

STATE
OF
CREATE

A DARK & GOLDEN AGE

There has never been a better time in history to be a creative person. More people than ever before have the tools to create, share, and earn an income from their art.

And yet, creators are facing more obstacles than ever. Volatile platforms, unpredictable income, difficulty reaching followers... the list goes on and on.



Those problems are real. And they hurt. So why are we so optimistic about the future of the internet for creative people?

Because despite all of these challenges, there are signs that a new fundamental shift is underway toward a more creator-first future.

We surveyed:

1K+ 2K+

Creators

Fans



Here's what we learned...
and why we're so f*cking
excited about it.

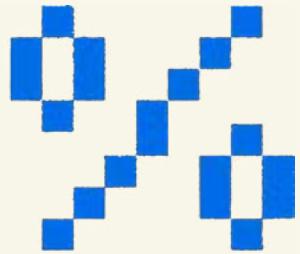
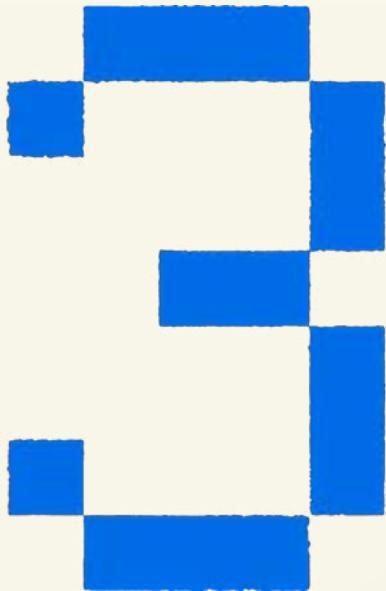
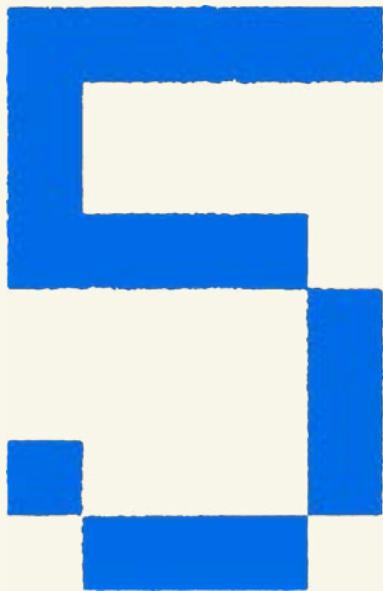
THE

FALL

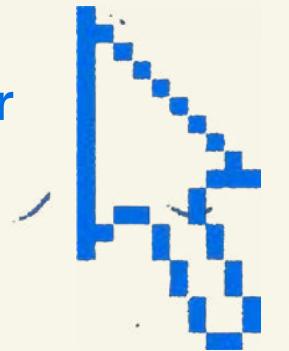
OF

THE

FOLLOW



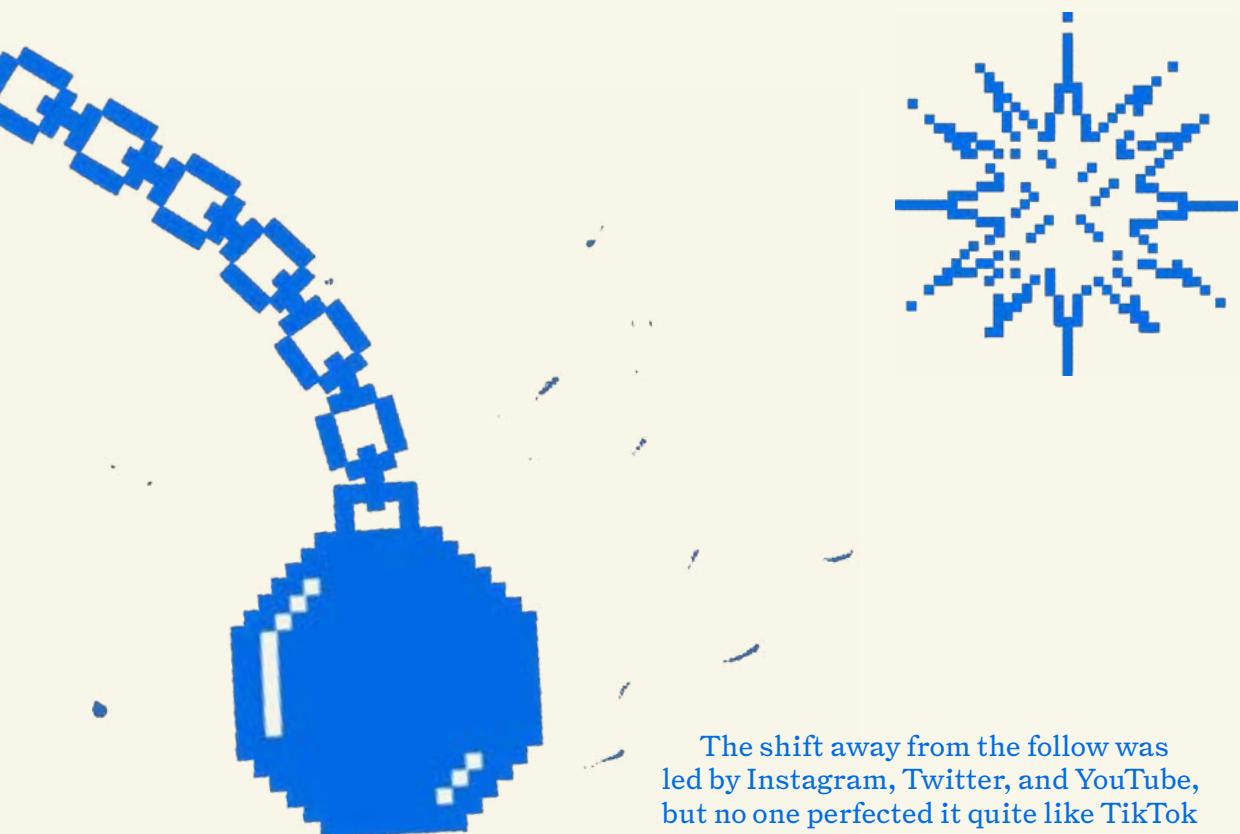
of creators say it's harder to reach their followers today than five years ago



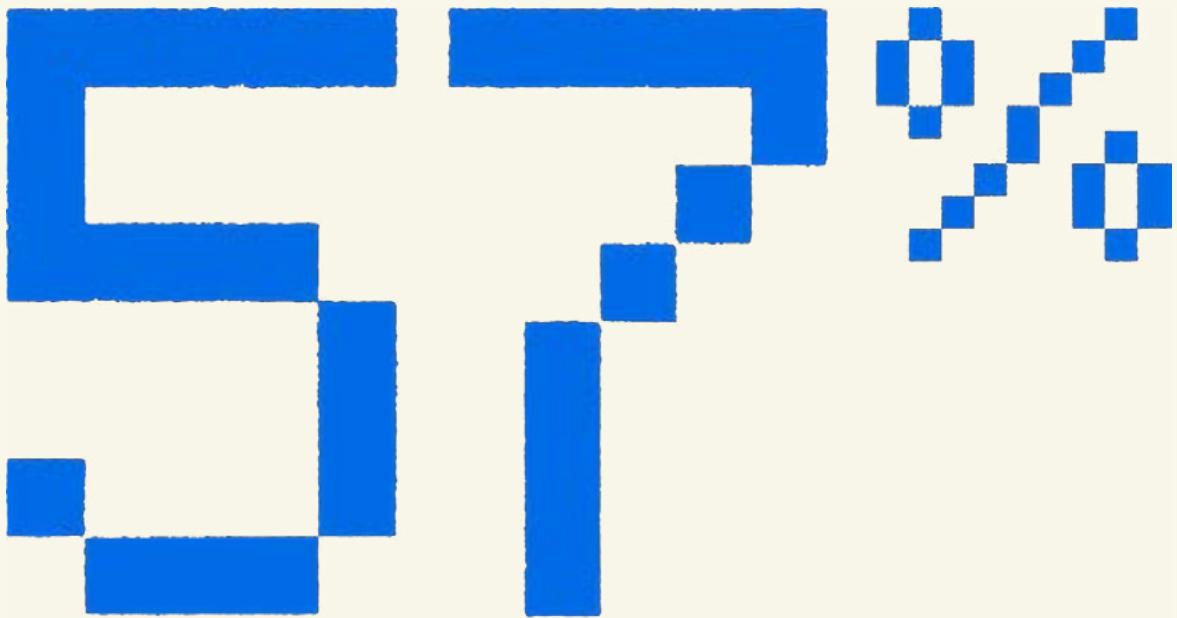
The creator-fan relationship used to be the beating heart of the social internet. The 'follow' and 'subscribe' buttons allowed fans to keep up with creators they loved, and helped creators build loyal, energized communities around their art.

But today, fans' feeds are increasingly filled with recommended posts for creators they don't know, along with ads, sponcon, and "brain rot" – the sort of stuff that keeps you watching, but doesn't provide lasting value. What happened?

