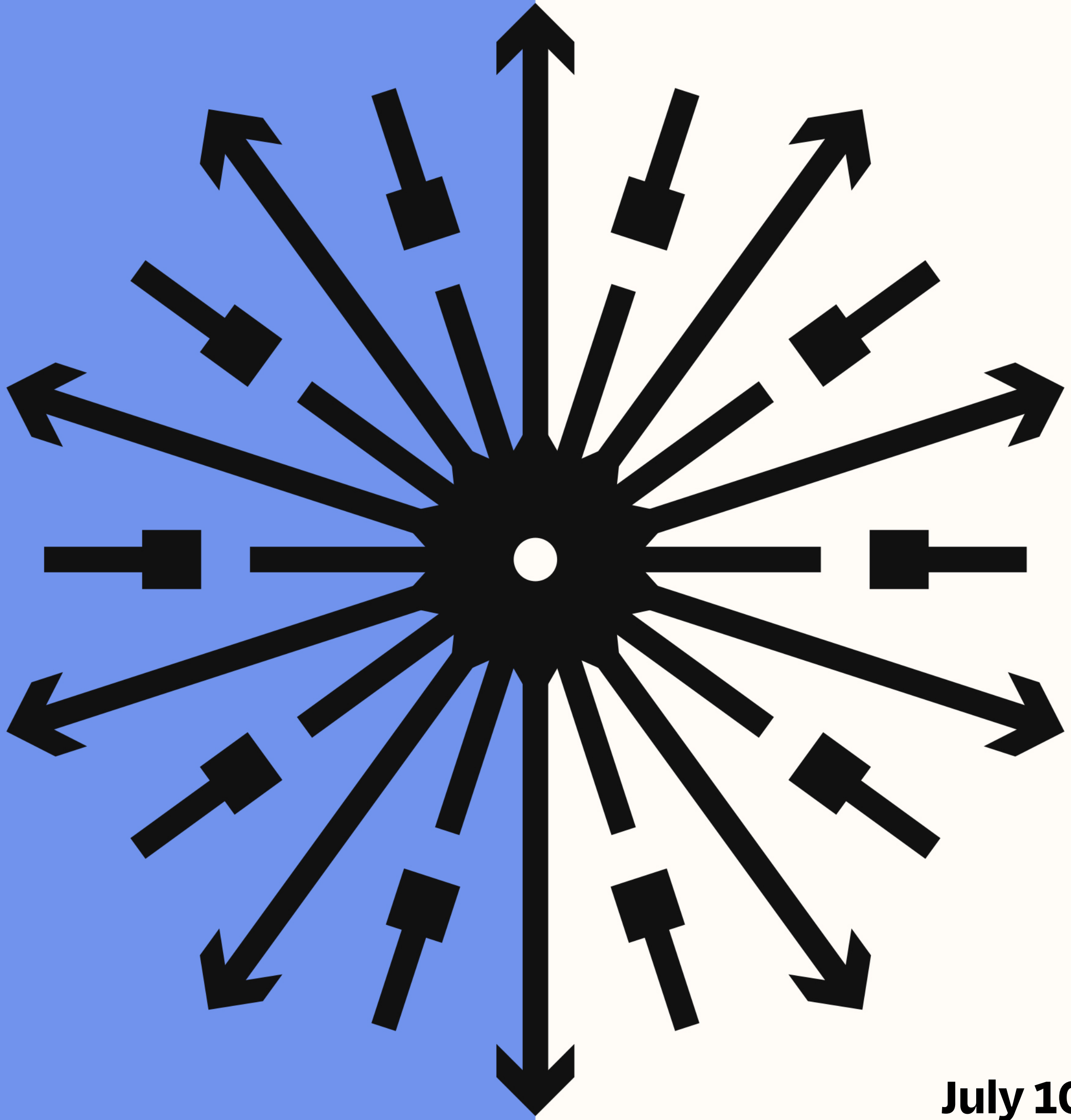
BAVC MEDIA

Bay Area Survey of Film & Media Makers



Prepared by John Carnwath, WolfBrown

July 10, 2024

Introduction

The Bay Area has long been on the cutting edge of media production. Whether one looks at documentaries, fiction, animation, or the introduction of new media technologies, the Bay Area has often been at the forefront of the film and media sector.

Yet in the past, the shape, size, and needs of the creative workforce that drives the Bay Area's media sector have been poorly understood, and there has been no coherent strategy to support the sector at the regional level.

This study presents findings from a survey of 324 Bay Area film and media makers to inform future policy discussions, programs, and advocacy efforts. While the survey can't provide a definitive assessment of the sector as a whole due to its limited scale, it illustrates the diverse contexts within which media creators operate and highlights challenges that warrant further attention.

Key Takeaways & Implications

Key Takeaways and Implications

1. **Our data shows a correlation between age and race/ethnicity, with older respondents being more likely to identify as White. (p. 12)**
   - **Implication:** Further research is necessary to determine whether this finding reflects bias in our survey sample or whether the Bay Area's media sector is becoming more diverse.
2. **On average, respondents work in 4.3 media fields. Just 12% are only active in a single field. (p.15)**
   - **Implication:** This suggests a high level of interconnectedness between media fields in the Bay Area.
3. **73% of respondents pursue their primary media occupation as business owners or as self-employed/ freelance/contract workers. (p.18)**
   - **Implication:** Most pursue their primary media occupation at their own financial risk.
4. **Slightly more respondents report teaching film or media production than working in the tech sector (28% vs. 27%). Just 6% of respondents earn income through app-based gig services. (p. 20)**
   - **Implication:** The Bay Area's tech sector and work through gig apps may be a less significant source of income for media workers than previously thought.
5. **The median income among survey respondents is roughly in line with the general population of the Bay Area. (p. 21)**
   - **Implication:** Further research is needed to contextualize this finding. How does the income of media makers compare to other similarly well-educated workers? How does their income compare to other small business owners and/or freelance workers?
6. **On average, respondents earn half their income from their primary media occupation and another 14% from other work in the media sector. (p.22)**
   - **Implication:** About one third of respondents' income comes from non-media sources.
7. **Documentary filmmakers earn more money overall and derive a greater share of their income from their media work than narrative film makers. (p.23 -25)**
   - **Implication:** There are several possible explanations for this (e.g., the documentary filmmakers in our sample are older and have more years of experience, which could lead to higher incomes), but these would need to be tested with a larger, more representative sample.

Key Takeaways and Implications (cont.)

8. Editors earn more income from their primary creative practice than Directors and Screenwriters. (p. 26)
   - **Implication:** Based on this finding, one might hypothesize that media occupations that are transferable to a wide range of applications are more lucrative than others, but further research is needed to test this.
9. 82% of respondents have worked for free or below standard rates on projects for friends and colleagues in the past 2 years. (p.28)
   - **Implication:** By working for free or below standard rates, media makers are subsidizing the Bay Area's media production sector.
10. Almost two thirds (63%) of respondents moved to the Bay Area as an adult. 17% came to the Bay Area for film school. (p. 35)
    - **Implication:** While the present study can't tell us what specifically draws them to the Bay Area, the data suggests it is an attractive destination for media makers.
11. 43% of respondents think the odds they'll still be living in the Bay Area in three years are 50/50 or lower. (p. 36)
    - **Implication:** Many survey respondents consider their future in the Bay Area uncertain. Write-in responses highlighted the high cost of living as a challenge, but also noted the advantages of the supportive local film community and inspiring location.
12. 57% describe their media careers as "growing" (24%) , "stable" (18%), or "recovering" (15%). However, 32% describe their careers as "stagnant," and 12% say it's "declining." (p. 37)
    - **Implication:** While some have reservations, most respondents seem to have an optimistic outlook for their careers in media.
13. Respondents are generally satisfied with the availability of personnel, locations, and equipment in the Bay Area. Opinions are split on the availability of production and post-production facilities, as well as opportunities for training and exhibition. (p. 38 & 39)
    - **Implication:** According to the survey respondents, the biggest gaps in the availability of production resources exist in access to financing, including private investors, foundation support, and tax incentives.
    - A small number of respondents shared concerns about safety and theft during film shoots in write-in responses. Although this wasn't a focus of the study, it may be worth exploring to what extent security concerns impact local productions in future research.

Methodology

Methodology

- Data was collected through an online survey, between August 18 and November 1, 2023. The survey was promoted by BAVC Media as well as partner organizations (e.g., BAMMS, Cinemama, The Roxie Theater, SFFILM) through email, social media, in-venue announcements, and flyers. Some social media posts were boosted (paid) to increase their reach.

- To take the survey, respondents had to confirm their eligibility by answering the following three questions:
  - Are you 18 years of age, or older?
  - In the past two years, have you been involved in the production of film or media content (incl. film, television, web content, etc.) either in a creative or administrative capacity, whether paid or unpaid?
  - Do you currently live in the Bay Area (defined as the following counties: Alameda, Contra Costa, Marin, Napa, San Francisco, San Mateo, Santa Clara, Solano, Sonoma)?

- The median completion time was approximately 12 minutes.

- Immediately upon completing the survey, respondents were able to view preliminary results for select survey questions on an online dashboard. Respondents could also register to receive a free digital copy of the final report.

- The research project was overseen by an Advisory Committee consisting of: Sam Bempong (Co- organizer, East Bay Film Collective; CEO, Mindful Media), Anne Lai (Executive Director, SFFILM), Rivkah Beth Medow, (Principal, Frankly Speaking Films), Masashi Niwano (Director of Artist Development, SFFILM), and Lex Sloan (Executive Director, The Roxie Theater).

Overview of Survey Sample

Survey Sample

We received a total of 324 valid survey responses.

The respondents represent a diverse cross-section of perspectives; however, since participants were not randomly selected, we can't assume they accurately reflect the entire population of Bay Area Film and Media Makers.

The Sample Includes:

- **Good representation of all age groups from 25 to 65**
- **44% of respondents identifying as multi-racial or people of color**

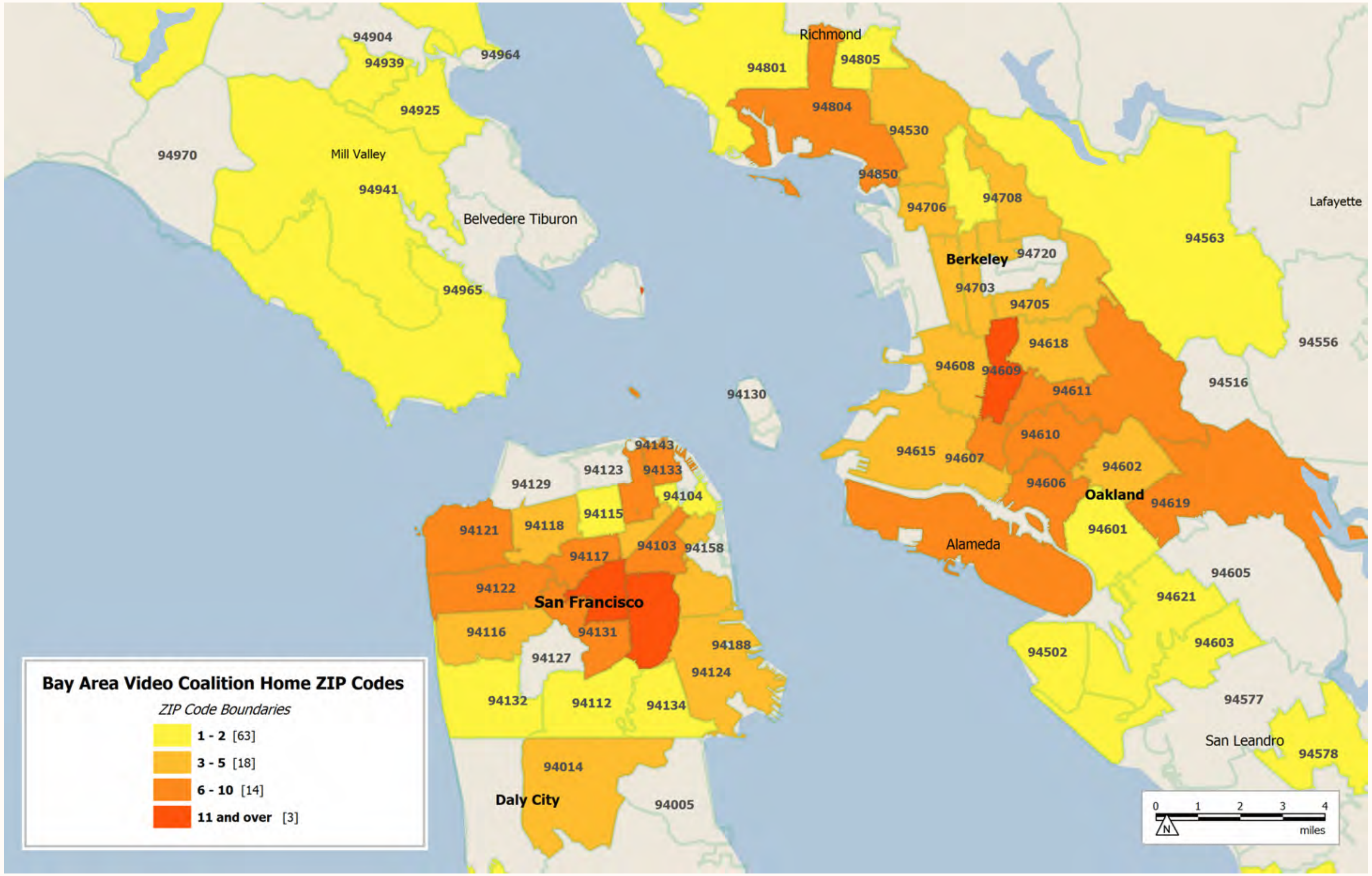
DEMOGRAPHIC SUMMARY	Number of	% of
Age Cohorts, n=280		
18-24	11	4%
25-34	49	18%
35-44	82	29%
45-54	72	26%
55-64	46	16%
65+	20	7%
Race/Ethnicity (multiple select; does not sum to 100%) n=295		
American Indian or Alaska Native or Indigenous or First Nations	13	4%
Arab or Middle Eastern or North African	12	4%
Asian or Asian American	55	19%
Black or African American	24	8%
Hispanic or Latino(a) or Latinx or Spanish origin	45	15%
Native Hawaiian or Pacific Islander	4	1%
White/Caucasian	186	63%
Prefer to self-identify	16	5%
Total BIPOC or Multi-Racial (selecting at least one option other than White)	*130*	*44%*
White/Caucasian only	*153*	*52%*

Survey Sample (cont.)

