

HOLLYWOOD DIVERSITY

REPORT 2022

A NEW, POST-PANDEMIC NORMAL?

PART 1: FILM

UCLA College
Social Sciences
ENGAGING LA, CHANGING THE WORLD

Acknowledgements

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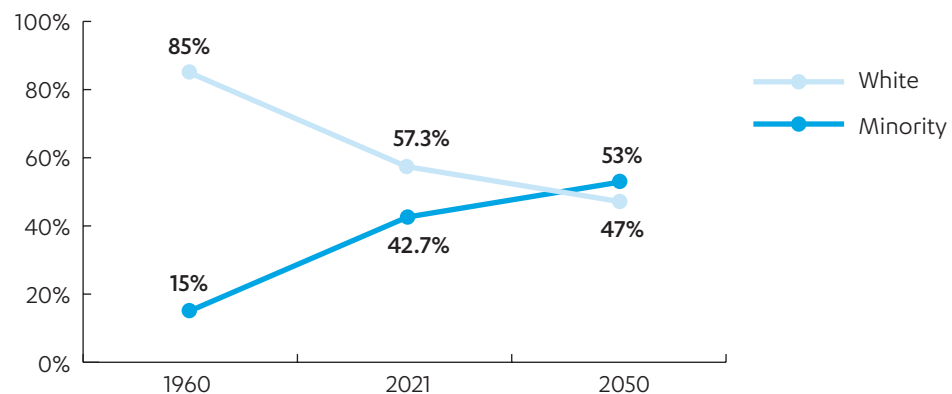
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STUDY HIGHLIGHTS

The previous installment in the Hollywood Diversity Report series, which focused on films released during the 2020 calendar year, chronicled unparalleled industry disruptions wrought by the worldwide spread of the COVID-19 virus. As the worsening pandemic led to a shuttering of theaters around the globe, the lion's share of the films examined in the report were, for the first time, released via streaming platforms. Though the introduction of vaccines in early 2021 have since facilitated cautious moves toward business as usual in the Hollywood industry, this report — the ninth in a series of annual reports — reveals that streaming platforms continued to play a dominant role in audiences' engagement with "big screen" content.

The 2022 Hollywood Diversity Report: Part 1 examines relationships between diversity and the bottom line in a Hollywood context still distorted by the virus. It considers the top 200 theatrical and all major streaming, English-language film releases in 2021, ranked by global box office and total household ratings, in order to document the degree to which women and people of color are present in front of and behind the camera. It discusses any patterns between these findings and box office receipts and 18-49 viewer and household ratings by key audience demographics. The report also charts any trends that may reveal the degree to which the industry is progressing on the diversity front over time.

U.S. Population Shares, White and Minority, 1960-2050



Source: U.S. Census

The following highlights emerge from this year’s analysis:

1. Minorities. The minority share of the U.S. population is growing by nearly half a percent each year. Constituting nearly 43 percent of the U. S. population in 2021,¹ people of color will become the majority within a couple of decades. Since the previous report, people of color posted gains relative to their White counterparts in three of the four key Hollywood employment arenas examined in the film sector (i.e., film directors, film writers, and total actors). People of color held their ground among film leads (38.9 percent), after reaching proportionate representation for the first time in 2020, and they continued to post gains among total actors² (43.1 percent), after also reaching proportionate representation in this arena for the first time in the previous report. In the two remaining arenas, people of color remained underrepresented, despite gaining ground on their White counterparts since the last report:

- Less than 2 to 1 among film directors (30.2 percent)
- Less than 2 to 1 among film writers (32.3 percent)

Replicating a pattern observed in the previous report, films written or directed by people of color in 2021 had significantly more diverse casts than those written or directed by White men.

2. Women. Women posted gains, relative to their male counterparts, in two of the four key employment arenas in 2021 — among film directors and film writers. Like people of color, women held their ground among film leads in 2021 (47.2 percent), after effectively reaching parity the previous year. Women also held their

“ New evidence from 2021 supports findings from earlier reports in this series suggesting that America’s increasingly diverse audiences prefer diverse film content. ”

ground among total actors (42.2 percent), though they still had a little way to go to reach parity with men in this arena. Constituting slightly more than half of the population, women remained underrepresented among film directors and writers in 2021, despite the group’s continued progress in these arenas:

- Greater than 2 to 1 among film directors (21.8 percent)
- Less than 2 to 1 among film writers (33.5 percent)

Films written or directed by women in 2021 had casts that were significantly more diverse than those written or directed by White men, echoing findings from the previous report.

Overview: Degrees of Underrepresentation, Gains and Losses, 2021*

Arena	Minorities	Women
Film Leads	Proportionate	Proportionate
Film Directors	< 2 to 1	> 2 to 1
Film Writers	< 2 to 1	< 2 to 1
Total Actors	Proportionate	< Proportionate

*Gains since the previous report highlighted in blue, losses in gold.

3. Accolades. English-language films released in 2020³ with relatively diverse casts, directors of color, and leads of color gained considerable

ground at the Oscars compared to the year before. Most notably, the majority of Oscar-winning films from the 93rd annual Academy Awards were helmed by directors of color and featured minority leads, both firsts over the course of this report series. For women, however, the picture was mixed. While women directors treaded water relative to their male counterparts in helming Oscar-winning films, films with women leads fell further behind among Oscar-winning films.

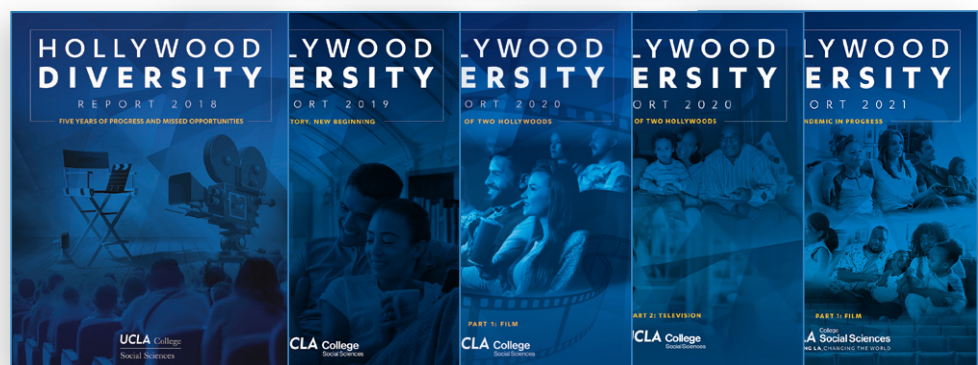
4. The Bottom Line. New evidence from 2021 supports findings from earlier reports in this series suggesting that America’s increasingly diverse audiences prefer diverse film content:

- In 2021, films with casts that were from 21 percent to 30 percent minority enjoyed the highest median global box office receipts, while films with casts that were less than 11 percent minority (echoing a pattern evident the last four years) were the poorest performers.
- Among the large number of top films released via streaming platforms in 2021 — due to continuing adjustments in how films were distributed during the pandemic — ratings for White, Latinx, Asian, and other-race households were all highest for films featuring casts that were from 21 percent to 30 percent minority. Meanwhile, ratings for Black households and viewers 18-49 peaked for streaming films with majority-minority casts, though films with casts that were from 21 percent to 30 percent minority came in a close second among viewers 18-49.
- In 2021, total social media interactions for films released via streaming platforms peaked for films with casts that were from 41 percent to 50 percent minority.
- Replicating a finding from the previous report, people of color accounted for the majority of opening weekend, domestic ticket sales for six of the top 10 films released in theaters in 2021 (ranked by global box office).
- Households of color accounted for a disproportionate share of the households viewing each of the top 10 films released via streaming platforms in 2021 (ranked by total household ratings).
- In 2021, nine of the top 10 theatrical films for Black moviegoers (ranked by the group’s share of opening weekend, domestic box office) featured casts that were over 30 percent minority, while eight of the top 10 films for Latinx moviegoers and seven of the top 10 films for Asian moviegoers did so. For White moviegoers, five of the group’s top 10 theatrical films featured casts that exceeded 30 percent minority, up from just one film a year earlier.
- Eight of the top 10 streaming films for other-race households (ranked by the group’s household rating) had casts that were over 30 percent minority in 2021. For Asian, Black, and Latinx households, seven of the top 10 shows for each group did so. Among the top 10 streaming films for White households in 2021, six had casts that were over 30 percent minority.

INTRODUCTION

2022 Hollywood Diversity Report: Part 1

This report is the ninth in a series of annual studies produced by UCLA's Institute for Research on Labor and Employment (IRLE) to explore relationships between diversity and the bottom line in the Hollywood entertainment industry. The Division of Social Sciences' Hollywood Advancement Project, from which this report series stems, has three primary goals: 1) to generate comprehensive research analyses of the inclusion of diverse groups in film and television, including lead roles, writing, directing, producing, and talent representation; 2) to identify and disseminate best practices for increasing the pipeline of underrepresented groups into the Hollywood entertainment industry; and 3) to consider the broader implications of diverse industry access and media images for society as a whole.



The Data

The *2022 Hollywood Diversity Report: Part 1* examines 252 of the top English-language films released in 2021 via theaters and/or major streaming subscription platforms.⁴ Variables considered in the analyses for this report include the following:

- Racial status of lead talent⁵
- Gender of lead talent⁶
- Overall cast diversity⁷
- Writer diversity
- Director diversity
- Genres
- Oscar awards
- Global and domestic box office
- Comscore ticket buyer demographics
- Nielsen viewer and Talkwalker social media ratings for select streaming titles⁸

Data for this report were compiled from a variety of sources that industry stakeholders rely upon for day-to-day updates on industry developments. These sources include The Studio System, Variety Insight, the Internet Movie Database (IMDb), Comscore, Nielsen, Talkwalker, and Box Office Mojo.

HOLLYWOOD LANDSCAPE

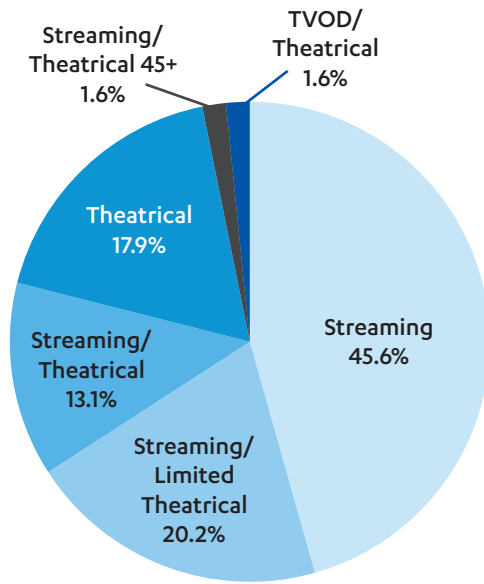
Hollywood Landscape

The pandemic that shook the world in 2020 continued to reshape the Hollywood industry in 2021. Though the widespread introduction of vaccines in early 2021 prompted the selective release of films in theaters, the emergence of new variants of the COVID 19 virus prevented a complete return to business as usual. The previous Hollywood Diversity Report noted that global box office plummeted 72 percent between 2019 and 2020, from \$42.3 billion to just \$12 billion, due to theater closures around the world. The effect of the pandemic was even more pronounced in the world's largest theatrical film market, the United States and Canada, where ticket sales nose dived from \$11.4 billion in 2019 to a mere \$2.2 billion in 2020 — an 81 percent decline.⁹

By the end of 2021, however, global box office sales had rebounded a bit. Ticket sales around the world nearly doubled to \$21.4 billion¹⁰, though they remained about half the \$42.3 billion figure posted the year before the pandemic. Meanwhile, ticket sales in the United States and Canada market more than doubled to \$4.48 billion in 2021,¹¹ but this figure was less than half the pre-pandemic total for 2019.

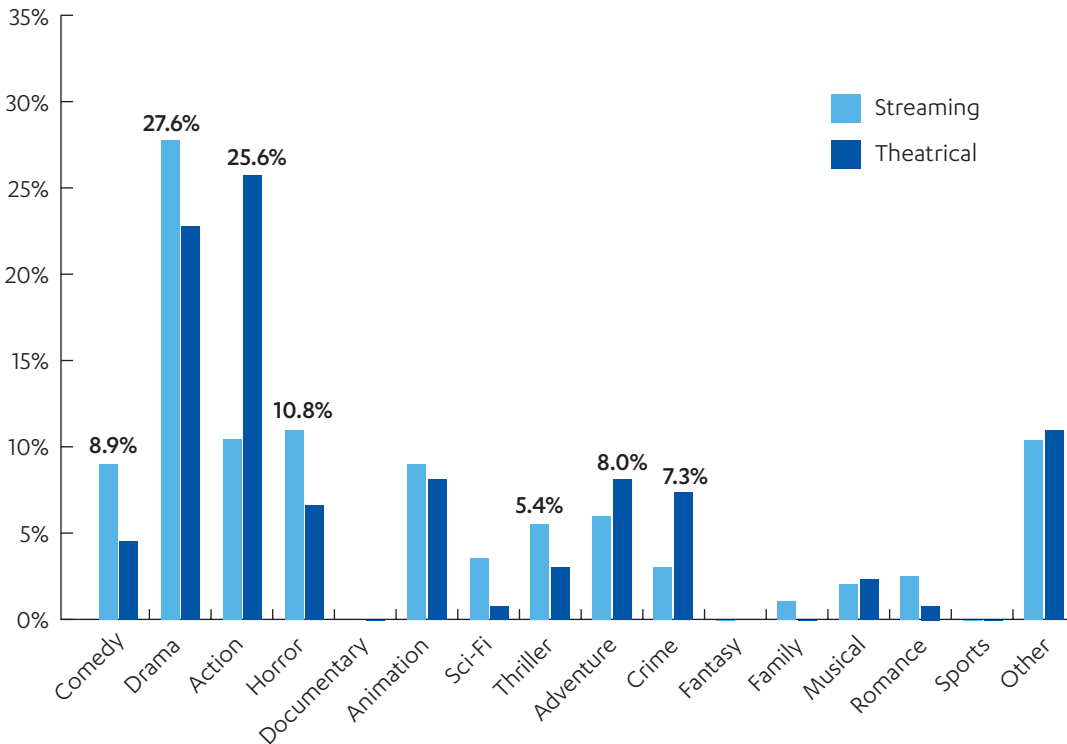
Due to continuing disruptions caused by the pandemic, the 252 top films considered in this report were released in a variety of ways, thus departing from the examination of only theatrical releases in earlier reports. The following charts document the different ways in which the films were released, as well as how film genres were distributed across the films released in theaters versus those released on streaming platforms.