A SOCIAL MEDIA REC-ING BALL



The shift away from the follow was led by Instagram, Twitter, and YouTube, but no one perfected it quite like TikTok and their 'For You' page. Instead of giving users control over what they see based on who they follow, TikTok serves up a feed based on what they predict will be most engaging.



of fans' time on TikTok is spent watching work from creators they don't follow

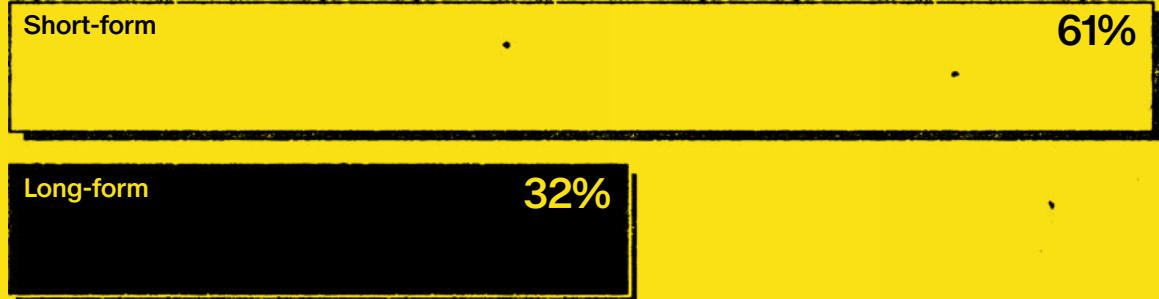
From a business perspective, this approach has been enormously successful, and other platforms have raced to follow suit. But creators are starting to realize that 'For You' isn't built for them.

OVER-CORRECTION TOWARD SHORT-FORM

Any platform whose business model relies on ad revenue is incentivized to value engagement and watch time. So it makes sense that those platforms would heavily feature short-form, which fans report being more likely to engage with.

But by leaning all the way into short-form at the expense of long-form, platforms are preventing creators from providing more value to their audiences... and earning more money.

Fans say they see almost twice as much short-form work on social media



But when asked which provides more value, fans favor long-form

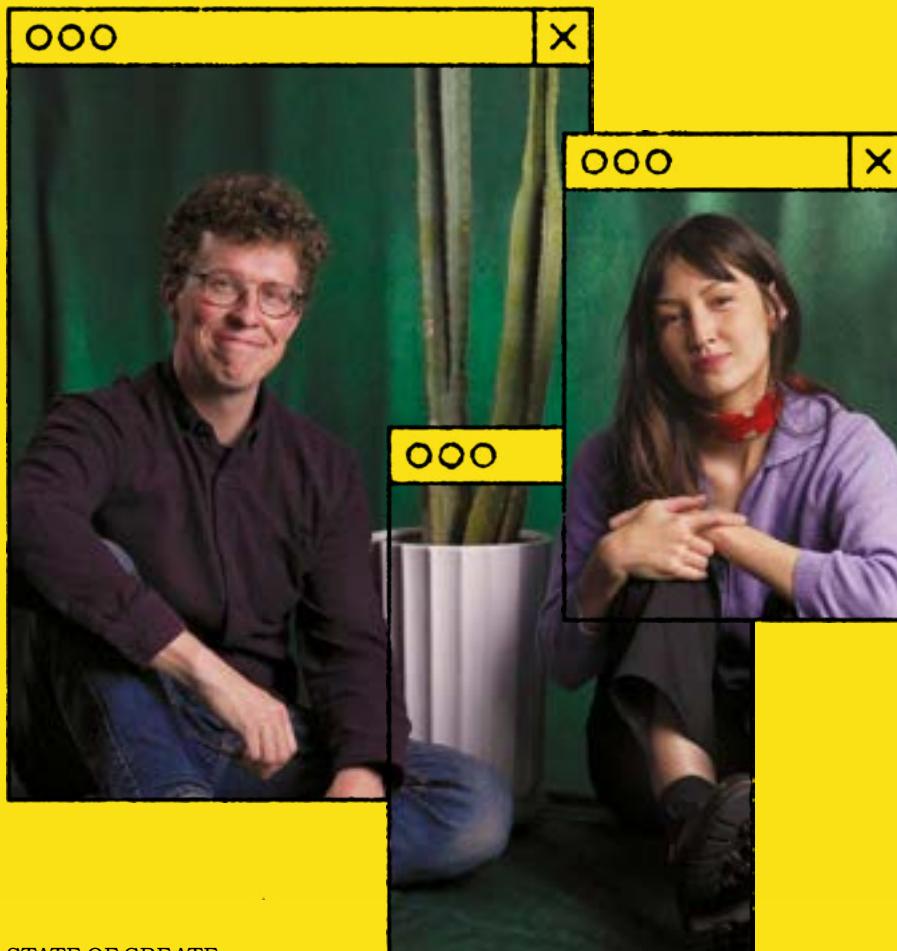


And when asked which they'd be more likely to pay for, long-form wins in a landslide



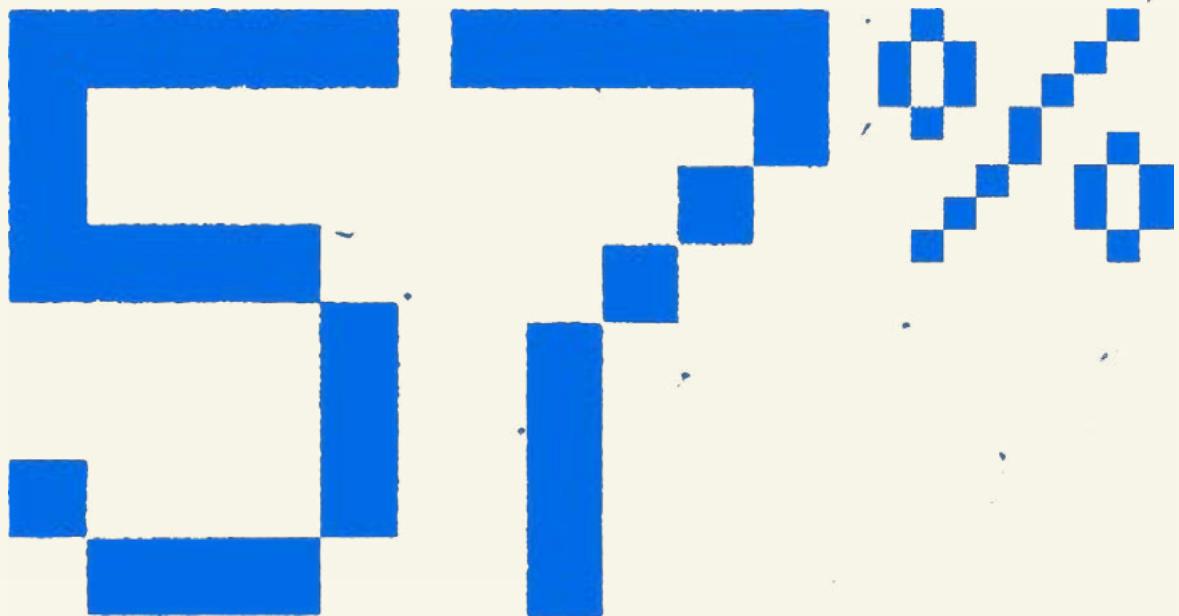
“Automated short-form video feeds are a fast way to grow, but the time we spend trying to surf that wave is time we’re not spending on the nuanced videos that really earn people’s trust.”

Joss Fong & Adam Cole of Howtown
Video creators

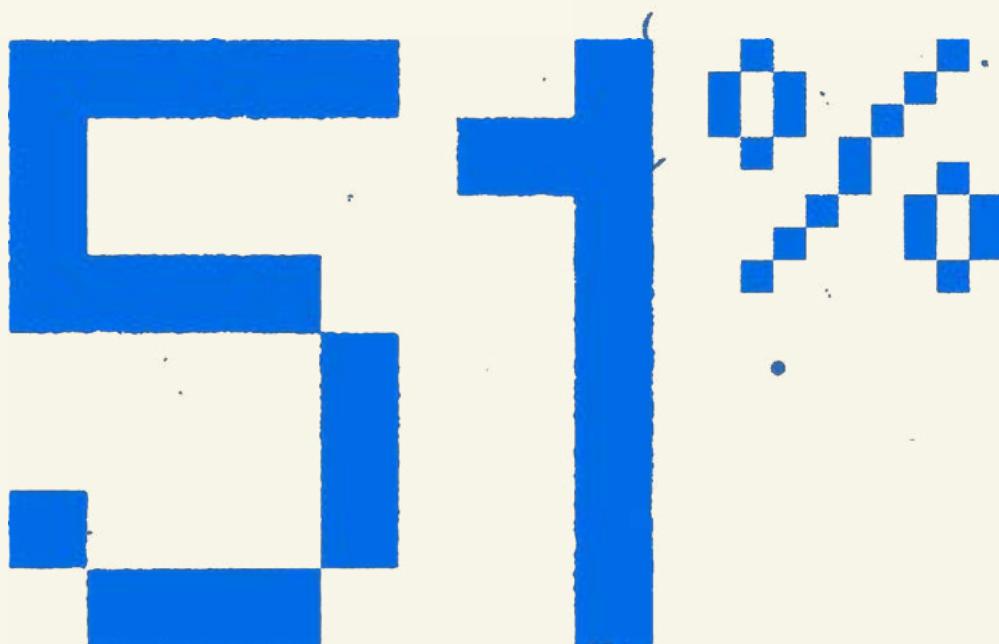


PROS AND CONSEQUENCES

On one hand, the TikTokification of the internet has helped more creators get discovered by new audiences, and that has been a welcome change. But creators are agreeing more and more that getting in front of all those potential new fans isn't so useful if they can't keep reaching them consistently.



of creators say the ability to reach large audiences
is the biggest factor in their success



of creators say it's harder to build a fan community
today than five years ago

HOW CREATORS



REALLY
FEEL

The way that major platforms currently organize their feeds is all about maximizing attention, watch time, and ad revenue. This approach has broadly earned the nickname ‘The Algorithm’, and creators aren’t shy in venting their frustrations about how it’s disconnecting them from their followers.