- **52% female, 35% male, and 9% respondents outside of the male/female binary**
- **Almost exclusively college educated respondents**
- **16% respondents with disabilities**

DEMOGRAPHIC SUMMARY *(continued)*	Number of	% of
Gender, n=298		
Female only	154	52%
Male only	103	35%
Agender, Genderfluid, Genderqueer, Nonbinary, Third Gender, Two-Spirit, or multiple selections	26	9%
Prefer to self-identify	8	3%
Education, n=301		
Some college, no degree	27	9%
Nondegree art or technical school training	6	2%
Associate degree	9	3%
Bachelor's degree	148	49%
Graduate or professional degree	111	37%
Other demographics		
Respondents with disabilities (n=280)	45	16%
Children in household (n=297)	77	26%
Gay/Lesbian, Queer, Bisexual, Asexual, Pansexual, Questioning (n=296)	103	35%
Transgender (n=298)	6	2%

Geographic Distribution Of Respondents (Home Zip Code)



San Francisco (102), Oakland (74), and Berkeley (23) received the highest response numbers.

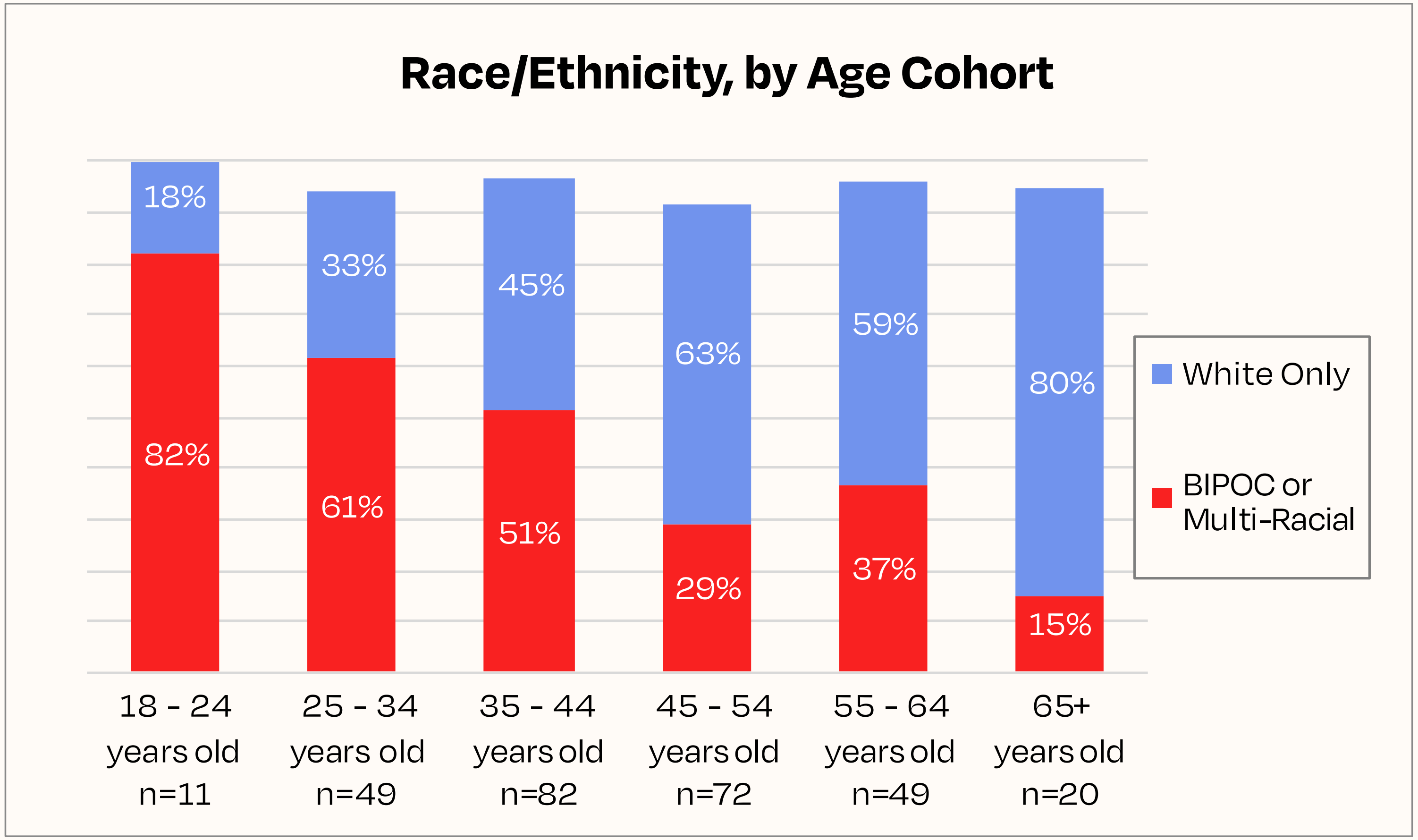
Total responses by county:

- Alameda: 112
- Contra Costa: 18
- Marin: 11
- Napa: 2
- San Francisco: 102
- San Mateo: 11
- Santa Clara: 12
- Solano: 3
- Sonoma: 6

NOTE: This map focuses on the areas with the highest concentration of responses to show detail. A small number of responses were received from ZIP codes beyond the area shown here.

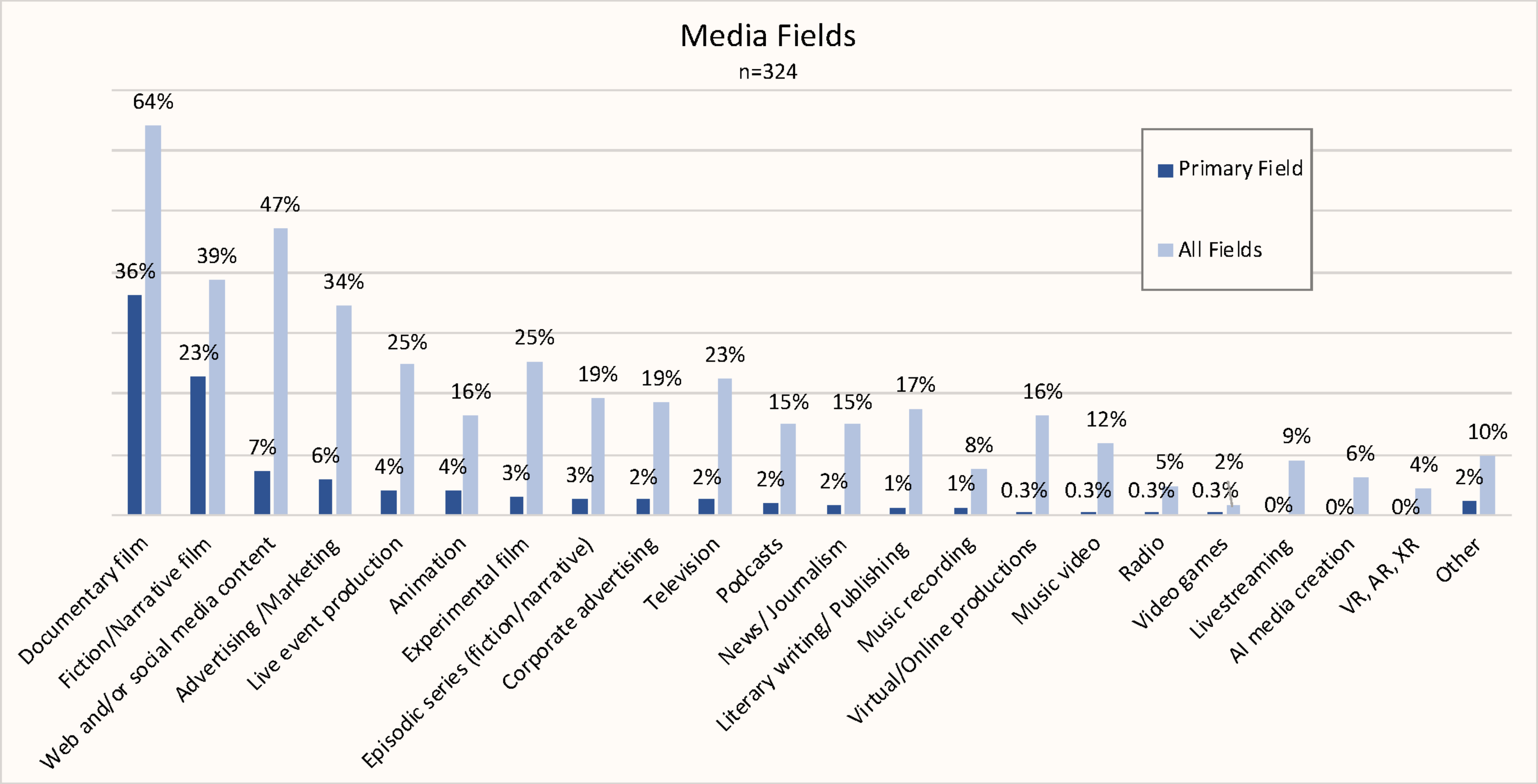
There is a strong correlation between age and race/ethnicity within the survey sample.

- **Older age cohorts are less diverse in term of race and ethnicity.**
- **Due to the limitations of the sampling method, we can't say whether that reflects a broader trend in the demographics of the field.**
- **This correlation between age and race/ethnicity complicates comparisons between subgroups.**



Findings

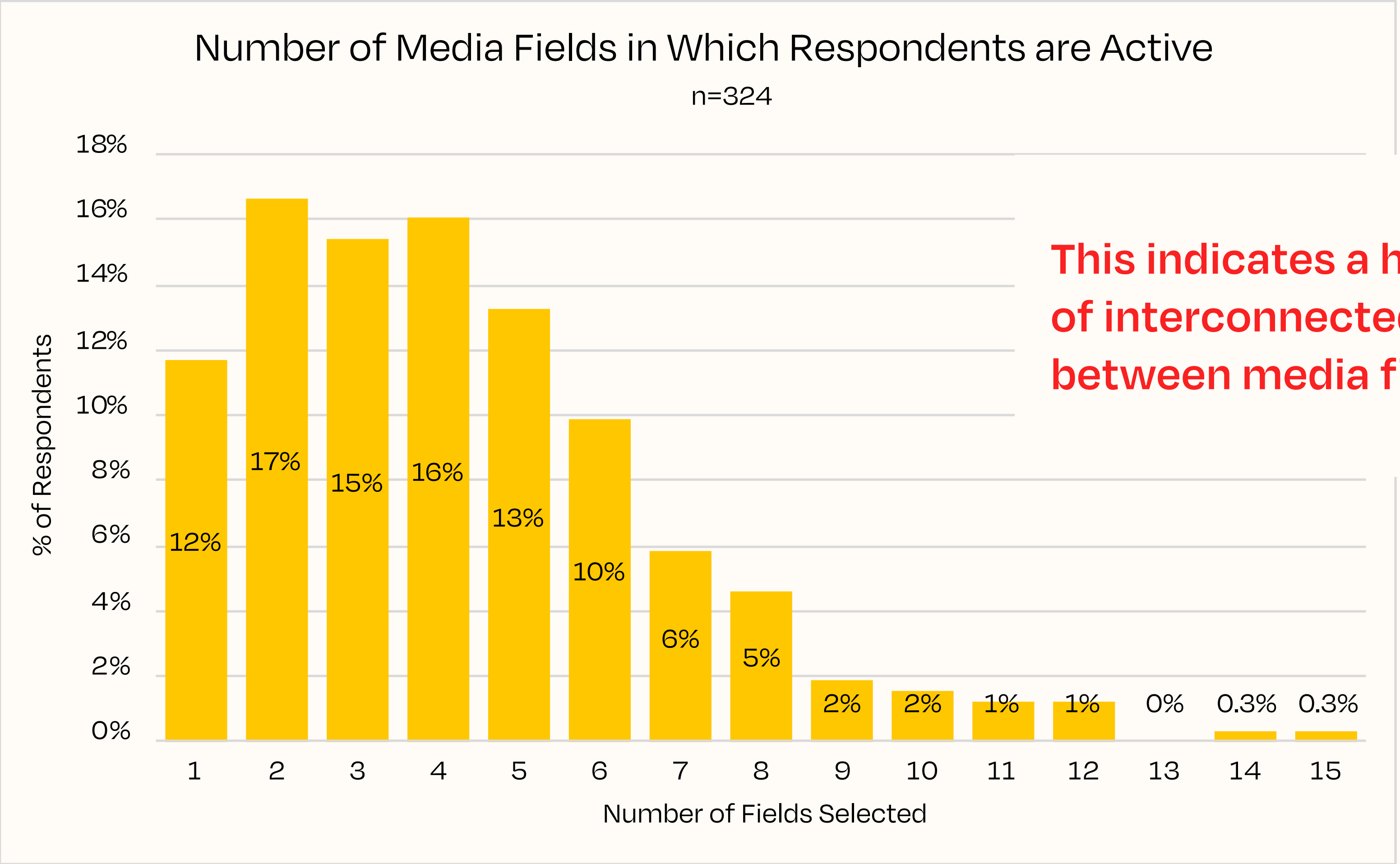
36% of respondents selected “Documentary Film” and 23% selected “Fiction/Narrative Film” as their primary media field.



While respondents could only select one “primary” field, they were able to indicate multiple additional areas of activity (shown as “All Fields” in the chart).

