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# *California Voters' Attitudes Towards the Film and TV Industry*

Findings from a statewide survey among California voters

*December 2024*



We conducted a survey on behalf of the California Production Coalition to gauge attitudes and statewide perceptions toward the industry and film tax incentives.

**OBJECTIVES:**

- Measure voters’ awareness of and views regarding California’s film tax incentives
- Assess voters’ views regarding possible changes to California’s film tax incentives

**METHODOLOGY:**



**ONLINE SURVEY WITH 1,500  
CA VOTERS**

**NOVEMBER 7-18, 2024**

**MARGIN OF ERROR**  
CA VOTERS: 2.5%

The survey was designed to be representative of the entire state of California including key subgroups like age, gender, region, education and household income..

*\*Notes: The survey began fielding post-2024 presidential election results. Due to rounding, some numbers shown may not add up exactly to 100.*

# Half of voters worry that the state is off on the wrong track – with concerns toward inflation and the economy top-of-mind.

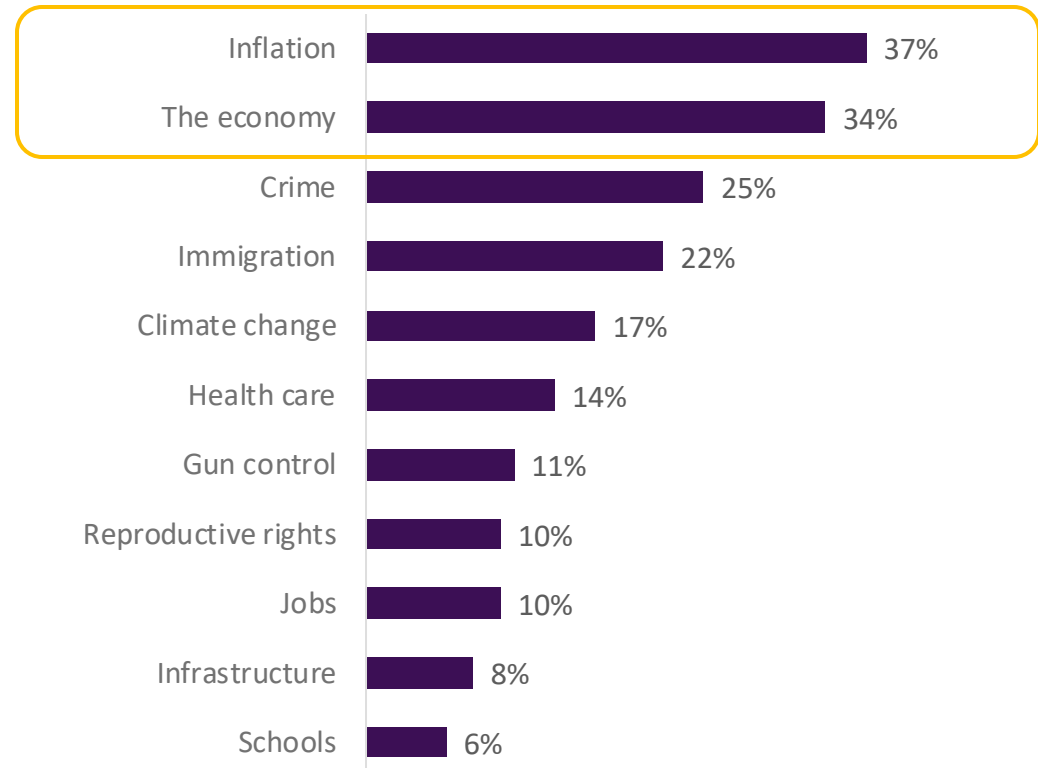
**49%** of CA voters think the state is off on the wrong track

