



2014 San Francisco Residents Opinion Survey Results

**PROJECT** (see Appendix A for survey questionnaire deployed)

Next Steps Marketing, in conjunction with input from FilmSF, developed and managed an online survey. The purpose of the survey was to get a better understanding of how a variety of San Franciscan residents feel about filming activities within San Francisco neighborhoods.

The 13 question survey was live from Oct 29, 2014 – through Dec 13, 2014. FilmSF staff deployed the survey through 5 different channels:

- The Mayor's Office of Neighborhood Services
- NextDoor
- Small Business Administration
- SF Travel
- Requested to neighborhood groups to post the survey link in their newsletter

SUMMARY SURVEY RESULTS (see Appendix B for full survey results)

1,300+ individuals took the survey, with the vast majority reporting positive to very positive feelings about filming activities in San Francisco.



- 90% state they like seeing San Francisco neighborhoods in Film and TV Shows
- There is strong agreement that filming activities impact the local economy positively, with job creation being the weakest point of agreement:
 - Film Production related businesses: 91%
 - Tourism related businesses: 88%
 - San Francisco's Overall Economy: 87%
 - Hotels & Restaurants: 87%
 - Jobs for San Franciscans: 71%
- 76% would like more filming with 33% of respondents wanting much more
- Many report seeing filming occur within the city in the last 2 years (all that apply):
 - 1/2 in their neighborhood
 - 1/3 near their work location
 - 2/3 somewhere else in the city
- 77% like seeing film crews with 42% stating that they like it very much

- 73% reported that they were positively impacted in the following ways (respondents chose all responses that applied):
 - Enjoyed the experience of seeing the filming: 62.4%
 - Saw my neighborhood on screen: 39.0%
 - Got to see a scene constructed: 23.2%
 - People/businesses I know benefited financially: 22.5%
 - I experienced a monetary benefit: 4.7%

- While 59% reported NOT being NEGATIVELY impacted by film activities, the 41% who were negatively impacted reported the following (respondents chose all responses that applied):
 - Street access was closed: 31.2%
 - Parking was restricted: 24.3%
 - Couldn't get access to a local store or restaurant: 9.5%
 - Bright lights in the evening: 5.5%
 - Great deal of noise in the area: 4.5%

- The impact of film activities on the San Francisco Economy is the greatest area of “unknown” for many respondents:
 - 70% report having no idea how the money is spent
 - 38% believe the industry generates \$1 million - \$10 million
 - 31% believe the industry generates \$10.1 million - \$20 million
- 80% feel the MUNI ad images provide insight into economic impact and 70% feel the images did make them feel more positive about the San Francisco film industry.

SURVEY COMMENTS & OBSERVATIONS (see Appendix C)

The survey generated over 1,400 comments. About 40% of the comments are positive, 40% negative and 20% neutral. Additionally, nearly 1/4 of respondents offered a suggestion.

Complaints received by FilmSF are **primarily around street closures and parking issues** in the affected neighborhoods. The survey confirms this is the case but residents cite other issues as well:

- Disrespect of film crews for the local area environment and its residents
- Incorrect signage or signs that aren't posted or removed in a timely manner

- No clear economic or other types of benefit shared with neighborhood filmed
- Lack of transparency or information about what is being filmed
- Distrust of FilmSF's figures about local economic benefit and the number of (long-term) jobs created
- Dislike of the marketing message in terms of design and focus of the message

On the positive side:

- Residents are proud of their city and like seeing San Francisco on the screen – film/TV
- There is broad support for the continued growth and efforts of FilmSF to bring more production to the city
- Respondents believe that there is a positive economic benefit to San Francisco that is both immediate and also has a longer “halo effect” as depictions of San Francisco is likely to increase tourism.

Below Table is a breakout of the number of comments per Question. Unsurprisingly, given the “micro local pride” of residents, Question 4 generated some harsh criticism of neighborhoods that were excluded from the survey, with some taking it as a lack of respect and regard for their area and another indication of the city's lack of concern and efforts for their area.



Question 13, which was a final opportunity for respondents to offer additional input, garnered the most suggestions regarding improvements and information they would like to have.

Q#	Question	Total		
		Positive	Negative	Neutral
1	How do you feel about seeing San Francisco neighborhoods in a film or TV show?	153	34	19
2	In general, what do you think is the overall effect of filming movies and TV shows in San Francisco on the local economy. Please use the scale below to evaluate each.	0	2	0
3	Please think about how much filming (TV and movies) is currently done in San Francisco. Which response below describes how you feel about the level of filming that should occur in the future?	51	13	28
4	In which neighborhood do you currently reside?	0	20	0
5	In the past two years, have you personally seen any filming activities occurring in San Francisco?	0	0	0
6	Which best describes how you typically feel about seeing film crews working in San Francisco?	65	38	18
7	If you recall seeing filming occur, were you NEGATIVELY impacted by the filming in any of the following ways?	32	70	32

Q#	Questions	Positive	Negative	Neutral	Total Comments
8	If you recall seeing filming occur, were you POSITIVELY impacted by the filming in the following ways?	36	3	7	46
9	How much revenue do you think the film industry directly or indirectly contributes to the San Francisco economy each year?	2	149	32	183
10	How do you think money that is generated by filming activities is used?	22	45	16	83
11	Do the images above give you a better understanding of the economic benefits San Francisco receives from filming activities?	58	105	23	186
12	Do the messages contained in the above images give you a more positive opinion of the San Francisco Film industry? (Select one)	36	55	8	99
13	Thank you for participating in this survey. If you would like to provide any additional comments about filming in San Francisco please enter them in the box below.	115	38	94	247
Total Comments		570 40.2%	572 40.2%	277 19.6%	1419 100.0%

RECOMMENDATIONS

- In general, respondents – even negative commenters – express support for the filming in San Francisco. FilmSF would benefit by introducing and investing in communication tools that

showcase recent and upcoming activities and that highlight the people/businesses affected positively by filming and the financial impact to the local economy. Ways to do that might include:

- Provide a human-face to FilmSF with quarterly enewsletter or “digimag” that highlights what is going on with FilmSF. Focus on what we learned people like—the locations around the city, seeing the celebrities, giving back to the community, financial impact on specific people or businesses.
- Respondents expressed the biggest area of unknown is the economic impact of filming activities. There is very little awareness about the economic impact of film activities and comments generally note a feeling that it’s a payday for the City that is not shared in any constructive way with residents.
 - Develop a “film by the numbers” infographic for the FilmSF site
- Respondents have a strong emotional connection to seeing San Francisco on the screen and would react positively to more information about filming activities in the City.
 - The FilmSF Facebook page has the potential to serve as an ongoing point of contact for a large audience. Undergo a campaign of paid and organic posts to substantially grow the list from the current 2,900 friends.

- Street closures and parking are by far the greatest dissatisfactions expressed by survey respondents and are the most complaints received in the FilmSF office. A good number believe the City doesn't have a real interest in finding workable solutions to the problems that neighborhoods experience.
 - Implement a post-filming "how did it go" survey to measure how the experience went and use responses to make improvements or measure how changes put into effect worked to reduce complaints.
 - Create an FAQ on the website addressing these and other frequent issues