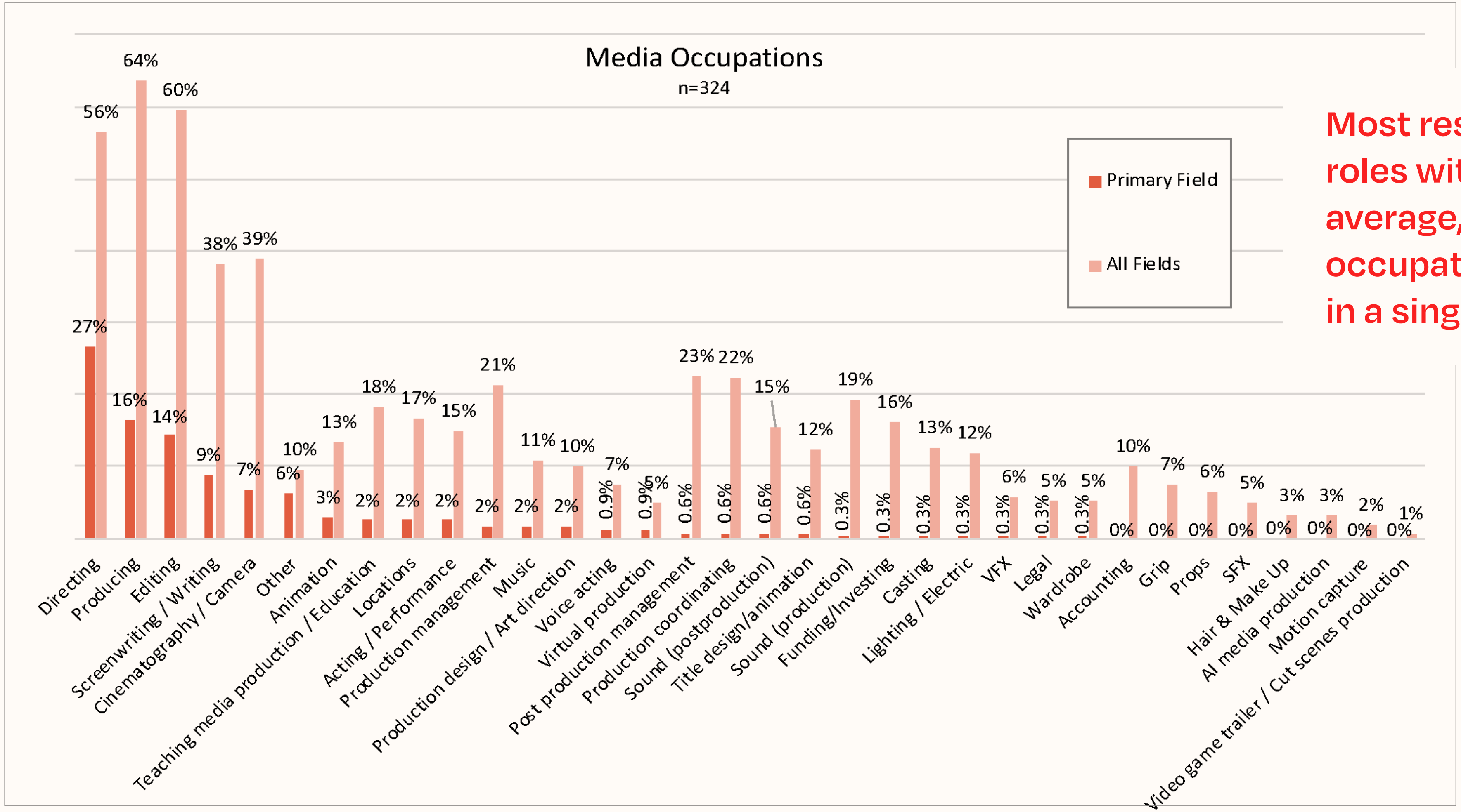
Fields such as “Web and/or Social Media Content” and “Advertising/ Marketing” were frequently selected as secondary fields.

On average, respondents work in 4.3 media fields. Only 12% say they're only active in a single field.



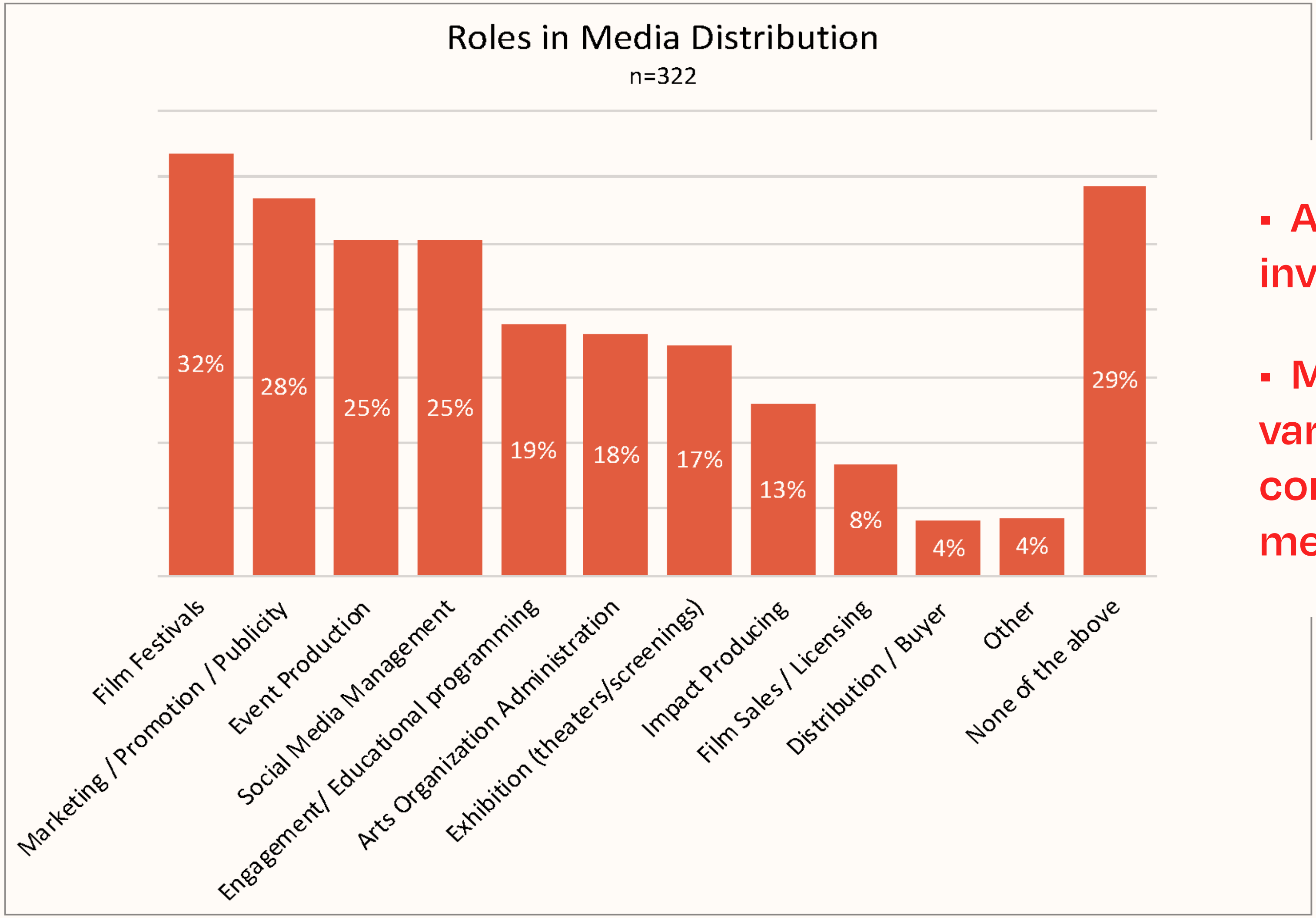
This indicates a high level of interconnectedness between media fields.

Respondents most frequently selected directing (27%), producing (16%), editing (14%), and screenwriting (9%) as their primary media occupation.



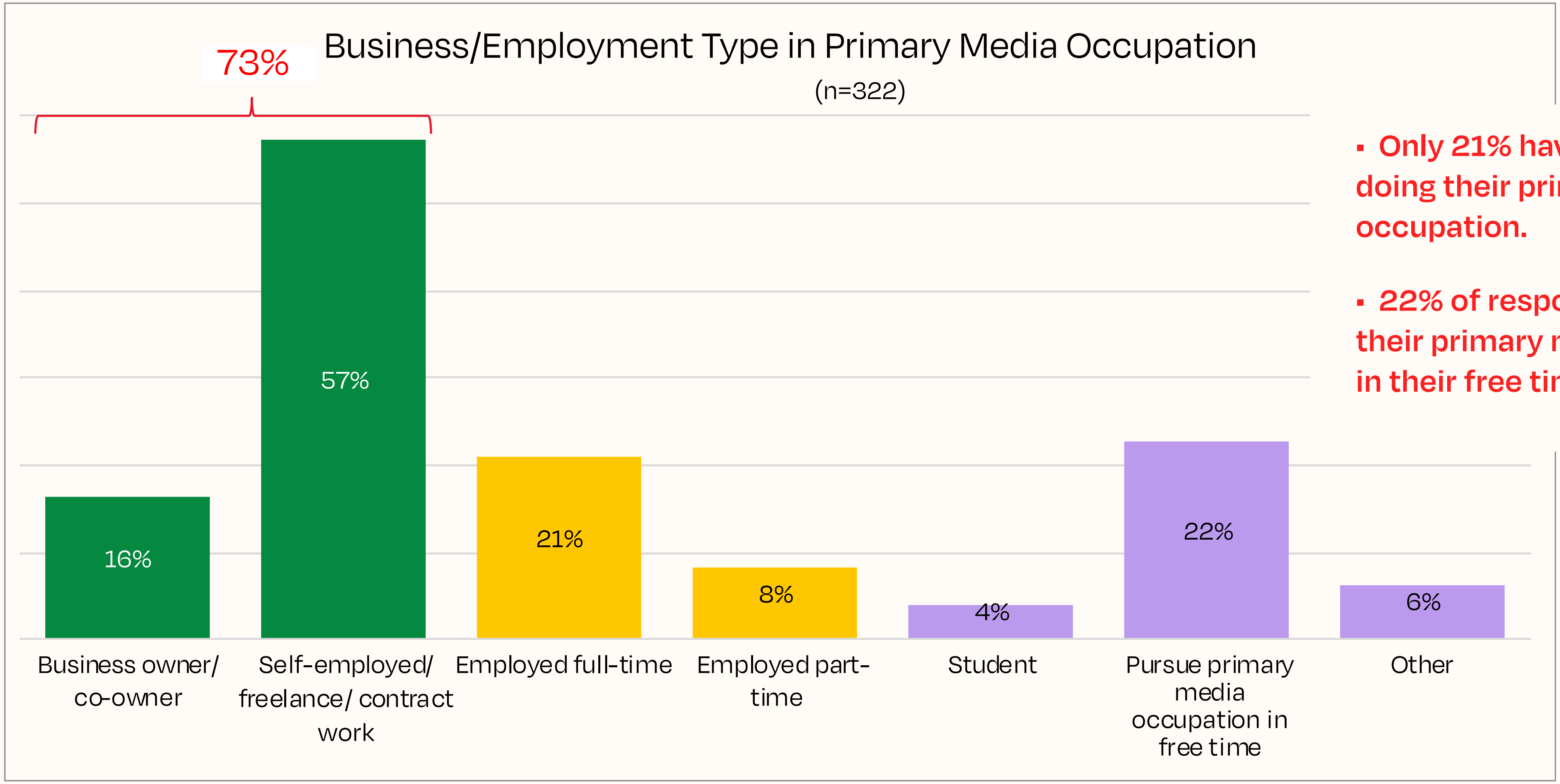
Most respondents fill multiple roles within the sector. On average, they selected 5.9 occupations. Just 1% specialize in a single occupation.

Over 70% of respondents are also active in distribution.



- Almost a third (32%) are involved with film festivals.
- Many are also involved with various aspects of marketing and communications promoting media content.

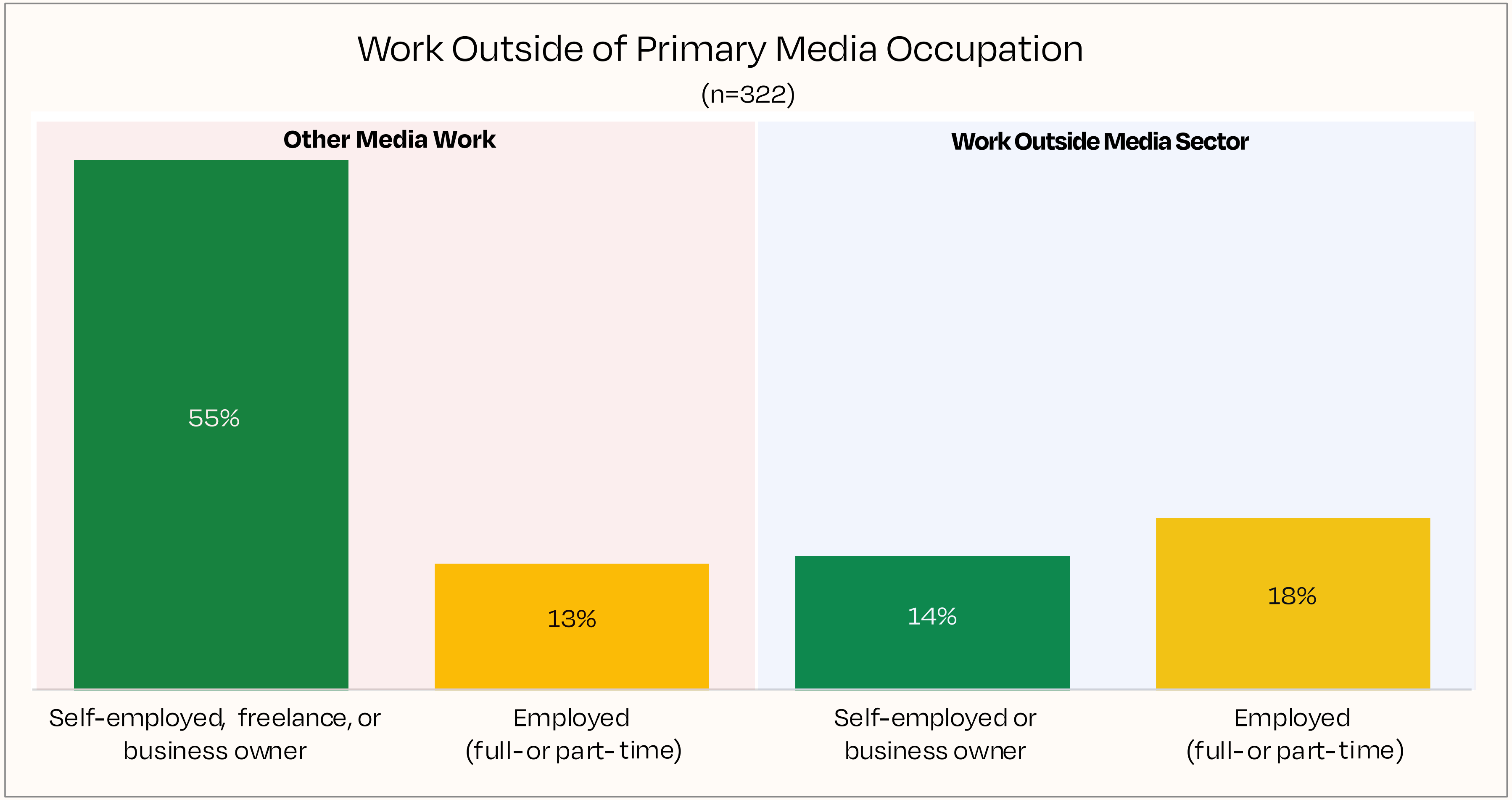
Almost three quarters of the respondents (73%) pursue their primary media occupation as business owners or as self-employed/ freelance/contract workers.