**52%** of CA voters think the state's economy is off on the wrong track

**Voters more likely to think California's economy is off on the wrong track:**

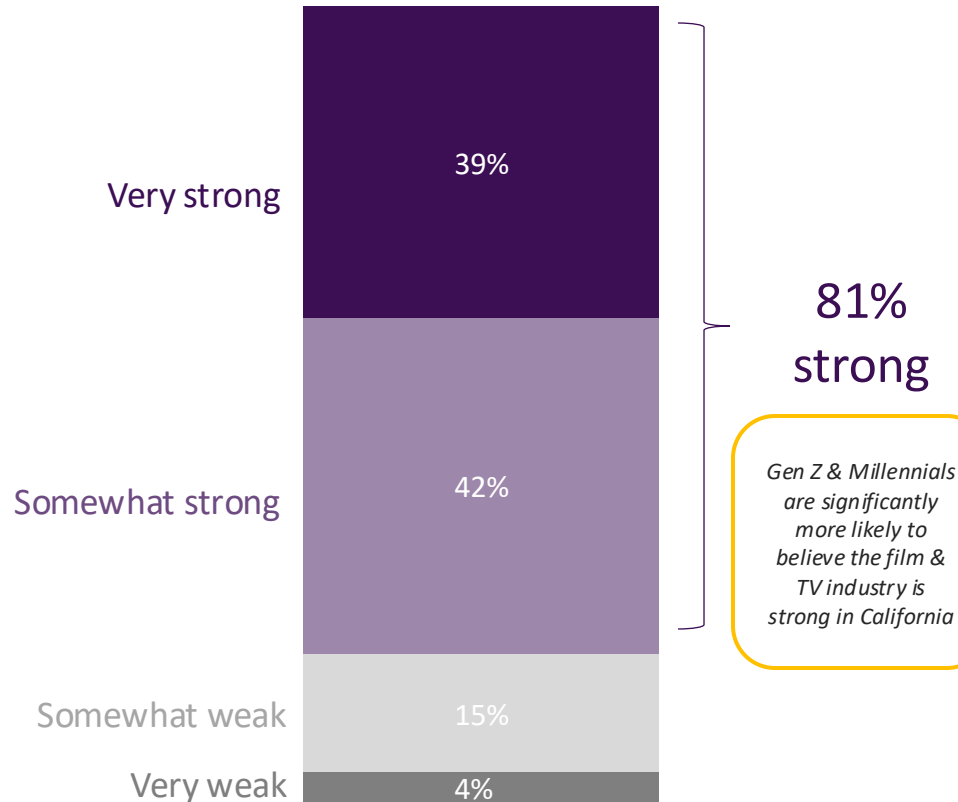
- Republicans (77%)
- Rural area voters (67%)
- Living in the Central Valley (64%)
- Gen X (60%)
- HHI \$50K - <\$100K (58%)

### Top two concerns facing the state:



# Over eight-in-ten California voters believe the film & TV industry is strong.

## Strength of Film & TV Industry in CA



## In their own words... (Open-ended responses sorted into themes)

### Ways the film industry is strong in California...

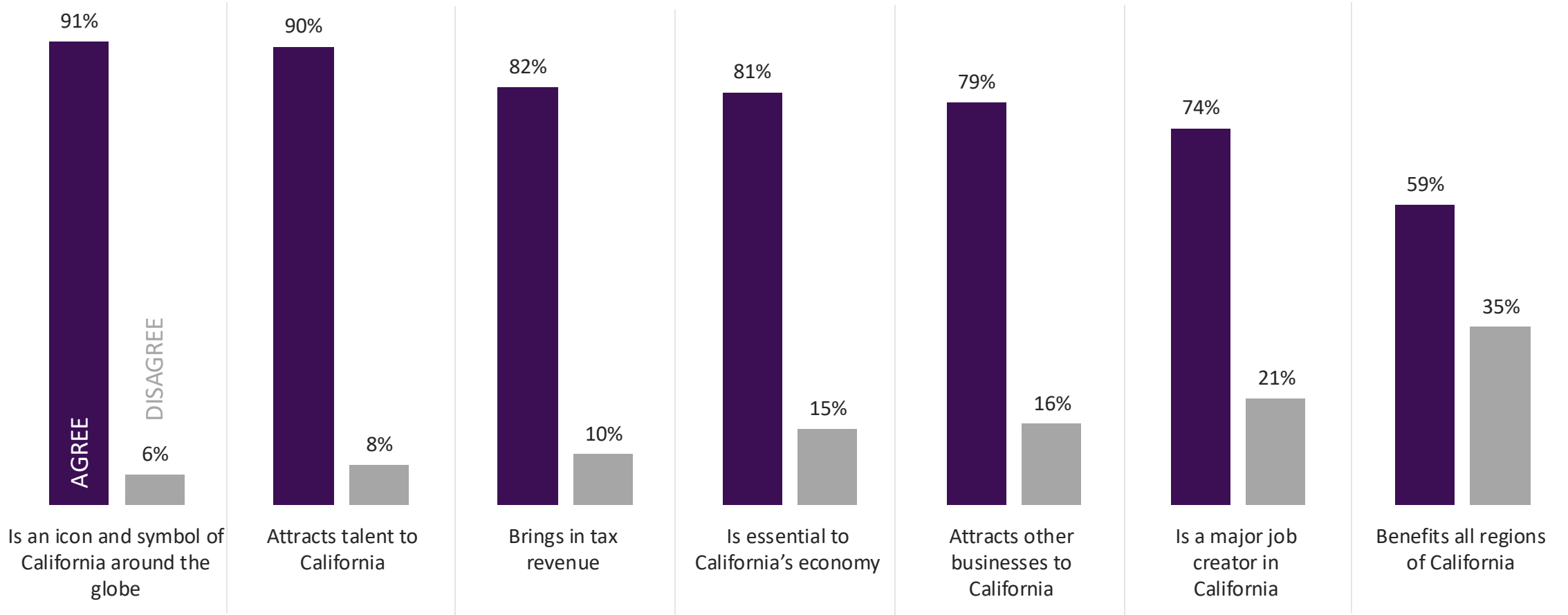
	CA voters
Hollywood reputation	31%
A lot of films/movies/shows filmed here	20%
Major studios located in the state	19%

