Research Study Report
OCTOBER 2025

Understanding Pennsylvania's Creative Workforce

Prepared by
Stuart Weitzman School of Design
University of Pennsylvania

Pennsylvania
Creative Industries
Powered by Pennsylvania Council on the Arts

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Weitzman School of Design
University of Pennsylvania

Department of City and Regional Planning
Stuart Weitzman School of Design, University of Pennsylvania
Meyerson Hall \ 210 S 34th Street \ Philadelphia, PA 19104
with support from PennPraxis

Penn Praxis

Pennsylvania Creative Industries
Powered by Pennsylvania Council on the Arts

Pennsylvania Creative Industries
Powered by Pennsylvania Council on the Arts
216 Finance Building \ Harrisburg, PA 17120
www.pa.gov/agencies/coa

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Authors
Michael Fichman, Jamaal Green,
Dyan Castro, Xiaxin Tang,
Jason Fan

Pennsylvania Creative Industries, Powered by Pennsylvania Council on the Arts Team
Karl Blischke, Jamie Dunlap,
Norah Johnson, Amanda Lovell,
Heather Doughty, Dana Payne

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GEAR PLAYGROUND. Tech25's tuition-free programs provide hands-on training for youth and adults, helping bridge equity and access gaps in Pittsburgh's creative industries workforce. *Image Credit: Chris Sprowls.*

Executive Summary

Pennsylvania Creative Industries, powered by Pennsylvania Council on the Arts, provided a grant to researchers from the University of Pennsylvania's Weitzman School of Design to investigate the composition, geography, and needs of Pennsylvania's creative workforce.

Creative workers are those who apply creative artistic and technical abilities to their work. Examples include craftspeople, musicians, arts educators, designers, film technicians and many others. This report focuses on their lives. It paints a multi-dimensional picture of creative Pennsylvanians—the nature of their work, their economic and demographic characteristics, and their opinions about their creative practice.

Pennsylvania's creative workforce is large, varied, and economically significant. Creatives work in a wide variety of professions and industries. Workers have pride and enthusiasm for their work and report general satisfaction with support for their career development.

However, many creative workers experience challenges related to financial stability and personal wellbeing. Specific difficulties arise from the nature of independent entrepreneurship and self-employment. The Commonwealth lags behind peer states in some key indicators—including average earnings and creative workforce density.

KEY FINDINGS

- **Workforce Size & Distribution:** According to US Census data, approximately 245,000 Pennsylvanians—4.2% of the labor force - are creative workers. This is one of the largest such workforces in the country, but it is, by percentage, lower than the national average. The creative workforce is primarily concentrated in the Philadelphia and Pittsburgh metro areas, but creative jobs are widespread throughout the Commonwealth. Smaller urban areas are experiencing notable growth.
- **Occupational Diversity:** Creative workers report working at least 38 occupational classes and 47 industries. Pennsylvanians describe their creative work in ways that transcend conventional occupational categories. Workers often blend multiple roles—artist, educator, administrator, entrepreneur, technician—within the same career. Many creative workers are embedded in sectors not traditionally classified as "creative," such as non-profits, healthcare, government, and manufacturing.
- **Work Structures & Precarity:** Approximately 45% of creative workers are self-employed—often juggling multiple roles. Roughly 60% of full-time, self-employed creatives earn under $40,000 annually. Creative workers report a connection between financial uncertainty and personal well-being.
- **Income & Inequality:** Earnings vary widely. Designers, administrators, and architects are generally better compensated than independent artists and musicians. Men, participate in the workforce at higher levels than women. Meanwhile, women earn less than men, on average, and earnings are stratified by education levels.
- **Drivers of Development:** Most creatives report satisfaction with professional training and work infrastructure (like internet and utilities). Access to capital and grants is perceived to be a major barrier across occupations and industries.
- **Well-being & Retention Risks:** Mental health, financial stress, and lack of a safety net are widespread concerns. One in five workers surveyed is considering leaving Pennsylvania—nearly one in three in urban centers—a fact motivated by higher wages and perceived opportunities in competing states.
- **Business Landscape:** The Commonwealth is home to over 13,500 creativity-related firms. Key industries include design, media, museums, education, and live performance. Growth areas include museums and live arts, while traditional media is in decline.

"Many workers in the creative sector have multiple roles. For instance, I am the executive director of an organization, but also work as a musician and freelance illustrator."

–FREE ANSWER SURVEY RESPONSE,
OPTIONAL "ADDITIONAL COMMENTS" SECTION

Introduction

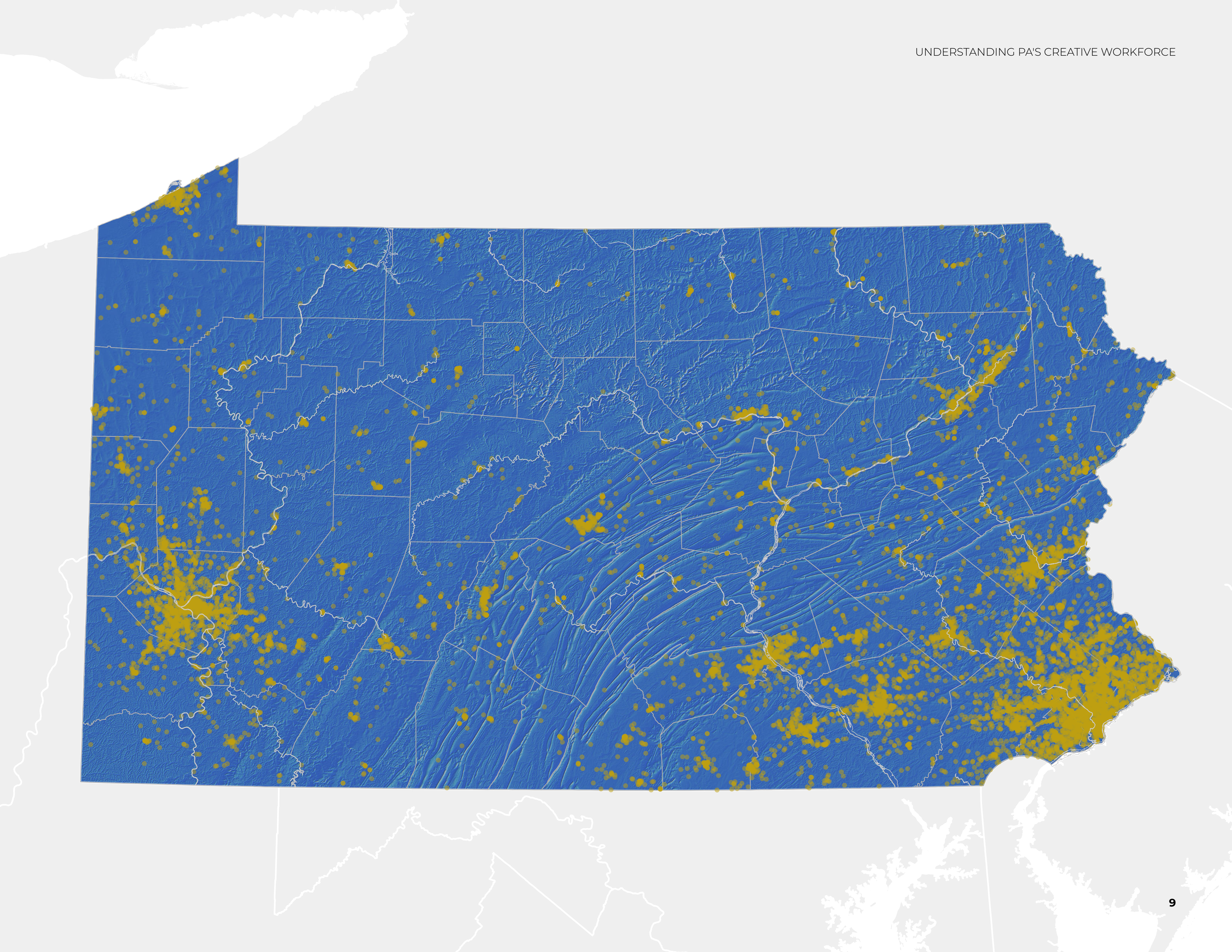
How can Pennsylvania Creative Industries, powered by Pennsylvania Council on the Arts, help Pennsylvania's creative workers succeed? First, they need to know: Who are the creative workers? How many are there? Where do they live? How do they describe the creative work they do? What do they say they need to be successful in their work and their lives? During 2024-25, our research team at the University of Pennsylvania Stuart Weitzman School of Design researched the varied dimensions of Pennsylvania's creative workforce using both US Census and proprietary business data, and then we asked them—in surveys and interviews—who they were and what they needed. This report details our findings.

Creativity is an integral part of the lives of many Pennsylvanians—but there are so many types of creative work practices that standard data from the US Census or Bureau of Labor Statistics are unable to tell us the full story of creatives in Pennsylvania (Fichman et al, 2021). There are semi-professional artisans who are on the books at a "day job." There are trained designers and videographers at typically non-creative organizations like hospitals and labor unions. There are musicians who teach lessons at and run a studio by day—and manage tours by night. This variety is a key theme in this report.

This report details research on the Commonwealth of Pennsylvania's creative workforce conducted in 2024-25 by a research team from the Department of City and Regional Planning at the University of Pennsylvania Weitzman School of Design, with support from PennPraxis. It contains the following:

- A section with **Findings in Brief (Page 10)** where the report's key themes, facts and figures are summarized.
- An **Occupational Analysis (Page 12)** of Pennsylvania's creative workforce using data from the US Census. This analysis shows the size and breadth of the workforce and details its economic and demographic characteristics.
- An **Industrial Analysis (Page 22)** of firms and organizations in Pennsylvania that are in key industry categories. We learn how many firms there are in creative and creative-adjacent sectors and analyze their earnings.
- **Results of a Survey (Page 32)** designed to create detailed quantitative and qualitative insights about the lives and needs of creative workers and those in creative enterprises.
- A synthesis of seven **Subject Interviews (Page 50)** with organizational leaders and creative industry thinkers in Pennsylvania.
- A summary of **Focus Areas (Page 56)** where policy formulation can address workforce needs.
- Several **Appendices (Page 66)** with information about methods, data sources, and the survey.

FIGURE 1 >
The geography of creative establishments in Pennsylvania.
Data – Data Axle (2022), US Census Bureau



Findings In Brief

"Given the scarcity of full-time employment opportunity in the arts, sometimes "OUT" is the only way to "MOVE UP" in institutional and regional settings."

–FREE RESPONSE TO SURVEY QUESTION:
"YES, I'VE CONSIDERED MOVING OUTSIDE OF PENNSYLVANIA"

THE DIMENSIONS OF THE CREATIVE WORKFORCE

Creative workers represent about 4.2% of the Commonwealth's adult population as of 2022—roughly 245,000 adults aged 25 and older. This is one of the largest creative workforces nationally, but as a percentage of the labor force, Pennsylvania has a lower concentration of creative workers than the national average and a lower concentration than some neighboring states.

Creative jobs are concentrated in the metropolitan areas of the state—Philadelphia and Pittsburgh and their metro areas—but **Lancaster County, Lehigh County, and the Commonwealth's smaller urban areas are experiencing recent growth.** Whereas performing arts, museums, and non-profits are more concentrated in the major cities, independent arts, and arts in education are widespread.