- **Only 21% have full-time jobs doing their primary media occupation.**
- **22% of respondents pursue their primary media occupation in their free time.**

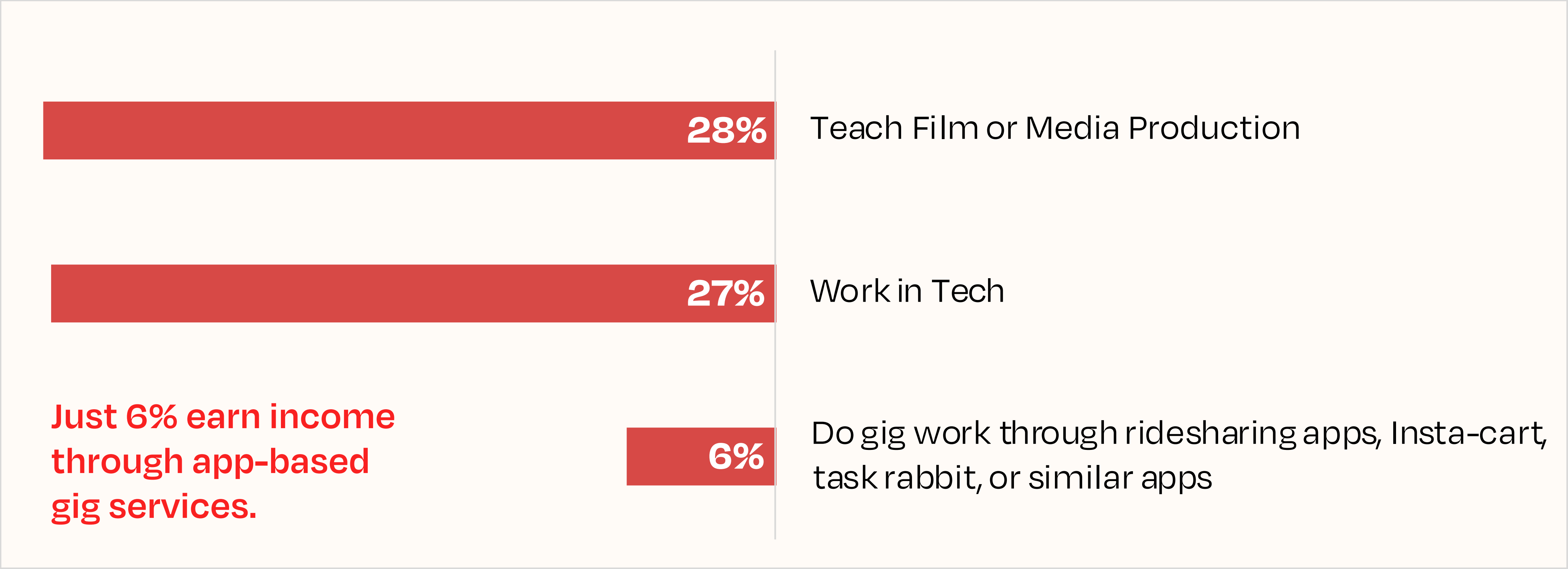
* Percentages don't sum to 100 because multiple selections possible.

55% of respondents work freelance or own their own business doing media work outside of their primary occupation.

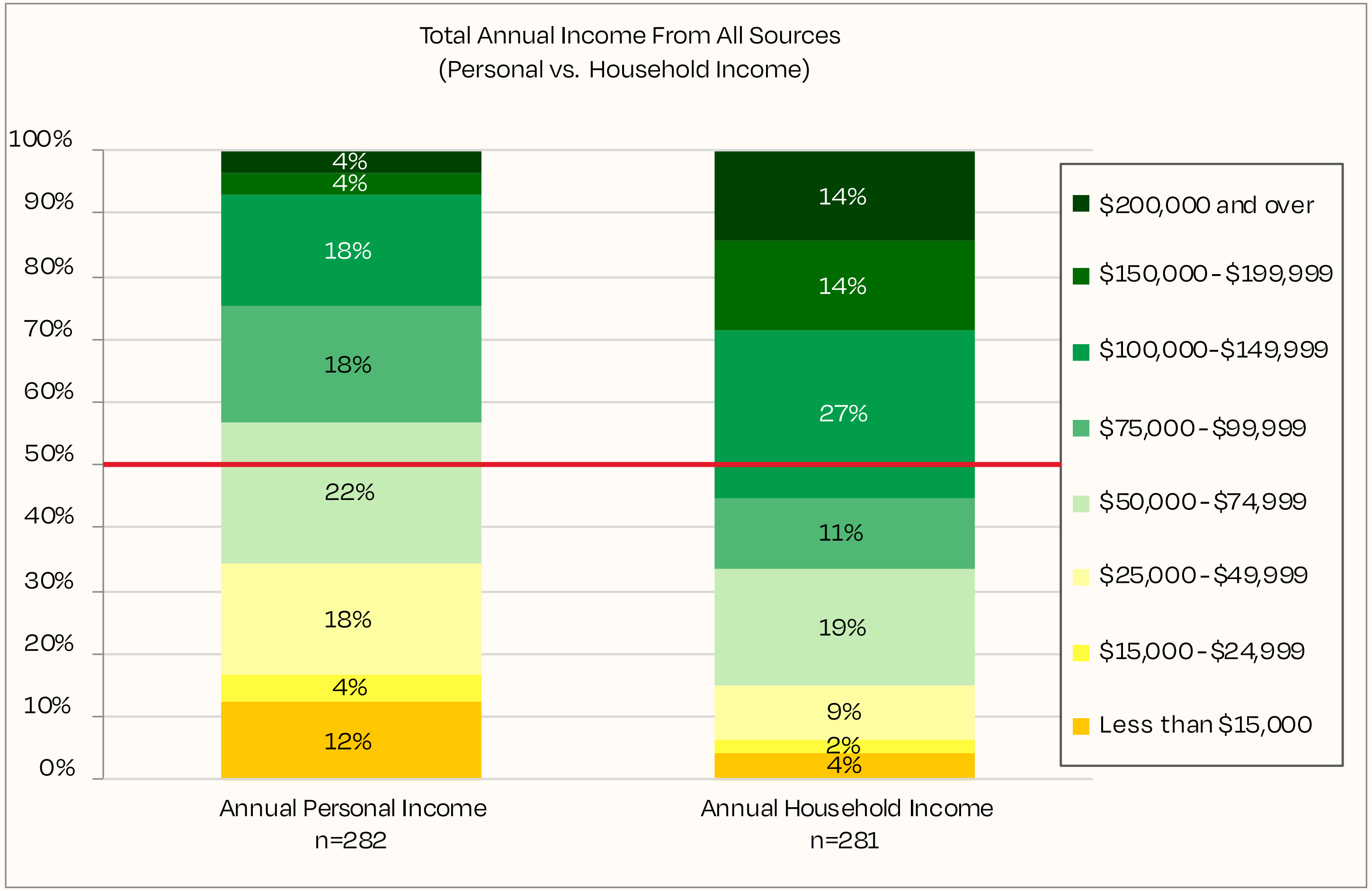


Just 13% have full or part time media jobs outside of their primary media occupation. Meanwhile, 18% are employed outside the media sector.

28% of respondents teach film or media production, or related skills. About the same percentage work in the Bay Area's technology sector.



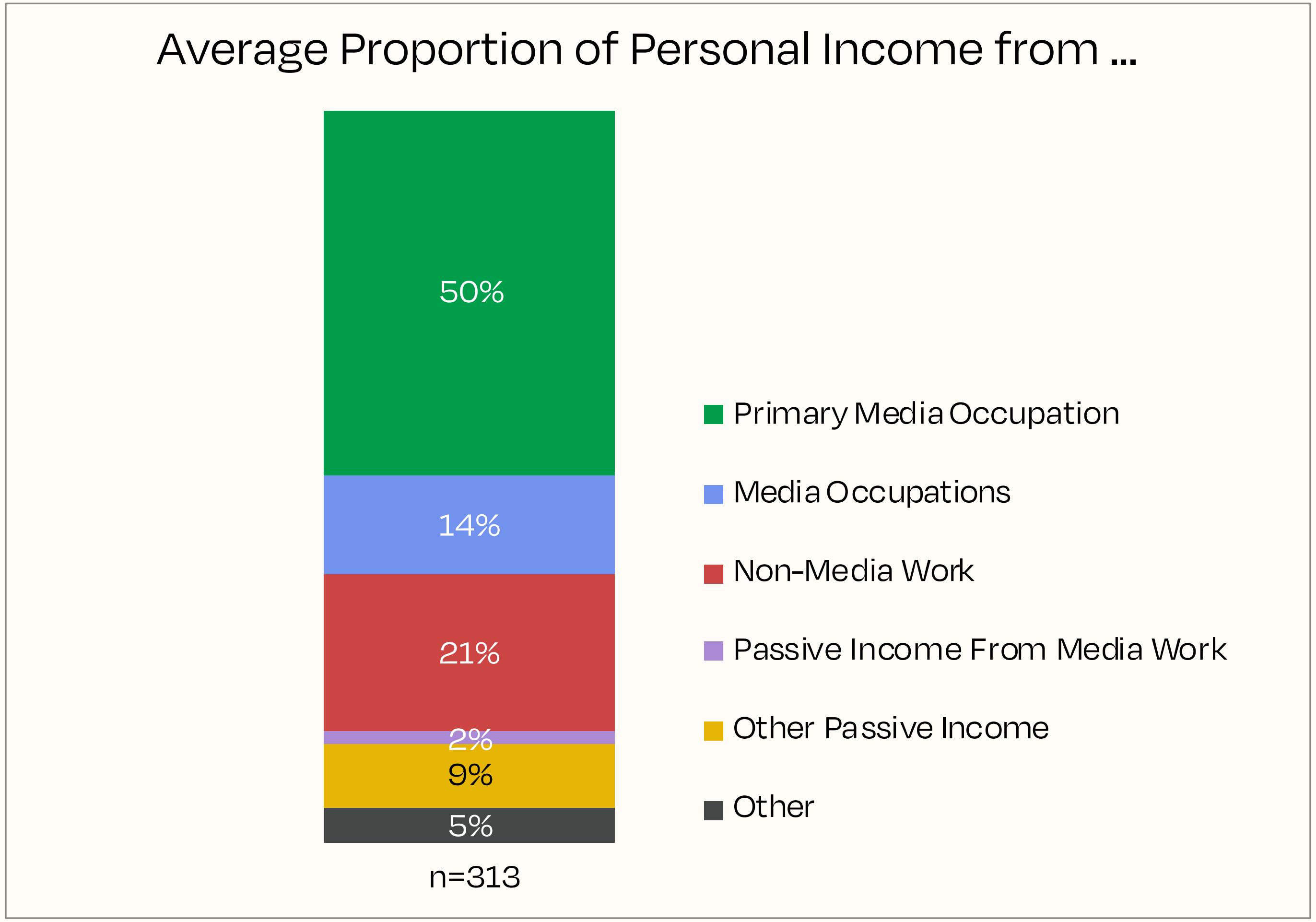
The median respondent (represented by the red line below) earns $50,000 to $75,000 in personal income annually and has a total household income between $100,000 and $150,000.



These income levels are roughly consistent with the median for the general population of the Bay Area. For comparison, the median worker in the Bay Area earned $66,981 in 2021 and the median household income was $119,300.

Source:
https://vitalsigns.mtc.ca.gov/indicators/income

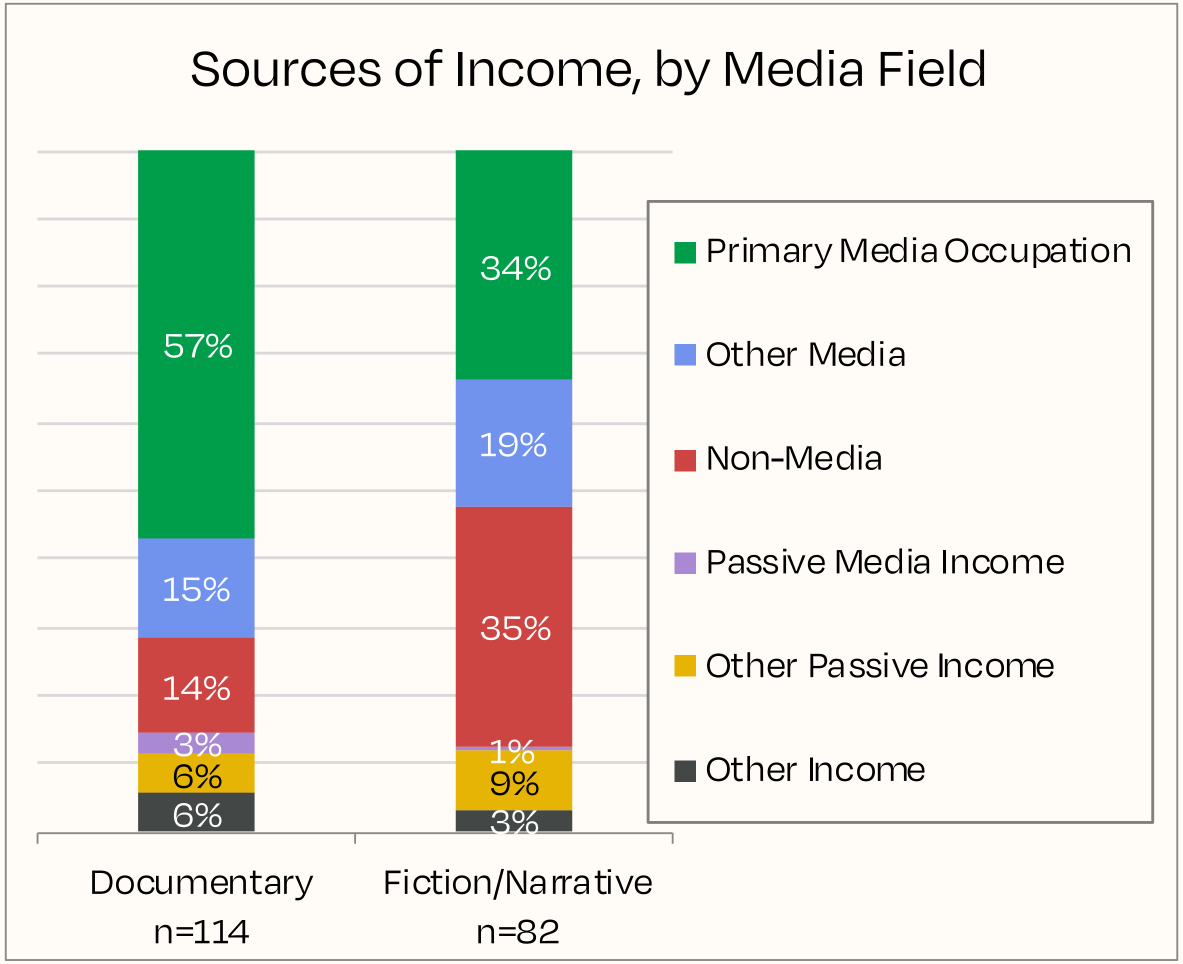
On average, respondents earn half their income from their primary media occupation and another 14% from other media occupations.