### Ways the film industry is weak in California...

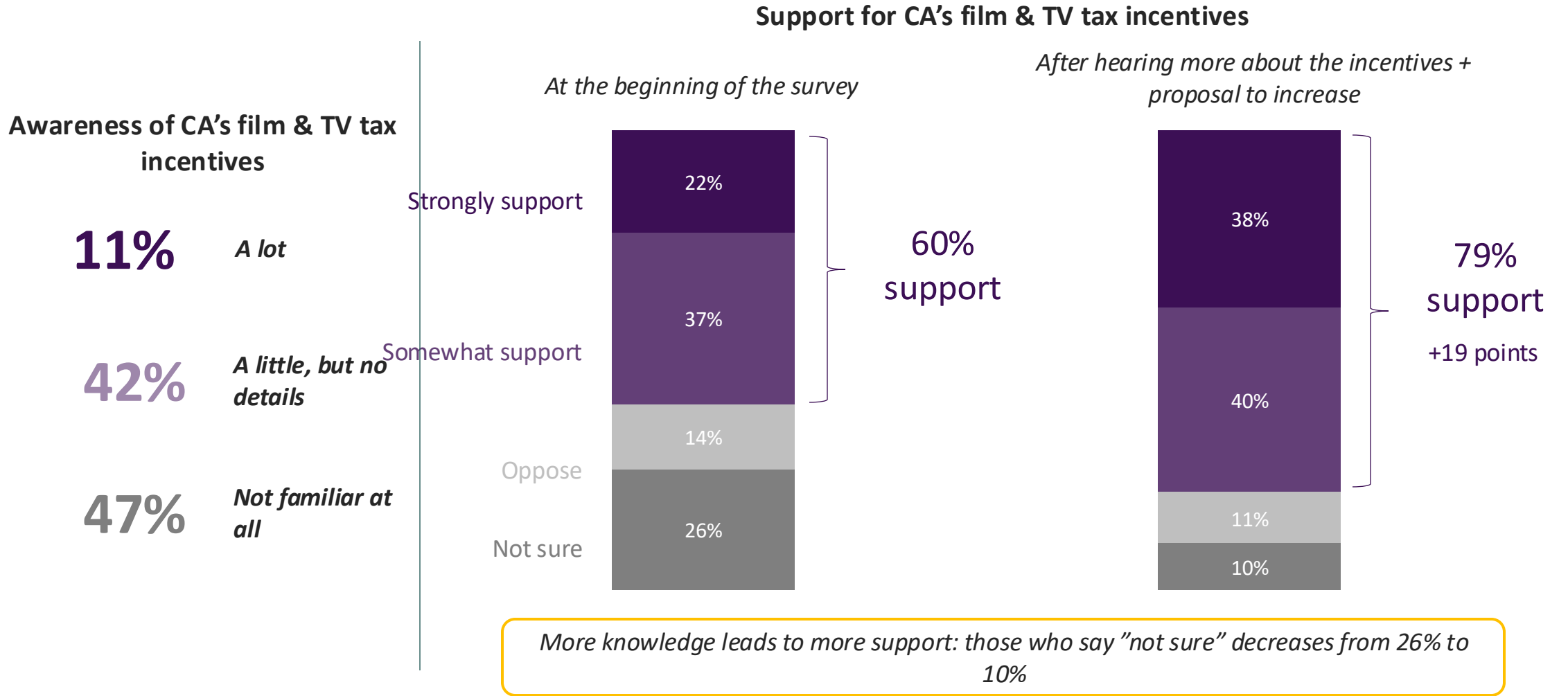
	CA Voters
Production is moving elsewhere	24%
Less expensive to film in other places	19%
No new shows coming out	18%

