up-and-coming API off-screen talent as well. As in other corners of the corporate world, new opportunities and investment in development for this talent can help API representation in the long run.

Organizations are now investing in emerging API talent to increase specialized skill sets in a variety of creative roles.<sup>26</sup> For example, Starz and the Coalition of Asian Pacifics in Entertainment (CAPE) recently collaborated to create the CAPE Showrunners Incubator to develop and mentor API showrunners.<sup>27</sup>

**4. Expand the criteria for evaluating projects.** Traditional comparables may not be the right way to evaluate the success of API projects. Just as non-US-produced API content has gained a foothold in the United States, US-produced API content has great potential to find international audiences. For example, the Asia–Pacific market has billions of consumers who could be interested in API content produced in the United States.

Broadening the definition of success for not just API projects but all projects (for example, including international box office potential and factoring in critical acclaim and social media engagement) could help the industry evaluate content from different perspectives. As one industry executive said, “We should reposition the API story as an early category that is consistently growing. The market in Asia has become a strategic imperative—the trends and growth all point there.”

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<sup>25</sup> “Asian American workers,” September 7, 2022.

<sup>26</sup> “Futures Accelerator: Producers,” Gold House, accessed April 18, 2024.

<sup>27</sup> Rebecca Sun, “Starz, CAPE team for showrunners incubator for Asian Pacific Islander TV writers (exclusive),” *Hollywood Reporter*, April 1, 2024.



*5. Continue to understand the state of API representation.* Making progress over the long term requires regularly tracking data and identifying trends for specific groups and intersectionalities to understand both the state of representation and the factors that contribute to commercial and critical success. With this increased visibility, industry leaders could develop a shared understanding of persistent challenges and the most effective interventions.

A better understanding of the API community's subgroups could also improve authenticity in content. Today, many still see the API community as a monolith, with one point of view and voice. An API industry leader noted, "You are often the only one, and you are forced to represent a lot of viewpoints. API is a really big umbrella, especially the difference between the 'A' and the 'PI.' To have one person speak for all of that is nearly impossible." These ideas are just a start. Given the changing nature of the industry, executives could also explore creative solutions to improve representation, such as analyzing the potential of ad sales through API content.

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Our research demonstrates the film and television industry has several compelling reasons to champion API representation in front of and behind the camera. However, it doesn't need to act out of altruism. The reward for getting it right could be a windfall of billions of dollars in annual revenues—and the prize will only grow. Capturing this opportunity would require a broader shift among decision makers in how capital is allocated for projects. Progress won't be easy, but when the enhanced richness and authenticity of storytelling could be accompanied by such a substantial opportunity, the business case is clear.

# Appendix: Methodology

To create this report, we collected and analyzed the following sets of data:

1. Luminate Film & TV data, with particular emphasis on data from 2018 to 2022
2. IMDb database and Box Office Mojo database, accessed November 2023
3. US Bureau of Labor Statistics' Consumer Expenditure Survey 2022
4. Qualitative interviews with API entertainment experts, conducted from May 2023 to April 2024
5. McKinsey API Consumer Survey, conducted in November and December 2023
6. McKinsey API in Entertainment and Media Expert Survey, conducted in November 2023

## Film methodology

### Data selection

For film analysis, we initially filtered the data to include domestic and foreign films distributed in the United States from 2018 to 2022. Subsequent analysis was conducted using this filtered data set, except for specified instances in which we included only domestically produced content.

### On-screen and off-screen representation

Our data set included films with only on-screen or off-screen talent data. Therefore, the sample size varies by analysis depending on whether it includes on-screen talent, off-screen talent, or both. For instance, the presence or absence of on-screen data did not affect the inclusion of films in the off-screen representation analysis.

- On-screen data, n = 6,164 films, 41,292 lead and supporting roles
- Off-screen data, n = 6,064 films, 16,208 off-screen talent slots
- On-screen and off-screen data, n = 5,444 films (slot analysis not conducted when looking at intersection of on- and off-screen talent)

During this data-filtering process, we excluded films with incomplete actor data (for example, those without data on actor ethnicity). Not all films had actor 1 through actor 10 data, but we kept those films and counted the available actor data.

## TV methodology

### Data selection

For TV analysis, we filtered the data set to include TV shows distributed in the United States through broadcast, cable, or digital platforms from 2018 to 2022. In addition, we considered only shows with a running time of 15 minutes to two hours. We conducted subsequent analysis using this filtered data set. This selection ensured our analysis focused on TV shows available to US audiences through various platforms.

### On-screen and off-screen representation

Our data set included instances where TV episodes had only on-screen or off-screen talent data. Therefore, the sample size varies by analysis depending on whether it covered on-screen talent, off-screen

talent, or both. In other words, the presence or absence of on-screen data did not affect the inclusion of films in the off-screen representation analysis.

- On-screen data, n = 18,645 episodes, 89,443 lead and supporting roles
- Off-screen data, n = 27,695 episodes (slot analysis not conducted when looking at off-screen talent)
- On-screen and off-screen data, n = 16,452 episodes (slot analysis not conducted when looking at intersection of on and off-screen talent)

During this data-filtering process, we excluded episodes with incomplete actor data (for instance, missing actor ethnicity). Not all films had actor 1 through 10 data. In such cases, we kept those films and counted the available actor data.

## Data used in this report

### Data set

The data set used in this study consisted of 26,733 films spanning 1913 to 2023 and 4,057 TV series spanning 1993 to 2022. The data was sourced primarily from databases such as Luminate Film & TV, IMDb, and Box Office Mojo. The film data included both foreign and domestic productions as well as data on budget and box office performance (domestic, international, worldwide), and details on off-screen and on-screen talent, including their names, ethnicities, and genders. Film genres were categorized by genre information from the IMDb database. Theatrical release information was obtained from Box Office Mojo.

Similarly, the TV data set comprised 98,424 episodes across 4,057 series, capturing information on running time, TV schedule, network type, budget, genre, and details on off-screen and on-screen talent. Titles were audited and evaluated using IMDb, extracting information such as title loglines, actor data, and theatrical distribution details. We leveraged IMDb and Box Office Mojo data (using trailers or commercials and plot summaries) to categorize content as race-agnostic versus race-specific.

### Interviews and focus groups

To augment the data set, we conducted about 30 interviews and focus groups in collaboration with Gold House. These discussions involved mid- and senior-level executives and talent working in Hollywood, providing valuable insights into their experiences and perspectives. Interviewees came from organizations such as A24, Hillman Grad, Lionsgate, Marginal MediaWorks, and Universal.

Throughout the focus groups, participants were asked about their experiences. We also sought their feedback throughout the report's development, and we conducted brainstorming sessions to generate recommendations for addressing the most pressing challenges faced by API individuals in the entertainment industry.

### Surveys

Two surveys were administered to gather additional data for the research. The McKinsey API in Entertainment and Media Expert Survey had a sample of 103 entertainment industry professionals. Areas of focus included breadth of API representation in media and challenges within the industry. The McKinsey API Consumer Survey encompassing API individuals in the United States ensured representation across all age ranges and subgroups, with a sample of 1,000 respondents. The focus was on authentic representation in media and how authentic representation affects consumers' spending and watching habits.



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From margins to mainstream: Asians  
and Pacific Islanders in media  
April 2024

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