FIGURE 1: Film Release Type, 2021 (n = 252)



▶ The largest single category of films considered in this report includes those that were released solely on streaming platforms¹² (45.6 percent), which is down from the share of streaming-only films considered in the previous report for 2020 (54.6 percent). By contrast, only 17.9 percent of films were released solely in theaters in 2021.¹³ Meanwhile, 20.2 percent of films were released both on streaming platforms and in limited theaters,¹⁴ while 13.1 percent were released both on streaming platforms and widely in theaters.¹⁵ Finally, only 1.6 percent of films were released both theatrically and through transactional video on demand,¹⁶ and 1.6 percent were released on streaming after a modified theatrical release window (45+ days).¹⁷

FIGURE 2: Percentage Distribution of Films by Genre, Streaming and Theatrical, 2021 (n=203, 137*)



*88 of the films were both released in theaters and on a streaming platform

▶ In 2021, there were some notable differences between the types of films released in theaters versus those released via streaming platforms. The action (25.6 percent), adventure (8.0 percent) and crime (7.3 percent) genres accounted for significantly larger shares of the films released theatrically than of those released on streaming platforms. Meanwhile, the drama (27.6 percent), horror (10.8 percent), comedy (8.9 percent) and thriller (5.4 percent) categories constituted significantly larger shares of the films released via streaming platforms than of those released in theaters.

LEADS

Leads

Leads constitute the central characters around whom a film’s narrative primarily revolves. Since the previous report, people of color and women have held their ground relative to their White and male counterparts among the leads in Hollywood’s top films. For both people of color and women, this meant essentially reaching proportionate representation among film leads for the first time in 2020 and then repeating this achievement in 2021.¹⁸ When we consider individual

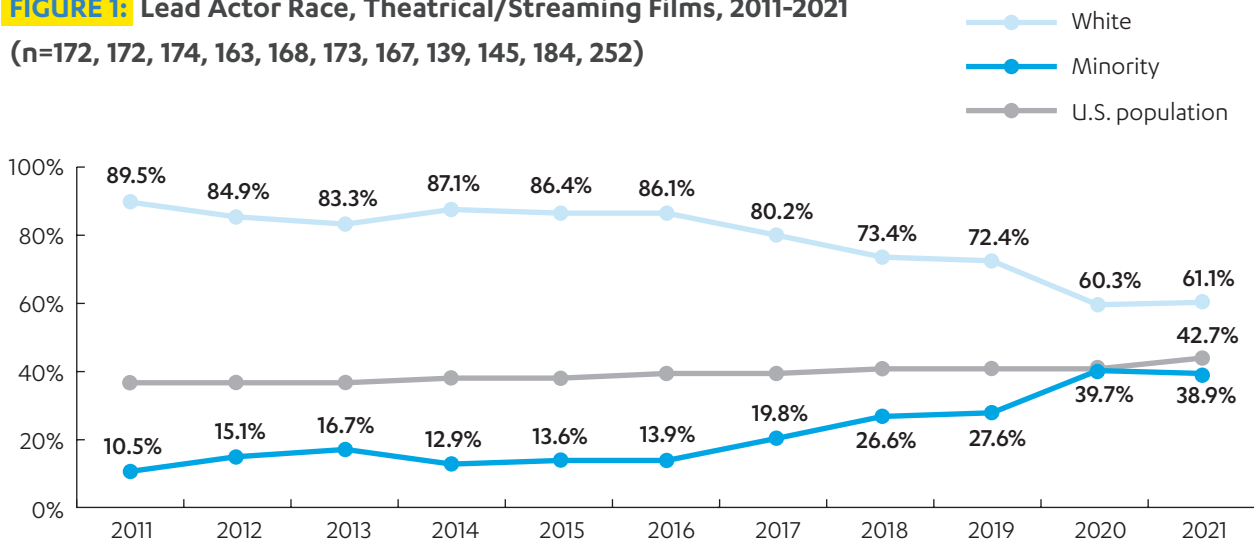


minority groups, only Black persons were overrepresented among film leads in 2021; all other minority groups remained underrepresented. And for all groups except Black persons, women approached or exceeded parity with their male counterparts among leads. Meanwhile, films with leads of color enjoyed budgets similar to those with White leads in 2021, an improvement over 2020 when White-led films were considerably more likely to have larger budgets. But films with female leads in 2021, as in 2020, continued to have smaller budgets than those with male leads.

In the previous report, we noted that subsequent years would provide us with a better understanding of whether the huge uptick in diverse leads observed in 2020 was merely an artifact of the pandemic (i.e., the larger share of streaming films) or the early signs of a new, more inclusive normal. Though the introduction of COVID vaccines in 2021 led to a measured reopening of theaters, most major films continued to be released via streaming platforms, making it difficult to sort out, at this point, which interpretation is more valid.

FIGURE 1: Lead Actor Race, Theatrical/Streaming Films, 2011-2021

(n=172, 172, 174, 163, 168, 173, 167, 139, 145, 184, 252)

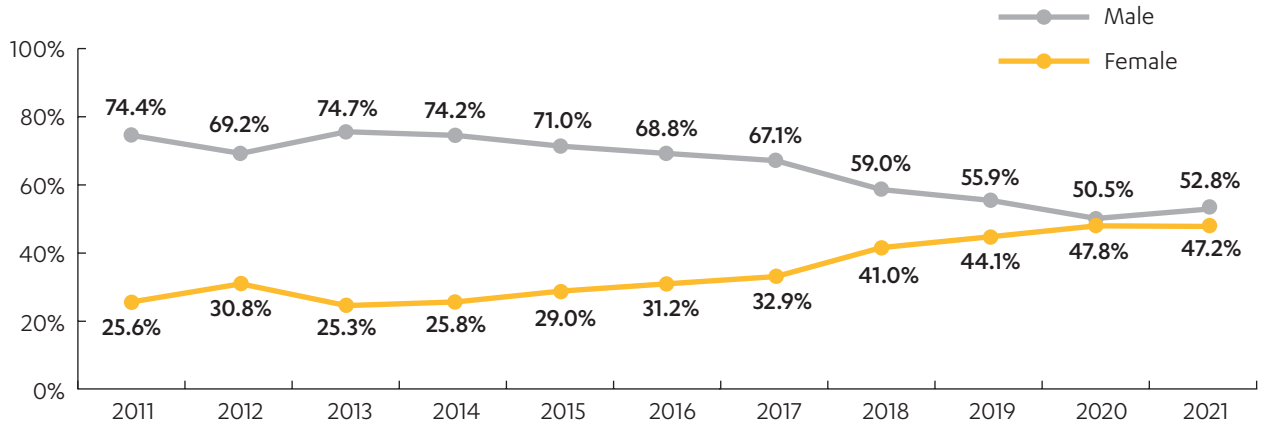


▲ People of color accounted for 38.9 percent of the leads in top films for 2021, roughly the same as the 39.7 percent share posted a year earlier, which was an all-time high. At 42.7 percent of the U.S. population in 2021, people of color were again just short of proportionate representation among film leads that year (gray line). As noted in the previous report, people of color have made tremendous progress among film leads over the course of this report series: the group's 2021 share was nearly quadruple its 2011 share (10.5 percent).



About **4 out of 10** lead actors in film are people of color

FIGURE 2: Lead Actor Gender, Theatrical/Streaming Films, 2011-2021
(n=172, 172, 174, 163, 168, 173, 167, 139, 145, 184, 252)



Like people of color, women have made enormous gains over the course of this report series in their share of top film leads. Women accounted for 47.2 percent of film leads in 2021, virtually unchanged from the 47.8 percent figure evident in 2020 but nearly double the share the group posted in 2011 (25.6 percent). Indeed, the lines for male and female leads were close to converging in 2020 and 2021, leaving women just shy of proportionate representation in this important employment arena both years.

FIGURE 3: Film Budget By Lead Race, Minority (n = 90) Versus White (n = 143), 2021

In 2021, there was little difference in the budgets for films with people of color leads compared to those with White leads. Indeed, films with people of color leads were about equally as likely as those with White leads to have budgets less than \$20 million (57.8 percent versus 56.7 percent). A year earlier, the gap was greater: 71.2 percent of the films with minority leads had the smallest budgets, compared to just 58.8 percent of films with White leads.

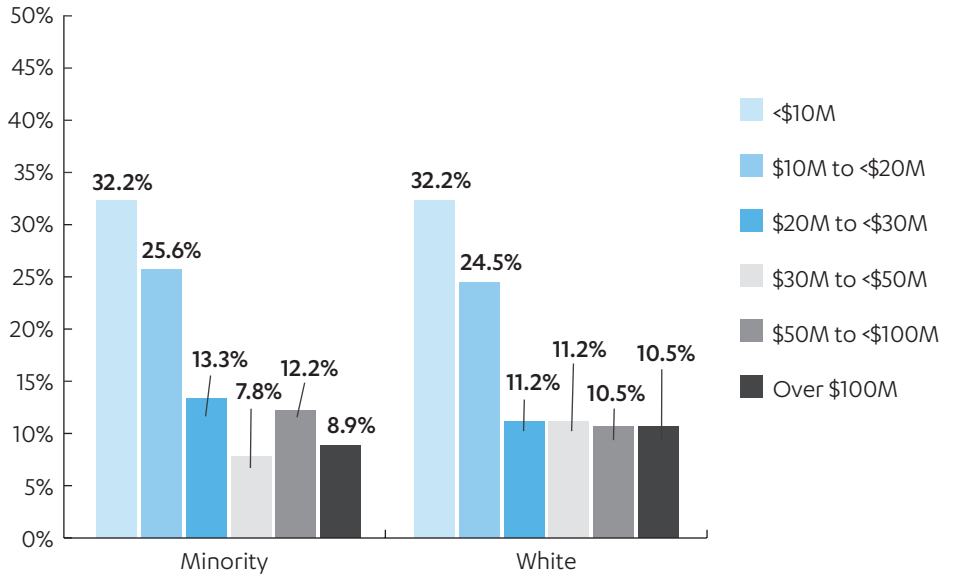
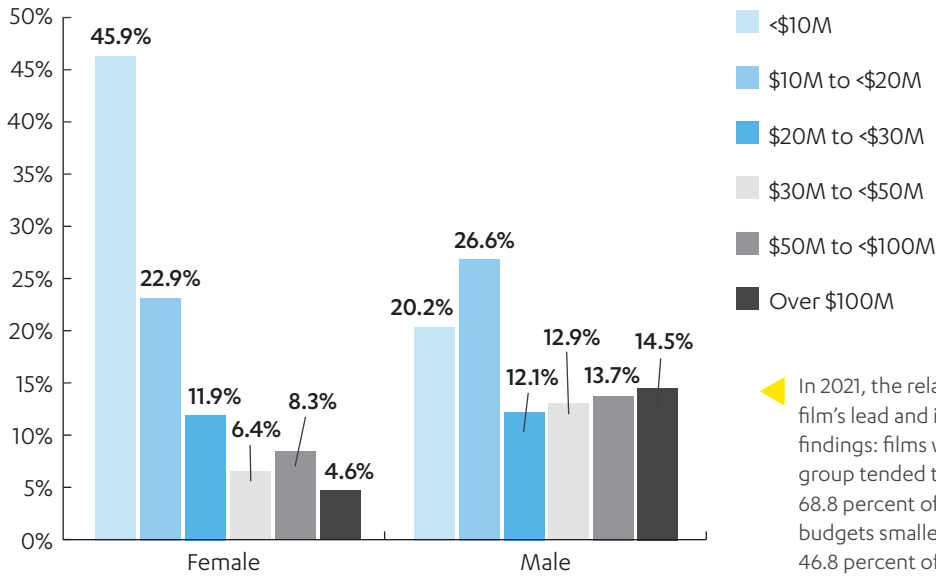


FIGURE 4: Film Budget By Lead Gender, Female (n = 109) Versus Male (n = 124), 2021



▶ In 2021, the relationship between the gender of a film’s lead and its budget, by contrast, echoed past findings: films with leads from the marginalized group tended to have the smallest budgets. That is, 68.8 percent of the films with female leads in 2021 had budgets smaller than \$20 million, compared to only 46.8 percent of the films with male leads. Meanwhile, films with male leads continued to be more likely than those with female leads to fall on the higher end of the budget spectrum — including more than three times as likely to enjoy budgets larger than \$100 million (14.5 percent versus 4.6 percent).

FIGURE 5: Share of Film Leads, by Race, 2021 (n=252)

▶ A breakdown of film leads by specific racial group shows that Black persons, about 13.4 percent of the U.S. population in 2021, were slightly overrepresented in this important employment arena (15.5 percent). Multiracial persons were at proportionate representation among film leads in 2021, constituting 10.3 percent of film leads. By contrast, Latinx (7.1 percent), Asian (5.6 percent), Native (0.4 percent), and MENA (0 percent) persons were all underrepresented among film leads in 2021.

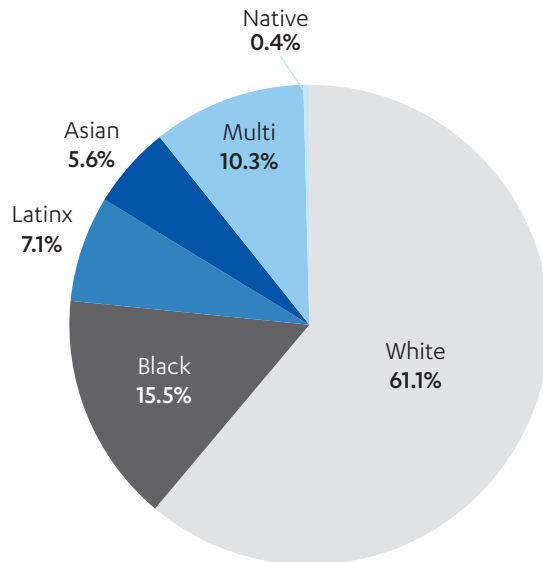
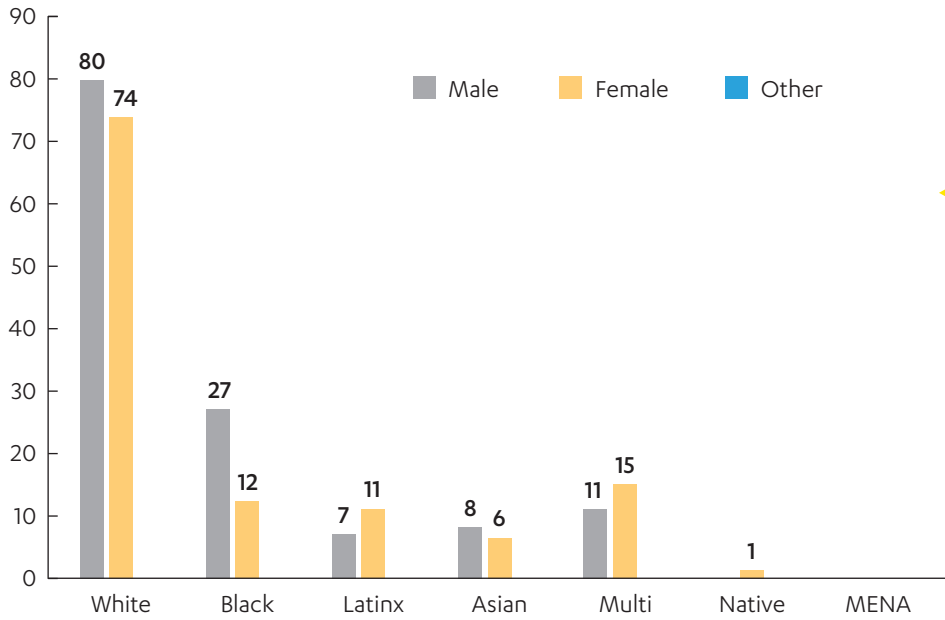


FIGURE 6: Film Lead Counts, by Race and Gender, 2021 (n=252)



Among White, Latinx, Asian, multiracial, and Native film leads, women either approached or exceeded the numbers for their male counterparts in 2021. Only among Black film leads were women significantly outnumbered by men that year, duplicating a pattern observed in the previous report for 2020.