THE NATURE OF WORK

Pennsylvania's creative workforce is complex, and its work is diverse in nature. Individuals have a much broader idea of "creativity" in their work than economic data sets can reveal. The Commonwealth is home to a wide range of artisans, administrators, technical professionals, tradespeople, educators, and entrepreneurs that report working in at least 38 distinct occupational categories, for at least 47 different categories of firms and organizations.

Self-described "creative" workers are embedded in many types of businesses and organizations, including many sectors not regarded as "creative." Creative workers identify themselves as working in many fields not typically included in studies of cultural workforces. These prominently include education, manufacturing, health care, non-profits, and government.

Creative workers are often ecumenically skilled—they report doing a wide array of gigs or tasks at their jobs. Some make art as well as administering non-profits and businesses. Often times, creative workers do many jobs at once—with novel self-made businesses and diverse freelance working lives.

DRIVERS OF DEVELOPMENT

Creative workers in Pennsylvania report being satisfied with many of the services and professional development needs that they say are important to their work—available workspace, access to markets, affordable utilities and internet service, training, and licensing compliance.

Creative workers across most industries and professions are dissatisfied with their access to finance and capital. Whether they are an independent artist, administrator, or entrepreneur—creative workers report that availability of finance and grants are important to their work. On average, workers believe their access to such funds is not satisfactory. There is a need for more available, accessible, and durable funding and the technical capacity to access it.

Emerging technologies like generative AI are seen as both opportunity and threat. There are new creative possibilities in fields like design, but there is a concern that entry level jobs might be lost to new technologies. Digital literacy is seen as indispensable in the post COVID-19 era.

PRECARITY

Precarity was a key theme that emerged from qualitative and quantitative research. Several pieces of evidence help illustrate this. Creative workers are self-employed at much higher rates than other individuals in the Pennsylvania workforce—estimates range between 30-45%. Artists and musicians are self-employed at even higher rates among creative workers. Meanwhile, over 60% of full-time, self-employed creative workers reported earning less than $40,000 last tax year. Income disparities by sex and education are other factors that compound worker challenges.

Financial instability and personal challenges are closely connected. Interviewees cited mental health, feelings of personal validation, access to health insurance, difficult working conditions, and financial instability as common sources of stress.

The creative workforce is stratified. Some professions typically employ highly educated, well-compensated workers. These include software design, architecture, and arts instruction in higher education. Meanwhile, self-employed independent artists and performers, though often well-credentialled, earn much less. Men participate in the creative labor force at higher levels than women. Additionally, women earn less than men at every level of education within the larger cultural sector. Pennsylvania creative workers earn average, slightly less than $85,000 per year, but many earn much more, or much less.

Roughly 20% of survey subjects (across all professions) reported considering a move outside the Commonwealth—a source of concern given the fact that arts-related occupations are (on average) better compensated in neighboring states of New Jersey and New York and represented in a higher density in the workforce. These workers who are considering relocating represent a relatively higher percentage of workers in the state's urbanized areas.

THE CREATIVE BUSINESS LANDSCAPE

The Commonwealth's mix of creative industries is similar to that of peer states. There is a notable similarity between Pennsylvania's density and type of firms as New York State—where performing arts, independent artists and design are represented at higher densities than elsewhere.

As of 2022, there are roughly 13,500 creative businesses in the Commonwealth. The largest creative industry sectors in Pennsylvania are in design (architecture, interior, graphic), media (broadcasting, commercial printing, and photography), museums, education, live performance, and independent art creation. These firms employ approximately 138,000 workers of all kinds.

The non-profit sector is an important employer of creative workers—educational institutions, purpose-driven non-profits, non-profit performance arts organizations, and non-profit community organizations were some of the most common employer types reported by subjects.

There are some rising and falling creative industries in Pennsylvania. Since 2017, there has been a decline in the total number of firms in traditional media and printing, while museums and live arts have been on the rise.

FREELANCE WRITER AND AUTHOR CHRIS RODELL is part of Bridgeway Capital's ACRE initiative, which provides opportunities to creative workers in rural Western Pennsylvania. *Image Credit: Bridge Perspective.*

Occupational Analysis

Occupational Analysis

BACKGROUND

Literature Review and Context

Our research approach largely followed a study by the College of Fine and Applied Arts at the University of Illinois Urbana-Champaign (Novak-Leonard & Banerjee, 2022) that analyzes a key subset of 18 arts-related occupational classifications using US Census Microdata. Upon consultation with Pennsylvania Creative Industries staff, the occupation list was expanded to 34 to include a wider range of "creative" occupations. A list of these codes and occupational descriptions can be found in Appendix I.

The National Endowment for the Arts (NEA, 2022) and Novak-Leonard & Banerjee (2022) report the following stylized facts about the *arts* workforce. First, the arts workforce is relatively small, comprising approximately 2% of the overall workforce nationally. Second, the arts workforce has relatively high educational attainment with the majority of artists having a college degree or higher, but this is specific to particular occupations. Third, the arts workforce is predominately non-Hispanic White and male, and these workers earn the most of working artists, largely due to occupational differences across demographics.

Studies show that workforce participation in creative occupations skews towards those with higher socio-economic status as a result of structural challenges related to financial support, unpaid entry level work, and gatekeeping in cultural industries (Brook, O'Brien & Taylor, 2020).

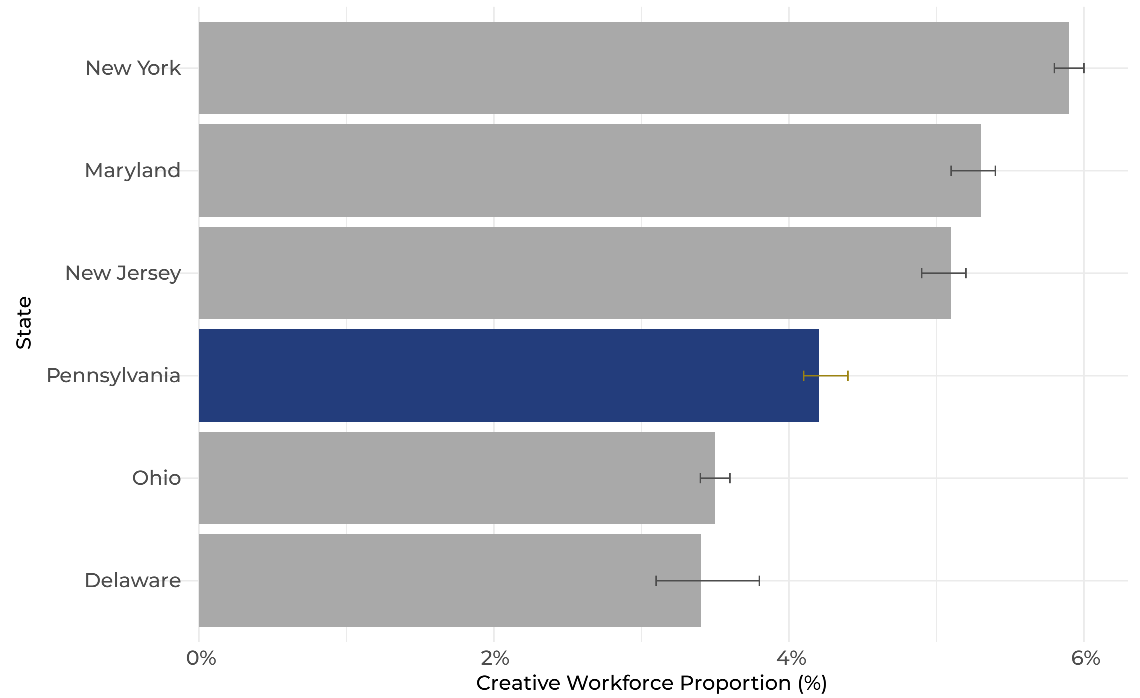
Our findings largely echo those of the Illinois and NEA reports, although due to our expanded list of occupations making up our target workforce, our figures are slightly larger, and the racial and gender-based disparities are starker. Gender and racial wage disparities are particularly stark in Pennsylvania compared to peer states.

METHODOLOGY

The primary data source for this section is the Public Use Microdata Series (PUMS) from the US Census. We collected our PUMS data from IPUMS USA, a product from the University of Minnesota that standardizes and makes publicly available a variety of US and international census data products (Ruggles et al, 2025). We use the 2018-2022 American Community Survey five-year estimates—the most robust recent estimates. All calculations are estimated at the state level. Also, this sample *does* overlap with the acute portions of the COVID-19 pandemic. This may bias some of our estimates downward as many artists were disproportionately affected by the pandemic.

We restricted our sample to adults aged 25 and older who listed themselves as *in the labor force*. This includes both employed and unemployed individuals, but those who are unemployed and still in the labor force are actively looking for work. Additionally, as mentioned earlier, we have a more expansive set of occupations than those found in the NEA-based reports. This larger sample of occupations generally pushes up many baseline statistics concerning the artistic workforce compared to other reports.

The structure of this section roughly follows that of similar reports referenced above. We extend upon this work in two primary ways. First, we have an expanded list of occupations that the Pennsylvania Creative Industries team deemed relevant to the state. This extends the NEA/Illinois methodology to be more broadly about "creative" workers and not just those in the arts. Second, we compare statewide figures with five reference states: Delaware, Maryland, New Jersey, New York, and Ohio. This gives us a better view of the position the Commonwealth has in relation to its neighbors.



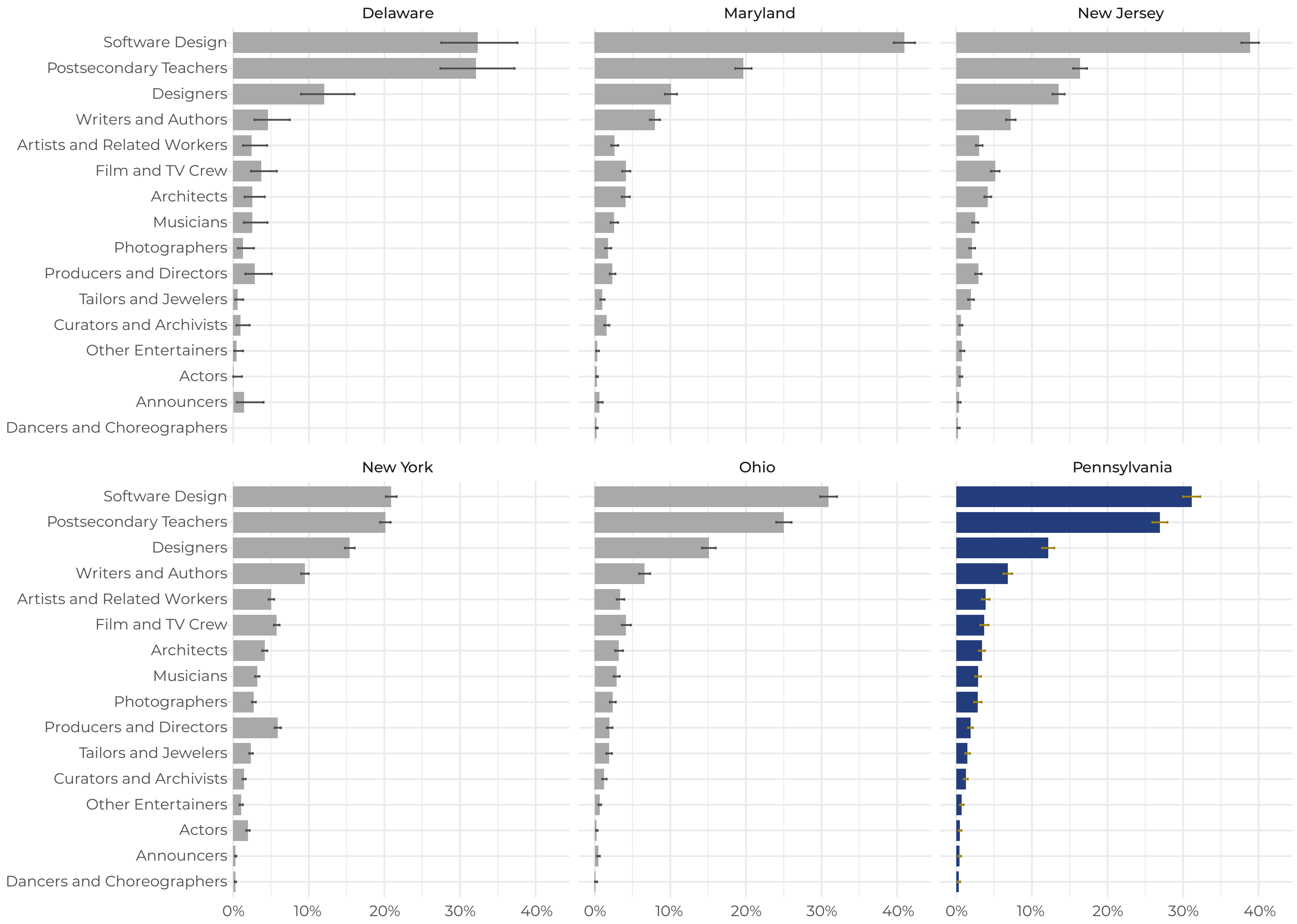
^FIGURE 2. Estimated percentage of adults in the labor force working in creative occupations, by state. Data: IPUMS USA, University of Minnesota, www.ipums.org.