60%

of creators say Instagram does not always show fans their most important work

CREATORS FEEL MANIPULATED

A creator's decision of what to make should be based on what excites them and their fans the most. But creators increasingly feel forced to post memes, trends, clickbait, and sensationalism, because they understand that's what will perform well.





78%

of creators say The Algorithm
impacts what they create

56%

of creators say The Algorithm
prevents them from exploring
their passions and interests

“Social media algorithms push you towards what’s ‘trending,’ and before you know it, you’re creating not from the soul but from some sense of ‘what works.’”

Malick Lombion
Video creator/visual artist



CREATORS FEEL HAMSTER- WHEELED

The creative process is not an assembly line. It requires time for experimentation and exploration. Yet a majority of creators say they feel pressured to create new work all the time, or else the platforms will stop showing their work in fans' feeds.

75% 78%

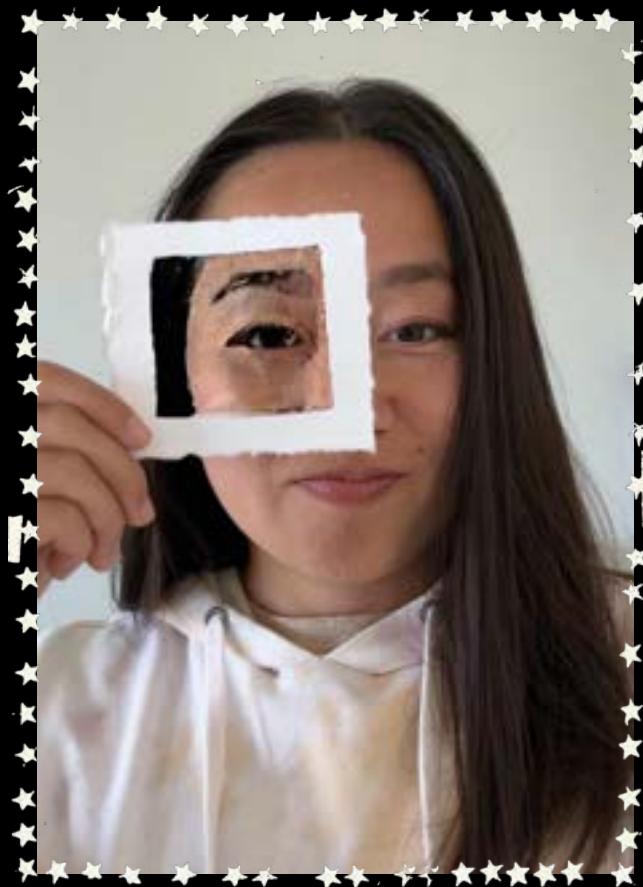
of creators say
platforms punish those
who aren't constantly
publishing work

of creators say
burnout impacts their
motivation to be a
creator

“As a fine artist, the work I produce takes a significant amount of time and energy, yet I feel a constant urge to post on social media to stay ‘relevant.’”

Brooke Cormier
Visual artist





“The Algorithm doesn’t measure what people want. It measures what people pay attention to.”

Karen X. Cheng
Creative director, video and visual arts

CREATORS FEEL GATEKEPT

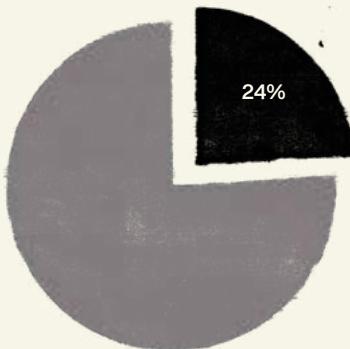


Platforms do offer following-only feeds, but those feeds are only useful if they're used. By deprioritizing the follow, platforms are increasingly serving as gatekeepers between creators and their fans.

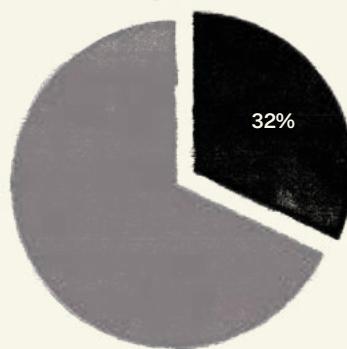


Fans report spending significantly less of their time in 'following' feeds

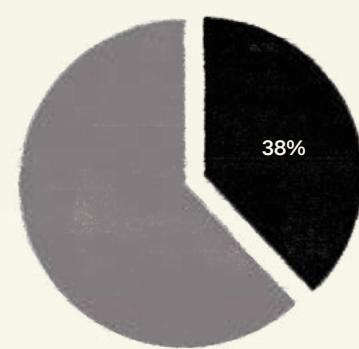
- 'Following' or 'subscription' feeds
- 'For You' feeds



Fans on Instagram

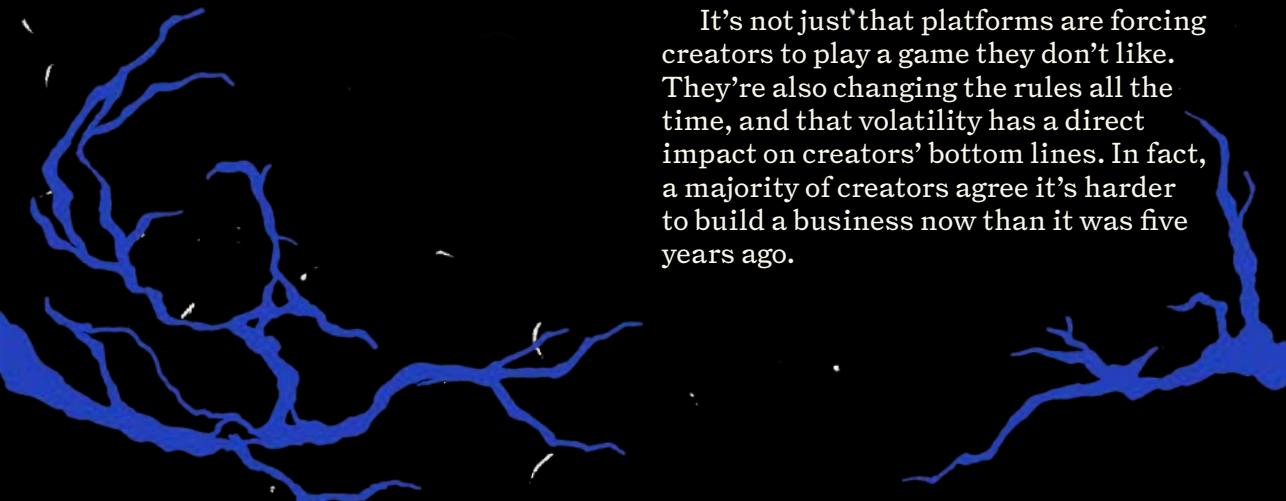


Fans on YouTube



Fans on TikTok

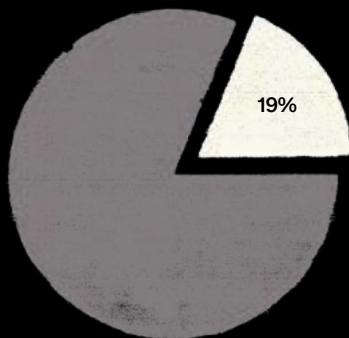
CREATORS FEEL DESTABILIZED



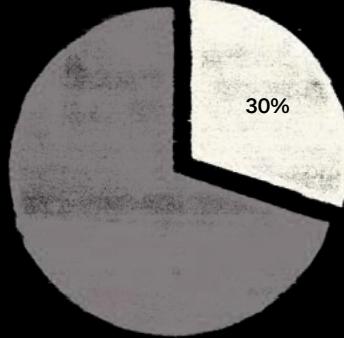
It's not just that platforms are forcing creators to play a game they don't like. They're also changing the rules all the time, and that volatility has a direct impact on creators' bottom lines. In fact, a majority of creators agree it's harder to build a business now than it was five years ago.

A majority of creators say their monthly incomes on the major platforms are unpredictable

- “My income is easy to predict”
- “My income is unpredictable”



Fans on Instagram



Fans on YouTube



Fans on TikTok

“It is exhausting trying to adapt to something that changes constantly, without warning and without reason or explanation.”