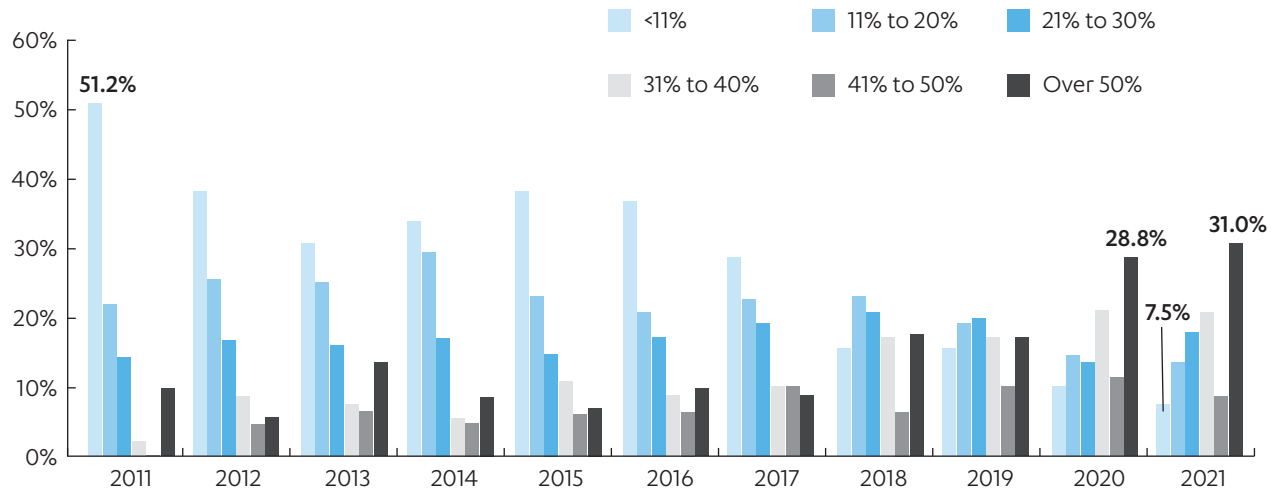
OVERALL CAST DIVERSITY

Overall Cast Diversity

Since the last report, people of color have collectively maintained and even advanced a bit their proportionate share of top film roles, which was first achieved in 2020.¹⁹ The slow, steady march toward increasing overall cast diversity in Hollywood films revealed in earlier reports surged forward in 2020, likely due to the outsized impact that streaming films had on the mix of roles considered during the pandemic. In 2021, people of color held on to these advances, as films with majority-minority casts represented the plurality of top films for the second year in a row. But considering individual minority groups, Black persons were overrepresented among top film roles in 2021, along with MENA persons, who were at or slightly above proportionate representation. All other minority groups were underrepresented. Meanwhile, women failed to reach parity with their male counterparts among White, Black, Asian, and MENA actors in 2021. As noted in the previous report, this finding is likely related to the fact that decisions about which film projects will be greenlighted — and which stories will be told — are still overwhelmingly made by (White) men.



FIGURE 1: Minority Cast Share, by Share of Theatrical/Streaming Films, 2011-2021
 (n=172, 172, 174, 162, 169, 173, 167, 139, 145, 184, 252)



Since the previous report, overall cast diversity continued to increase among Hollywood films. In 2011, most films (51.2 percent) fell into the least-diverse cast diversity interval (less than 11 percent minority). By 2021, the plurality of films (31 percent) fell into the most-diverse interval, films with majority-minority casts. This cast diversity interval became the most prominent for the first time a year earlier, in 2020 (28.8 percent). By contrast, the fewest films fell into the least-diverse interval in 2021, only 7.5 percent of films.

FIGURE 2: Share of All Film Roles, by Race, 2021 (n=1,944)

The White share of all top film roles dropped to 56.9 percent in 2021, down from 58 percent in 2020, thus continuing a downward trend for the group. As a result, Whites were slightly underrepresented among featured film roles in 2021. Meanwhile, Black actors claimed 18 percent of top film roles in 2021, down from 19.4 percent a year earlier, but still marking the fourth year in a row for which the group was overrepresented among these roles.

As in earlier years, Latinx (7.7 percent), Asian (6.4 percent), and Native persons (0.6 percent) remained underrepresented among all top film roles in 2021. Collectively accounting for about 42.7 percent of the population in 2021, people of color again reached proportionate representation among all top film roles (43.1 percent), which they had achieved for the first time a year earlier.

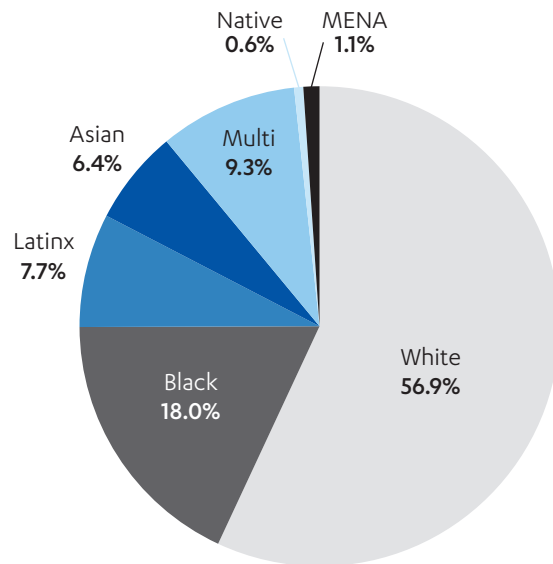
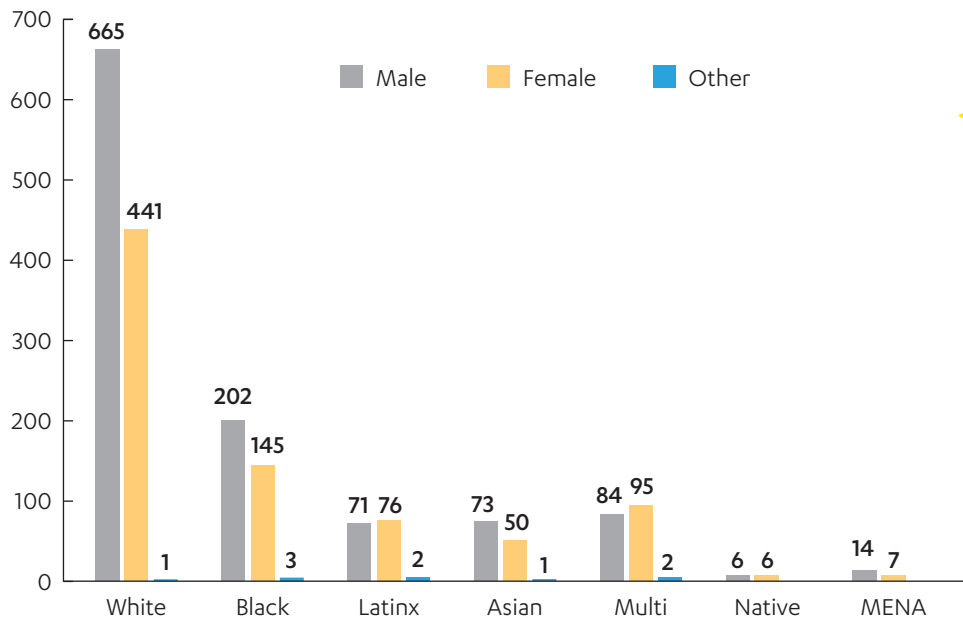


FIGURE 3: Film Actor Counts, by Race and Gender, 2021 (n=1,944)



◀ For White,²⁰ Black,²¹ Asian,²² and MENA persons, women were significantly underrepresented among the actors featured in the top theatrical and streaming films for 2021. This finding continues a pattern observed in earlier reports for White and Black persons. By contrast, for Latinx,²³ multiracial, and Native persons, women either approached parity with their male counterparts or exceeded it in this employment arena in 2021.

DIRECTORS

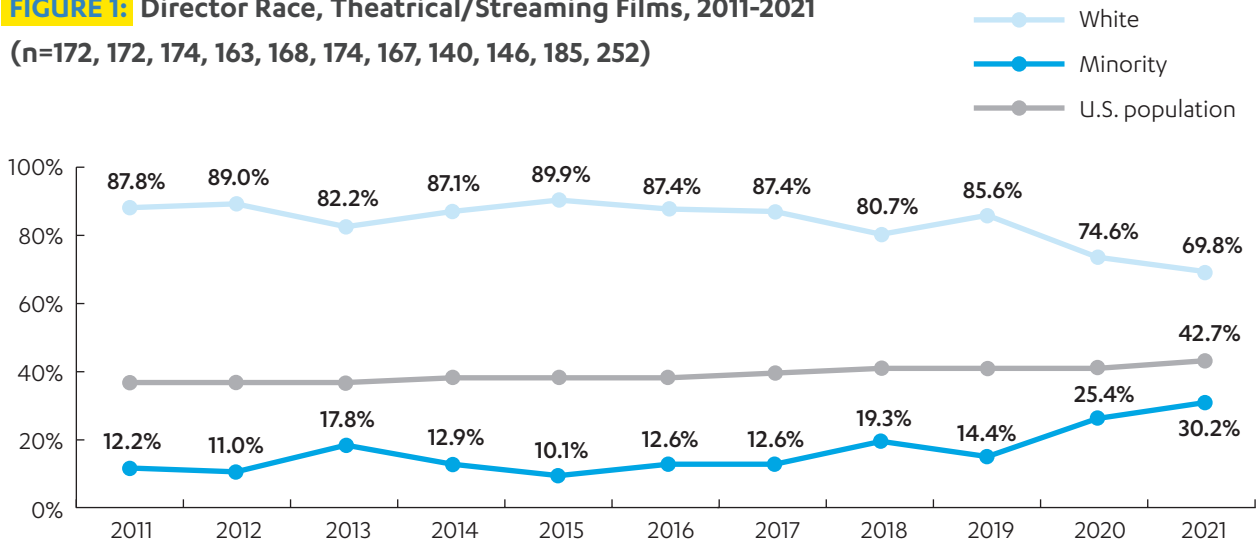
Directors

Directors are the artists who shape the look and feel of a film by overseeing key production elements, from script to screen. Since the last report, people of color made notable gains relative to their White counterparts among the ranks of film directors for top Hollywood films, thus continuing a trend evident over the course of this report series. Though women had also made significant advances among film directors in recent years, 2021 saw women barely gain any ground

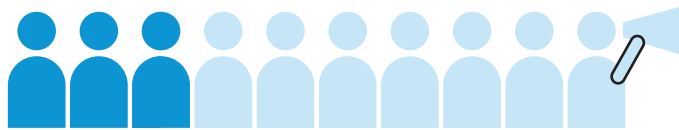


relative to their male counterparts. Women and people of color remained underrepresented among film directors in 2021, despite the gains posted by both groups over the years. Meanwhile, among White, Black, Latinx, multiracial, and MENA directors, women lagged their male counterparts in 2021; among Asian and Native directors, however, women approached or reached parity. Replicating findings from the previous report, films directed by people of color or women in 2021 tended to feature more diverse casts than those directed by White men; these films were also more likely to have smaller budgets than those directed by White men. As noted in the previous report, these findings raise the question of whether the industry may be relegating women directors and directors of color to women-themed and minority-themed projects, thereby limiting their opportunities in this critical employment arena.

FIGURE 1: Director Race, Theatrical/Streaming Films, 2011-2021
 (n=172, 172, 174, 163, 168, 174, 167, 140, 146, 185, 252)



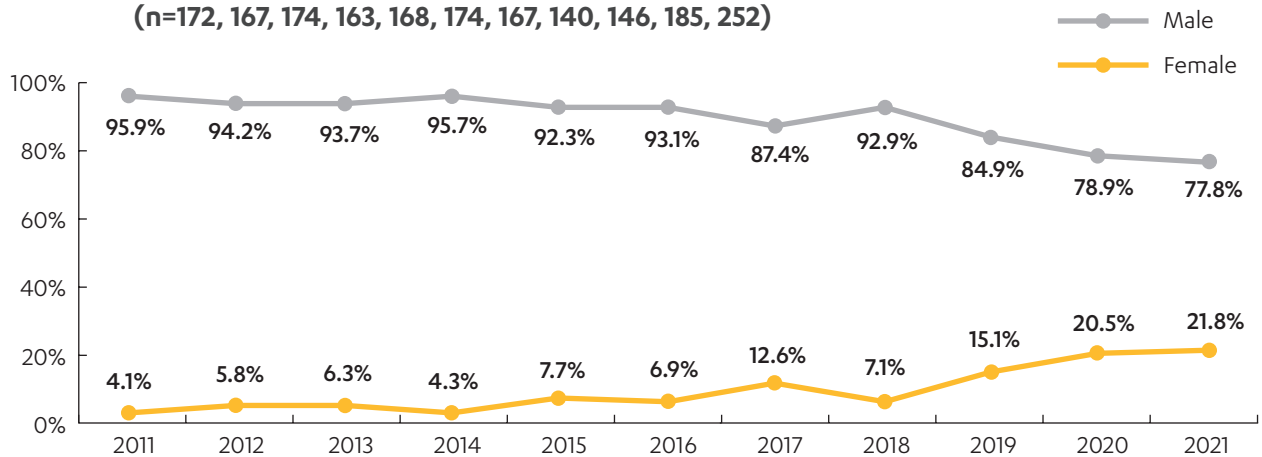
▲ In 2021, 30.2 percent of the directors for the year’s top films were people of color, up from the previous peak share for the group of 25.4 percent a year earlier. While this figure was nearly triple the group’s 2011 share (12.2 percent), people of color would have to increase their 2021 share by another 12 percentage points in order to reach proportionate representation among film directors (42.7 percent).



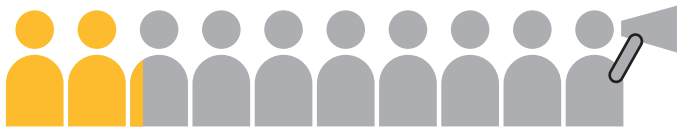
Only 3 out of 10 film directors are people of color

FIGURE 2: Director Gender, Theatrical/Streaming Films, 2011-2021

(n=172, 167, 174, 163, 168, 174, 167, 140, 146, 185, 252)



Since the previous report, women have inched forward relative to their male counterparts among the directors of top Hollywood films. Women claimed 21.8 percent of these critical positions in 2021, up just slightly from 20.5 percent in 2020. Between 2011, the first year examined in this report series, and 2021, women’s share of directors increased more than fivefold — from 4.1 percent to 21.8 percent. Despite these significant gains, women remained underrepresented by a factor of more than 2 to 1 in this employment arena in 2021.



only 2.2 out of 10 film directors are women

FIGURE 3: Film Budget By Director Race, Minority (n = 72) Versus White (n = 161), 2021

Replicating findings for 2020 in the previous report, top films directed by people of color in 2021 were more likely than those with White directors to have the smallest budgets. That is, 66.7 percent of the films directed by people of color had budgets smaller than \$20 million, compared to just 52.8 percent of the films helmed by White directors. In 2021, this pattern differed from what was found with race of the lead. The race of the director appeared to be a stronger predictor of the film’s budget in 2021. For films with a White director and a lead of color, 47.9 percent had budgets smaller than \$20 million. However, for films with a director of color and a White lead, 63.3 percent had budgets smaller than \$20 million.