When asked to write about the biggest challenge of being a Media Maker in the Bay Area, respondents most frequently mentioned the lack of work, specifically, the lack well- paying (market-rate) jobs, in the media field.

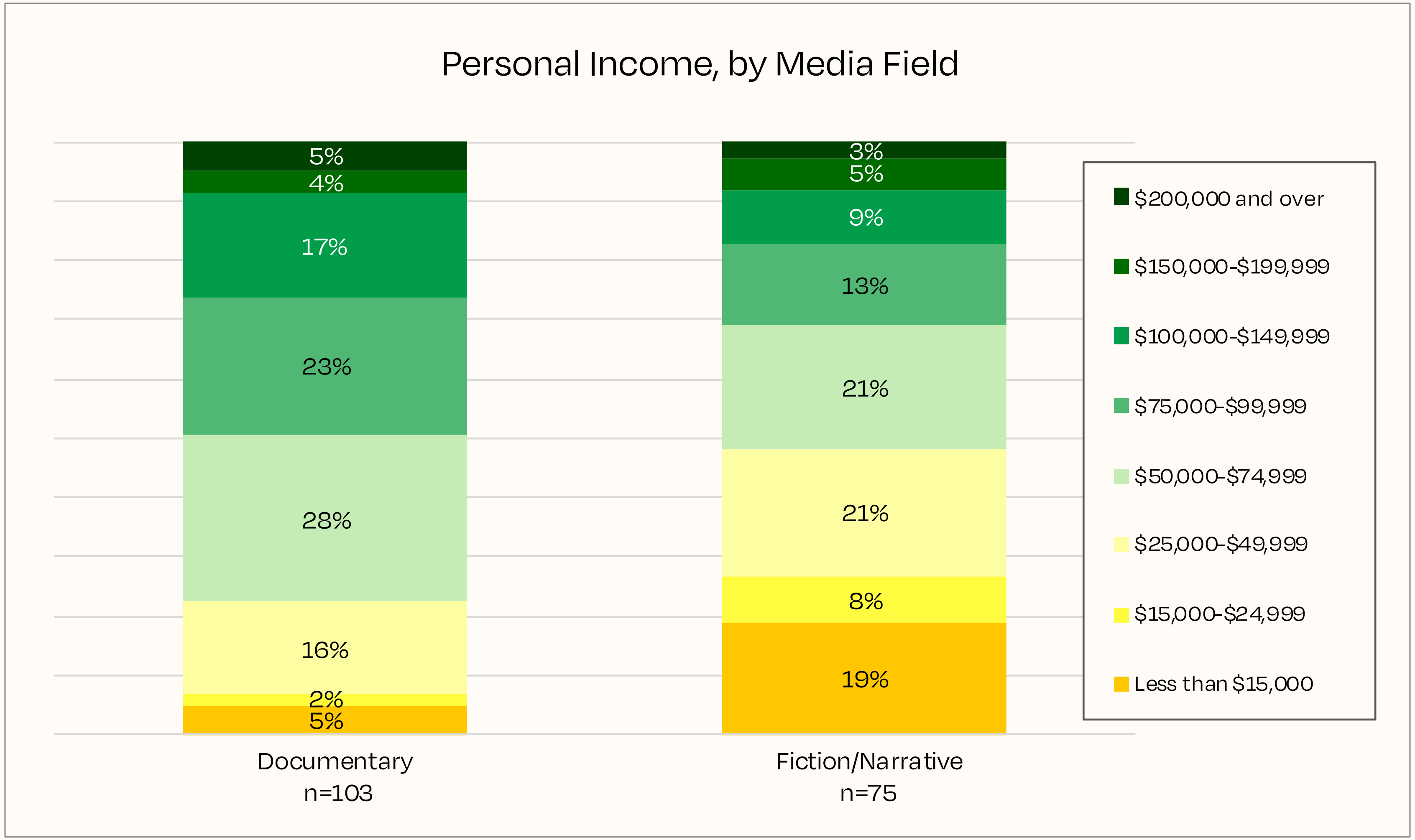
One representative example stated: "Cost of living and opportunities that pay well for living in the Bay Area. People expect art to be free work."

The documentary filmmakers in our sample earn a greater portion of their income (57%) from their primary occupation than those in fiction/narrative (34%).

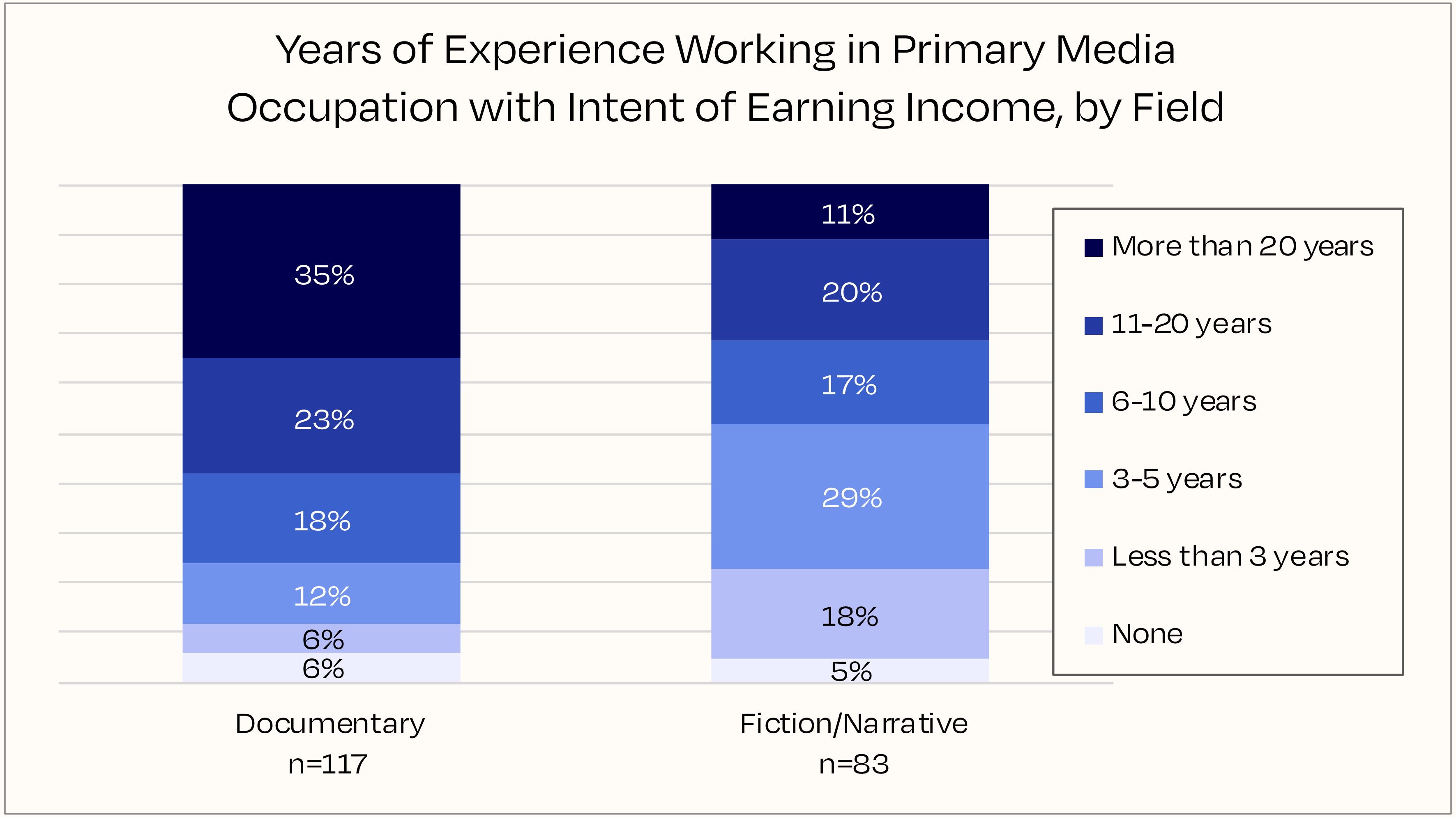


Those working in fiction/narrative derive a greater share of their income from work outside the media sector (35% vs. 14%), on average.

The documentary filmmakers in our sample also report higher personal (and household) income levels than those who work in fiction/narrative film.

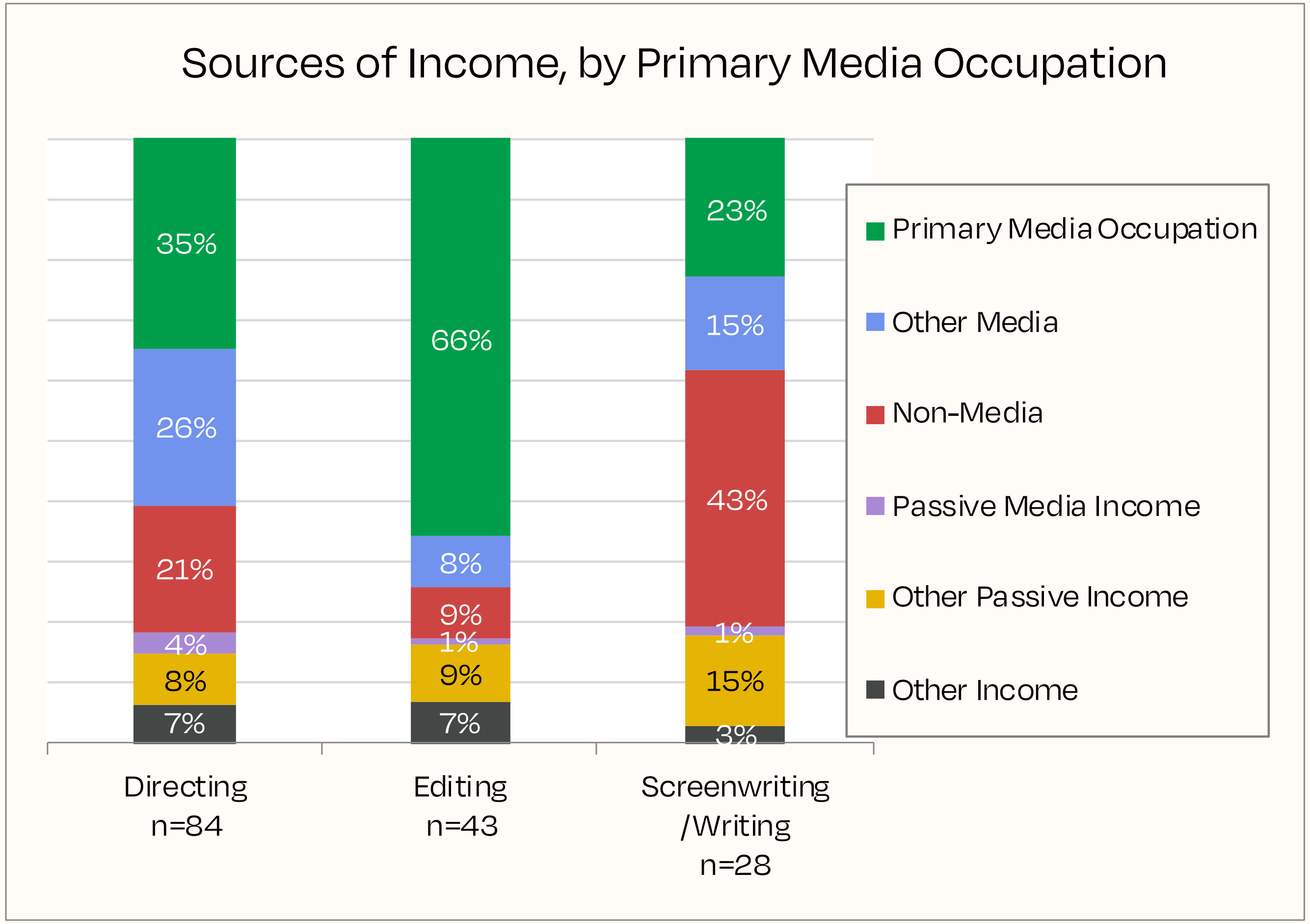


The higher earnings of documentary filmmakers in our sample may in part be explained by the fact that they are more advanced in their careers.