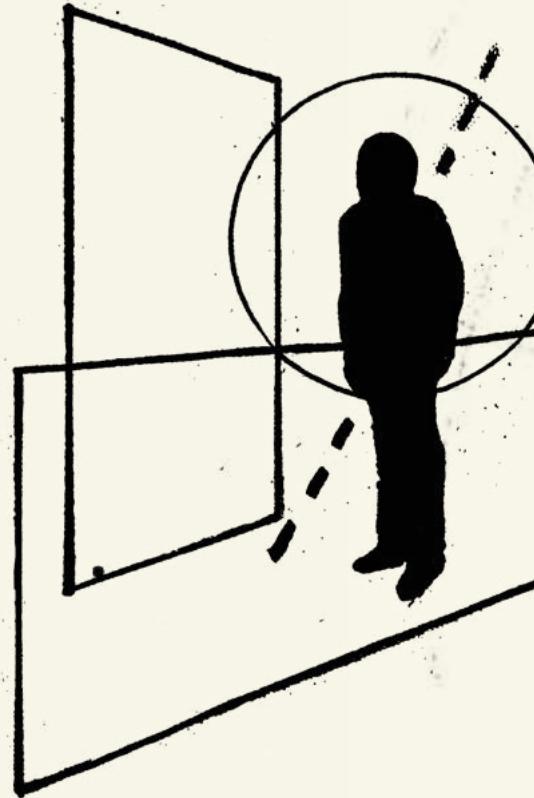
Hawk Podcasts
Podcaster – Law/News/Politics



CREATORS FEEL TRAPPED

Creators have begun to realize that they don't actually own the relationships with their own fans on many of the major platforms. They don't have emails or contact info. They don't have any way to continue reaching those fans if they ever go somewhere else. The platforms keep all of that for themselves.

But if you don't own the fan relationships, then ultimately they're not your fans. They're just the platforms' users.



81%

of creators want a direct channel of communication with their fans



“I’ve definitely felt fatigue with the necessity to hold people’s attention online. It’s becoming apparent that community is what’s going to get us through.”

Rachel Cargle
Educator and personal development facilitator

Hope in
a Post-
Follower
World

Difficulty reaching fans, burnout, unpredictable income, the “fall of ‘the follower’”... it sounds pretty rough for creators. So why are we feeling so optimistic?

Because creators’ values are changing, and there are growing signs that the internet is starting to change with them.

CREATORS' NEEDS ARE EVOLVING



As the creator economy grows, more creators are deciding to seriously pursue creativity long-term. Which means their values are shifting toward ways to achieve long-term stability instead of chasing short-term metrics.

We asked creators what their most important priorities were 5 years ago vs. today. Their answers excited us.



Most Important Five Years Ago

- 1 Follower Count
- 2 Likes, Comments and Shares
- 3 Views, Listens, and Watch Hours

Most Important Today

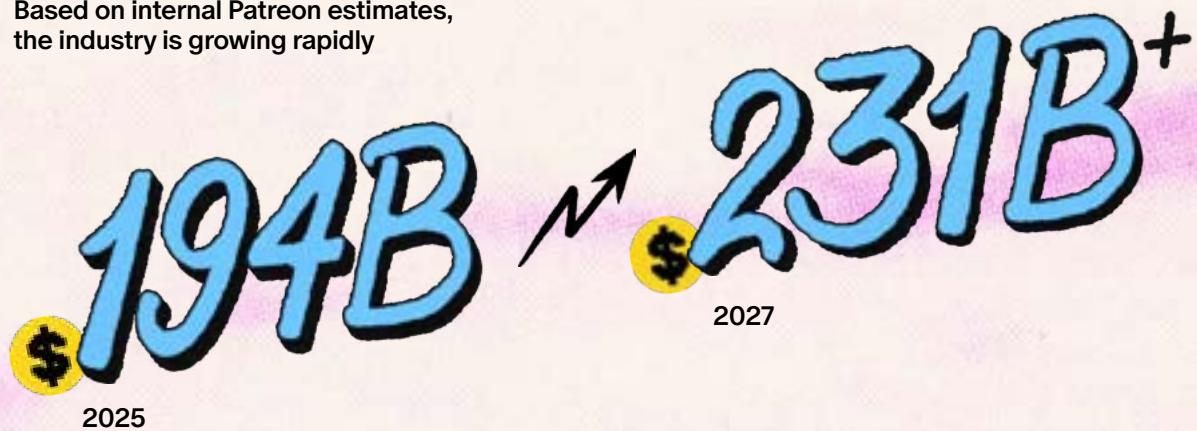
- 1 Quality of Creative Work
- 2 Building Fan Relationships
- 3 Financial Stability



THE DIRECT-TO-FAN MARKET IS GROWING

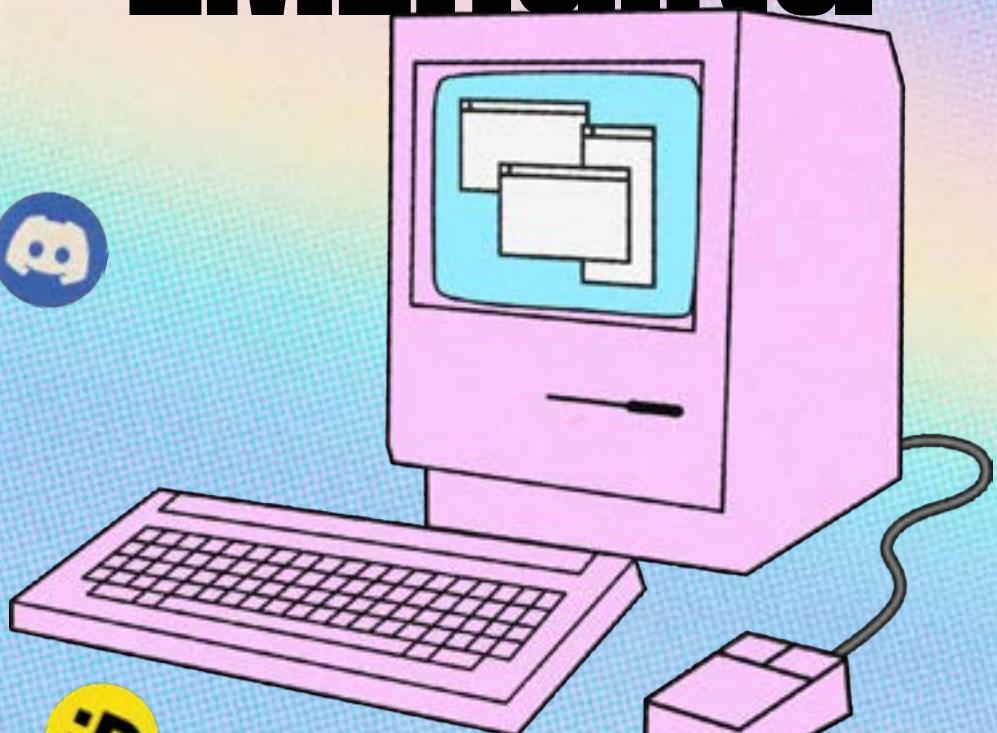
It's been a wild ride for creators these past few years. The 2020 pandemic caused an outpouring of online creativity... but as the world opened back up all of that momentum began to slow. Some even wondered whether the creator economy had peaked.

Based on internal Patreon estimates,
the industry is growing rapidly



In 2025, it's now clear that the direct-to-fan market – i.e. the sum total of payments from fans to creators – is growing fast.

NEW PLAYERS ARE EMERGING



With that growth comes an incredible opportunity for new ideas, new platforms, and new solutions to creators' biggest challenges.

Already we're seeing an entire ecosystem of companies – Substack, Discord, Dropout, Nebula, Bluesky, OnlyFans, Kajabi, Gumroad, and yes, Patreon – emerging to fill the gap between what creators need and what the major platforms currently provide.

Not only has this new creator economy helped give creators more of what they want, it also puts competitive pressure on the major platforms to adapt as well... or be left behind.

The Core Fan Era



One reason creators now value building fan relationships over follower counts is because they've realized an important truth: it's actually a small minority of their fans who make the most outsized impact on their income, and how energized their community is overall. Some call these fans true fans, or real fans, or superfans. We'll call them ***core fans***.

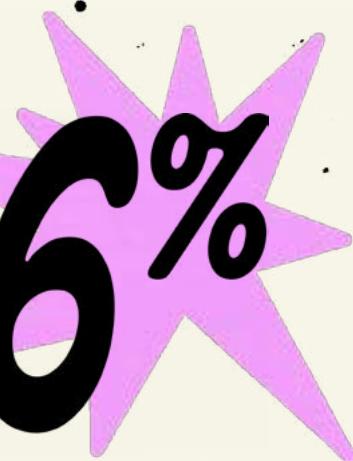
66

These are the folks who have your back, defend you in the comments, they wear the merch, they spread the word, they cheer you on. It's an amazing relationship.

Dan and Lynze Cummins
Timesuck Podcast

WHAT IS A CORE FAN?

Whereas casual fans might passively see what a creator posts when it's served up to them, core fans actively want more. They talk about their favorite creator's work with friends and other fans, they get involved in the creative process, they consider their fandom a significant piece of their identity, and they're much more likely to buy subscriptions, merch, and tickets.