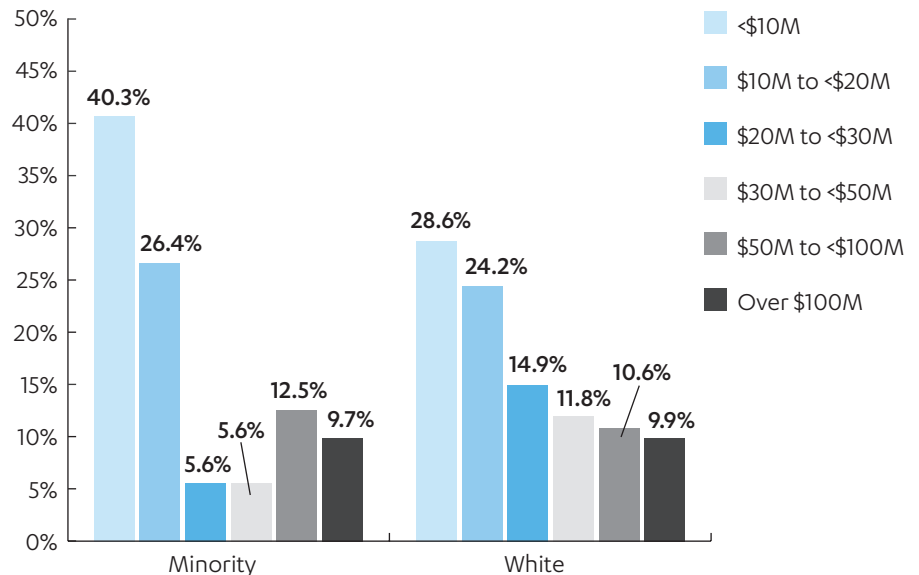
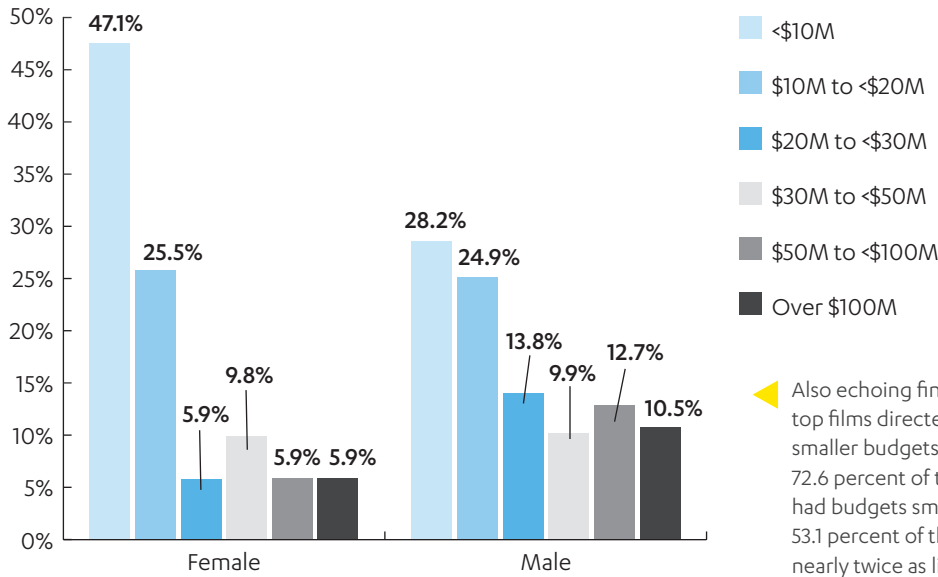


FIGURE 4: Film Budget By Director Gender, Female (n = 51) Versus Male (n = 181), 2021



Also echoing findings from the previous report, the top films directed by women in 2021 tended to have smaller budgets than those directed by men. That is, 72.6 percent of the films directed by women in 2021 had budgets smaller than \$20 million, compared to just 53.1 percent of the films helmed by men. Men were also nearly twice as likely as women in 2021 to direct films with budgets in excess of \$100 million (10.5 percent versus 5.9 percent). It should be noted that more than three quarters of the films helmed by women in 2021 also featured a female lead (76.8 percent).

FIGURE 5: Share of Film Directors, by Race, 2021 (n = 252)

In 2021, 69.8 percent of the directors for top Hollywood films were White, a nearly 5-percentage-point drop from the 74.6 percent share of these important positions the group claimed in 2020. Considering minority groups separately, Black (9.5 percent), Latinx (7.1 percent), Asian (6.7 percent), multiracial (4.4 percent), and Native (0.8 percent) persons were all underrepresented. For each of these groups — with the exception of Black persons, who were overrepresented among directors in 2020 — this observation replicates a longstanding finding.

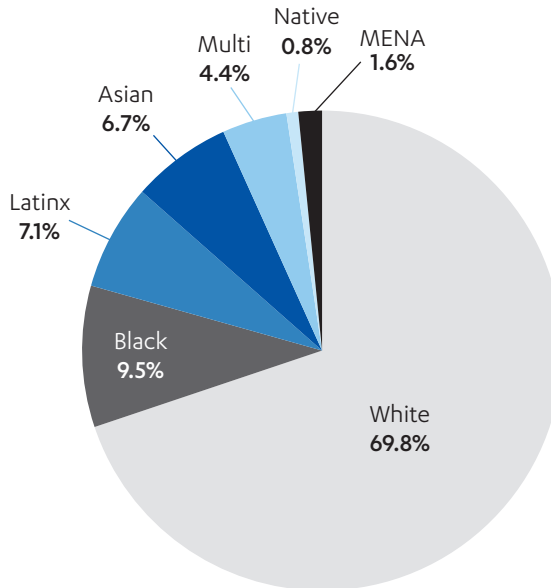
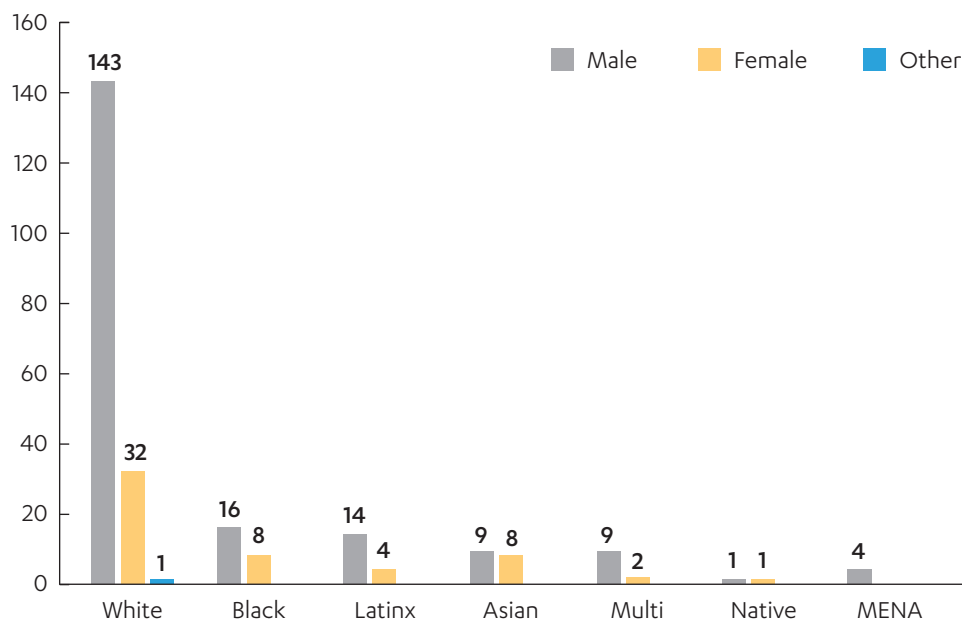


FIGURE 6: Film Director Counts, by Race and Gender, 2021 (n=252)



Among the White,²⁴ Black, Latinx, multiracial, and MENA directors helming 2021 films, women lagged far behind men. Only among Asian and Native directors did women approach or reach parity with their male counterparts in securing these important positions.

TABLE 1: White Male Directors and Cast Diversity, 2021 Films (n = 143)

Less than half of films directed by White males in 2021 had casts that were 30 percent minority or less (43.4 percent). This is a modest improvement over 2020, when more than half of the films directed by white males (51.3 percent) had casts that were 30 percent minority or less. Meanwhile, nearly two thirds of films directed by White males in 2021 had casts that were 40 percent female or less (61.6 percent).

Percent Cast	Minority	Female
< 11%	7.7%	0.7%
11% - 20%	13.3%	13.3%
21% - 30%	22.4%	17.5%
31% - 40%	28.0%	30.1%
41% - 50%	9.1%	25.9%
Over 50%	19.6%	12.6%

TABLE 2: Women* Directors and Cast Diversity, 2021 Films (n = 56)

Percent Cast	Minority	Female
< 11%	7.1%	0%
11% - 20%	17.9%	5.4%
21% - 30%	16.1%	7.1%
31% - 40%	10.7%	19.6%
41% - 50%	8.9%	25.0%
Over 50%	39.3%	42.9%

More than half of the films directed by women in 2021 featured casts that were more than 30 percent minority (58.9 percent), down from more than three quarters a year earlier (76.9 percent). Meanwhile, two thirds of the films directed by women in 2021 had casts that were more than 40 percent female (67.9 percent).

* Includes one trans woman.

More than three quarters of the films directed by people of color in 2021 featured casts that were greater than 30 percent minority (78.9 percent). Indeed, 60.5 percent of the films had majority-minority casts. Meanwhile, more than half of the films had casts that were more than 40 percent female (53.9 percent), up from a little over a third in 2020 (36.2 percent).

TABLE 3: Directors of Color and Cast Diversity, 2021 Films (n = 76)

Percent Cast	Minority	Female
< 11%	5.3%	0%
11% - 20%	10.5%	10.5%
21% - 30%	5.3%	10.5%
31% - 40%	10.5%	25.0%
41% - 50%	7.9%	26.3%
Over 50%	60.5%	27.6%

TABLE 4: Women of Color Directors and Cast Diversity, 2021 Films (n = 23)

Percent Cast	Minority	Female
< 11%	0%	0%
11% - 20%	8.7%	0%
21% - 30%	0%	8.7%
31% - 40%	4.4%	30.4%
41% - 50%	8.7%	26.1%
Over 50%	78.3%	34.8%

The lion's share of films directed by women of color in 2021 had casts that were more than 30 percent minority (91.4 percent), including 78.3 percent that featured majority-minority casts. Meanwhile, nearly two thirds of the films had casts that were more than 40 percent female (60.9 percent), up from half a year earlier (50 percent).

WRITERS

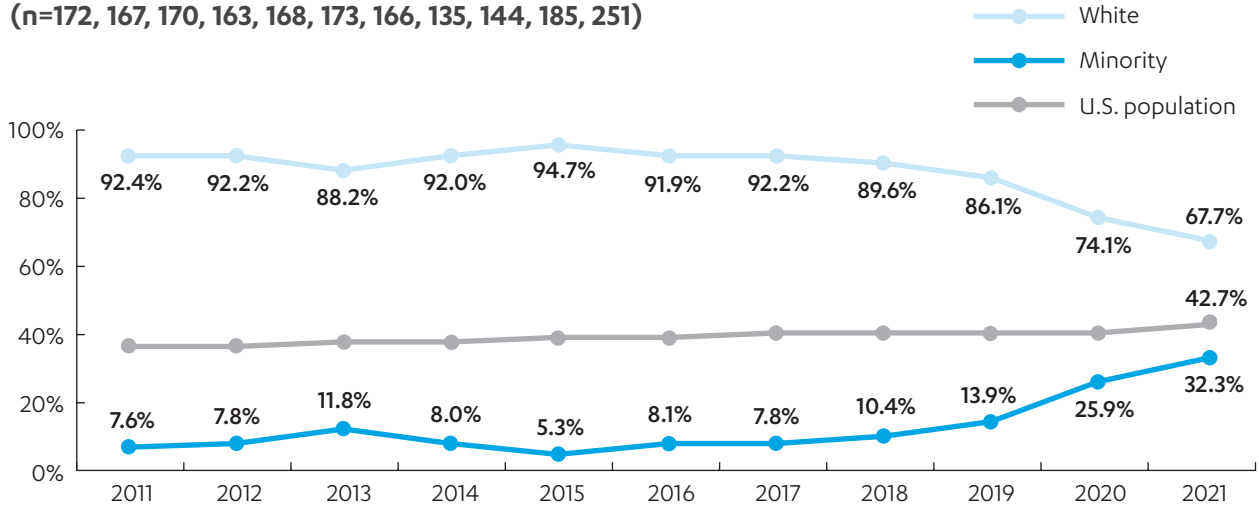
Writers

Screenwriters are the artists who transform source material and original ideas into the stories that animate Hollywood films. Since the last report, people of color and women extended the long-term trends in which they have claimed ever larger shares of the writers for top Hollywood films. Still, both groups remained underrepresented in this important employment arena in 2021. Only MENA persons, considering individual minority groups, were overrepresented among top Hollywood screenwriters in 2021. While women lagged their male counterparts among White, Latinx, multiracial, and MENA screenwriters in 2021, they reached or exceeded parity with men among Asian, Black, and Native screenwriters. Echoing findings from the previous report, films written by people of color or women in 2021 tended to feature casts that were more diverse than those written by White men. It is worth noting that most films written by people of color in 2021 also featured a director of color, again raising questions about the degree to which Hollywood provides opportunities for screenwriters of color to work on projects that are not minority themed.