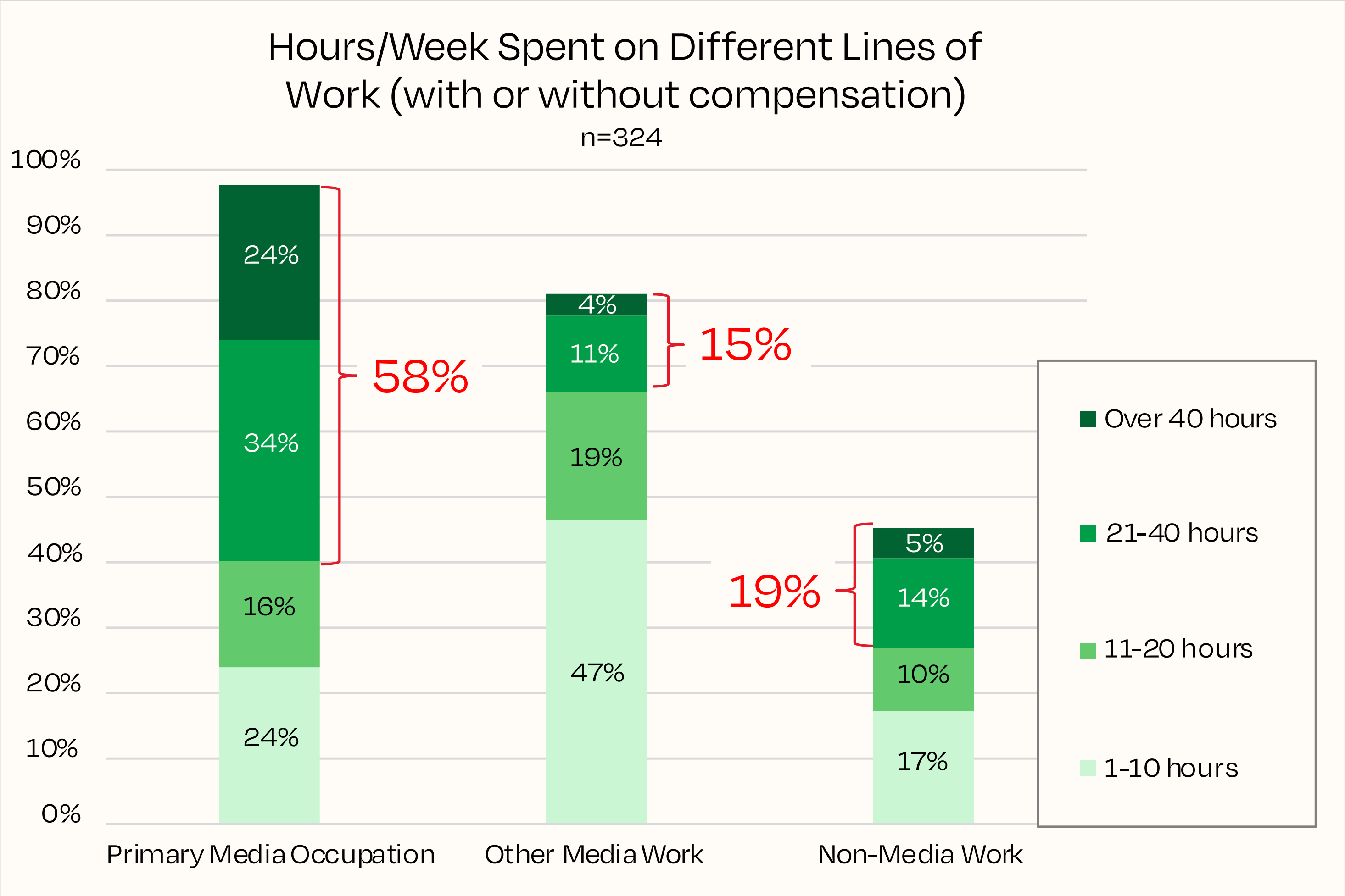


There are also notable differences between primary media occupations.

- On average, editors earn 66% of their income from their editing work, whereas just 35% of directors' and 23% of screenwriters' incomes derive from their primary media occupations.
- Screenwriters derive a more significant share of their income from work outside of the media sector (43%), whereas directors earn a larger share of their income from other media work (26%).
- We don't have enough responses to compare all occupations, but the available data suggests the following occupation groups generate 50% or more of their income from their Primary Media Occupations: Cinematography, Editing, Producing, Production Support, and Digital & Post-Production. By contrast, Directors, Performers and Screenwriters generate less than 50% of their income from their Primary Media Occupation.



Most respondents (58%) spend more than 20 hours per week on their primary media occupation.



- Over 80% of respondents spend at least some time working in other media occupations in an average week (represented by total column height in the chart).
- While less than half of the respondents spend time on non-media work, those who who do are more likely to commit 20+ hours to that work. 19% of all respondents spend 20+ hours on non-media work in an average week.

Many respondents support the work of other media makers by providing services for free or at discounted rates.

Have worked for free or below standard rates on projects for friends and colleagues in the past 2 years.

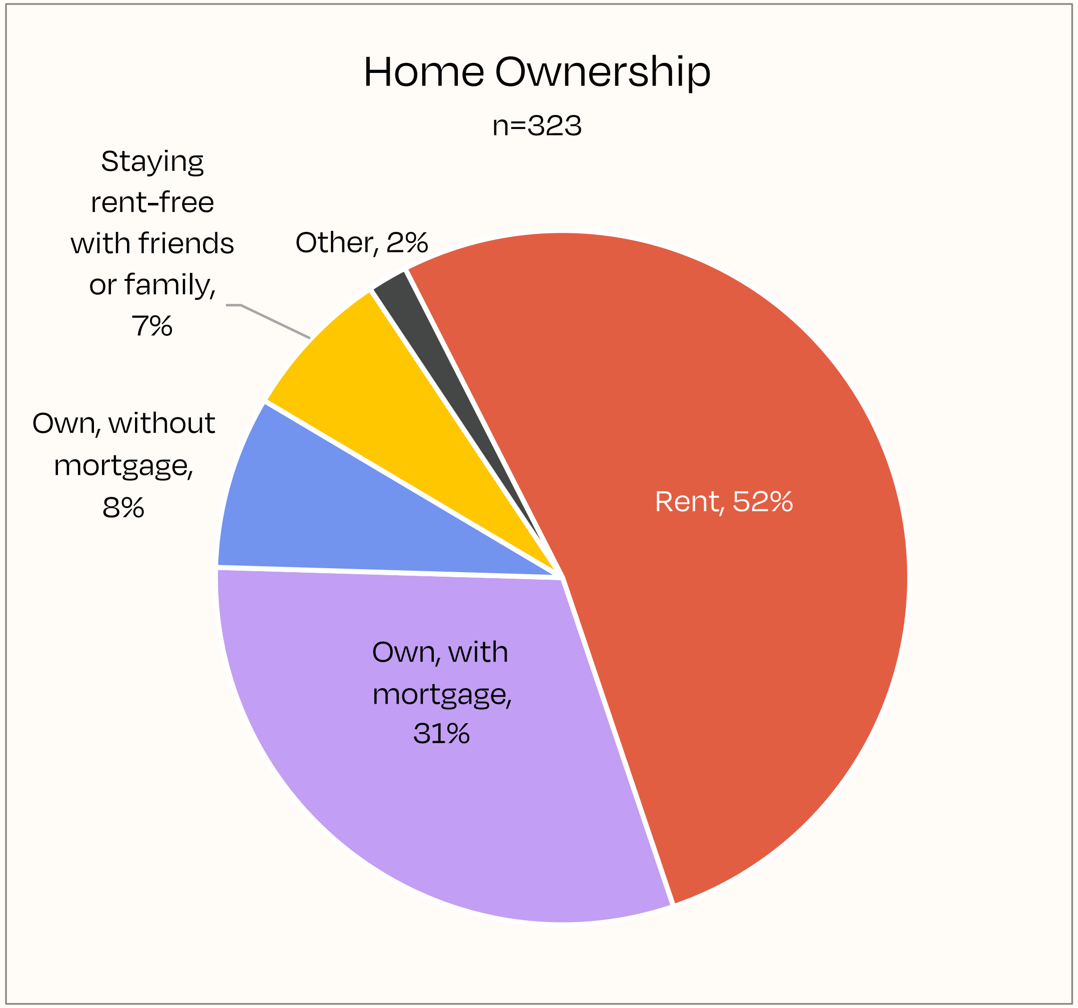
15% of respondents are members in media-related unions.

- 13 responses were received from SAG-AFTRA members, 9 from IATSE members, and 8 from members of the Teamsters union.

UNION	NUMBER OF RESPONSES
SAG-AFTRA	13
International Alliance of Theatrical Stage Employees (IATSE)	9
Teamsters	8
Director's Guild of America	5
Writers Guild of America	5
Location Managers Guild International	4
Motion Picture Editors Guild	2

The following unions received a single response: Art Directors Guild, Dramatists Guild, CWA Local 9415, Motion Picture Sound Editors, NABET-CWA (National Association of Broadcast Employees and Technicians - Communications Workers of America), News Media Guild is Local 31222, Producers Union, Society of Camera Operators.

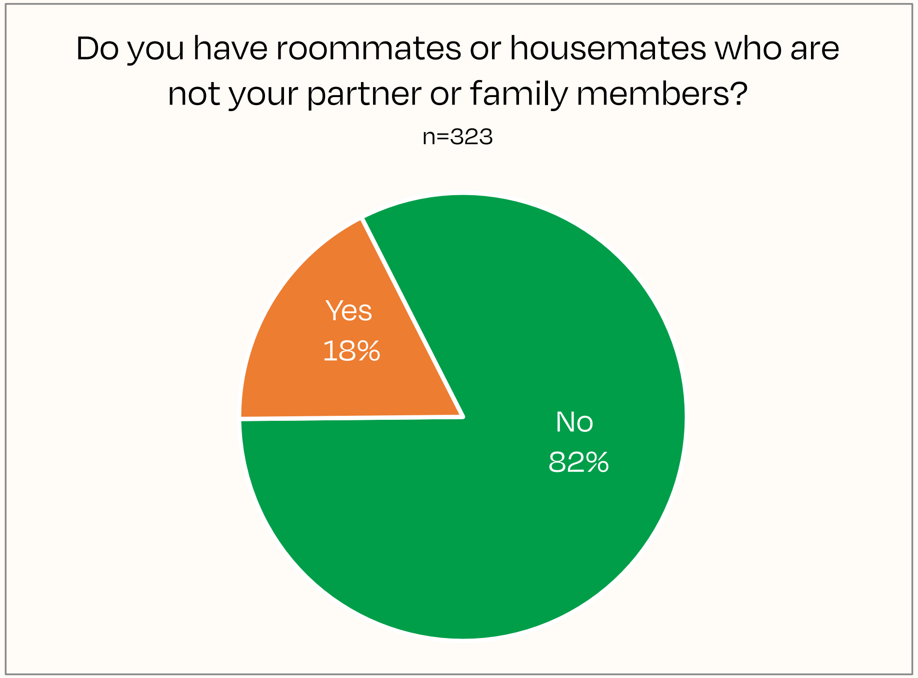
52% of the respondents live in rental housing, and 18% share their space with roommates or housemates.



39% of survey respondents own their living space. For comparison, the homeownership rate in the Bay Area is 56% overall.

Source:

https://bayareaequityatlas.org/indicators/homeownership?geo_compare=02000000000006000



47% of respondents spend between 20% and 40% of their income on housing.

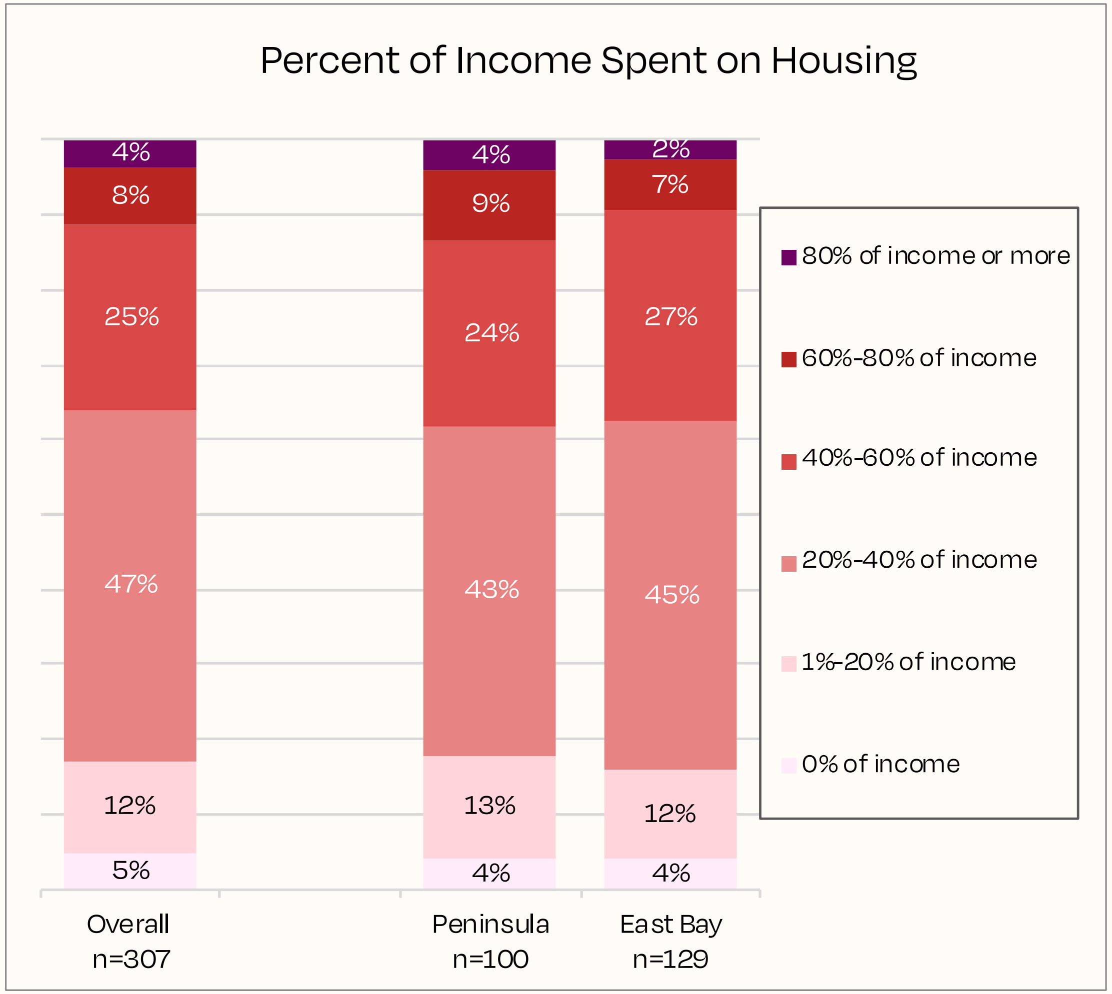
- The figures are similar for the Peninsula and the East Bay.
- The median is roughly consistent with the average consumer spending on housing in the San Francisco-Oakland-Hayward Metro Area.