86%

of core fans are likely to join a dedicated online community



80%

of core fans are likely to pay creators

AN ENGINE FOR GROWTH

Core fans are more likely to energize the rest of a creator's community by engaging with other fans. In doing so, they can help snowball the fandom into a community that generates value on its own, even when the creator is not posting new work.

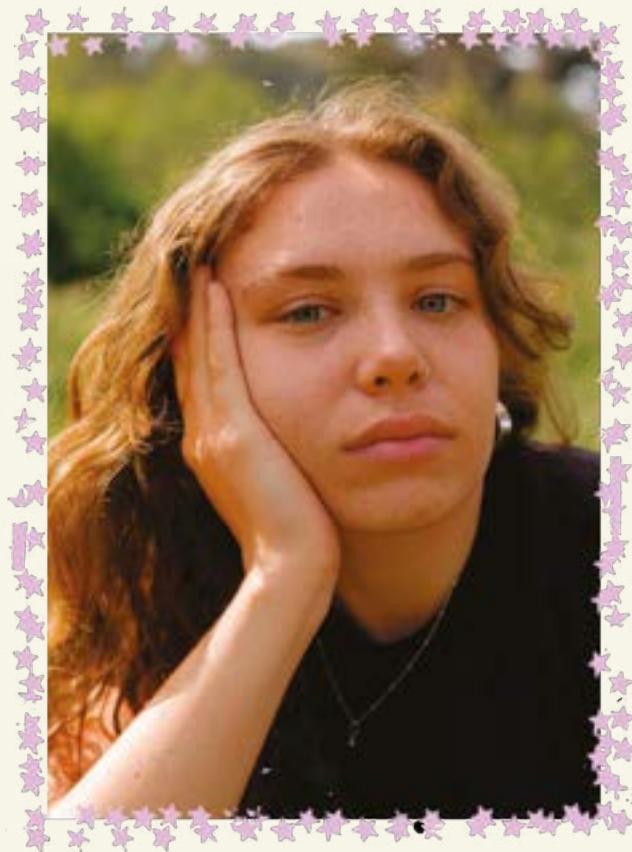
Not only does this added value make the community even more appealing for newer fans to want to join, it also takes the pressure off of the creator to be constantly creating.

87%

of core fans say they're likely to engage with other fans

“Connecting with my most loyal fans makes me feel the most inspired to create the work I want to make, which makes me the happiest, and ultimately leads to my best designs.”

Kate Weinberg
Visual artist – Graphic design



FANDOM THAT FEELS LIKE FIRE



This is only the beginning. Creators are overwhelmingly seeking out more ways to deepen connections with their biggest fans. That's not to say follower count isn't important to creators – it's just not the only end goal anymore. The new driver motivating creators to build a large follower count is to have more chances to turn followers into fans, and fans into core fans.

72%



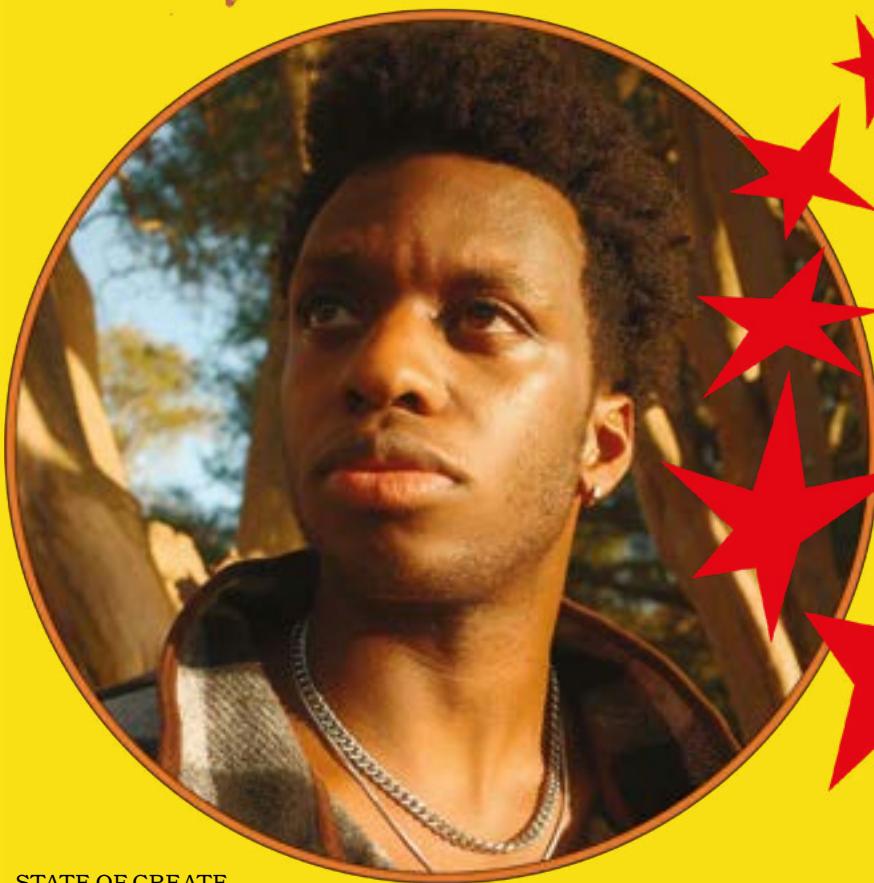
of creators want more
fan interaction

87%

of creators value the
importance of having a fan
community around their work

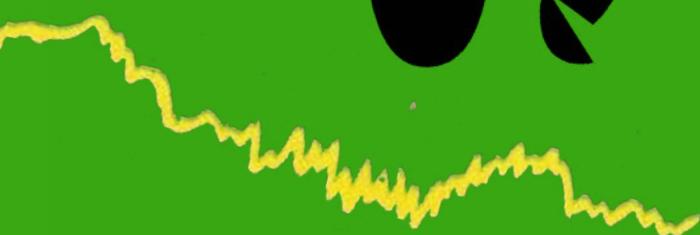
“There is so much power in having people who genuinely support you because they will never leave you.”

Joel Roache
Digital creator



Creators are

CREATING
CRUSHING
IT



In the past ten years, the idea of paying creators online for the value they provide has gone from essentially unheard of to totally normal. Today, millions of creative people are not only getting paid, they're building entire media businesses around their work. And they're confident that they'll continue to grow well into the future.



STABILITY THROUGH FRAG- MENTATION



The major platforms are going through a lot right now. TikTok is fighting with Washington, YouTube and Instagram are fighting to win back attention from TikTok, X-née-Twitter is fighting to keep advertisers. And yet, unexpectedly, all of this volatility has actually helped creators by encouraging them to turn toward more stable, direct-to-fan revenue streams like subscriptions and sales of digital goods.

67%

more creators report
earning from subscriptions
than five years ago

29%

more creators report earning
from sales of digital work
than five years ago

A DIRECT-TO-FAN FUTURE

According to internal Patreon research, over half of the \$290B that encompasses today's creator economy comes from direct-to-fan value like

- ticket sales, courses, livestreams, and paid memberships.

This is great news for creators, because ad revenue and brand deals are inherently unpredictable, while direct-to-fan offerings like subscriptions and digital shops are more stable revenue streams, contributing to a clearer path to long-term success.

50%

of all creator economy
value is direct-to-fan

“I’ve seen creators with huge audiences come and go. The ones who have longevity in the space are the ones who deeply connect with their fans.”