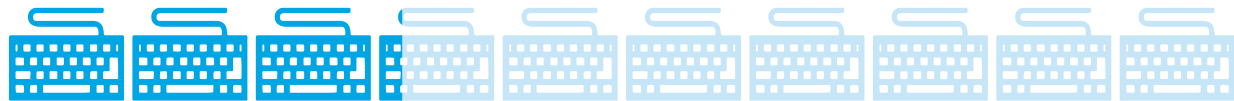


FIGURE 1: Writer Race, Theatrical/Streaming Films, 2011-2021

(n=172, 167, 170, 163, 168, 173, 166, 135, 144, 185, 251)

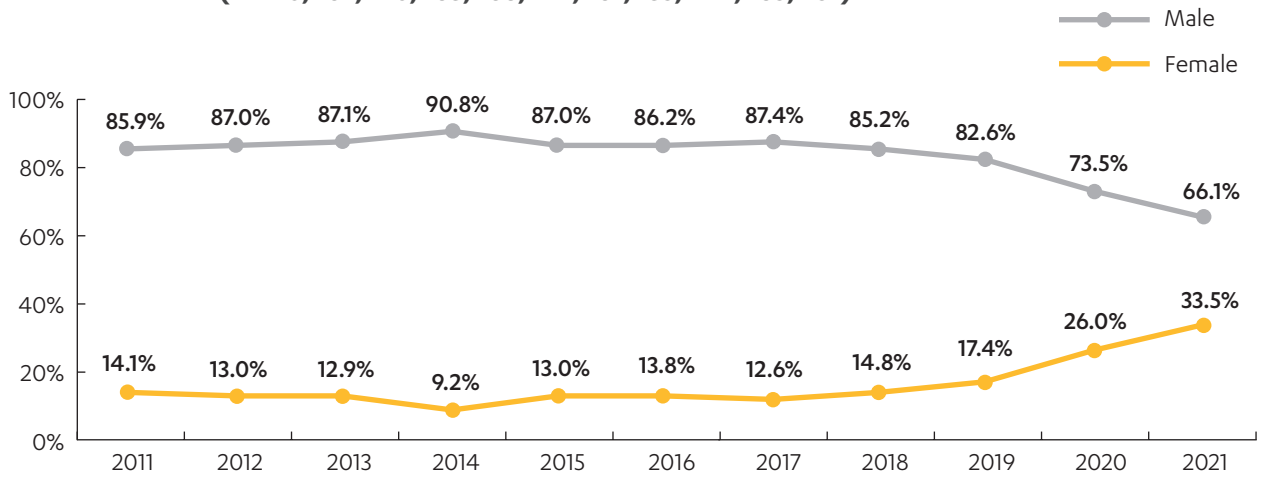


▲ People of color’s share of the writers credited for top Hollywood films increased to 32.3 percent in 2021, up from 25.9 percent in 2020. This latest increase continues a trend in which people of color have more than quadrupled their share of screenwriters since 2011, when the group’s share was only 7.6 percent. People of color nonetheless would have to increase their 2021 share by about 10 percentage points to reach proportionate representation in this employment arena (42.7 percent). It should be noted that nearly three quarters of the films written by people of color in 2021 also had minority directors (73.2 percent).



only 3.2 out of 10 film writers are people of color

FIGURE 2: Writer Gender, Theatrical/Streaming Films, 2011-2021
(n=170, 169, 170, 163, 168, 174, 167, 135, 144, 185, 251)



Women’s share of the writers credited for top films increased to 33.5 percent in 2021, an increase of more than seven percentage points over the 26 percent figure the group posted for 2020. This increase continues an upward trend for women screenwriters evident over the course of this report series. Indeed, women’s share of screenwriters in 2021 was more than double the 14.1 percent figure observed in 2011. Still, women would have to increase their 2021 share by nearly 20 percentage points to reach parity with men in this employment arena. It’s worth noting that writer/director matching was not as pronounced for women as it was for people of color in 2021 — just half of the films with woman writers that year also had women directors (50 percent).

FIGURE 3: Share of Film Writers, by Race, 2021 (n=251)

Though the White share of writers for top Hollywood films declined again since the last report (from 74.1 percent in 2020 to 67.7 percent in 2021), almost all individual minority groups remained underrepresented among these important creatives. Black (10.4 percent), Latinx (5.6 percent), Asian (4 percent), multiracial (8.8 percent), and Native (0.8 percent) persons were underrepresented in 2021.

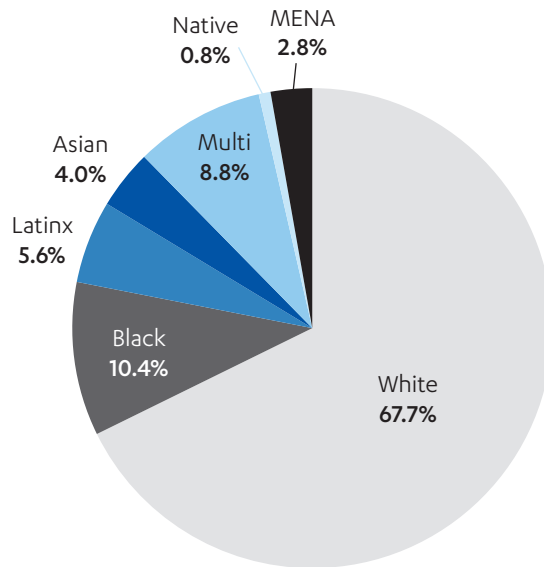
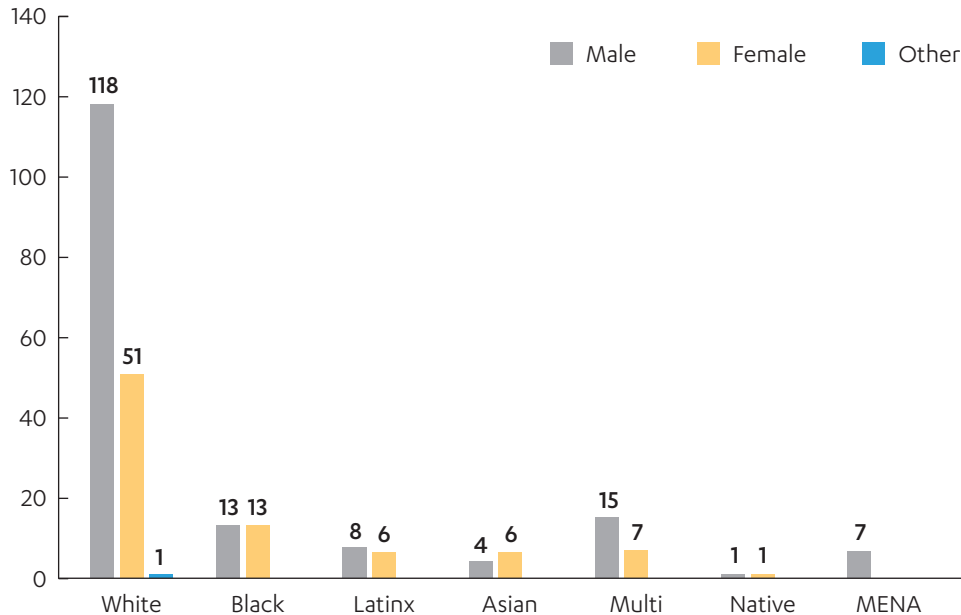


FIGURE 4: Film Writer Counts, by Race and Gender, 2021 (n=251)



For White,²⁵ Latinx,²⁶ multiracial, and MENA persons, women lagged their male counterparts among writers for the top Hollywood films in 2021. By contrast, women claimed a greater share of the screenwriting positions occupied by Asian persons and reached parity with their male counterparts among Black and Native persons in 2021.

TABLE 1: White Male Writers and Cast Diversity, 2021 Films (n = 118)

Nearly half of the films written by White males in 2021 had casts that were 30 percent minority or less (48.3 percent), and nearly two thirds had casts that were 40 percent female or less (62.8 percent).

Percent Cast	Minority	Female
< 11%	6.8%	0.9%
11% - 20%	17.8%	16.1%
21% - 30%	23.7%	17.8%
31% - 40%	28.0%	28.0%
41% - 50%	10.2%	27.1%
Over 50%	13.6%	10.2%

TABLE 2: Women* Writers and Cast Diversity, 2021 Films (n = 85)

Percent Cast	Minority	Female
< 11%	8.2%	0%
11% - 20%	12.9%	5.9%
21% - 30%	15.3%	3.5%
31% - 40%	10.6%	18.8%
41% - 50%	10.6%	28.2%
Over 50%	42.4%	43.5%

Nearly two thirds of the films written by women in 2021 featured casts that were greater than 30 percent minority (63.6 percent), and more than two thirds had casts that were greater than 40 percent female (71.7 percent).

* Includes one trans woman.

TABLE 3: Writers of Color and Cast Diversity, 2021 Films (n = 82)

More than three quarters of the films written by people of color in 2021 had casts that were greater than 30 percent minority (82.9 percent), while nearly half featured casts that were over 40 percent female (48.8 percent).

Percent Cast	Minority	Female
< 11%	4.9%	0%
11% - 20%	7.3%	8.5%
21% - 30%	4.9%	13.4%
31% - 40%	13.4%	29.3%
41% - 50%	4.9%	22.0%
Over 50%	64.6%	26.8%

TABLE 4: Women of Color Writers and Cast Diversity, 2021 Films (n = 33)

Percent Cast	Minority	Female
< 11%	0%	0%
11% - 20%	9.1%	3.0%
21% - 30%	0%	0%
31% - 40%	0%	21.2%
41% - 50%	9.1%	27.3%
Over 50%	81.8%	48.5%

The lion's share of films written by women of color in 2021 featured casts that were greater than 40 percent minority (90.9 percent), and three quarters had casts that were over 40 percent female (75.8 percent).

ACCOLADES

Accolades

In September of 2020, the Academy of Motion Picture Arts and Sciences announced new representation and inclusion standards for Oscar eligibility in the Best Picture category.²⁷ Against a backdrop of recent critiques of Oscar nominations and awards for their lack of diversity (e.g., #OscarsSoWhite), and conceived as

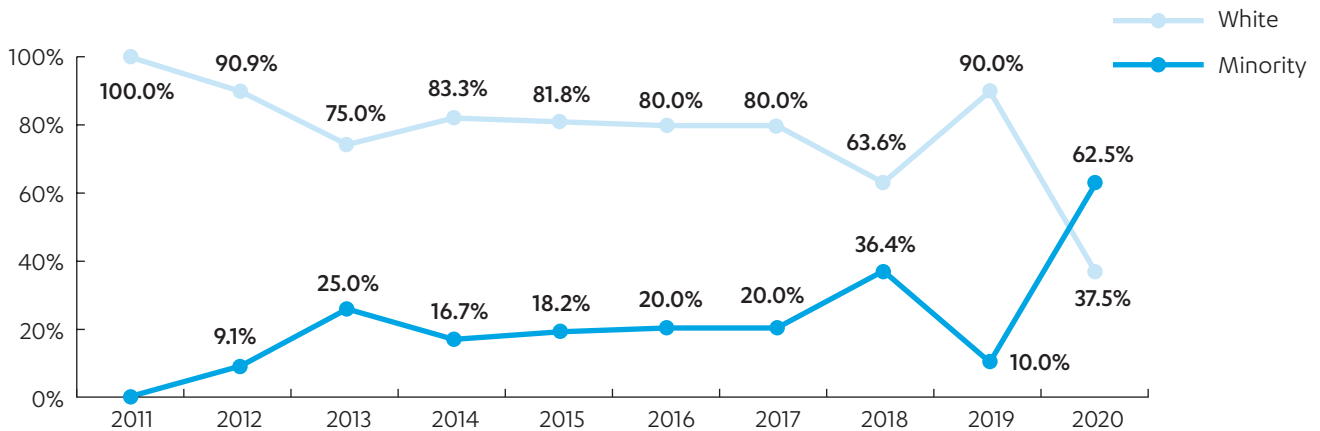


a cultural intervention to expand notions of what “best” means in a diversifying society, the new standards were to be fully implemented by 2024. This initiative followed an earlier pledge to double the representation of women and people of color within an Academy membership that was overwhelmingly White and older. As noted in the previous report, signs were evident by 2021 that these efforts may finally be paying dividends. To be sure, nominations for the 93rd annual Academy Awards (i.e., films released in 2020) set several diversity firsts — including the most inclusive acting slate ever, the first woman of color nominated for best director, and the first film with an all-Black producing team nominated for best picture.²⁸

Findings from this report document that the ground-breaking collection of diverse nominees for the 2021 Oscar ceremony also resulted in an unprecedented number of diverse award winners. Indeed, English-language films with relatively diverse casts, directors of color, and leads of color gained considerable ground at the 93rd annual Academy Awards compared to the year before. Most notably, the *majority* of Oscar-winning films from 2020 were helmed by directors of color and featured minority leads, both firsts over the course of this report series. For women, however, the picture was mixed. While women directors treaded water relative to their male counterparts in helping Oscar-winning films, films with women leads fell further behind among Oscar-winning films.

FIGURE 1: Oscar Winners by Director Race, Theatrical Films, 2011-2020

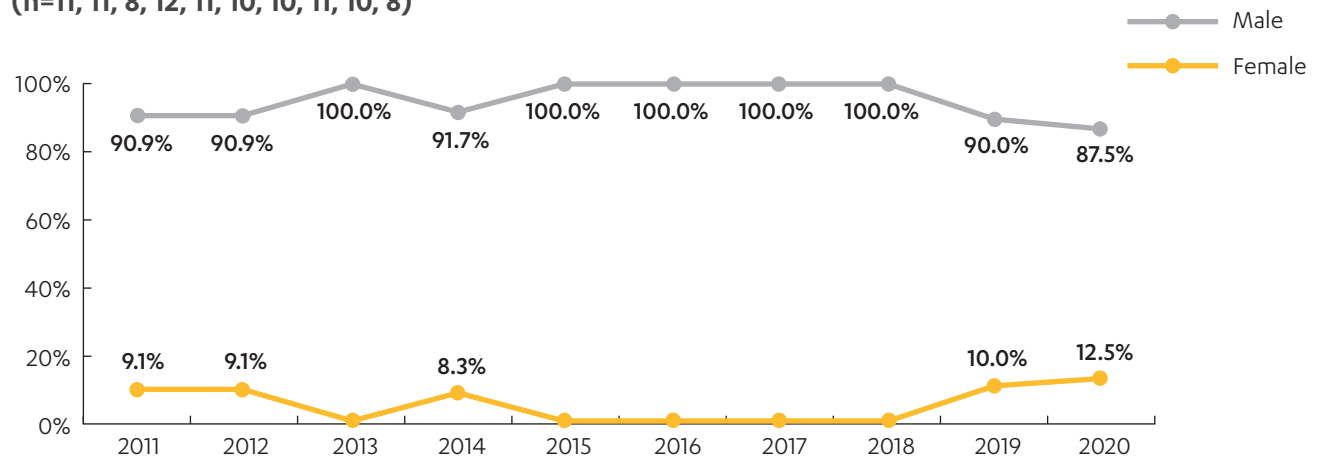
(n=11, 11, 8, 12, 11, 10, 10, 11, 10, 8)



In 2020 — for the first time in this report series — the share of English-language films with at least one Oscar winner that were also directed by a person of color exceeded the White share. That is, five of the eight Oscar-winning films in 2020 were directed by people of color (62.5 percent). These films included: *Judas and the Black Messiah*, *Ma Rainey’s Black Bottom*, *Minari*, *Nomadland*, and *Soul*.