KEY RESULTS

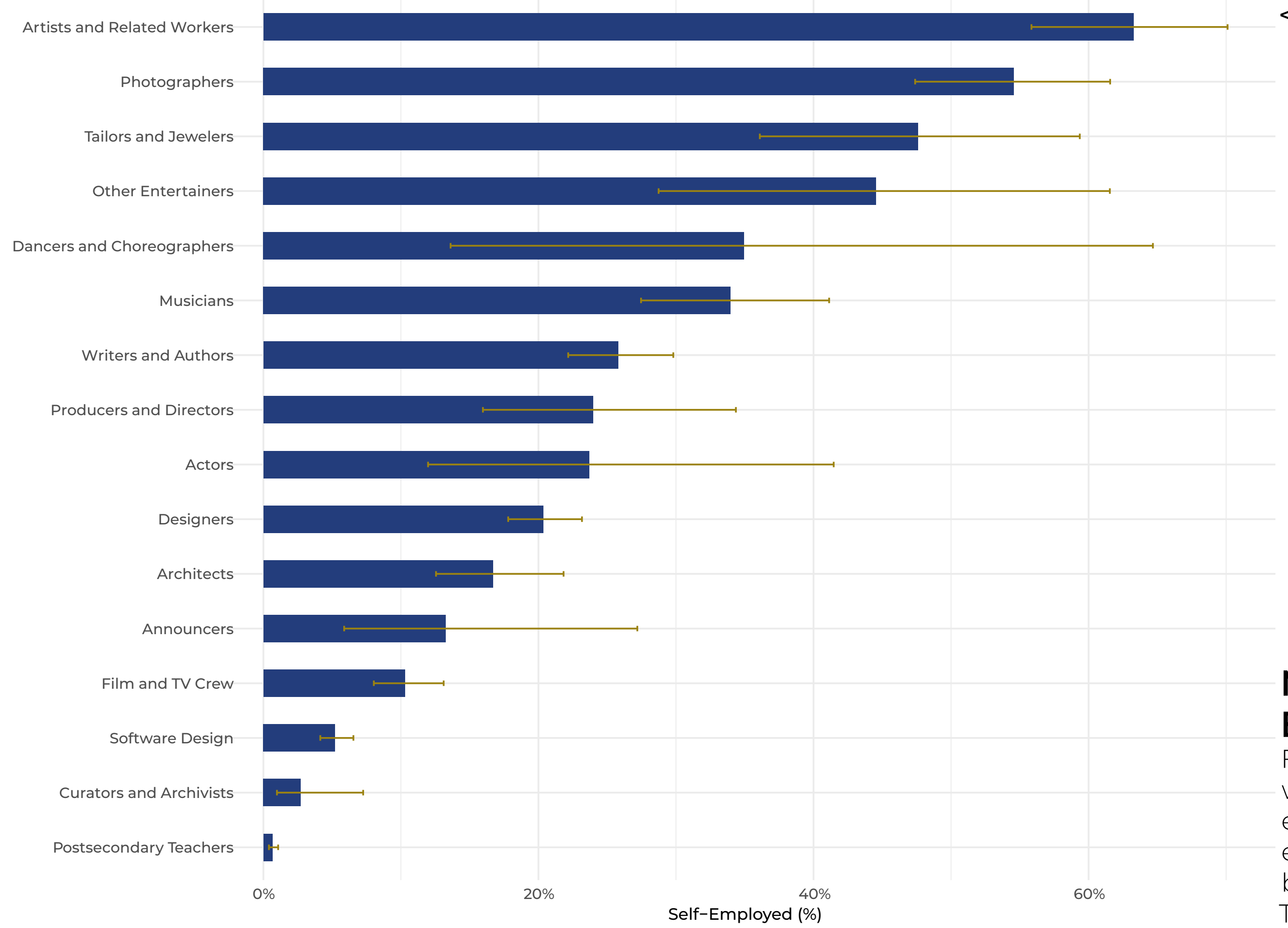
Pennsylvania's Creative Workforce is Large but Lags in Share of Employment

Pennsylvania's *creative* workers represent approximately 4.2% of persons 25 and older in the labor force. There are approximately 245,437 such people , in Pennsylvania who work in creative occupations. As a percentage of creatives in the workforce, this is smaller than rates observed in New York, New Jersey and Maryland (Figure 2).

The NEA estimates describe Pennsylvania as having the sixth-largest workforce of *artists* in the country, but as a percentage of total labor force (~1.5%) Pennsylvania's density of artists is below the national rate of 1.6% and far behind New York (2.5%), California (2.3%), New Jersey (1.8%) and other leading states (NEA, 2024a).



^FIGURE 3. Creative occupations in Pennsylvania and peer states, by share of employment in the creative workforce. Data: IPUMS USA, University of Minnesota, www.ipums.org.



< FIGURE 4. Rates of self-employment for creative occupations. Data: IPUMS USA, University of Minnesota, www.ipums.org.
Note that the confidence intervals for many of these occupations are rather wide so the point estimates as presented should be read with caution.

Software Designers and Postsecondary Teachers Dominate Creative Occupations

Whereas "Designers" lead in employment in studies by the NEA and University of Illinois (NEA, 2024a; Novak-Leonard & Banerjee, 2022), they are number three in our measurements—behind "Postsecondary Teachers" (26.9%) and "Software Designers" (31.1%). Designers still make up a large proportion of creative workers in our sample—approximately 12.1%. This pattern also largely holds across our comparison states (Figure 3). It is notable that "Software Designers" were absent from our survey sample, which recruited subjects who considered their work "creative in nature."

Non-Profit Employment and Self-Employment Are Common

Fifty-five percent of Pennsylvanian creative workers (55.4%) are employed by for-profit enterprises. Meanwhile, 13.6% are self-employed. The remainder (31.0%) are employed by not-for-profit or government organizations. The self-employment rate for creative workers is significantly higher than that for others.

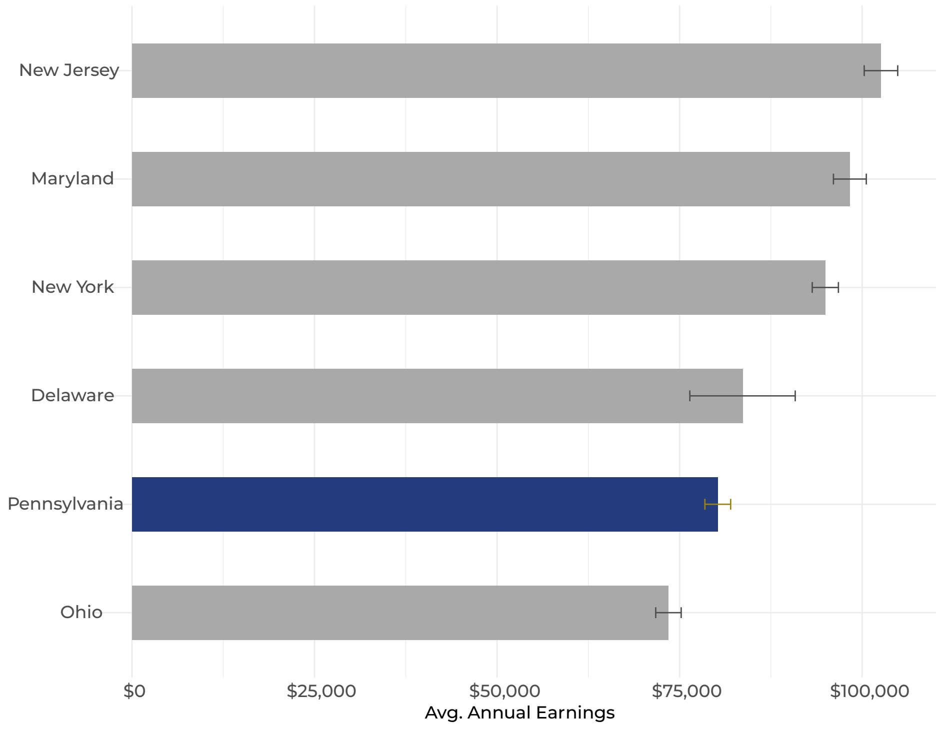
Self-employment rates also vary widely *within* the creative workforce in Pennsylvania. "Artists and Related Workers", "Photographers" and "Tailors and Jewelers" are dominated by self-employed workers. "Artists and Related Workers" and "Photographers" both have more than half of their workers as self-employed compared to less than 1% for "Postsecondary Teachers" (Figure 4). In the overall labor force, only 8.6% are self-employed in Pennsylvania, a five-percentage point difference. This difference is consistent across our comparison states where creative worker self-employment rates range from 12-20% whereas general self-employment rates range between 8.5-9.1%.