The industry is seen as a symbol of California around the globe, attracting talent and tax revenue to the state.

### The film & TV industry in California...



# Eight-in-ten California voters support the current program after learning more.

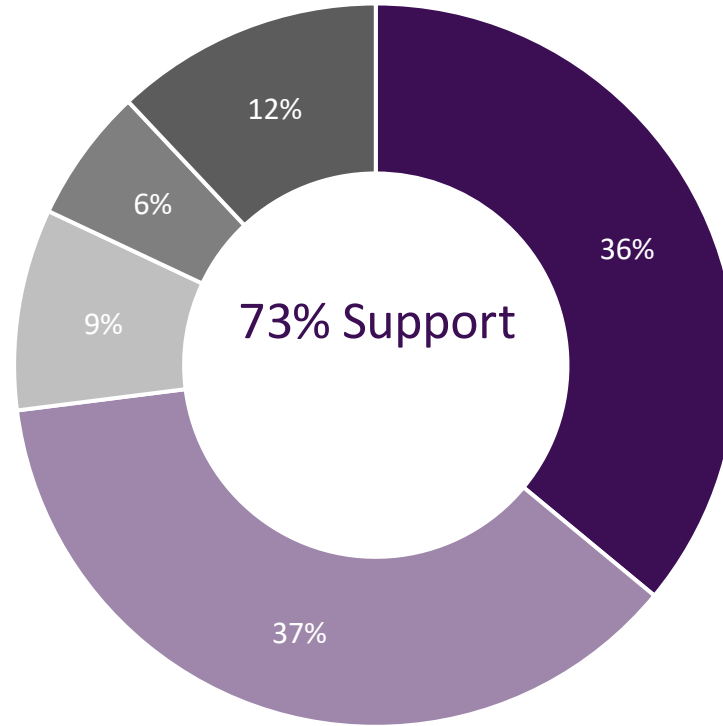


# Three-quarters of voters say they support Governor Newsom’s proposed efforts to increase the tax incentives in California.

## Support for Governor Newsom’s efforts

Strongly support    Somewhat support    Somewhat Oppose    Strongly Oppose    Not sure

Language Tested: *Recently, Governor Newsom proposed increasing California’s incentive to \$750 million a year, which is comparable to New York’s \$700 million program but lower than Georgia’s program of upwards of \$1 billion.*