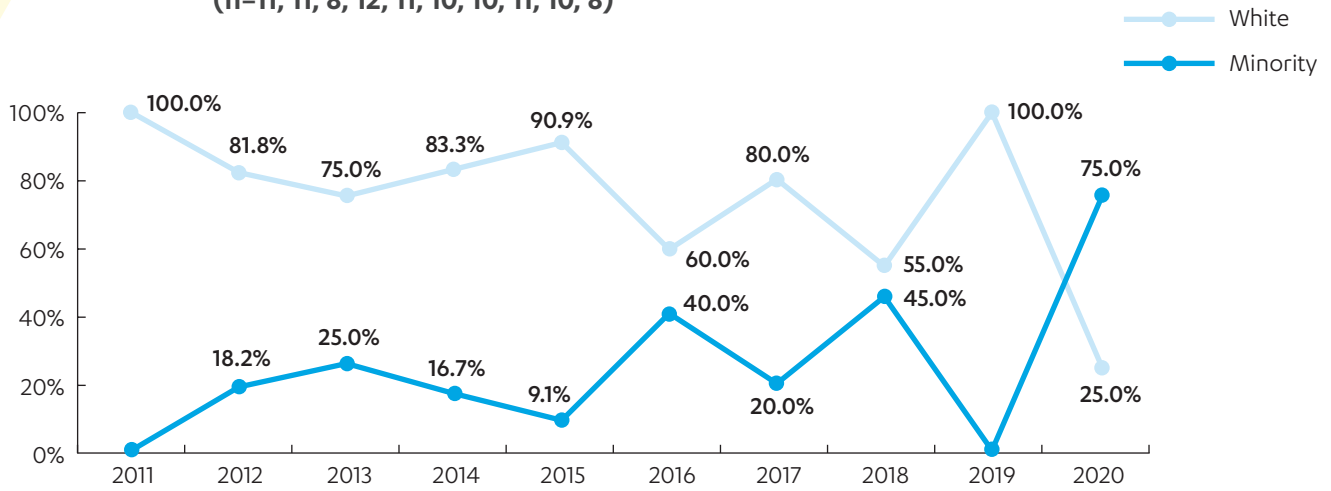
FIGURE 2: Oscar Winners by Director Gender, Theatrical Films, 2011-2020

(n=11, 11, 8, 12, 11, 10, 10, 11, 10, 8)



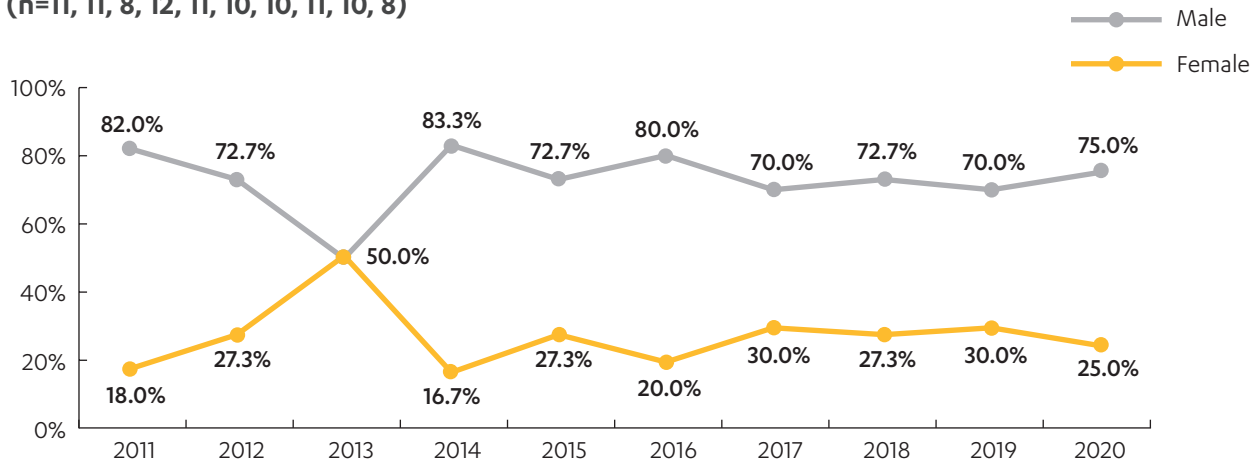
After remaining flat at zero between 2015 and 2018, the share of English-language films with at least one Oscar winner that were also directed by a woman increased a bit between 2019 and 2020 (from 10 percent to 12.5 percent, respectively). But the 2020 figure (as in 2019) was the product of just a single Oscar-winning film, *Nomadland*. Underscoring the marginalization of women among Hollywood film directors, the group’s share of Oscar-winning films has not exceeded 12.5 percent over the course of this report series.

FIGURE 3: Oscar Winners, by Lead Actor Race, Theatrical Films, 2011-2020
(n=11, 11, 8, 12, 11, 10, 10, 11, 10, 8)



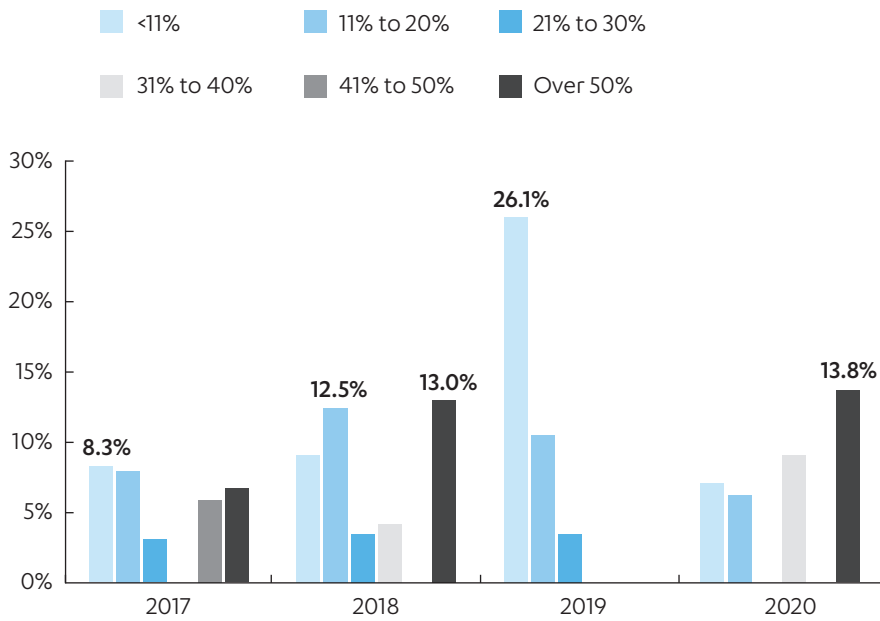
▲ In 2020 — for the first time in this report series — the share of English-language films with at least one Oscar winner that also featured a person of color lead exceeded the share for films with White leads. That is, six of the eight Oscar-winning films for 2020 featured leads of color (75 percent). These films included: *Judas and the Black Messiah*, *Ma Rainey’s Black Bottom*, *Minari*, *Soul*, *Sound of Metal*, and *Tenet*.

FIGURE 4: Oscar Winners, by Lead Actor Gender, Theatrical Films, 2011-2020
(n=11, 11, 8, 12, 11, 10, 10, 11, 10, 8)



▲ The share of English-language films with at least one Oscar winner that also featured a female lead remained relatively flat since 2015, from 27.3 percent of all Oscar-winning films that year to 25 percent for 2020. Two Oscar-winning films accounted for the 2020 share: *Ma Rainey’s Black Bottom* and *Nomadland*.

FIGURE 5: Likelihood of Winning Oscar, by Minority Cast Share, Theatrical Films, 2017-2020

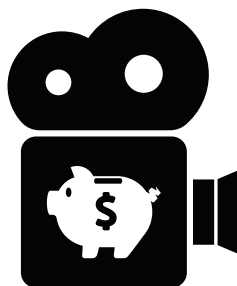


▶ In 2020 — as in 2018 — the likelihood²⁹ that a film would win at least one Oscar was highest for English-language films with majority-minority casts (13.8 percent chance). Four Oscar-winning films with majority-minority casts contributed to these odds: *Judas and the Black Messiah*, *Ma Rainey's Black Bottom*, *Minari*, and *Soul*.

THE BOTTOM LINE

The Bottom Line

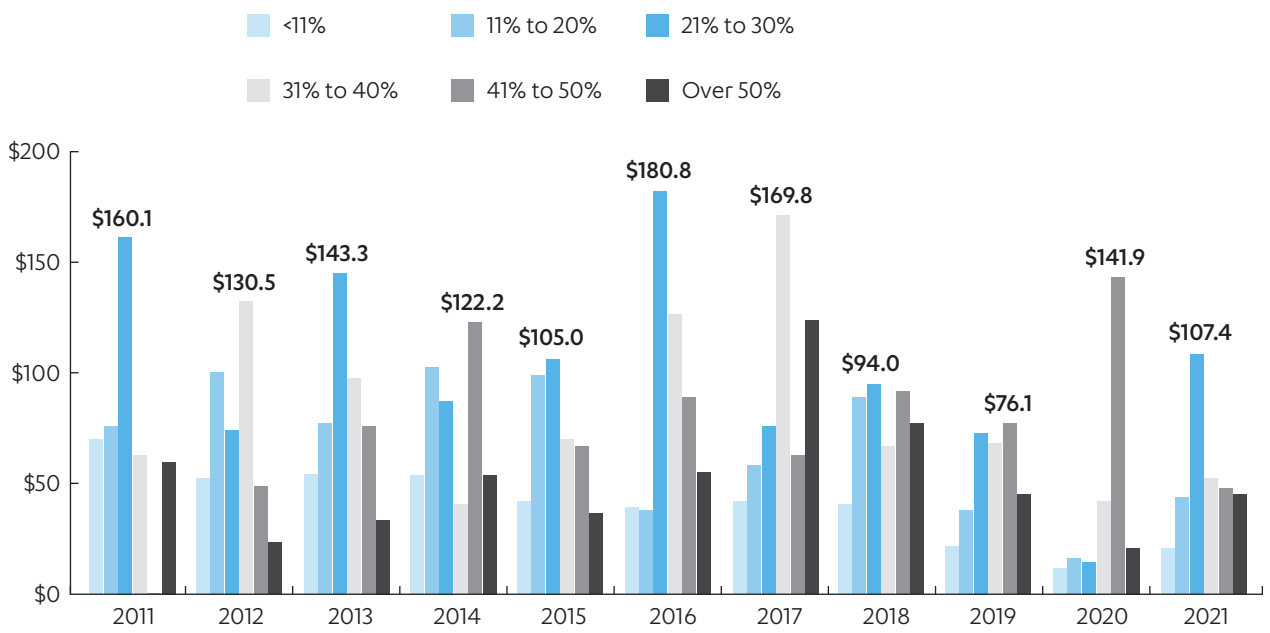
A COVID-encumbered 2021, like the pandemic's initial year, resulted in significant deviations from business as usual in the film sector. Though more top Hollywood films were released in theaters in 2021 than the year before, films released via streaming platforms continued to dominate the titles considered in this report. Still, the general patterns observed throughout this report series about the relationship



between diverse content and the bottom line held: audiences of color are becoming an increasingly important market anchor, and diverse content sells. For the smaller-than-normal number of top films released theatrically in 2021, median global box office receipts peaked for those that had relatively diverse casts — from 21 percent to 30 percent minority. For the larger collection of top films released via streaming platforms in 2021, ratings for most groups were also highest for films with casts that were from 21 percent to 30 percent minority, though for viewers 18-49 and Black households it was films with majority-minority casts that garnered the highest ratings. Meanwhile, social media interactions peaked for streaming films with casts that were from 41 percent to 50 percent minority. Replicating findings from the previous report, people of color accounted for the majority of opening weekend, domestic ticket sales for six of the top 10 films released in theaters in 2021 (ranked by global box office). Notably, households of color accounted for a disproportionate share of the households viewing each of the top 10 films released via streaming platforms in 2021 (ranked by total household ratings). Finally, findings based on box office share and household ratings reveal that the films most favored by diverse moviegoers and households in 2021, as in 2020, tended to feature casts that were more than 30 percent minority.

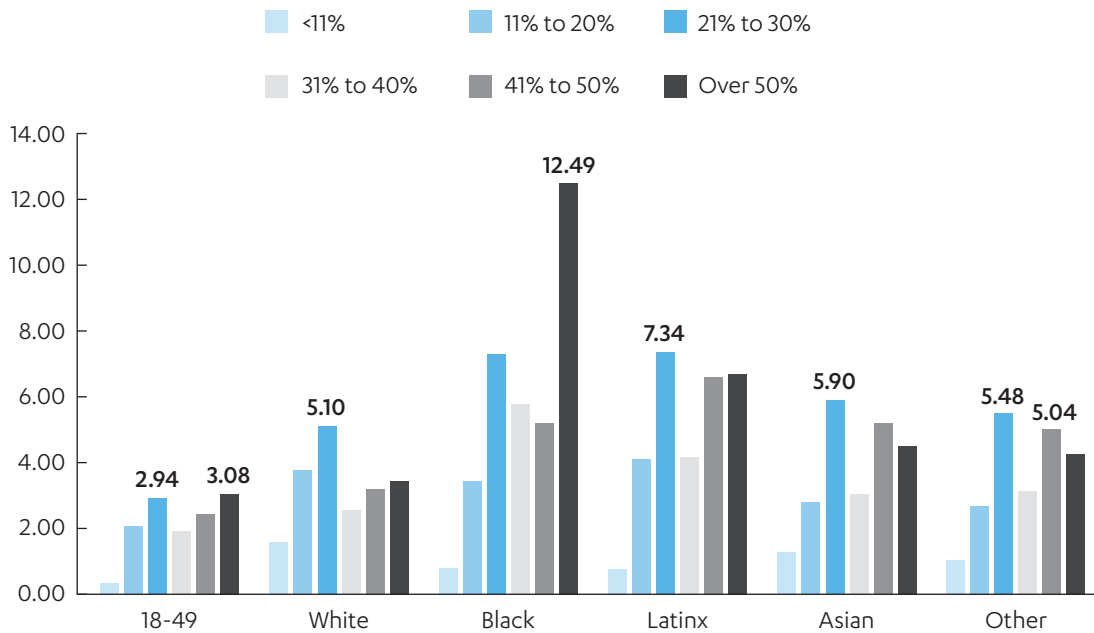
The following charts and tables document the details associated with these findings. Building on takeaways from earlier reports, they collectively underscore the degree to which diverse content has become a first-order business imperative in the Hollywood entertainment industry. Constituting nearly 43 percent of the U.S. population in 2021, people of color accounted for an even larger share of the market due to their heavy consumption of top theatrical and streaming films in 2021. And the data clearly show that these diverse audiences preferred diverse content.

FIGURE 1: Global Box Office (000,000s), by Minority Cast Share, Theatrical Films, 2011-2021
 (n=172, 164, 163, 162, 168, 173, 167, 140, 145, 56, 84)



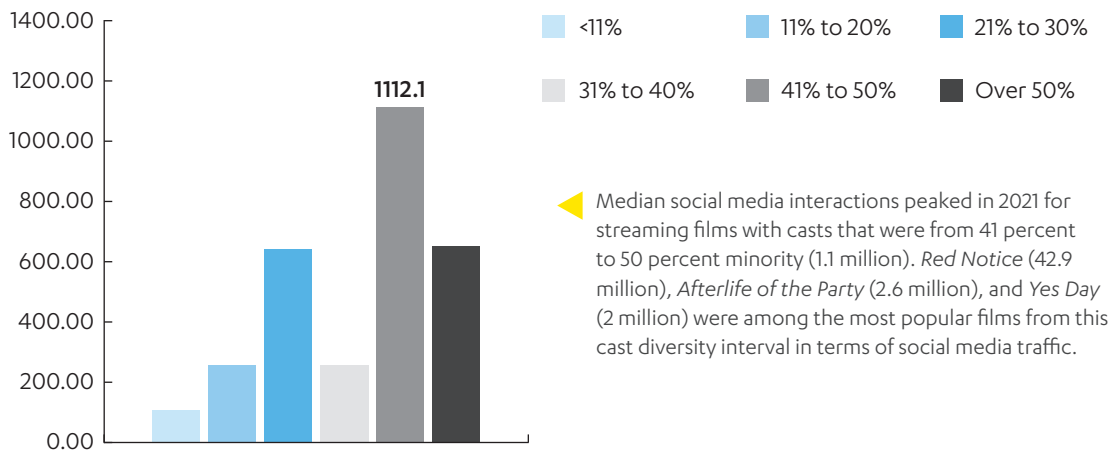
▲ Median global box office peaked for films with casts that were from 21 to 30 percent minority in 2021 (\$107.4 million). Twenty-five films fell into this cast diversity interval, including *Venom: Let There Be Carnage* (\$501.0 million), *A Quiet Place Part II* (\$297.4 million), and *Cruella* (\$233.3 million). In a year in which theater attendance began to rebound after a COVID-decimated 2020, theatrically released films with relatively diverse casts again outshined their less-diverse counterparts at the box office. Indeed, the 14 films with the least-diverse casts (less than 11 percent minority) were again the poorest performers in 2021.