Creative Workers are High Earners, But Earnings Vary Widely by Profession, Gender and Education

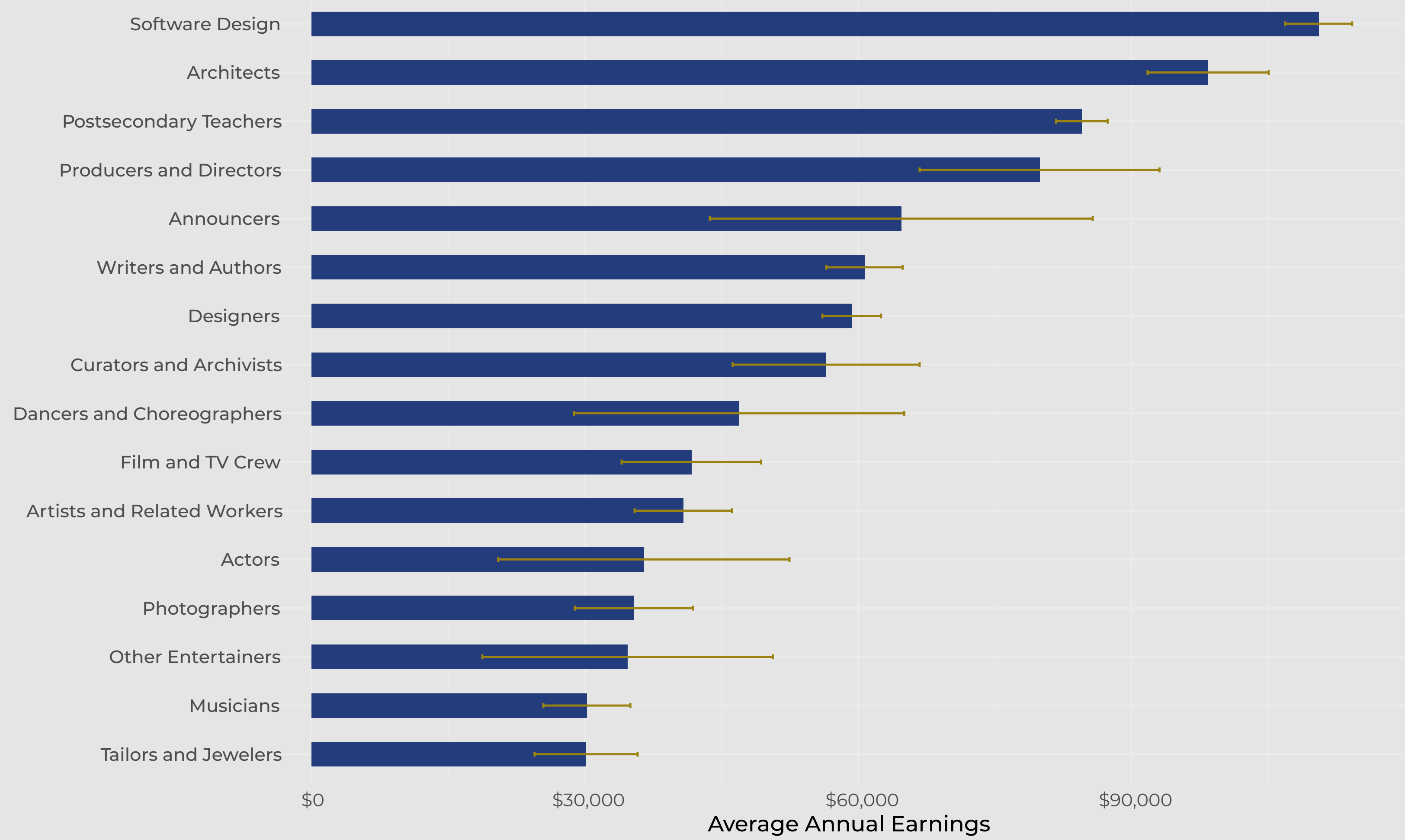
On average, creative workers outearn non-creative workers in Pennsylvania and comparison states. Pennsylvania creative workers earn less than those in New York, New Jersey, and Maryland, but still earn a little over $80,000, on average (Figure 5). However, the distribution of incomes underlying this average figure is wide, as there are several high earning professions which drive up the mean.

There is significant stratification of reported earnings by profession. "Software Designers," "Architects," and "Postsecondary Teachers" (occupations that might require extensive postsecondary training) lead the way in earnings, earning between $85,000 and $110,000. This is a stark contrast from the average ~$30,000 that "Tailors and Jewelers" and "Musicians" earn. Many occupational groupings earn less than $50,000, on average (Figure 6). While the low earnings of these occupations are concerning, the bottom earning occupations make up a little over 16% of all creative workers in Pennsylvania, whereas "Software Designers" comprise nearly one-third of creative workers. This means that creative work is particularly well remunerated in the Commonwealth, but this also speaks to the disparities found in the creative sector as a whole.

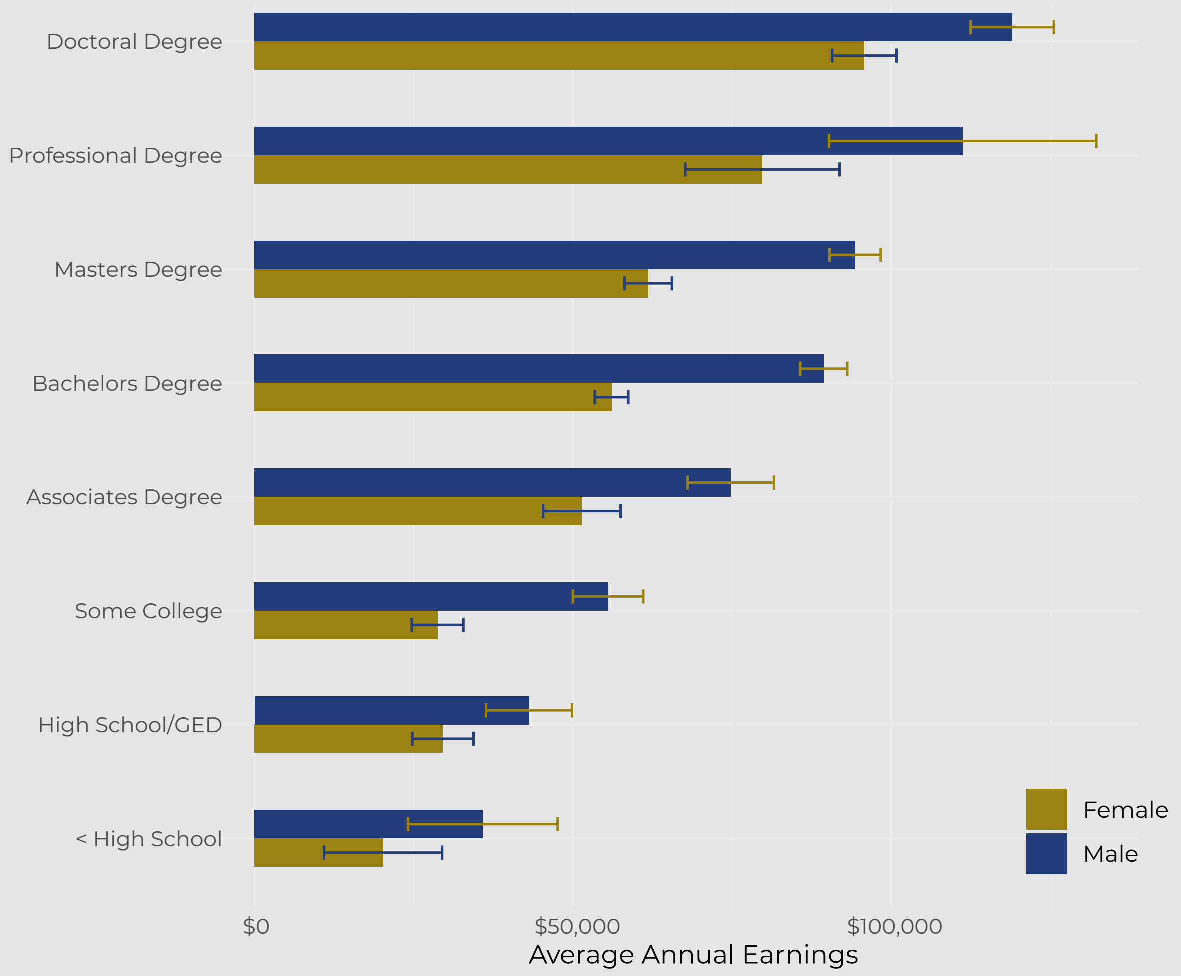
There are three notable earnings gaps amongst creative workers. First, incomes are stratified by educational achievement—the higher the degree, the higher the average earnings. Second, men earn much more than women. Women in the fields we included earn $20,000 per year less than male counterparts, on average. This gap persists across every level of education (Figure 7). Third, there are racial disparities in income, with non-Hispanic Black and Hispanic creative workers earning less than others in the workforce, on average (Figure 8).



^FIGURE 5. Average annual earnings for creative professions in Pennsylvania and five other states, 2022. Data: IPUMS USA, University of Minnesota, www.ipums.org.



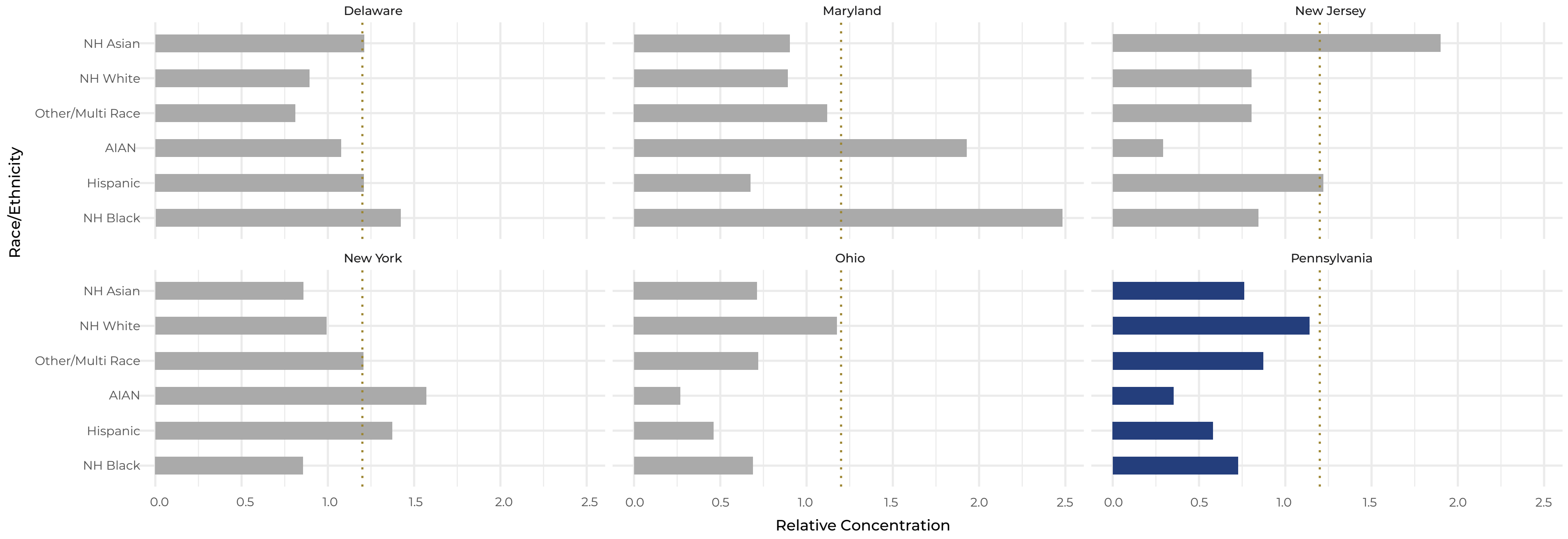
^FIGURE 6. Average annual earnings in creative professions in Pennsylvania, 2022. Data: IPUMS USA, University of Minnesota, www.ipums.org.