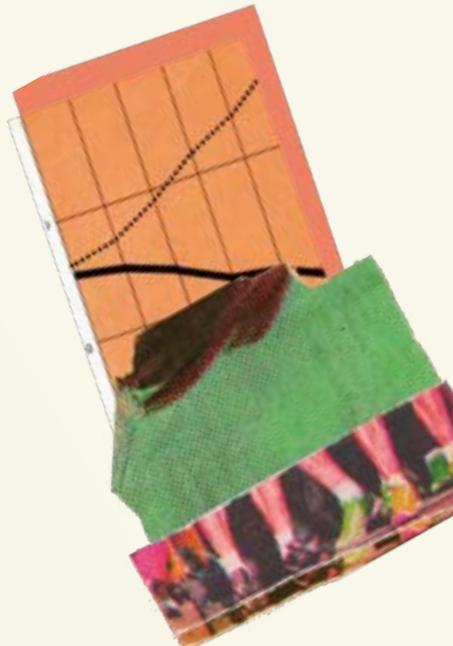
Amanda Rach Lee
Video creator/artist

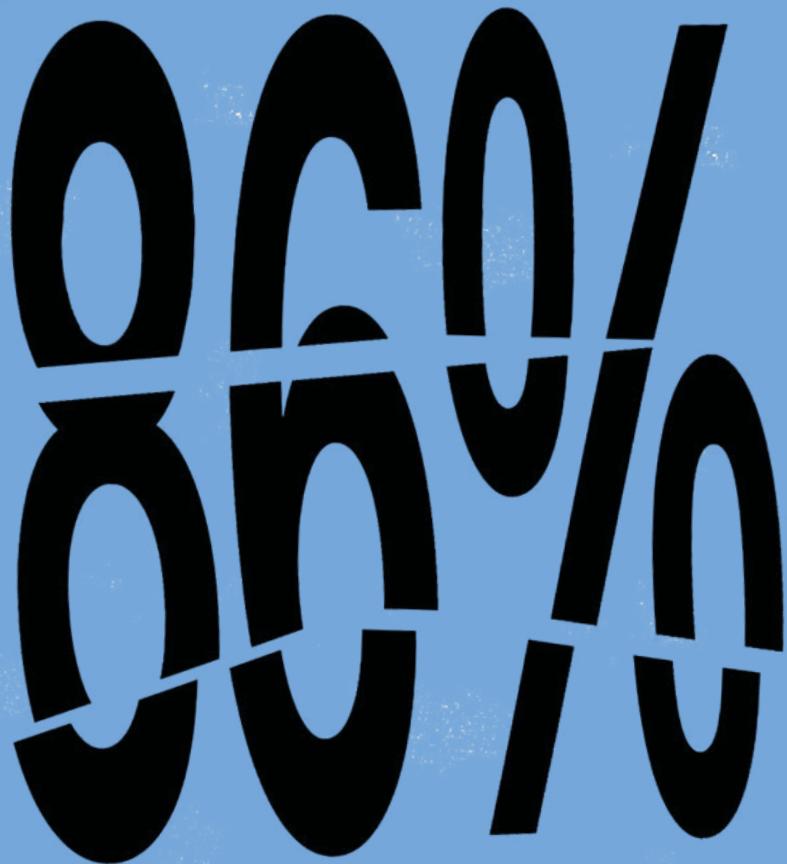


CREATORS LOVE WHAT THEY DO



Being a creator isn't easy, but the people who do it live for the challenge. And despite the exacerbating threats of burnout and platform gatekeeping, a majority of creators feel very confident they can continue producing at the same or greater level of output as they do today.





CREATE

of creators would recommend
being a creator to others

Patreon's Responsibility

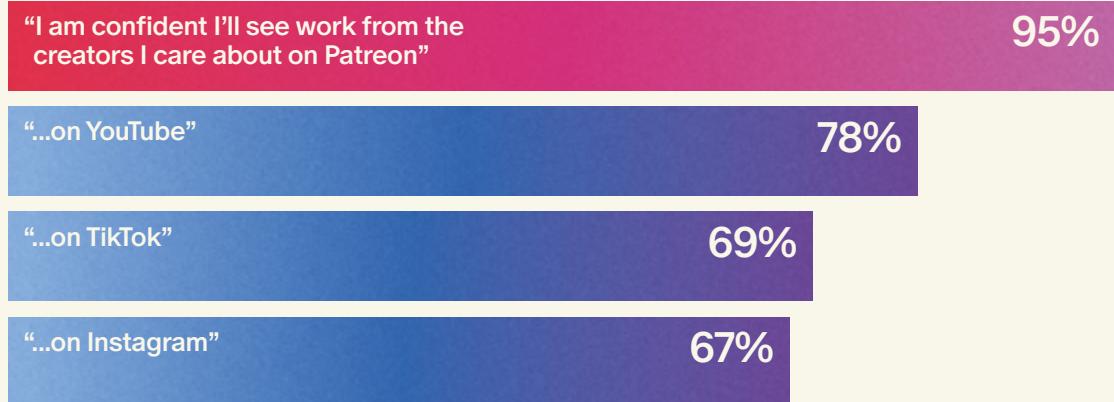
Building what's best for creators has been at the heart of everything Patreon has done since day one. Our goal with this report is not just to share what creators and fans want, but to use this information to build the future that they deserve.

Here are our biggest commitments for 2025 and beyond based on what we've found.

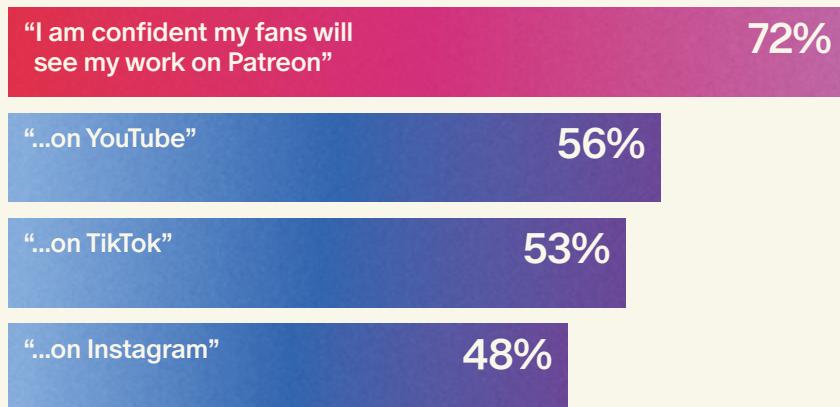
PROVIDING A DIRECT LINE OF ACCESS

No one should stand in the way of creators reaching their fans. And no one should stand in the way of fans seeing work from the creators they choose to follow. We remain committed to providing a space where creators can reach their fans directly and reliably.

More fans are confident they'll see work from creators they care about on Patreon



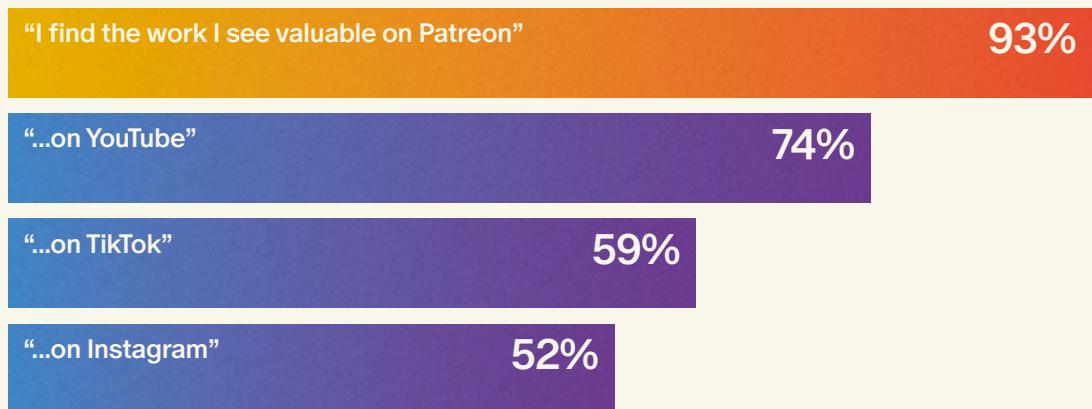
More creators are confident that fans will see their work on Patreon, compared to other platforms



INCENTIVIZING CREATIVE EXPRESSION

The major platforms are built around an old internet philosophy that ‘Content is King’. But there’s a problem with that philosophy: by centering everything around ‘content’ these platforms have commoditized the people who actually make the work.

More fans feel that the work they see
on Patreon is valuable



We remain committed to building a space on the internet that won't push creators toward any one kind of work to serve our own interests, or the interests of advertisers. Our goal is to incentivize creators to make what excites them most, because we believe that platforms should serve creators, and not the other way around.

“It may sound backwards, but I personally would really rather not ‘go viral’. I enjoy the slow and steady growth that I have had because I love the community I have.”

Anya Karolyn
Artist



HELPING CREATORS REACH NEW FANS

The ‘For You’ approach to discovery has become so ubiquitous that it’s easy to fall into the trap of thinking that the only possible algorithm is ‘The Algorithm’.

But over the past year we’ve invested in our own forms of discovery, including an Explore tab, creator-to-creator recommendations, gifting, autopilot, and even our own algorithmic recommendations, the combination of which is now sending millions of dollars to creators annually.

Patreon is demonstrating that it is possible to build discovery tools, and yes, even algorithms, that not only help creators reach new fans, but also deepen connections with existing fans, and ultimately build stronger communities and businesses.

ENABLING LONG-TERM BUSINESS SUCCESS

Patreon's mission is to help fund the creative class, and right now we're making good on that promise. Our goal is to continue to build even more direct-to-fan revenue sources for creators to help them provide more value to their fans, earn more income from that value, and build more stable, diversified businesses that are set up for long-term success.