FIGURE 2: 18-49 Ratings and HH Ratings, by Minority Cast Share, Streaming Films, 2021 (n=164)



During the second full year of the pandemic, the volume of major films released via streaming platforms continued to increase, from 87 films in 2020 to 164 in 2021. Again, for all groups, median ratings were highest for relatively diverse streaming films in 2021. That is, for viewers 18-49 (3.08 ratings points) and Black households (12.49 ratings points), ratings peaked for streaming films with majority-minority casts. Seventy-two films fell into this cast diversity interval in 2021, including: *Raya and the Last Dragon*, *Coming 2 America*, *Vivo*, and *Mortal Kombat*. For viewers 18-49, though, it should be noted that streaming films with casts that were from 21 percent to 30 percent minority came in a close second (2.94 ratings points). For White (5.10 ratings points), Latinx (7.34 ratings points), Asian (5.90 ratings points), and other-race households (5.48 ratings points), streaming films that were from 21 percent to 30 percent minority also enjoyed the highest ratings in 2021. Examples of the 36 films that fell into this diversity interval include: *Don't Look Up*, *The Boss Baby: Family Business*, and *The Suicide Squad*.

FIGURE 3: Total Social Media Interactions (000s), by Minority Cast Share, Streaming Films, 2021 (n=141)



Median social media interactions peaked in 2021 for streaming films with casts that were from 41 percent to 50 percent minority (1.1 million). *Red Notice* (42.9 million), *Afterlife of the Party* (2.6 million), and *Yes Day* (2 million) were among the most popular films from this cast diversity interval in terms of social media traffic.

TABLE 1: Top 10 Theatrical Films and Minority Box Office Share (2021)

Rank	Title	Box Office (000,000s)	Lead Race	Minority Share	Percent Minority
1	Spider-Man: No Way Home	\$1,368.9	White	60%	31% - 40%
2	No Time to Die	\$774.0	White	47%	31% - 40%
3	F9: The Fast Saga	\$726.2	Multi	65%	Over 50%
4	Venom: Let There be Carnage	\$501.0	White	56%	21% - 30%
5	Godzilla vs. Kong	\$467.9	White	59%	Over 50%
6	Shang-Chi and the Legend of the Ten Rings	\$432.2	Asian	58%	Over 50%
7	Eternals	\$401.5	Asian	49%	41% - 50%
8	Dune	\$394.6	White	39%	31% - 40%
9	Black Widow	\$379.6	White	51%	11% - 20%
10	Free Guy	\$331.5	White	44%	31% - 40%

▶ In 2021, people of color were responsible for the majority of opening weekend, domestic ticket sales for six of the top 10 films (ranked by global box office), matching the figure from a year earlier. Also replicating findings from 2020, eight of the top 10 theatrically released films in 2021 featured casts that were greater than 30 percent minority.

TABLE 2: Top 10 Streaming Films and Minority Household Share (2021)

▶ Minority households were overrepresented³⁰ among the households streaming each of the top 10 films in 2021 (ranked by total household ratings), up from eight films in 2020.

Rank	Title	Total HH Rating	Lead Race	Minority HH Share	Percent Minority
1	Luca	65.48	White	43.5%	21% - 30%
2	Raya and the Last Dragon	39.16	Asian	41.1%	Over 50%
3	Red Notice	32.33	Multi	42.3%	41% - 50%
4	The Mitchells vs. the Machines	26.21	White	45.5%	31% - 40%
5	Vivo	23.51	Latinx	60.1%	Over 50%
6	Coming 2 America	21.77	Black	60.1%	Over 50%
7	Cruella	21.02	White	42.0%	21% - 30%
8	The Tomorrow War	19.10	White	40.3%	31% - 40%
9	Black Widow	19.07	White	46.1%	11% - 20%
10	Fatherhood	18.05	Black	53.6%	Over 50%

TABLE 3: Top 10 Films by Asian Box Office Share (2021)

Rank	Title	Box Office (000,000s)	Genre	Asian Share	Percent Minority
1	Shang-Chi and the Legend of the Ten Rings	\$432.2	Action	17%	Over 50%
2	Last Night in Soho	\$23.0	Drama	13%	11% - 20%
3	Mortal Kombat	\$83.6	Action	12%	Over 50%
4	Snake Eyes	\$40.1	Action	12%	Over 50%
5	No Time to Die	\$774.0	Action	11%	31% - 40%
6	The Protégé	\$8.3	Action	11%	31% - 40%
7	The King's Man	\$47.8	Action	9%	11% - 20%
8	Spider-Man: No Way Home	\$1,368.9	Action	9%	31% - 40%
9	A Quiet Place Part II	\$297.4	Horror	9%	21% - 30%
10	The French Dispatch	\$42.4	Comedy	9%	31% - 40%



▶ Seven of the top 10 theatrical films in 2021 — ranked by the Asian share of opening weekend, domestic box office — featured casts that were more than 30 percent minority, matching the number of films from 2020.

TABLE 4: Top 10 Films by Black Box Office Share (2021)

Rank	Title	Box Office (000,000s)	Genre	Black Share	Percent Minority
1	Judas and the Black Messiah	\$6.8	Biography	59%	Over 50%
2	Respect	\$31.4	Biography	43%	Over 50%
3	Candyman	\$77.4	Horror	32%	Over 50%
4	Space Jam: A New Legacy	\$162.8	Adventure	31%	Over 50%
5	King Richard	\$118.2	Biography	28%	31% - 40%
6	Don't Breathe 2	\$47.2	Action	26%	11% - 20%
7	Spiral	\$40.6	Crime	24%	41% - 50%
8	The Protégé	\$8.3	Action	23%	31% - 40%
9	Tom and Jerry	\$132.8	Adventure	22%	41% - 50%
10	Escape Room: Tournament of Champions	\$313.6	Action	21%	41% - 50%

Nine of the top 10 theatrical films in 2021 — ranked by the Black share of opening weekend, domestic box office — featured casts that were more than 30 percent minority, up from seven films in 2020.

TABLE 5: Top 10 Films by Latinx Box Office Share (2021)

Rank	Title	Box Office (000,000s)	Genre	Latinx Share	Percent Minority
1	Encanto	\$206.3	Animated	57%	Over 50%
2	Clifford the Big Red Dog	\$73.4	Comedy	46%	31% - 40%
3	In the Heights	\$43.9	Drama	40%	Over 50%
4	Sing 2	\$144.6	Adventure	39%	21% - 30%
5	F9: The Fast Saga	\$726.2	Action	37%	Over 50%
6	Resident Evil: Welcome to Raccoon City	\$31.8	Action	37%	41% - 50%
7	Tom and Jerry	\$132.8	Adventure	35%	34% - 50%
8	Halloween Kills	\$131.6	Horror	34%	10% or Less
9	Spirit Untamed	\$42.6	Animated	34%	41% - 50%
10	Spider-Man: No Way Home	\$1,368.9	Action	33%	31% - 40%

Eight of the top 10 theatrical films in 2021 — ranked by the Latinx share of opening weekend, domestic box office — featured casts that were more than 30 percent minority, up from just four films in 2020.

TABLE 6: Top 10 Films by White Box Office Share (2021)

Rank	Title	Box Office (000,000s)	Genre	White Share	Percent Minority
1	Spencer	\$14.4	Biography	73%	10% or less
2	The Courier	\$26.0	Drama	72%	10% or less
3	American Underdog	\$15.0	Action	71%	31% - 40%
4	Stillwater	\$19.7	Crime	71%	21% - 30%
5	The French Dispatch	\$42.4	Comedy	70%	31% - 40%
6	West Side Story	\$52.7	Musical	67%	41% - 50%
7	Nightmare Alley	\$7.6	Crime	66%	10% or less
8	The Last Duel	\$30.6	Drama	64%	10% or less
9	Cry Macho	\$14.3	Drama	62%	Over 50%
10	The Green Knight	\$18.9	Adventure	62%	31% - 40%

Five of the top 10 theatrical films in 2021 — ranked by the White share of opening weekend, global box office — featured casts that were more than 30 percent minority, up from just a single film in 2020.

TABLE 7: Top 10 Streaming Films by Asian HH Rating (2021)

Rank	Title	Asian HH Rating	Genre	18-49 Rating	Percent Minority
1	Luca	67.02	Animated	35.35	21% - 30%
2	Raya and the Last Dragon	46.84	Action	24.37	Over 50%
3	Red Notice	36.84	Action	19.13	41% - 50%
4	The Mitchells vs. the Machines	31.97	Animated	13.28	31% - 40%
5	Black Widow	27.00	Action	14.36	11% - 20%
6	Shang-Chi and the Legend of the Ten Rings	26.79	Action	11.39	Over 50%
7	The Tomorrow War	25.69	Action	11.14	31% - 40%
8	Wish Dragon	23.10	Adventure	7.82	Over 50%
9	Vivo	22.14	Animated	8.94	Over 50%
10	Cruella	21.08	Adventure	15.97	21% - 30%



Seven of the top 10 streaming films in 2021 — ranked by Asian household rating — featured casts that were more than 30 percent minority, down from eight films in 2020.

TABLE 8: Top 10 Streaming Films by Black HH Rating (2021)

Rank	Title	Black HH Rating	Genre	18-49 Rating	Percent Minority
1	Luca	53.32	Animated	35.35	21% - 30%
2	The Harder They Fall	52.92	Western	7.64	Over 50%
3	Red Notice	40.53	Action	19.13	41% - 50%
4	Raya and the Last Dragon	37.06	Action	24.37	Over 50%
5	Vivo	36.33	Animated	10.93	Over 50%
6	Godzilla vs. Kong	31.74	Action	12.72	Over 50%
7	The Mitchells vs. the Machines	29.26	Animated	13.28	31% - 40%
8	Black Widow	26.30	Action	14.36	11% - 20%
9	The Tomorrow War	26.17	Action	11.14	31% - 40%
10	The Suicide Squad	24.34	Action	12.30	21% - 30%

Seven of the top 10 streaming films in 2021 — ranked by Black household rating — featured casts that were more than 30 percent minority, matching the number of films from 2020.

TABLE 9: Top 10 Streaming Films by Latinx HH Rating (2021)

Rank	Title	Latinx HH Rating	Genre	18-49 Rating	Percent Minority
1	Luca	100.00	Animated	35.35	21% - 30%
2	Raya and the Last Dragon	58.69	Action	24.37	Over 50%
3	Vivo	56.81	Animated	10.93	Over 50%
4	The Mitchells vs. the Machines	42.63	Animated	13.28	31% - 40%
5	Red Notice	42.50	Action	19.13	41% - 50%
6	Cruella	33.95	Adventure	15.97	21% - 30%
7	Wish Dragon	32.28	Adventure	7.82	Over 50%
8	Encanto	29.50	Animated	9.49	Over 50%
9	Godzilla vs. Kong	28.34	Action	12.72	Over 50%
10	Black Widow	25.97	Action	14.36	11% - 20%

Seven of the top 10 streaming films in 2021 — ranked by Latinx household rating — featured casts that were more than 30 percent minority, up from six films in 2020.

TABLE 10: Top 10 Streaming Films by White HH Rating (2021)

Rank	Title	White HH Rating	Genre	18-49 Rating	Percent Minority
1	Luca	56.03	Animated	35.35	21% - 30%
2	Raya and the Last Dragon	34.93	Action	24.37	Over 50%
3	Red Notice	28.26	Action	19.13	41% - 50%
4	The Mitchells vs. the Machines	21.63	Animated	13.28	31% - 40%
5	Cruella	18.48	Adventure	15.97	21% - 30%
6	Jungle Cruise	17.27	Action	12.72	31% - 40%
7	The Tomorrow War	17.27	Action	11.14	31% - 40%
8	PAW Patrol: The Movie	16.62	Animated	7.05	31% - 40%
9	Black Widow	15.55	Action	14.36	11% - 20%
10	Don't Look Up	15.45	Comedy	8.61	21% - 30%

Six of the top 10 streaming films in 2021 — ranked by White household rating — featured casts that were more than 30 percent minority, matching the number of films from 2020.

TABLE 11: Top 10 Streaming Films by Other HH Rating (2021)

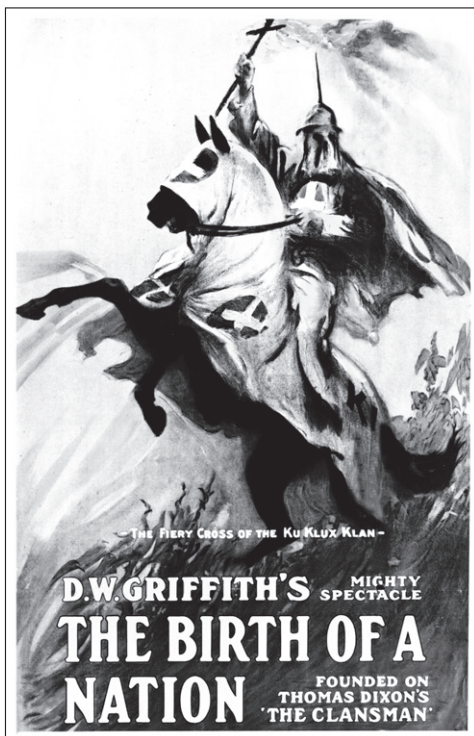
Rank	Title	Other HH Rating	Genre	18-49 Rating	Percent Minority
1	Luca	60.62	Animated	35.35	21 to 30%
2	Raya and the Last Dragon	43.08	Action	24.37	Over 50%
3	Red Notice	34.91	Action	19.13	41 to 50%
4	The Mitchells vs. the Machines	30.51	Animated	13.28	31 to 40%
5	Black Widow	25.02	Action	14.36	11 to 20%
6	Shang-Chi and the Legend of the Ten Rings	23.74	Action	11.39	Over 50%
7	The Tomorrow War	23.10	Action	11.14	31 to 40%
8	Wish Dragon	20.98	Adventure	7.82	Over 50%
9	Jungle Cruise	19.77	Action	12.72	31 to 40%
10	Vivo	19.64	Animated	10.93	Over 50%

Eight of the top 10 streaming films in 2021 — ranked by other-race household rating — featured casts that were more than 30 percent minority.