^FIGURE 7. Average annual earnings for creative workers in Pennsylvania, by sex and educational level, 2022. Data: IPUMS USA, University of Minnesota, www.ipums.org.

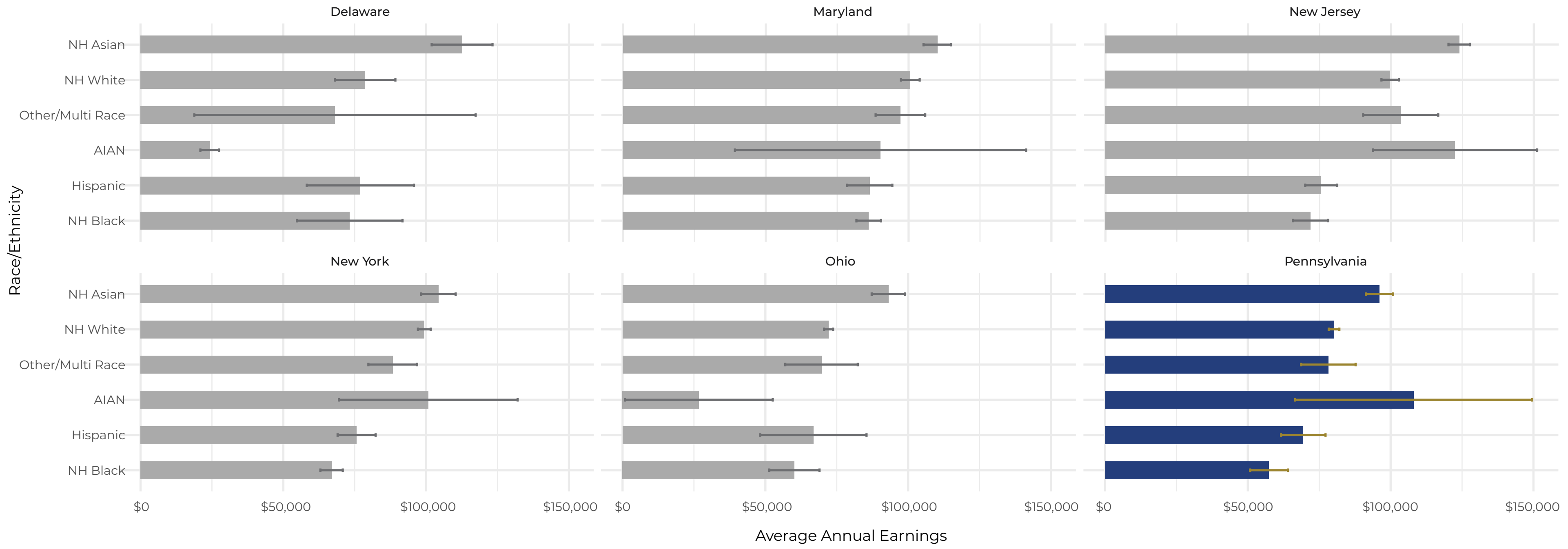
The Creative Workforce Has Similarities to the General Workforce

The makeup of the creative workforce generally mirrors the demographics of the state—Pennsylvania's creative workforce is largely made up of White, non-Hispanic individuals. By comparing workforce participation to US Census demographic estimates (US Census Bureau, 2023a), we observe that non-White workers are under-represented in the creative workforce. Pennsylvania's minority workforce participation lags behind New York and New Jersey (Figure 9), which have more diverse populations as a whole (US Census Bureau 2023b, US Census Bureau 2023c). Creative workers are disproportionately male—a phenomenon that comports with higher male labor force participation rates overall (US Department of Labor, 2024). PUMS estimates show that 60.8% of Pennsylvania's creative workers identify as male.



^FIGURE 8. Average annual earnings in creative professions in Pennsylvania, by race, 2022. Data: IPUMS USA, University of Minnesota, www.ipums.org.

> *"Rather than just business grants, artists need more tangible meaningful support. NYSCA offers NY artists much more money in each grant, Ohio Council on the Arts is also a great example. While the small grants are nice, they seem like more of a short term gesture rather than a meaningful career boost."*
>
> – FREE ANSWER SURVEY RESPONSE, OPTIONAL "ADDITIONAL COMMENTS" SECTION



^FIGURE 9. Location quotients for demographic groups. in creative occupations, by state. A value over 1 represents a greater representation within the creative workforce than the state workforce as a whole. The dotted line represents location quotients over 1.2, a generally considered cutoff for concentration. Data: IPUMS USA, University of Minnesota, www.ipums.org.

WICKS & WAX STUDIO offers hands-on workshops to create an all natural soy blend candle from start to finish. It's part of Bridgeway Capital's ACRE initiative, which provides opportunities to creative workers in rural Western Pennsylvania. *Image Credit: Bridge Perspective.*

Industrial Analysis

Industrial Analysis

BACKGROUND

Literature Review and Context

The National Endowment for the Arts (NEA) and the Bureau of Economic Analysis (BEA) annually report on the economic impact of arts and culture in the U.S. through the Arts and Cultural Production Satellite Account (ACPSA). The ACPSA tracks economic output, employment, compensation, consumer spending, and trade in the arts sector, with time-series data spanning over two decades to support analysis of trends. In addition to national figures, the agencies produce state-level estimates and distribute them via fact sheets, dashboards, and other resources for policymakers and researchers (NASAA, 2025).

The latest ACPSA-collected data for the state of Pennsylvania estimates the total market value of goods and services of the "arts and culture" economy at over $30 billion in 2023. This exceeds education services, utilities, and agriculture for total value added for the state. The related estimate of *direct* and *indirect* employment related to these sectors is roughly 190,000 jobs (NASAA, 2025). A 2012 report entitled *Arts & Economic Prosperity IV* estimates that the creative *non-profit* sector contributed nearly 81,000 *direct* jobs to the Commonwealth in 2010 (Americans for the Arts, 2012).

While the ACPSA data is valuable, it has certain limitations that limit its utility. First, the data is only available at the state level—making it impossible to look at the finer geography of the creative economy for the state. Second, the "core" creative industries the ACPSA uses are narrower than the industries the Pennsylvania Creative Industries team has set forth as representing the greater creative economy in the state. As such, we chose to take the "core" industries from the ACPSA and add additional industries that better represent the full gamut of creative industries in Pennsylvania.

Firms in creative industries can employ a wide variety of workers. They should not be thought of as synonymous with creative workers. A key example of this would be a firm like Atomic Design, of Lititz, Pennsylvania—a major event production and staging company. This firm employs creative directors, designers, and scenic artists, as well as numerous project managers, HR administrators, technicians, and supply chain specialists (Atomic Design, 2025).

CREATIVE COMMUNITY NETWORKING >
The American Institute of Graphic Arts (AIGA) Philadelphia Chapter hosts creative community events at the Barnes Foundation, bringing together members and local partners.
Image Credit: William Miller.

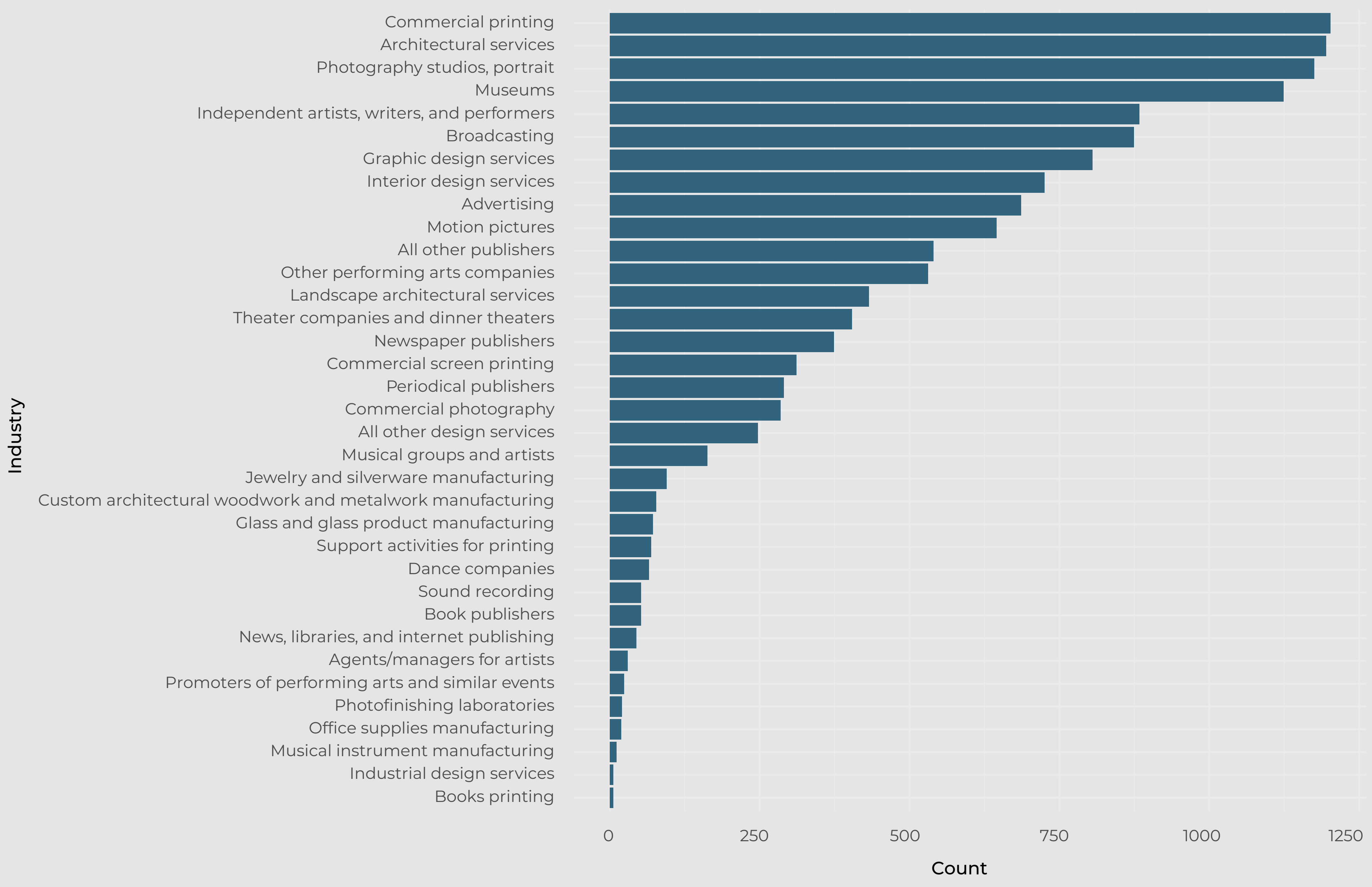
METHODOLOGY

Following the NEA and BEA's ACSPSA guidance we made our initial list of industries comprised of their 34 "core" creative industries. In consultation with the Pennsylvania Council of the Arts, we modified the list in order to more fully capture the creative economy for the state—a group of 65 industries we refer to as "Core Plus." A list of North American Industry Classification System (NAICS) codes and sector descriptions used in this analysis can be found in Appendix II.

Our primary dataset for this section is establishment level data sourced from Data Axle (formerly known as Infogroup) provided by Wharton Research Data Services at the University of Pennsylvania. The Data Axle dataset aggregates firm-level data from the US and Canada—firm names, addresses, industry codes, sales volume, executive information, and credit ratings. The data are considered relatively accurate on the date of retrieval (March, 2025). The research data are a subset of Data Axle's catalog, selected based on NAICS codes from ACSPSA and guidance from Pennsylvania Council of the Arts. The most recent firm-level data on offer are from 2022.