  Source: https://www.bls.gov/regions/west/news-release/consumerexpenditures_sanfrancisco.html

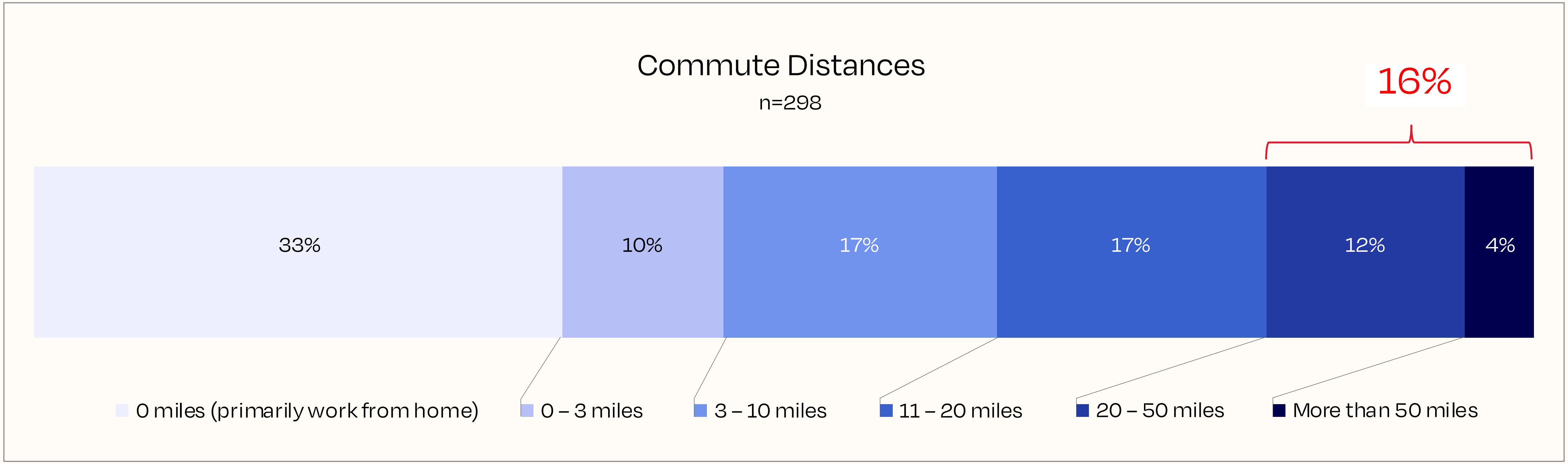
- However, survey respondents are more likely to spend over 40% of their income housing, and less likely to spend under 20% than the Bay Area's population overall.

  Source: https://vitalsigns.mtc.ca.gov/indicators/housing-affordability

- Respondent write-ins reflect that the high cost of living is a major challenge in the region. One respondent wrote, "Cost of living is too expensive to have freedom/peace of mind to explore and experiment..."



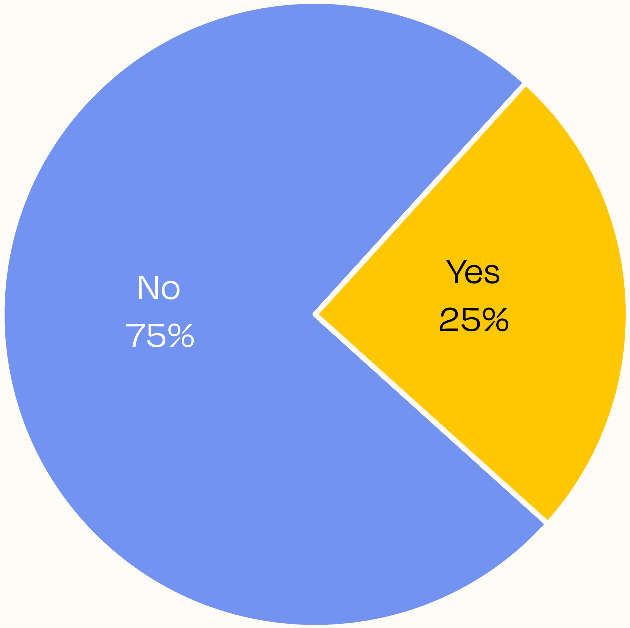
16% of respondents typically commute more than 20 miles to work in their primary media occupation.



Only 25% have a designated workspace outside of their home where they go to work at least once a week.

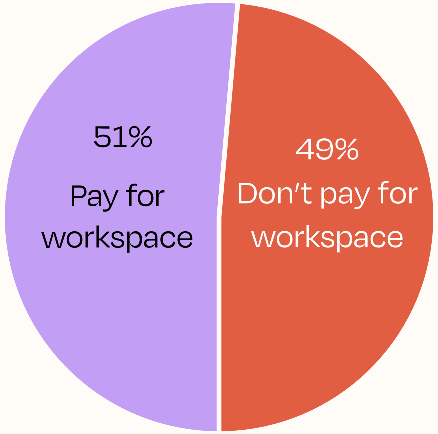
Do you have a space outside of your home that you use for your primary media practice at least once a week?

n=297



Of those who have a designated workspace, 51% pay rent for their space.

Of those who have a work space outside their home...



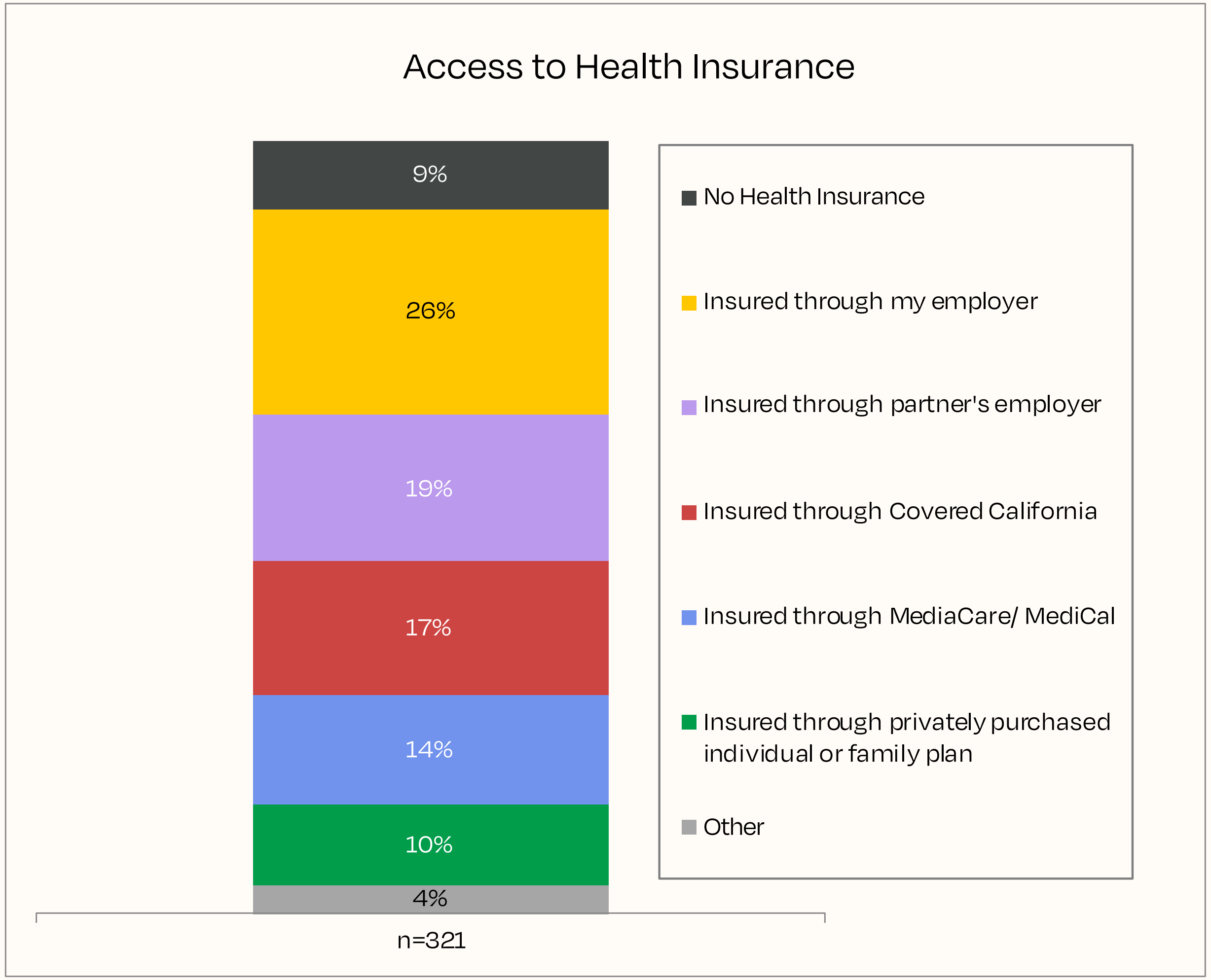
The most common workspace ZIP codes are 94710 (Berkeley/Albany) and 4133 (SF North Beach / Chinatown).

9% of survey respondents do not have health insurance.

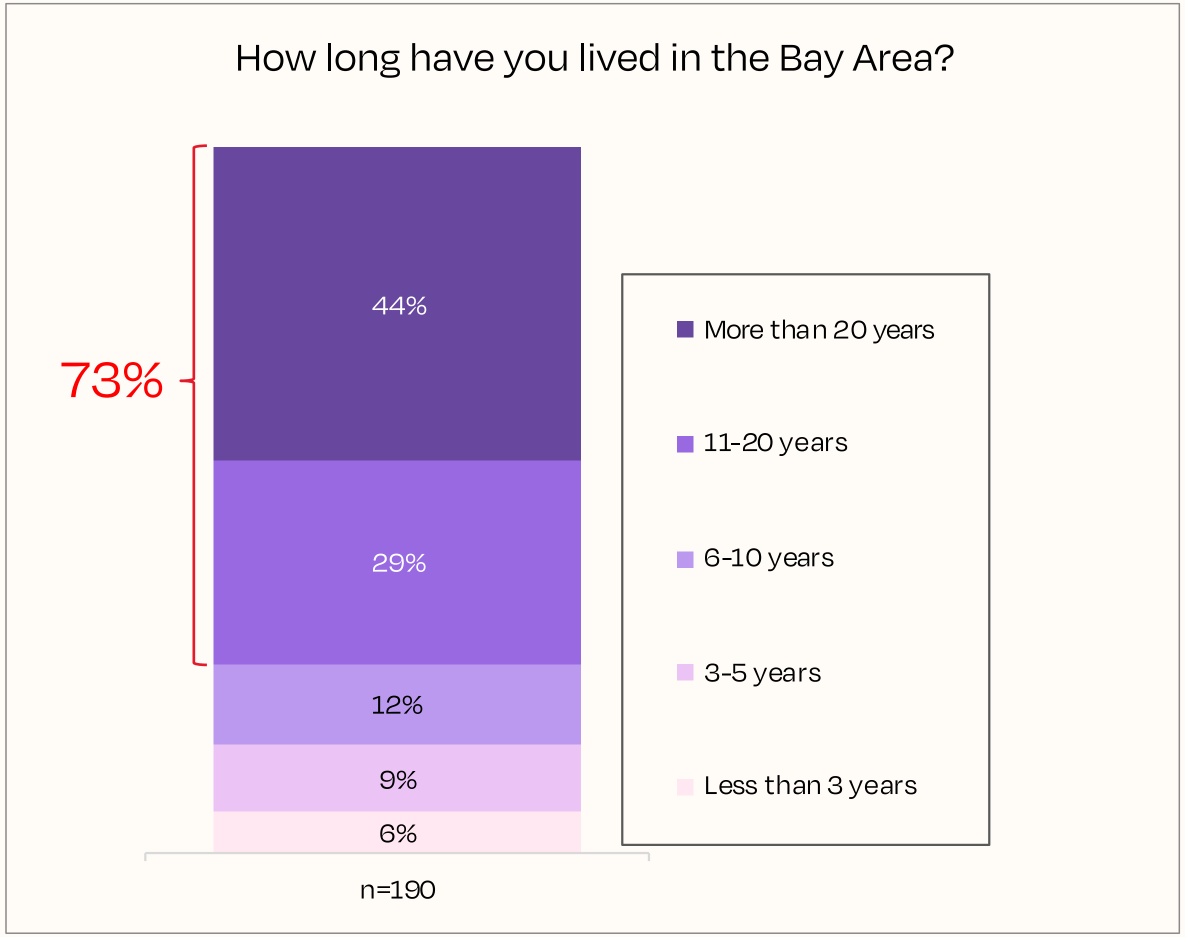
- That's slightly higher than the proportion of uninsured statewide (8%), and about double the rate of uninsured in the Bay Area (4.5%).