Creators say their median annual income per fan is 40x bigger on Patreon than TikTok

\$52

is the average annual income per fan that creators earn on Patreon

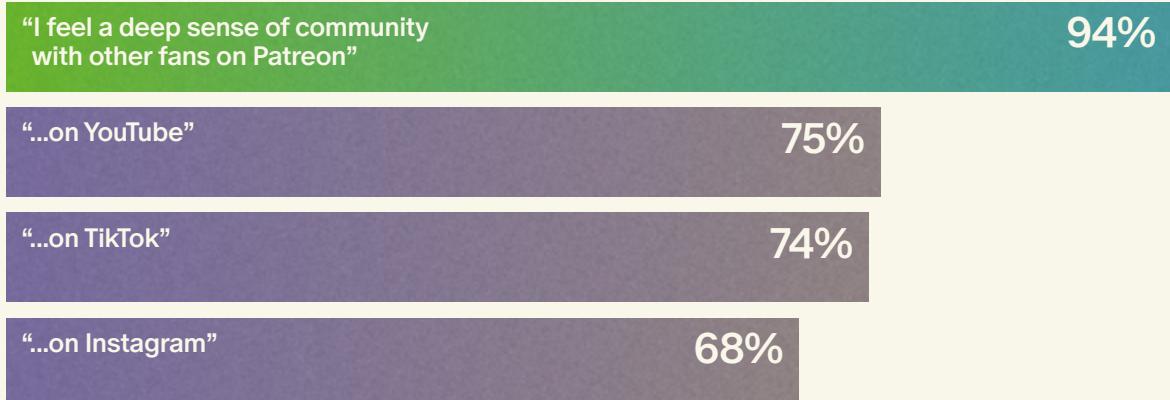
\$110

is the average annual income per paying member that creators earn on Patreon

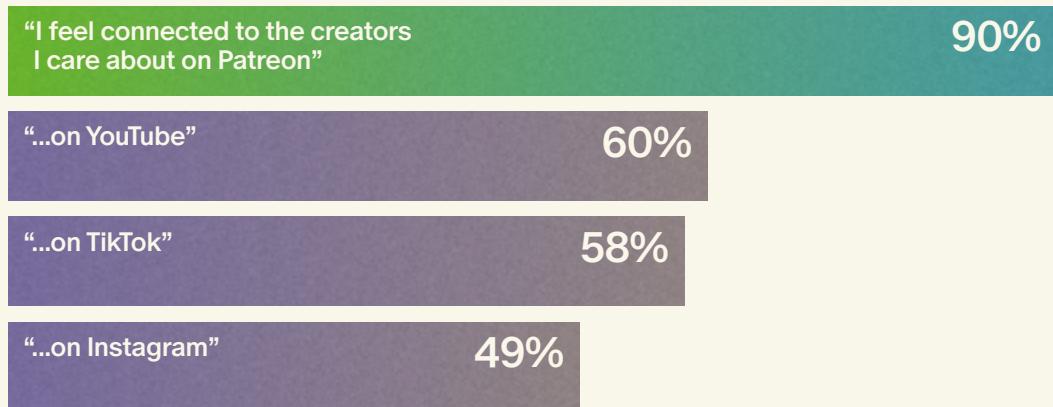
FOSTERING ENERGIZED FAN COMMUNITIES

We've spent a lot of energy over the past few years building new ways for creators to bring fans together, deepen relationships, and build fired-up fandoms. Based on what we're hearing from creators and fans, we're not letting up on the momentum anytime soon.

More fans feel a deep sense of community with other fans on Patreon



More fans feel connected to the creators they care about on Patreon



We will continue to build ways to strengthen relationships between creators and the people who love what they do, because we know the true key to lasting creative fulfillment and professional success is not just having the biggest fanbase, but also energizing your biggest fans.

CONCLUSION

CHANGING HOW ART AND COMMUNITY EXIST ON THE INTERNET

“Fame and fortune were never the goal. Spreading joy, touching lives, sharing the human experience, feeling less alone in a world that can be so damn isolating — that’s the only goal. Making a living doing that is the icing on the cake.”

Pretty Much It
Video creator

● **§. I** Creators want a space online to strengthen relationships with their most passionate fans, explore their creativity in its purest form, and grow sustainable businesses that they control and own.

● **§. II** They deserve that space. And that’s exactly the future we’re continuing to build toward: one where fandoms thrive and professional creativity is possible for anyone.

Sincerely,

Patreon Inc.
San Francisco, California

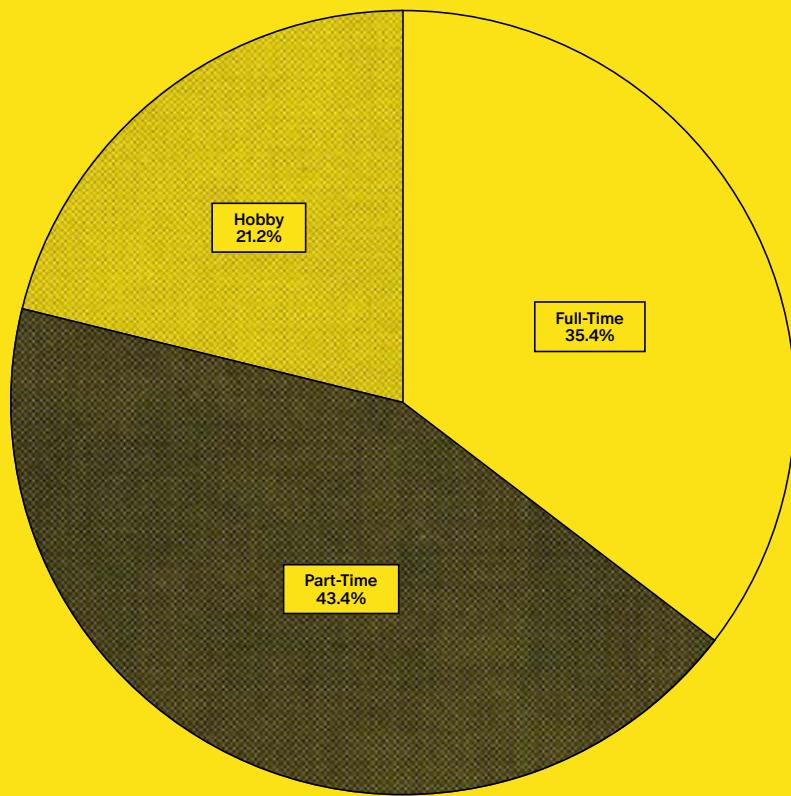




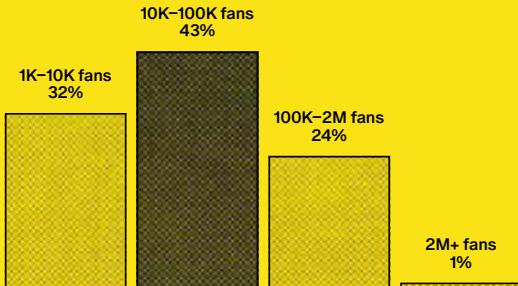
METHODOLOGY

In August 2024, Patreon's research team conducted an in-depth survey with over 1,000 creators and 2,000 fans. The goal was to develop a nuanced understanding of the current state of the creator economy and its evolution. We partnered with Newton X to capture a representative sample of creators and fans across platforms and genres in the United States.