While the Data Axle data is rich and validated it still has some limitations. First, we present sales data for individual establishments and industries, as a whole. Sales data is modeled by Data Axle. Getting direct sales data is difficult, especially for small firms. The model is based on estimates from the United States Department of Commerce's estimates of sales per employee at the six-digit NAICS level. Given these limitations, estimates of sales presented here, especially for individual establishments should be thought of as valid estimates, but *not* as definitive. Additionally, some firms do not have any reported sales data, and other kinds of firms, particularly educational and non-profit institutions do not report sales data at all. Recognizing these limitations, the Data Axle data still provides us with the most detailed, and validated, establishment level data and form the backbone of this section.

Additionally, sales data is presented at the individual *establishment* level. For most measurements this is unproblematic, but we present some data at the *firm* level which includes all establishments. As such, we combined establishments together based upon their parent company identified in the Data Axle dataset. This approach risks creating aggregation errors. As such, we have confidence in the relative rankings of firms based on their sales, but the exact value of the estimated sales should not be taken as definitive.



< **FIGURE 10. Count of creative industry establishments by NAICS sector in Pennsylvania, 2022.** There are over 13,500 Creative establishments in Pennsylvania. Data – Data Axle (2022)

KEY RESULTS

Sector Size is Buoyed by Several Media Industries

The creative sector in Pennsylvania is comprised of approximately 13,533 establishments as of 2022. These firms and organizations directly employ approximately 138,000 people. The sector is responsible for approximately $17 billion dollars in gross sales in 2022 (Data Axle, 2022). A complete digest of firm count and density by county can be found in Appendix III.

The creative economy is driven by a few notable industries, particularly "Broadcasting" and "Commercial Printing" (Figure 10). These two industries account for more than 40% of sector-wide sales and a little more than a quarter of employment. Firms of these types are well-represented in our list of the highest grossing creative sector companies in the Commonwealth (Table 1)—and it's notable that many are well-known for telecommunications or bulk printing. It is unclear the degree to which these companies are generators of creative work products or merely vectors for dissemination. These employers are not well represented in our survey of creative workers (see Survey).

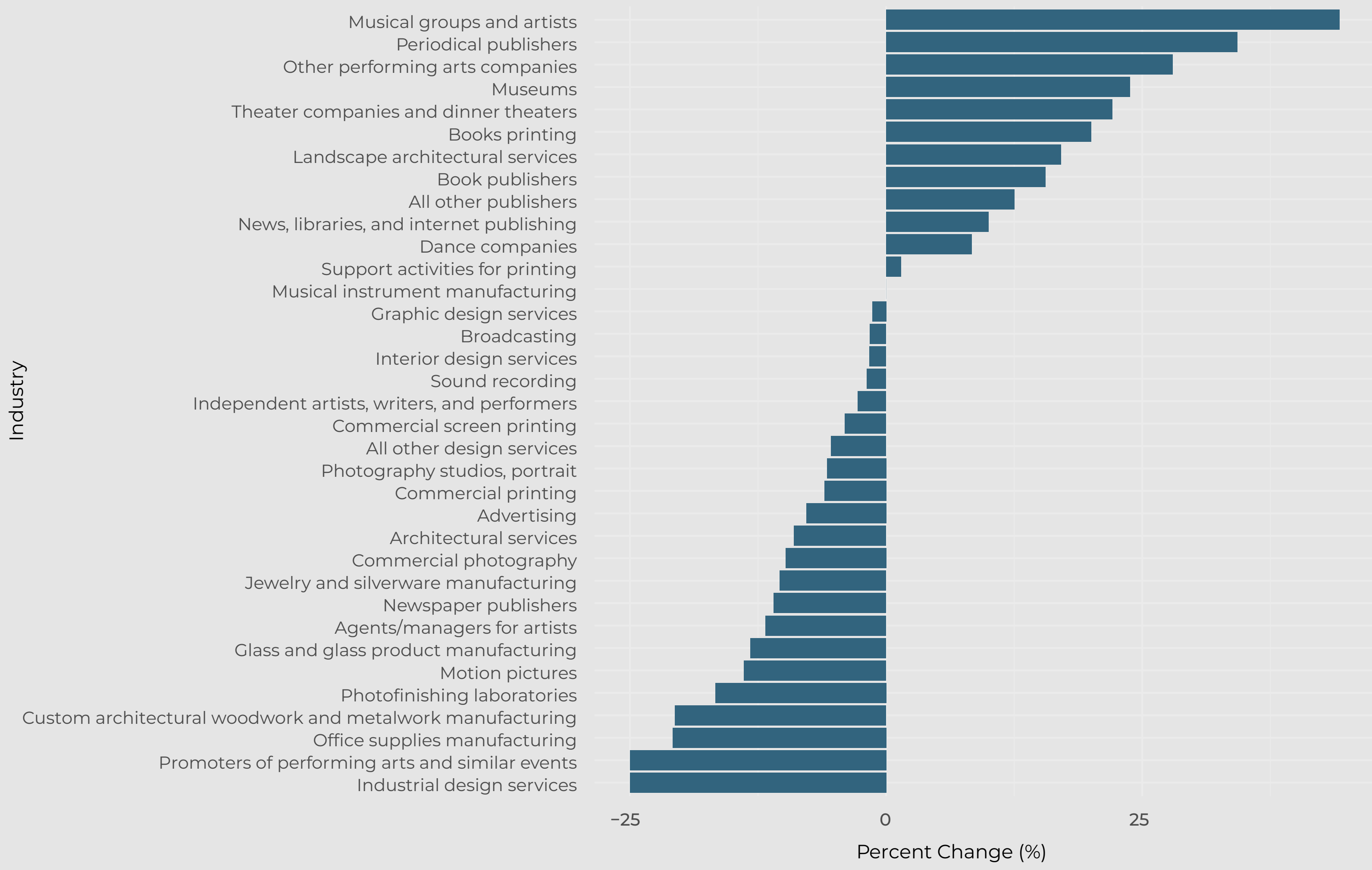
"Museums," "Publishing," "Photography," "Architectural Services," and "Theater" are also notable industries in terms of total employment and number of firms. These are more traditionally "artistic" or "cultural" categories.

Company	Sales Volume (M)	Industry
XFINITY	$448.4	Broadcasting
LSC COMMUNICATIONS	$404.4	Commercial printing
DISH SATELLITE TV	$251.9	Broadcasting
DISH NETWORK	$194.5	Broadcasting
CBS CORP	$190.5	Broadcasting
OFFSET PAPERBACK MFRS INC	$179.5	Book publishing
ATLANTIC BROADBAND	$148.5	Broadcasting
CW PHILLY	$142.9	Broadcasting
QUAD/GRAPHICS INC	$136.5	Commercial printing
R R DONNELLEY	$102.9	Commercial printing
WTXF	$95.3	Broadcasting
ENGLE PRINTING & PUBLISHING CO	$94.1	Commercial printing
SPENCER ADVERTISING & MARKETING	$91.1	Advertising
FRY COMMUNICATIONS	$89.0	Commercial printing
KEYBANK PAVILION	$87.0	Theater companies and dinner theaters
BUCKS COUNTY COURIER TIMES	$85.9	Newspaper publishers
SERVICE ELECTRIC CABLE TV	$84.2	Broadcasting
PATRIOT NEWS	$84.1	Newspaper publishers
NEP BROADCASTING	$81.8	Motion pictures
STANTEC	$81.6	Architectural services

^**TABLE 1 - Top 20 Pennsylvania firms in creative industries** - by estimated sales volume, 2022. Data – Data Axle (2022).

< **FIGURE 11. Creative sector industry metrics for Pennsylvania and five nearby states, 2022.** Data: Data Axle (2022).

This "heatmap" shows the relative position of creative industries in their respective states as a level set of three quantiles. Each quantile has the same number, or as close to the same number, of establishments within them, so one can imagine them as slicing the sample of establishments into near thirds. The darker the color of a box indicates a higher value for that specific industry in that state. For example, if we take "Photography Studios, portrait" we can see that the industry has a "medium" number of employees compared to other creative industries in PA in the first column. When you move the number of establishments section we find that photography studios also have a large number of individual establishments compared to other creative industries in the state. Finally, we can see that the industry is responsible for a "medium" amount of overall sales compared to other industries. This signals to us that the "Photography Studios, portrait" industry is made up by a large number of small establishments.



^**FIGURE 12. Sector-specific growth rates by number of firms for selected industries, 2017-2022**. Data: Data Axle (2022)

Pennsylvania's industrial mix is roughly similar to that of peer states. Figure 11 offers a snapshot of the characteristics of individual industries in Pennsylvania and five neighboring states.

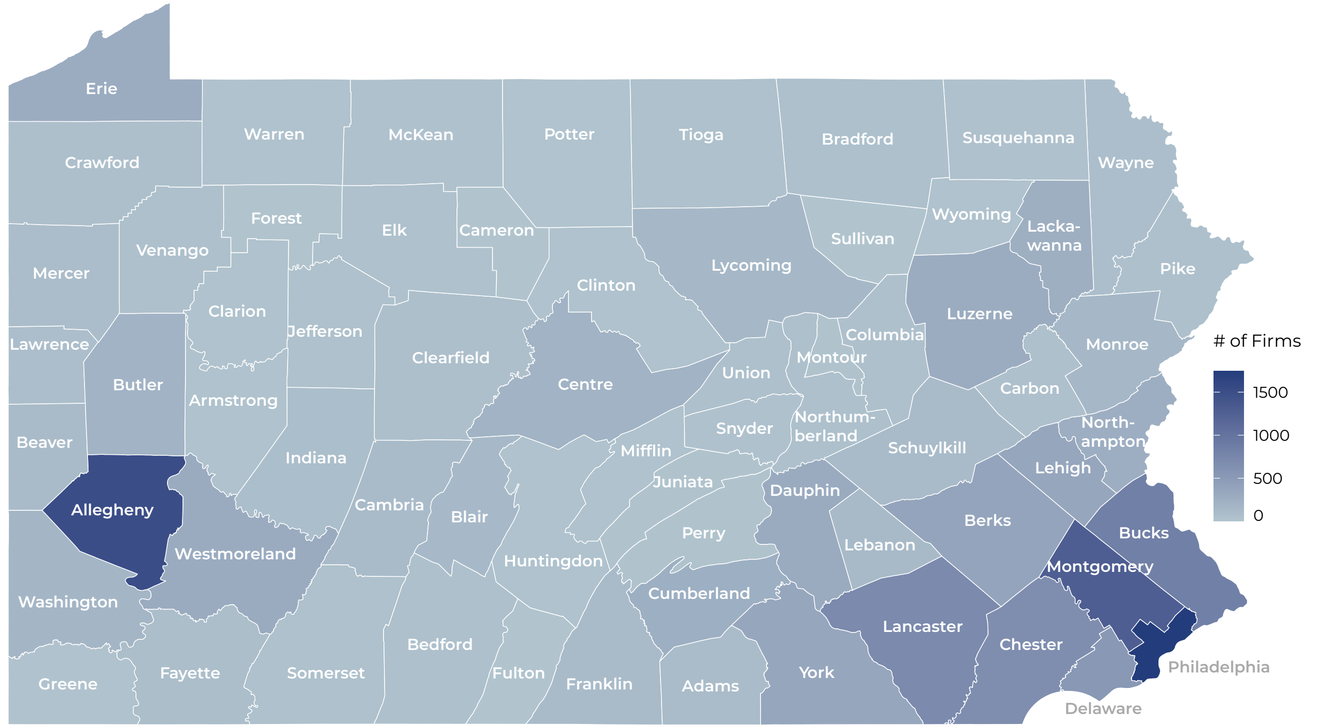
Live Arts are Growing While Traditional Media are in Decline

Certain sectors have shown resilient growth in the number of establishments during recent years (Figure 12). This is especially notable, considering the damage the COVID-19 pandemic had on many live arts venues during our study period of 2017-2022. “Musical Groups and Artists” (+44.3%), “Museums” (+23.8%), “Performing Arts” (+28.0%), and “Theater Companies and Dinner Theaters” (+22.1%) all grew robustly, in terms of the number of new firms, over our study period. While each of these individual industries are relatively modest in size they do encompass more than 20,000 workers in the state and are distributed throughout the state.