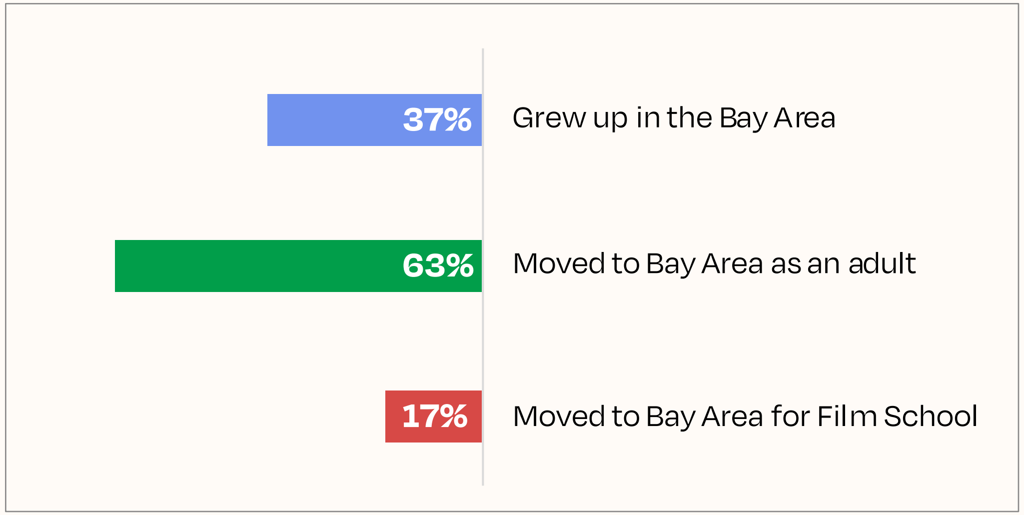
  Sources:
  https://laborcenter.berkeley.edu/californias-uninsured-in-2024/;
  https://abc7news.com/health-insurance-uninsured-hispanics-in
  -bay-area-gap-inequities/11045248/#:~:text=Out%20of%20all
  %20nine%20B ay,across%20all%20of%20the%20counties

- 31% are insured through state-sponsored insurance programs (Covered California, MediCare, MediCal).

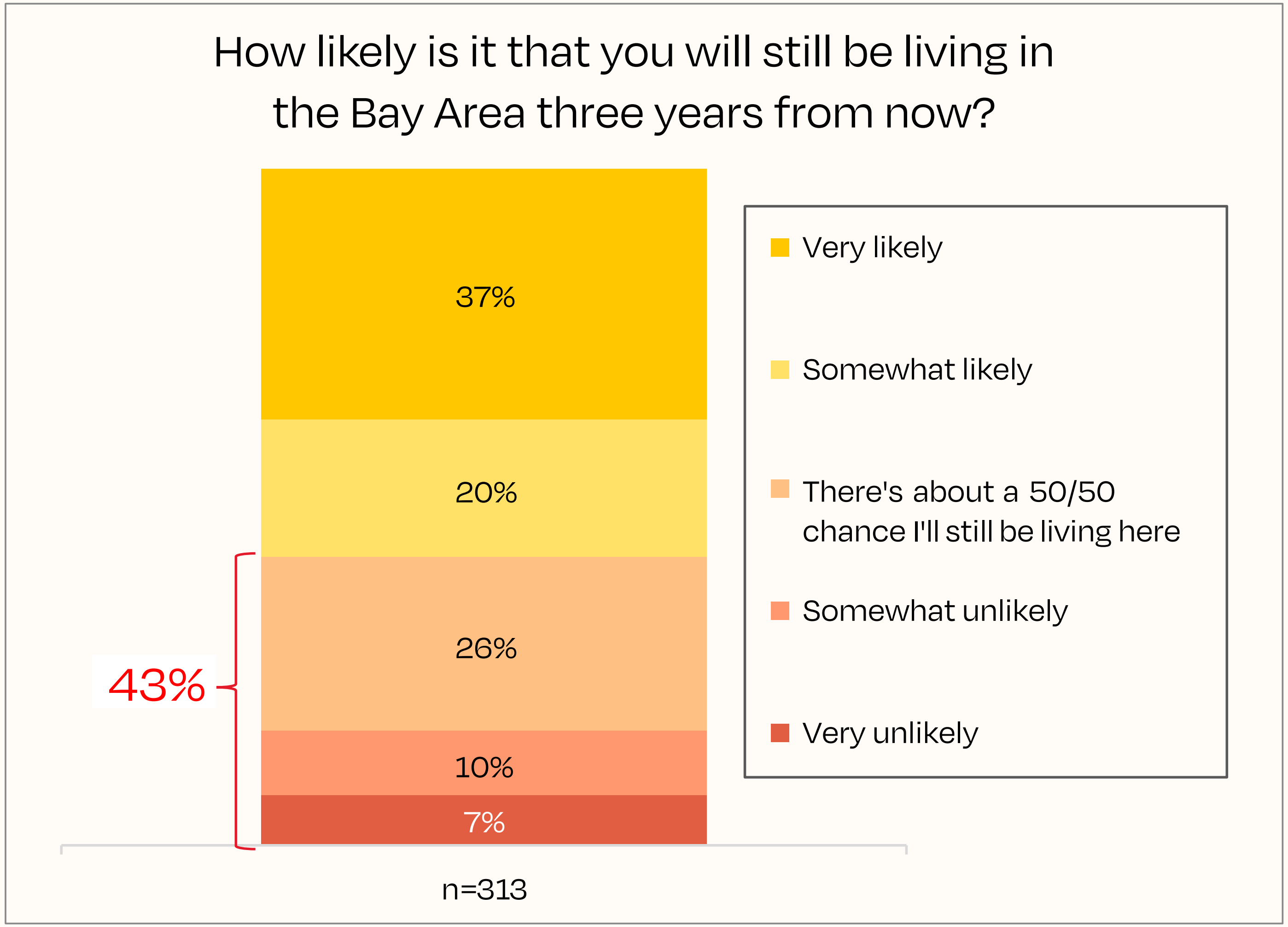


73% have lived in the Bay Area for more than 10 years.



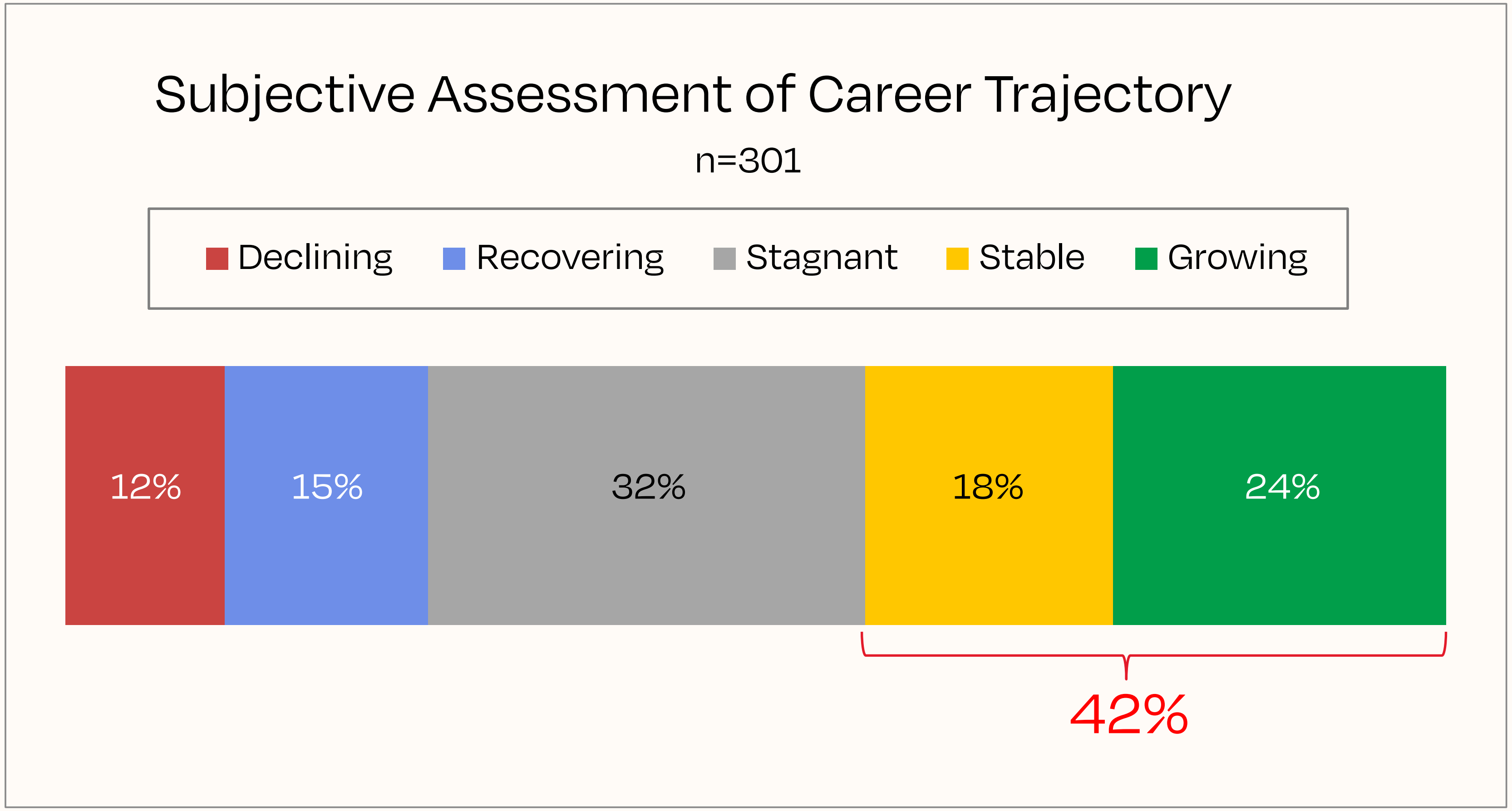


43% of respondents think the odds they'll still be living in the Bay Area in three years are 50/50 or lower.



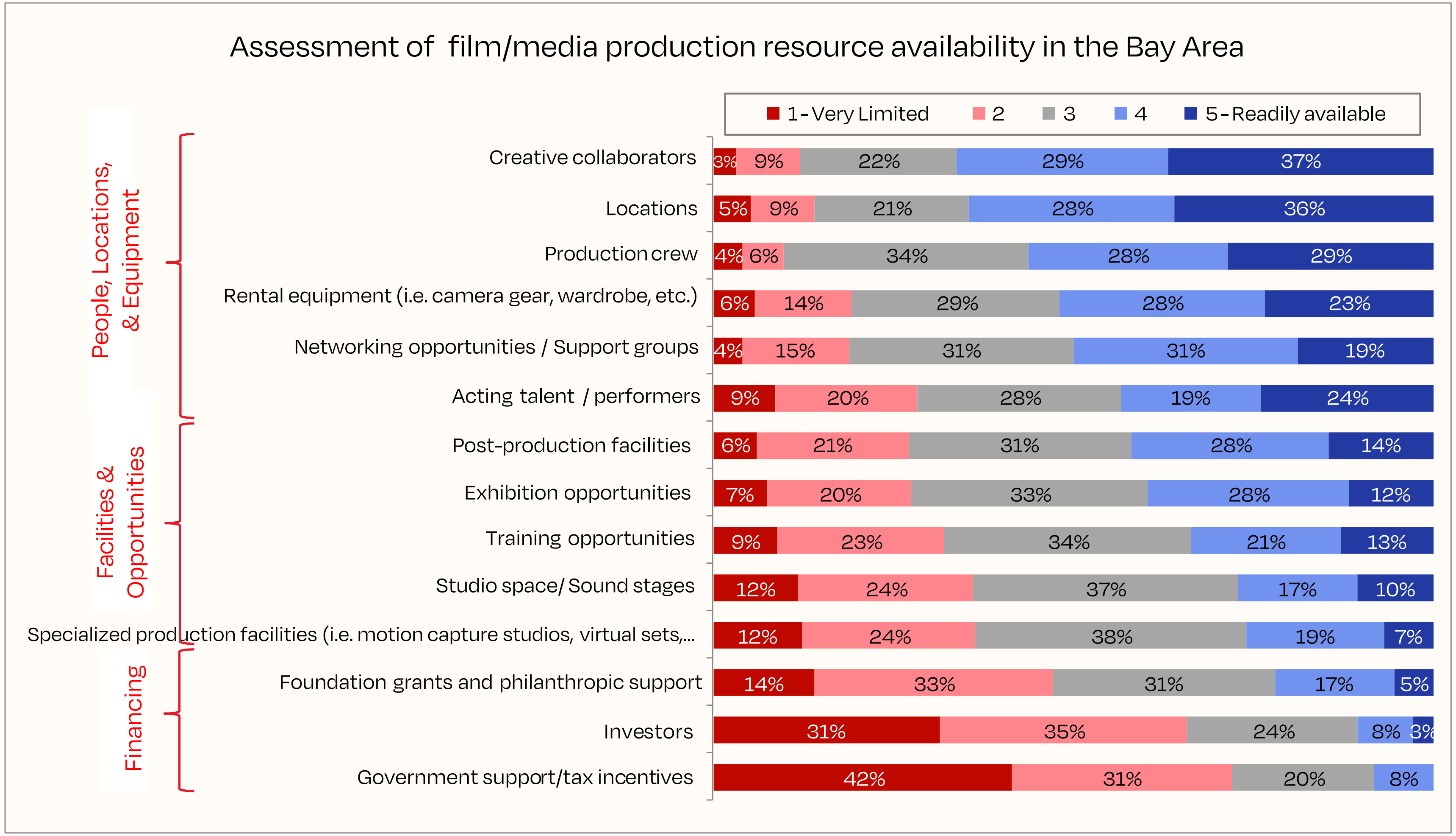
- Among those who think there's at least a 50/50 chance of leaving, the most common anticipated destinations are Los Angeles (43%) and New York (26%). 11% indicated they would go to Atlanta, followed by Austin (7%), Chicago (5%), and Toronto (4%). 29% don't know where they would go.

42% of respondents describe their careers as “stable” or “growing.”



32% describe their career as “stagnant”, 15% as “recovering,” and 12% as “declining.”

Clear clusters emerge when respondents rate the availability of production resources in the Bay Area.



- The pool of creative professionals, locations, and availability of equipment are rated most favorably.
- Opinions are split on the availability of production and post-production facilities, as well as opportunities for training and exhibition.
- The availability of financing/financial support is most limited.

Write-in responses describing the biggest advantages and disadvantages of being a Film & Media Worker in the Bay Area reinforce several of those themes:

- Respondents lauded the tight-knit community as the greatest benefit of being in the Bay Area. The community was frequently described as "creative", "collaborative", and "passionate." One person wrote: "This place is so beautiful, so diverse, such a hub for world-changing ideas and the community of filmmakers here is amazing. We are smart, innovative, creative and generous with one another. We push one another and support one another. It's a great group of people to be a part of."

- Media makers value the Bay Area because of its ambiance. People cited the "diversity", "culture", and "beautiful environment".

- Respondents also expressed satisfaction with the amount of support they get from arts organizations, namely from film festivals and educational organizations.

- However, there is a strong desire for more project funding and industry infrastructure (related to distribution, government support, studio space, etc.)

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