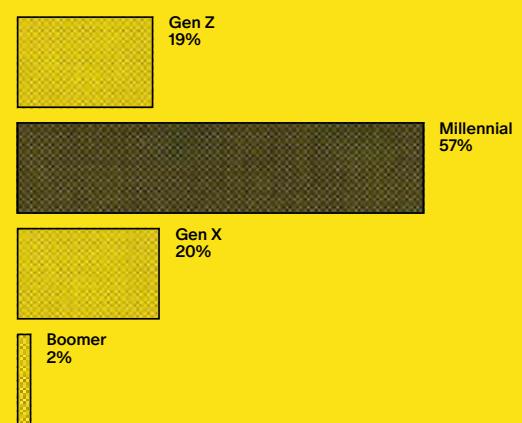
Professionalization Status



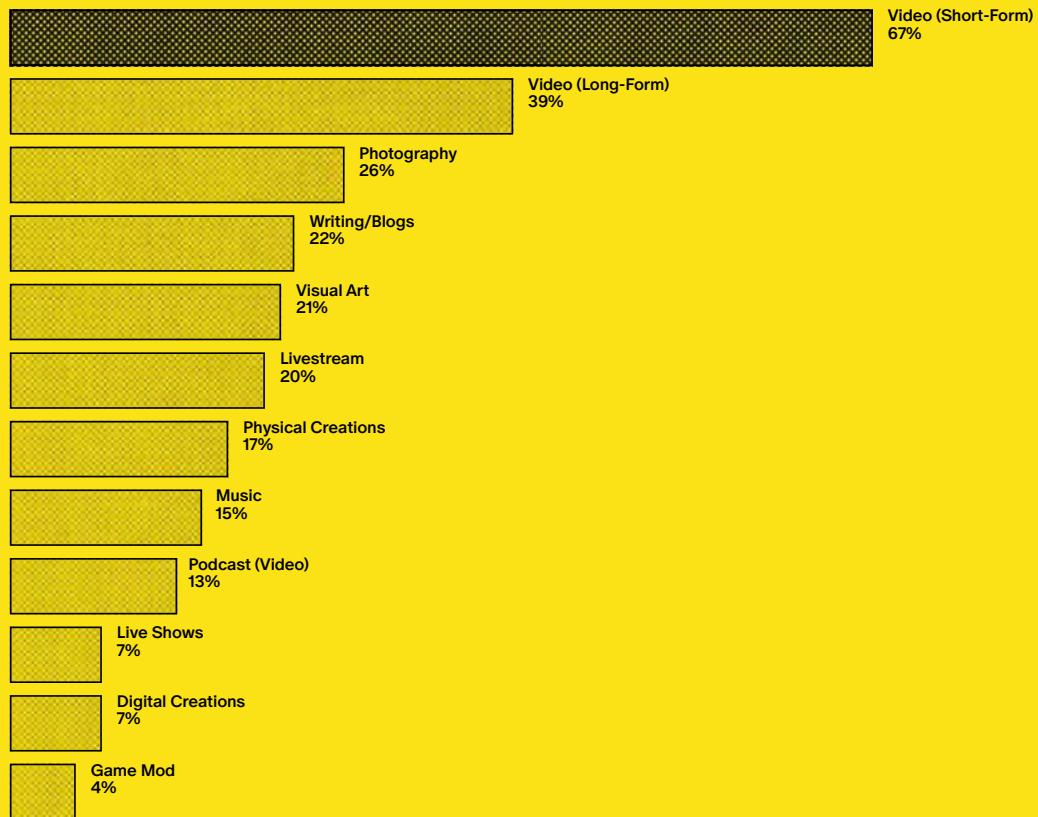
Creator Size



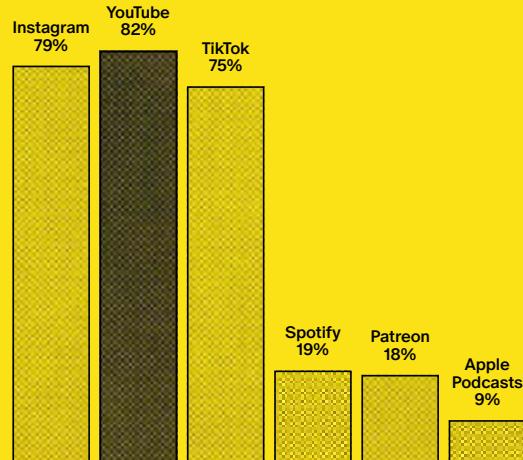
Age



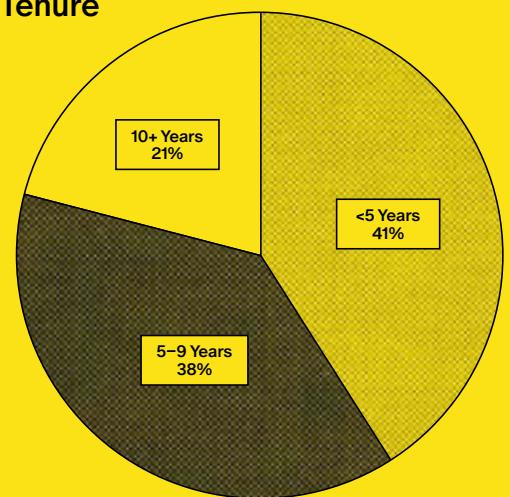
Modality



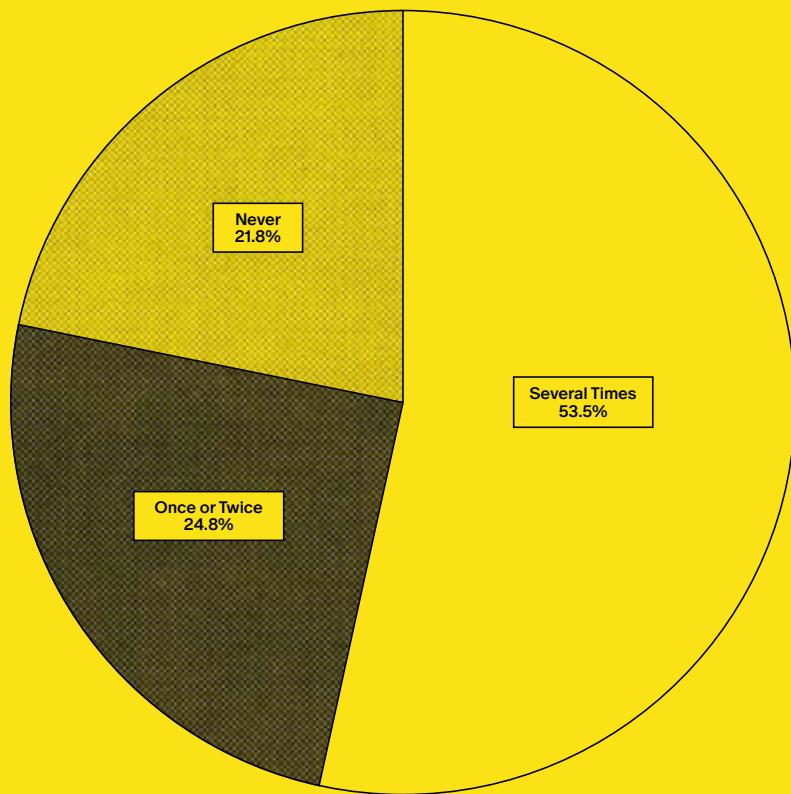
Platform Usage



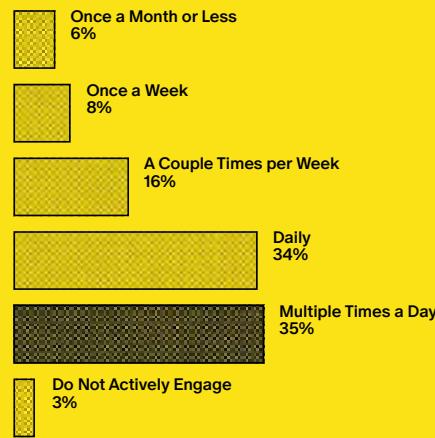
Tenure



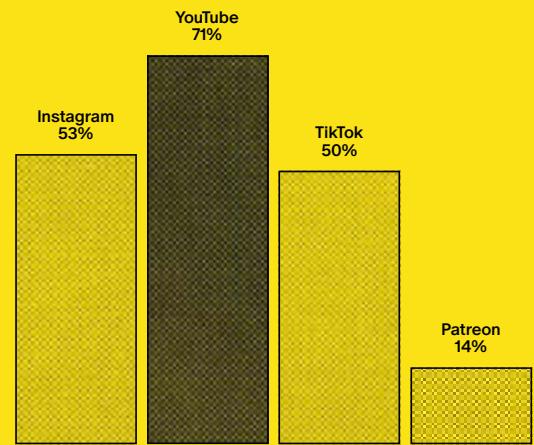
Payments To Creators



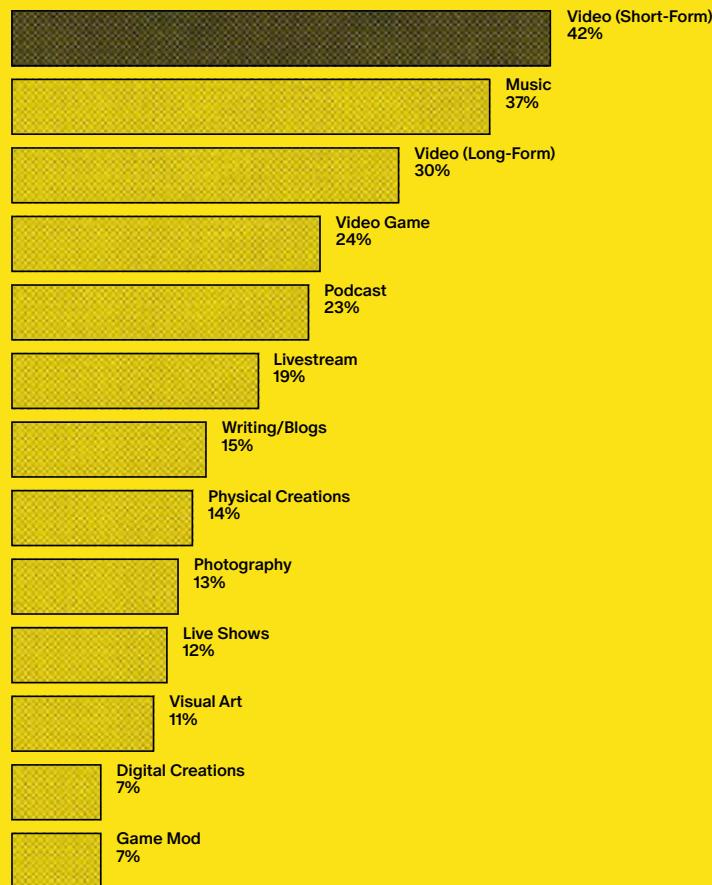
Engagement With Creative Work



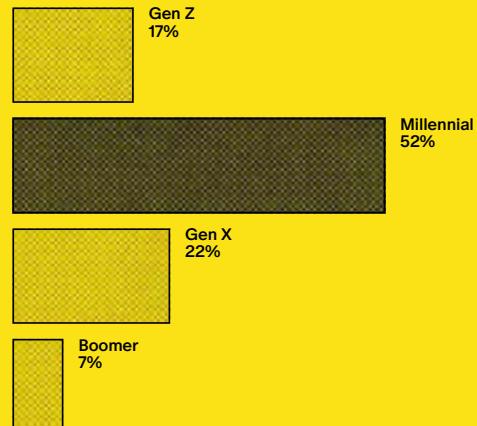
Platform Usage



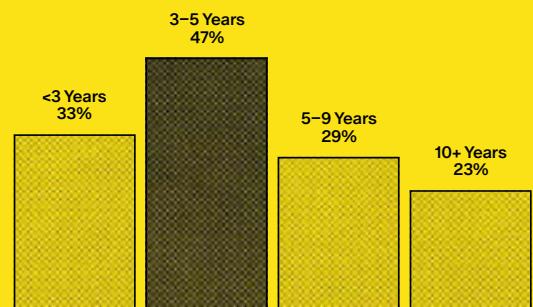
Modality



Age



Fan Tenure



PATREON
2025