CONCLUSION

A New, Post-Pandemic Normal?

By 1915, a critical mass of motion-pictures companies had moved from the East Coast to Los Angeles, laying the foundation for the entertainment industry we recognize today as Hollywood.³¹ That year also marks the release of what many film historians argue was the first true Hollywood film, D.W. Griffith's racist epic,



The Birth of a Nation. Not only did the film glorify Ku Klux Klan efforts to protect White supremacy and feature White actors in blackface enacting potent Black stereotypes, but it also introduced advanced editing techniques and other cinematic innovations that film audiences take for granted today.³² *Birth of a Nation* was so popular with White audiences that U.S. President Woodrow Wilson screened the film for dignitaries at the White House, reportedly describing the film as “like history written in lightening.”³³

Within three years, of course, America and the rest of the world would be saddled with a deadly pandemic unlike anything seen again until the emergence of the COVID-19 virus nearly a century later. To be sure, the current pandemic has had an unprecedented impact on Hollywood business as usual, which was still in its most nascent form during the era of the “Spanish flu.”

Though moviegoers have been shying away from theaters for years, the COVID-19 pandemic has clearly accelerated the trend.³⁴ The plurality of top films released in 2021, as this report notes, were available solely on streaming platforms, while reboots and tent-pole franchises dominated a deflated box office. The question



raised by the previous *Hollywood Diversity Report*, and posed anew by this one, is whether the current state of affairs signals a new, post-pandemic normal for Hollywood? If so, what might this mean for an industry that has struggled with equity, diversity, and inclusion since its racist beginnings?

Film sector findings from this report reinforce those from the previous one: following the significant advances noted for people of color and women in 2020, both groups made small gains, or at least held their ground, relative to their White and male counterparts in 2021. As a result, both groups enjoyed proportionate representation among film leads and top film roles for the second year in a row. The previous report noted that many of the more diverse films considered for 2020 may not have made the cut as top 200 films (ranked by global box office) if the analysis had been restricted, as in previous reports, to films originally released in theaters. Given the continuing dominance of streaming platforms in 2021, the same is true for the films considered in this report. Just as the previous report questioned whether the spikes in on-screen diversity documented for

films released in 2020 were just an artifact of the pandemic, so too must we question the stability of the diversity apex this report documents for 2021. We are still too close to the pandemic to answer this question definitively, but the findings from this report, combined with other film sector trends, suggest that it's unlikely the post-pandemic normal will look like the one that immediately preceded it.

Streaming is Here to Stay

Despite the allure of the theater experience — the communal aspects³⁵ and the “particularity” of actually going out to watch a film³⁶ — the film sector has reordered itself in recent years. As two industry observers put it, “films featuring human beings coping with more human-sized problems”³⁷ seem tailor made for streaming platforms because “huge-budget franchise films with built-in audiences, produced by giant corporations, are squeezing out space once occupied by mid-budget original fare.”³⁸ To be sure, streaming services picked up some of the hottest projects on the market during the pandemic, when theater closures provided an opportunity to demonstrate, as never before, the potential for these platforms to serve as dominant

distributors of original film content. Film release strategies will continue to evolve, but the industry seems to be coalescing around a 45-day theatrical window, and simultaneous releases seem likely to stay around.³⁹ Indeed, studies show that 49 percent of pre-pandemic moviegoers are no longer going to theaters, and 8 percent of this missing group may be lost forever.⁴⁰ Today's multiplicity of film release modalities (documented in this report for 2021) has thus led to changes in the way companies measure, "or at least spin,"⁴¹ how successful a film is.

Findings from this report document that increasingly diverse audiences continued to flex their muscles at the box office and on streaming platforms in 2021, driving domestic ticket sales for the top 10 theatrical releases and accounting for a disproportionate share of the audiences for the top 10 streaming releases.

Findings also show that diverse audiences, now market anchors in the film sector, clearly

preferred diverse content. That is, the lion's share of the most highly rated films among diverse households in 2021 (and increasingly among White households and viewers 18-49) featured casts that were *at least* 30 percent minority. Following our conclusion in the previous report, Hollywood would benefit greatly from embracing 2021's (re)affirmation of the bottom-line possibilities associated with major advances on the diversity front — particularly in a sector reordered by the ascendance of streaming platforms. People of color constituted nearly 43 percent of the U.S. population in 2021, and their share is increasing by about half a percent a year. This trend, combined with diverse audiences' heavy engagement with original, streaming film content, underscores the importance of diversity as a first-order business imperative for the film industry.

Hollywood has come a long way since the days of *Birth of a Nation*.



ENDNOTES

- 1 See Janie Boschma, Daniel Wolfe, Priya Krishnakumar, Christopher Hickey, Meghna Maharishi, Renée Rigdon, John Keefe and David Wright, "Census Release Shows America Is More Diverse and More Multiracial Than Ever," *CNN*, August 12, 2021, <https://www.cnn.com/2021/08/12/politics/us-census-2020-data/index.html>.
- 2 This report considers only the top eight actors in each film, in order of appearance in the credits.
- 3 This report considers Oscar winners in 2021 for films released from January 2020 through February 2021. The report was released prior to the announcement of 2022 Oscars winners for films released in 2021. For the same reason, the previous report considered Oscar winners for films released in 2019.
- 4 These films included the top 200 theatrically released films at the global box office in 2021, minus non-English language titles, and all English-language films released on major streaming subscription platforms (Amazon Prime, AMC+, Apple TV+, BET+, Crackle Plus, Disney+, HBO Max, Hulu, Netflix, Paramount+, and Peacock) in 2021. Eighty-eight of the films were released both in theaters and on streaming subscription platforms. For this report, "streaming" will refer to subscription video on demand (SVOD). Films released only on transactional video on demand (TVOD) and/or were not ranked in the top 200 at the global box office in 2021 were not included in the analysis. Theatrical films and their corresponding box office data were collected by selecting films ranked from 1 to 200 on the "2021 Worldwide Box Office" page on Box Office Mojo on January 3, 2022. Streaming (SVOD) films were selected using the aforementioned criteria on Studio System with an initial search on December 10, 2021 and then a final search on January 5, 2022.
- 5 Race/ethnicity was coded into the following major categories: White, Black, Asian, Native, Latinx, Black Latinx, Multiracial/Multiethnic (referred to as multiracial throughout this report), and MENA (Middle Eastern or North African). While Black Latinx cases are combined with Latinx cases in featured charts and tables, Black Latinx counts are included in the endnotes. The Latinx category contains persons of Latin American origin or descent and does not include Spaniards. The Native category contains global indigenous peoples, including Native Americans, Native Hawaiians, and Native New Zealanders. The MENA category contains persons descended from the following nationalities: Algerian, Bahraini, Egyptian, Emirati, Iranian, Iraqi, Israeli, Jordanian, Kuwaiti, Lebanese, Libyan, Moroccan, Omani, Palestinian, Qatari, Saudi Arabian, Syrian, Tunisian, and Yemeni. Transnational ethnic groups from the MENA region are also included, such as Amazigh or Berber, Assyrian, Bedouin, Chaldean, Copt, Druze, Kurdish, and Syriac, as well as pan-ethnic groups such as Arab, Middle Eastern, and North Africa.
- 6 Gender was coded according to the following categories: male, female, transgender, and non-binary. Transgender and non-binary cases were combined as "other" in featured charts and tables.
- 7 For each film, this study considers the top eight credited actors for the purpose of computing overall cast diversity.
- 8 For SVOD content ratings, Nielsen identifies Programs & Episodes viewed through the TV glass by the National TV panel. Because Nielsen measures these SVOD programs independently, Nielsen needs to capture certain viewership levels for a program through its panel in order to be able to report on it. The HH ratings presented by race are based on the race of the head of household, while 18-49 ratings are based on individual viewers. The social media ratings are collected by TalkWalker, formerly a unit within Nielsen. The social media ratings are the total interactions during the period measured. The Twitter interactions measure ascribes tweets to a streaming film, and includes engagements (i.e., replies, retweets, and quotes) in relation to a valid tweet, regardless of whether the engagements include the name of the film. The Facebook interactions measure considers the aggregated and anonymized number of comments, shares and likes by consumers about a given streaming film shared on their news feeds and the news feeds of their friends. The Instagram engagement metric is the sum of comments and likes from owned Instagram content (content posted by official accounts associated with a program or sports event, including network, program, talent, league, team, announcer and athlete accounts).
- 9 *2020 Theatrical and Home Entertainment Market Environment Report (THEME)*, p. 34 (Washington, DC: Motion Picture Association of America, 2021), <https://www.motionpictures.org/wp-content/uploads/2021/03/MPA-2020-THEME-Report.pdf>.
- 10 Patrick Frater, "Global Box Office Hit \$21.4 Billion in 2021, Says Analyst," *Variety*, January 6, 2022, <https://variety.com/2022/film/box-office/global-box-office-2021-1235148732/>.
- 11 José Gabriel Navarro, "Box Office Revenue in the United States and Canada from 1980 to 2021," *Statista*, Jan 13, 2022, <https://www.statista.com/statistics/187069/north-american-box-office-gross-revenue-since-1980/>.
- 12 Films were categorized as "Streaming" if they were released directly to a streaming (SVOD) platform in 2021 and not released theatrically.
- 13 Films were categorized as "Theatrical" if they were ranked within the top 200 at the global box office in 2021 and were *not* released on TVOD/SVOD within the traditional theatrical window (74 days TVOD/90 days SVOD).
- 14 Films were categorized as "Streaming/Limited Theatrical" if they were released on a streaming (SVOD) platform in 2021, released in ten or fewer non-domestic markets, and/or released in limited theaters (600 or less) domestically. Three of these films were ranked in the top 200 at the global box office as well.
- 15 Films were categorized as "Streaming/Theatrical" if they were released on a streaming (SVOD) platform in 2021, released in more than ten non-domestic markets, and/or released wide domestically within the 45-day modified theatrical window. All, except for five films, were ranked in the top 200 at the global box office.

- 16 Films were categorized as “TVOD/Theatrical” if they were ranked within the top 200 at the global box office in 2021 and they were released on TVOD within the traditional theatrical window.
- 17 Films were categorized as “Streaming/Theatrical45+” if they were released on a streaming (SVOD) platform in 2021, released in more than ten non-domestic markets, and/or released wide domestically between the 45-day modified theatrical window and the traditional theatrical window (74 days TVOD/90 days SVOD). All these films were ranked in the top 200 at the global box office.
- 18 To compare proportionate representation for the individual groups, this report employs the latest Census population data from 2020 that shows the following shares: 10.2 percent multiracial/multiethnic, 18.7 percent Hispanic/Latinx, 12.4 percent Black, 6 percent Asian, and approximately 1.3 percent Native (Nicholas Jones, Rachel Marks, Roberto Ramirez, and Merarys Ríos-Vargas, 2020 Census Illuminates Racial and Ethnic Composition of the Country, *United States Census Bureau*, August 12, 2021, <https://www.census.gov/library/stories/2021/08/improved-race-ethnicity-measures-reveal-united-states-population-much-more-multiracial.html>). Although MENA is not considered a separate racial category in the Census, the most recent data show that this group is approximately 0.9 percent of the population (Sarah Parvini and Ellis Simani, Are Arabs and Iranians White? Census Says Yes, But Many Disagree, *Los Angeles Times*, March 28, 2019, <https://www.latimes.com/projects/la-me-census-middle-east-north-africa-race/>).
- 19 This report provides data on the top eight actors for each film, in order of on-screen credits. These featured actors are used to compute each film’s overall cast diversity, as well as aggregate race, gender, and intersectional figures across all films.
- 20 Among White actors, there was one actor who identified as non-binary.
- 21 Among Black actors, there were two actors who identified as non-binary and one transgender person.
- 22 Among Asian actors, there was one actor who identified as non-binary.
- 23 Among Latinx actors, there were 10 Black Latinx males, 10 Black Latinx females, one Black Latinx person who identified as non-binary, and one Black Latinx transgender person.
- 24 Among White directors, there was one transgender person.
- 25 Among White writers, there was one transgender person.
- 26 Among Latinx writers, there was one Black Latinx male.
- 27 “Academy Establishes Representation and Inclusion Standards for Oscars® Eligibility,” Academy of Motion Pictures Arts and Sciences, September 8, 2020, <https://www.oscars.org/news/academy-establishes-representation-and-inclusion-standards-oscars-eligibility>.
- 28 Adam B. Vary, “Oscars Nominate Most Diverse Acting Slate Ever, Including First Asian American Best Actor,” *Variety*, March 15, 2021, <https://variety.com/2021/film/news/oscars-diversity-steven-yeun-riz-ahmed-1234928862/>.
- 29 In this chart (and others that consider the odds of winning an Oscar or Emmy), the conditional probability of Event A (winning an award) is computed, given that Event B (overall cast diversity) has already occurred.
- 30 Defined here as accounting for more than 34 percent of the households streaming the film. See <https://www.statista.com/statistics/242027/number-of-households-in-the-us-by-ethnic-group/>.
- 31 “Hollywood,” *History*, August 21, 2018, <https://www.history.com/topics/roaring-twenties/hollywood>.
- 32 Darnell M. Hunt, *Channeling Blackness: Studies on Television and Race in America* (New York: Oxford University Press, 2005).
- 33 Alexis Clark, “How ‘The Birth of a Nation’ Revived the Ku Klux Klan,” *History*, July 29, 2019, <https://www.history.com/news/kkk-birth-of-a-nation-film>.
- 34 “How The Pandemic Is Changing American Cinema,” *NPR*, January 25, 2022, <https://www.npr.org/2022/01/25/1075590056/how-the-pandemic-is-changing-american-cinema>.
- 35 Alissa Wilkinson, “What Do Moviegoers Want from the Movies Now?” *Vox*, December 25, 2021, <https://www.vox.com/22841390/movie-theaters-cinema-pandemic>.
- 36 Brent Lang and Rebecca Rubin, “How Movie Theaters Fought to Survive (Another) Year of Turbulence and Change,” *Variety*, December 29, 2021, <https://variety.com/2021/film/news/movie-theaters-box-office-2021-pandemic-omicron-1235142992/>.
- 37 Ibid.
- 38 Wilkinson, “Moviegoers Want.”
- 39 Travis Clark, “What the Future Looks Like for Movie Theaters in 2022, According to Top Industry Execs,” *Business Insider*, December 23, 2021, <https://www.businessinsider.com/what-future-looks-like-for-movie-theaters-2022-industry-outlook-2021-12>.
- 40 Lang and Rubin, “Movie Theaters Fought.”
- 41 Ibid.

ABOUT THE AUTHORS

Dr. Darnell Hunt is Dean of the Division of Social Sciences at UCLA, and professor of sociology and African American Studies. Dr. Hunt has written extensively on race and media. He is editor of *Channeling Blackness: Studies on Television and Race in America*, (Oxford University Press, 2005), an anthology of classic and contemporary studies examining television access and images of race. He also is the lead author on the past eight installments of the annual Hollywood Diversity Reports. For more than 25 years, Dr. Hunt has contributed to numerous projects addressing the issues of access and diversity in the entertainment industry, including work with the WGA, SAG, AFTRA, NAACP, Color of Change and the U.S. Commission on Civil Rights.

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