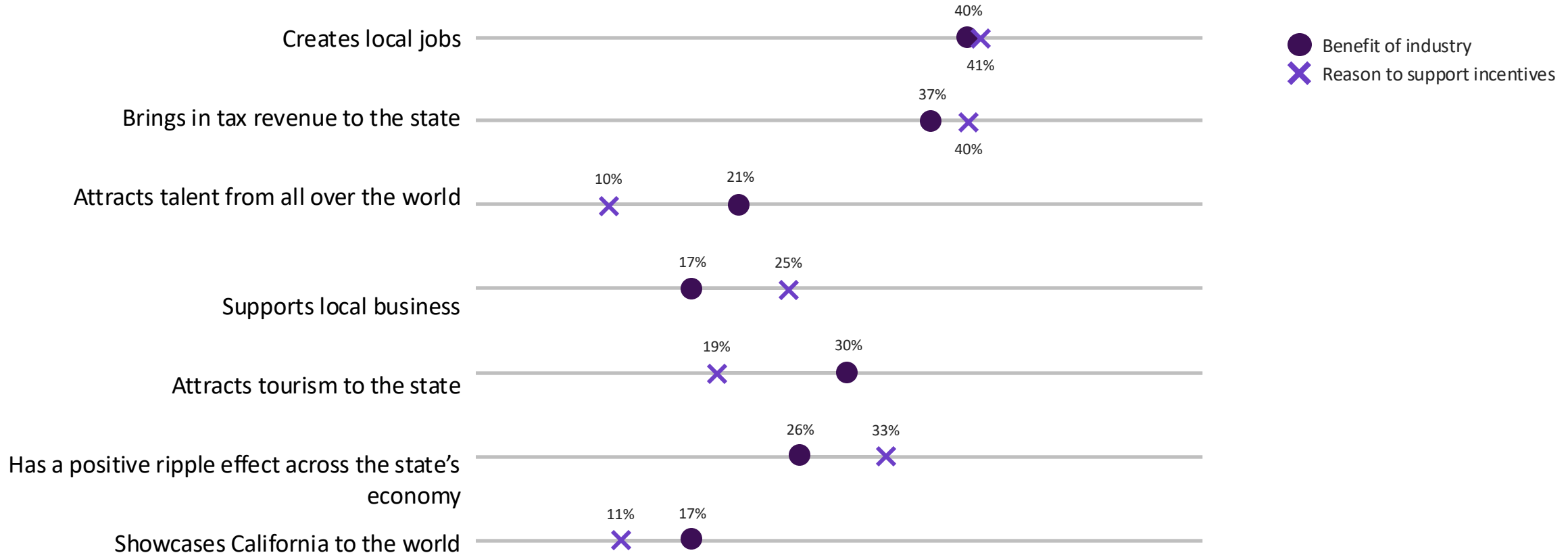
Support extends for expansion of the tax credit to include additional programming – especially shorter scripted TV shows and game shows.

Support for tax incentives being made available for:	Strongly support	Somewhat support	Total support
Shorter scripted TV shows	29%	44%	73%
Game shows (like Jeopardy)	29%	40%	70%
Competition shows (like American Ninja Warrior)	27%	37%	64%
Talk shows	24%	38%	63%
Reality shows or unscripted TV shows	25%	33%	58%



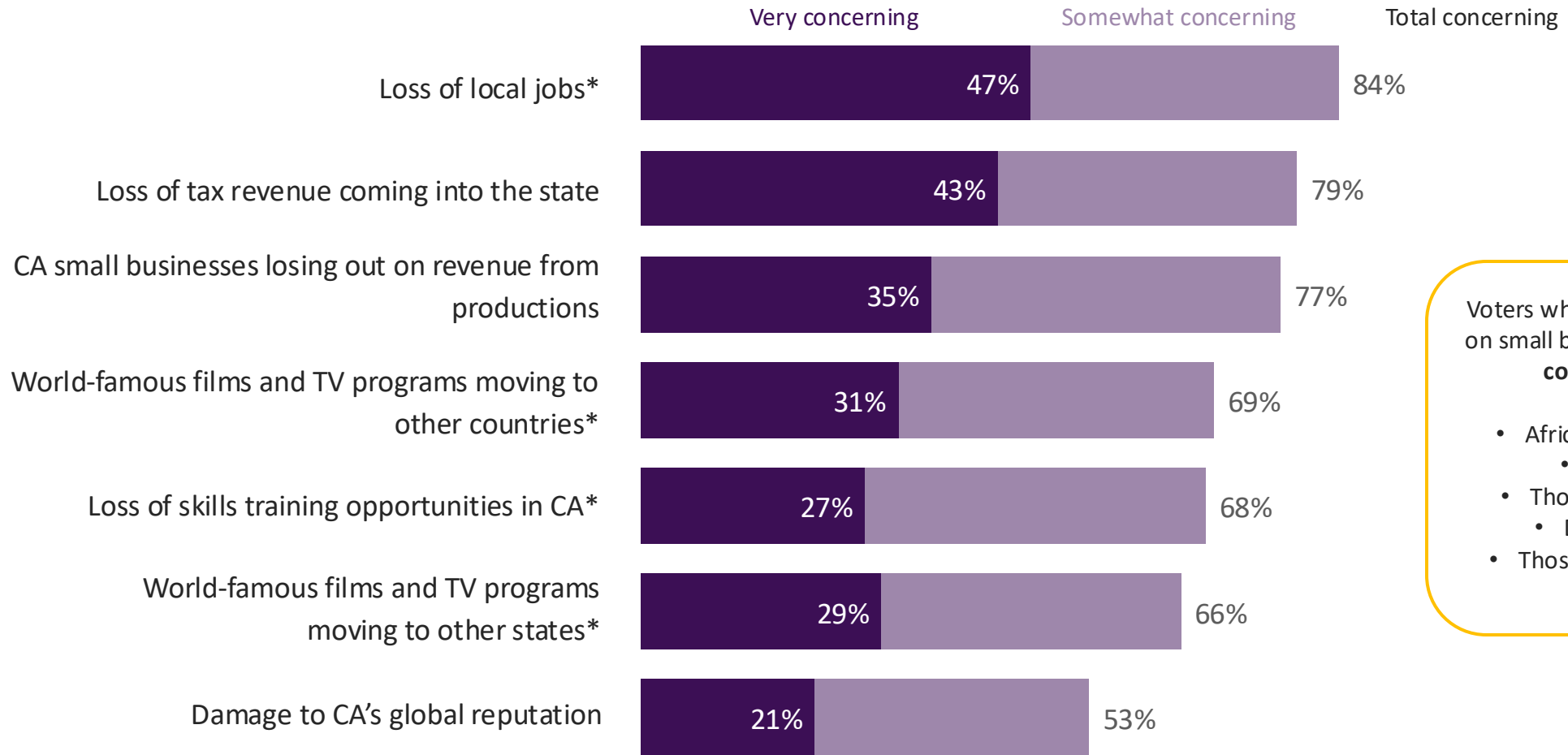
# Voters see job creation and tax revenues as both top benefits of the industry and top reasons to support the incentives.