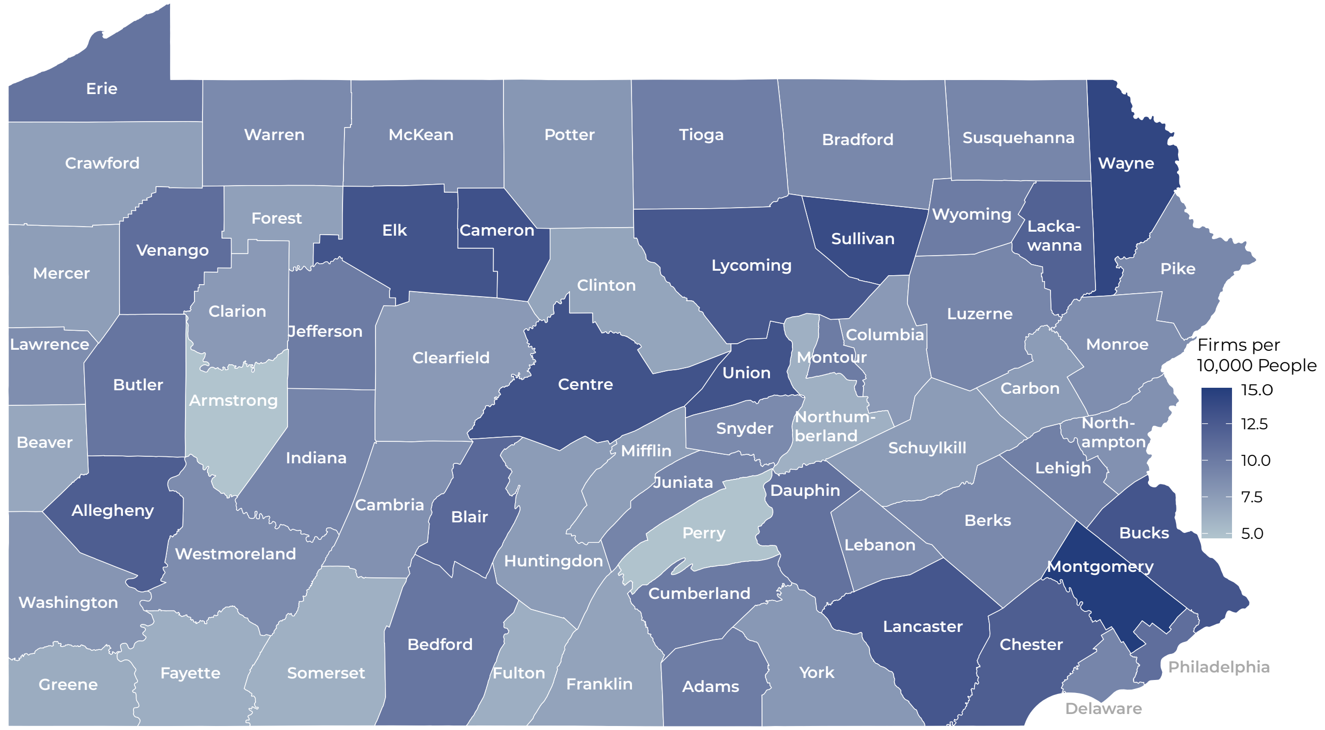
Conversely, some of the largest industries in this sector have suffered from contraction over the same time period. Traditional publishing and media industries such as “Newspaper Publishers” (-11.0%), Commercial Printing (-6.0%), and even “Broadcasting” (-1.6%) have lost establishments over our study period. These industries are still large, and productive, but the current media landscape poses serious structural concerns, especially in print media.

The Creative Economy Extends Well Beyond Major Metros

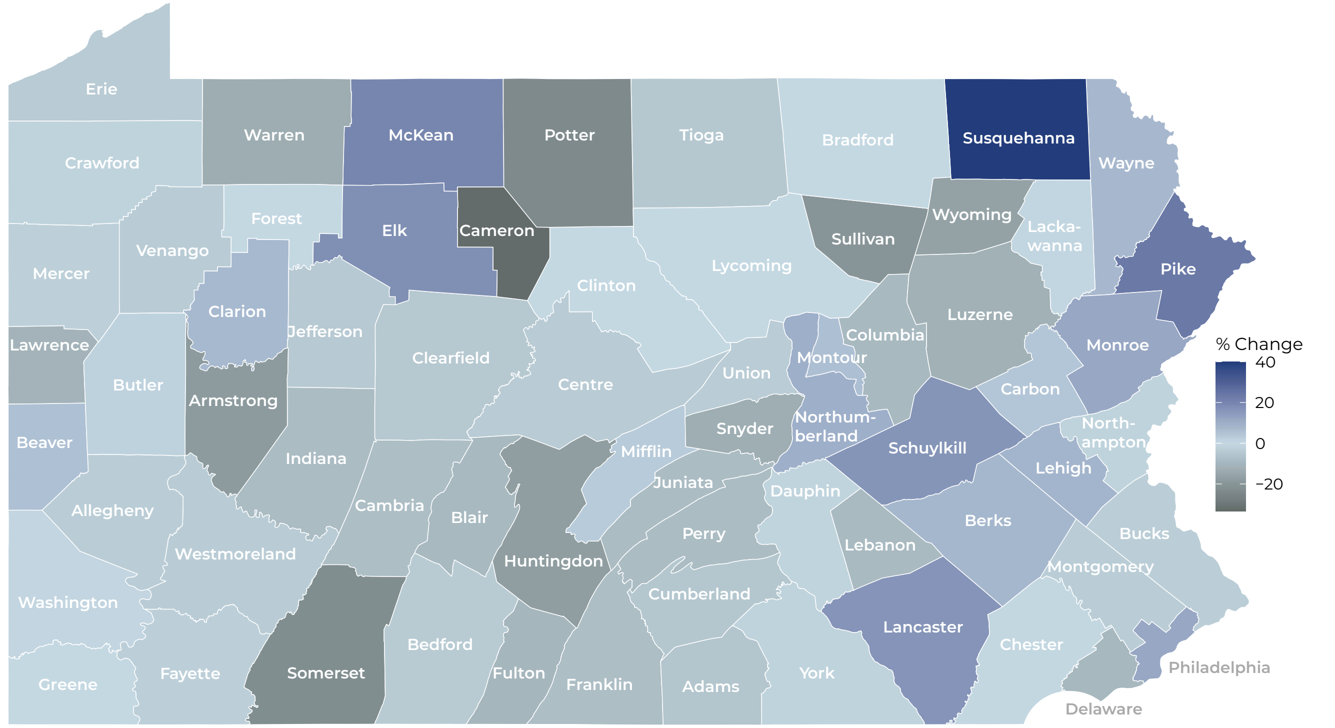
While Philadelphia and Allegheny Counties are the state’s most concentrated hubs of creative industry (Figure 13 and 14), firm growth in relevant industries has been notably strong in other areas of the state. Lancaster and Lehigh Counties stand out as areas with sizable clusters of firms that have seen above average growth in its arts economy (Figure 15). Philadelphia, home of the largest cluster of firms, is experiencing growth as well. It should be noted that the time period for measurement of industry growth includes most severe part of the COVID-19 pandemic. See Appendix III for a complete table with firm count, per capita density, and percentage change by county.



^**FIGURE 13. Creative industry firm count in Pennsylvania.** Data: Data Axle (2022)



^**FIGURE 14. Creative industry firm per-capita density in Pennsylvania.** Data: Data Axle (2022)



^**FIGURE 15. Creative industry firm percentage change in Pennsylvania.** Data: Data Axle (2022)

THE ALLEGORY GALLERY is a creative space in Ligonier, serving as a bead store, jewelry boutique, art gallery, and gift shop. It promotes artisan craftspeople and offers classes. The Gallery is in the ACRE network. *Image Credit: Bridge Perspective.*

Survey

Survey

FIGURE 16 >
Social media graphics posted on the official Instagram, LinkedIn, and Facebook accounts of Pennsylvania Creative Industries, powered by Pennsylvania Council on the Arts.

BACKGROUND AND CONTEXT

Government data sources do not tell us much about the *nature* of subjects' work, and their *needs* with regards to space, quality of life, technology, health, and other subjects. Our working assumption is that a reasonable proportion of creative workers are not well represented in economic data—they are part time workers who report other employment on formal paperwork, or they do creative work in a non-creative firm and are not seen in firm-level data sets that focus on the arts (Fichman, 2021). Therefore, we designed a survey instrument to explore the varied ways that creativity is embedded in workplaces across the Commonwealth, and to ask creative workers what they need to be successful in their endeavors.

This survey instrument was based on a 2021-22 PennPraxis study called Voices of Creatives (Deutsche Gesellschaft für Internationale Zusammenarbeit GmbH, 2021). In that particular project, PennPraxis worked with Dutch consultancy VibeLab, the German Federal Ministry for Economic Cooperation and Development (BMZ) and German Federal Agency for International Cooperation (GIZ) to survey creative workers in Middle Eastern and African countries about the nature of their work and lives. Key to this research was a focus measuring the importance of, and satisfaction with "Drivers of Development." This phrase refers to the skills, training, financing, space, infrastructure, and equipment that people need to sustain and build their careers and firms.

Based on information gleaned from informant interviews and literature review, issues of precarity were a focus in the survey design. Survey research and literature on precarity in the arts highlight the instability of the gig economy, the pressures of self-employment, low wages, lack of social acceptance, and structural economic challenges as being key contributors to above average rates of anxiety and depression in creative workers (Gross and Musgrave, 2020). These challenges are abundant across the creative workforce and allied hospitality and service workers (Duvivier et al, 2021).

METHODOLOGY

A survey instrument was designed with the intention of asking detailed questions about the needs and working lives of creative workers and of workers (creative and non-creative) at creative firms. The target subjects were individuals living and/or working in Pennsylvania who do work they consider "creative" in nature or report working for a firm whose primary business is in the creative fields.