Ranked choice: Top two benefits of film & TV shows being produced in California & Top two reasons to support the incentives



# Voters are concerned about loss of jobs and tax revenues if incentives are changed or limited, with worries too about impact on small businesses.

## Concerns with potentially changing and limiting tax incentives



Voters who say the impact on small businesses is **very concerning**:

- African Americans
  - Gen X
- Those living in LA
  - Democrats
- Those living in rural areas

\*Note: This item was asked of half the sample

# Hearing about the impacts of tax incentives, as well as job creation, makes voters more likely to support film tax incentives.

## Top reasons to say you're more likely to support film & TV tax incentives

	Much more likely	Somewhat more likely	Total more likely
The film industry supports over 800,000 jobs and more than \$46 billion in wages for California workers.	46%	33%	79%
Nine projects totaling more than \$510 million in production activity relocated to California as a result of the tax incentive in 2022.	33%	37%	70%
Surveys have found that more competitive tax incentives are the most important reason why productions choose to shoot in other states than California.	29%	35%	64%
More than half of California production projects that did not receive tax credits left California to be produced out-of-state.	25%	34%	59%
California limits film and TV production credits to \$330 million a year, while New York offers \$700 million a year and states like Georgia have no limit.	26%	33%	59%
Film production in the Los Angeles area is down by 33% over the past five years.	25%	34%	59%
Starting in 2025, all productions applying for the California tax credit are required to submit a diversity workplan checklist to qualify.	23%	30%	53%

## Key headlines:

- 1 Support for the current California film tax incentives increases to 79% after voters learn more, up from initial support of six-in-ten (60%).
- 2 Creating local jobs and bringing tax revenue to the state are seen as the top reasons to support film tax incentives, as well as the top benefits of production in California.
- 3 Eight-in-ten voters are concerned about loss of jobs (84%) and loss of tax revenue coming into the state (78%) if tax incentives are changed or limited; with over three-quarters (77%) worried about CA small businesses losing out on future revenues from production.
- 4 Three-quarters of voters (73%) back Governor Newsom's proposal to increase film tax incentives in California, with strong support for expanding the incentive to support shorter scripted TV shows.
- 5 More broadly, nine-in-ten voters (91%) see the film & TV industry as a symbol of California around the world, with eight-in-ten (81%) seeing the industry as essential to the state's economy
- 6 Support is set against a context where over half of Californian voters (52%) think the state's economy is off on the wrong track, with only 31% thinking economy is on the right track.



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