The survey instrument was created in the fall and winter of 2024-25 and deployed online from Monday, March 24, 2025, to Friday, April 25, 2025, using the Qualtrics survey platform. The survey was *not* deployed as a random sampling of the population. The research team collaborated with Pennsylvania Creative Industries, powered by Pennsylvania Council on the Arts, to compile a distribution list composed of key contacts from constituencies, stakeholder groups, and partner organizations of Pennsylvania Creative Industries. Many of these contacts were drawn from an earlier list of priority partners identified by the Pennsylvania Creative Industries team. Subject interviews, along with a detailed stakeholder identification exercise, and initial client consultation, helped identify key issue areas and informed both the survey content and the outreach strategy.

The Pennsylvania Creative Industries team led distribution efforts by sending the Qualtrics survey link to their stakeholder list via email and encouraging recipients to further disseminate the link to their networks. Additionally, Pennsylvania Creative Industries shared the survey with their grant awardee lists. Certain groups—such as those in the architecture industry—were underrepresented in survey responses, in part due to Pennsylvania Creative Industries's limited communication channels with those sectors.

To broaden the survey's reach, the research team developed graphics for a social media campaign (Figure 16). After the survey launch, the team monitored response patterns and adjusted communications to better reach industries or worker types with weaker response rates.

Data were analyzed using custom Qualtrics-R workflows and integrated with spatial data from the US Census using open-source software packages (U.S. Census Bureau, 2022a; Walker, 2025; Pebesma, 2018; Pebesma & Bivand, 2023; Wickham et al, 2019). We discarded surveys which were less than two-thirds complete or lacked answers regarding the subject's occupation or employer. These answers were disaggregated from all other subject information and analyzed using a large language model from OpenAI's GPT-4o instructed to associate Census Occupational Codes and NAICS Codes (U.S. Census Bureau, 2020). All AI-interpreted codes were manually reviewed—roughly 30% were adjusted by researchers to more appropriate codes.

Data instruments, study personnel, privacy protocols, analysis methods, and data handling procedures were reviewed for informed consent and other human subject research protocols and exempted from Common Rule protocols (45 CFR 46) by the Internal Review Board at the University of Pennsylvania on March 17, 2025 (IRB Protocol #: 858052).

See Appendix IV for a copy of the survey instrument and the survey results.

KEY RESULTS

The Survey Sample Has Some Limitations

The survey outreach campaign yielded 610 high quality surveys. Participation was highest in the most populated metro areas of the Commonwealth. Participants came from all but six counties (Figure 17 and Table 2).

There are many ways in which our sample is similar to that found in our occupational analysis of US Census data (see Occupational Analysis).

- Our sample shows a roughly similar geographic distribution to our data on firms and workers.
- Respondents were, on average, better college educated than state averages.
- Subjects described their racial characteristics with proportions roughly in line with those observed in occupational data from the US Census.

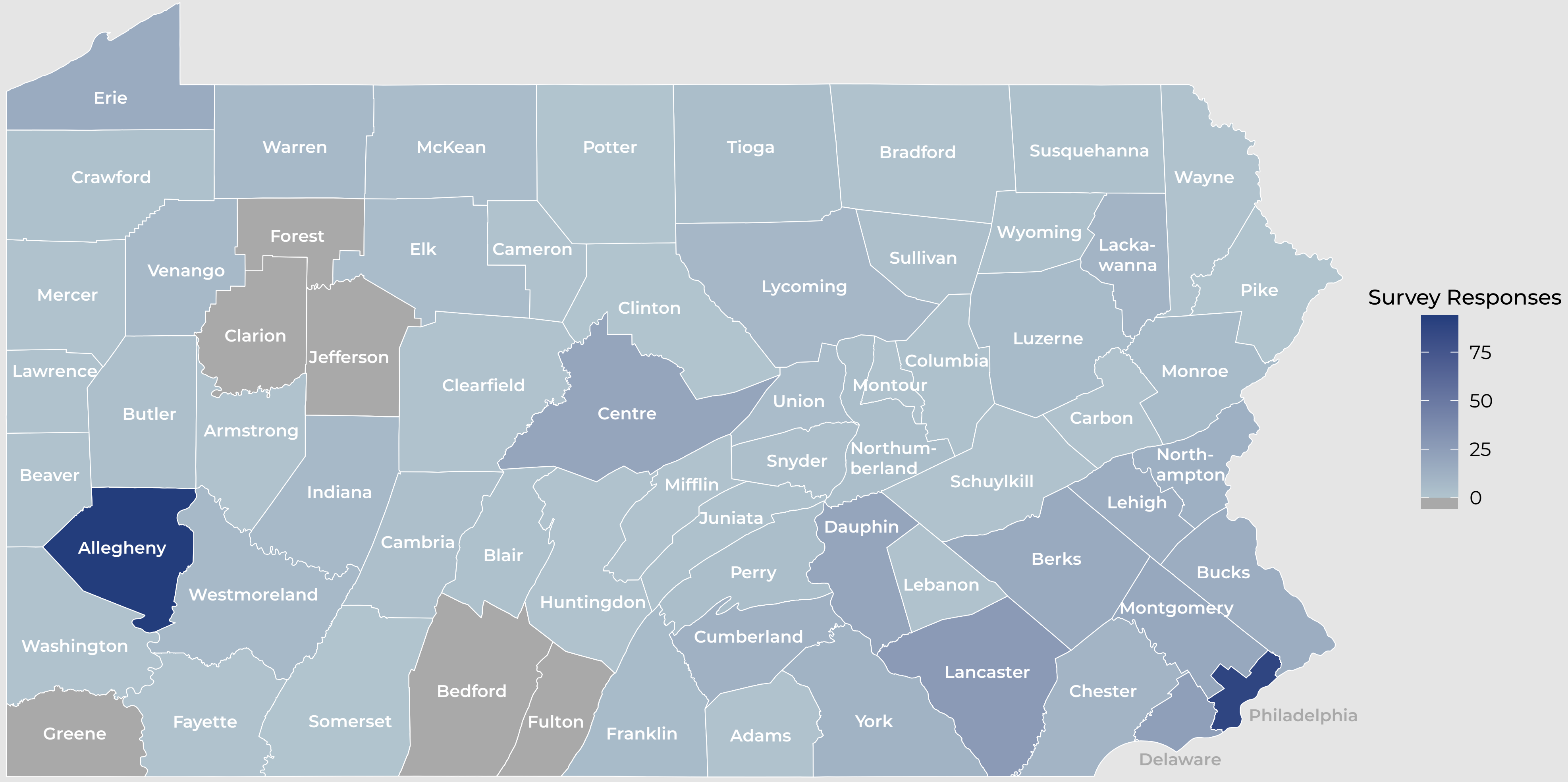
The survey sample differs from Census estimates in several ways:

- The design-related fields (architecture, graphic design, software design, and others) were under-sampled.
- Artists were sampled at roughly twice the rate (21%) seen in our occupational analysis of creative workers (8%).
- Our sample included only post-secondary educators who identified themselves as doing "creative work"—they were less prominent than in Census instruments.
- Survey subjects were *far* more likely to report being female—at a rate above 60%. This stands in contrast to the ~60% majority male sample from the US Census.

v TABLE 2. TOP TEN COUNTIES represented in survey sample.

County	Count	Percentage
Allegheny County	94	17.7%
Philadelphia County	88	16.5%
Lancaster County	27	5.1%
Delaware County	24	4.5%
Dauphin County	20	3.8%
Centre County	20	3.8%
Montgomery County	18	3.4%
Berks County	17	3.2%
Erie County	16	3.0%
Bucks County	15	2.8%
Lehigh County	15	2.8%

Sampling bias and the aggregation methods used by other instruments are responsible for these incongruities. We note the methodological limitations where relevant below in our analysis. Participation and non-participation in the survey as, in part, a function of the levels of participation within the outreach network of Pennsylvania Creative Industries. Meanwhile, it's also very reasonable to expect that rigid government data instruments don't necessarily correspond to the way individuals perceive themselves as creative workers.



^ FIGURE 17. Survey responses by county. Counties in grey registered no subjects.
Data: U.S. Census Bureau 2022 TIGER/Line shapefiles

Occupation	Respondents	Percentage
Artists and Related Workers	123	21.1%
Chief Executives	55	9.4%
Managers, All Other	50	8.6%
Entertainers and Performers, Sports and Related Workers	40	6.8%
Public Relations Specialists	38	6.5%
Musicians and Singers	36	6.2%
Postsecondary Teachers	27	4.6%
Broadcast, Sound, and Lighting Technicians	19	3.3%
Graphic Designers	17	2.9%
Archivists, Curators, and Museum Technicians	16	2.7%
Television, Video, and Film Camera Operators and Editors	16	2.7%
General and Operations Managers	15	2.6%
Writers and Editors	15	2.6%
Photographers	12	2.1%
Market Research Analysts and Marketing Specialists	11	1.9%
Counselors	10	1.7%
Education Administrators	10	1.7%
Elementary and Middle School Teachers	9	1.5%
Other Teachers and Instructors	9	1.5%
Office Clerks, General	8	1.4%
Sewers, Tailors, and Upholsterers	6	1.0%

< TABLE 3. Top 20 Census Occupational Codes classified from free-answer survey responses to the question: "In one or two sentences, how would you describe the nature of your work?"

What is a "Creative Job?" Workers Offered Expansive and Unexpected Answers

Individuals have a broader and more varied idea of "creativity" in their work than other economic instruments would suggest. There are 38 different occupational codes reported by those who describe their work as creative in nature, more than were used in peer studies of arts and culture workforces.

"Artists and Related Workers" made up the largest single group of workers in our sample (21.1%), with the closely allied "Entertainers and Performers" adding another 6.8% (Table 3). The second largest group were administrators and managers— "Chief Executives", "Managers", "Public Relations Specialists" (a class that includes grant writers). "Teachers," "Designers," and "Technicians" were also major groups. The presence of educators is notable—arts educators are hard to detect in other data instruments as a subset of educators in general. The non-participation of software designers is striking—they are a very major segment of the workforce in our occupational analysis.

Many creatives report working in administration and management. Most subjects who report holding leadership and administrative roles (such as "executive," or "grant writer") consider their work creative in nature, and their personal descriptions of their work imply a background in the creative work at the core of their organization's purpose.

Creative workers and creative organizations defy easy categorization. While basic economic instruments narrow-cast workers and firms into discrete categories, many creative workers and firms have novel and complex practices. Subjects were asked to describe their primary work and their employer (or their business, if self-employed), and the results were often complex and colorful. Table 4 and 5 are used to illustrate the idea that categorizing creative workers and their employers is an inexact task.

v TABLE 4. Subject descriptions of the nature of their work with relevant Census Occupational Code categories.

"In one or two sentences, how would you describe the nature of your work?"	Relevant Census Occupational Codes (Assigned code in bold)
Full time, traveling entertainment artist and instructor, face painter, balloon twister, henna artist, potter	**2600 (Artists and Related Workers)**, 2720 (Entertainers and Performers, Sports and Related Workers, All Other), 2360 (Other Teachers and Instructors)
Teach music at college level - conduct choirs at church at community level	**2205 (Postsecondary Teachers)**, 2751 (Music Directors and Composers), 2360 (Other Teachers and Instructors)
Full time musician and grant writer, focusing on Older adults and performances in public spaces free of charge.	**2825 (Public Relations Specialists)**, 2752 (Musicians and Singers), 2850 (Writers and Authors)
I am an abstract folk art painter who also teaches art lessons for children of all ages	**2600 (Artists and Related Workers)**, 2360 (Other Teachers and Instructors),
Musician, filmmaker, photographer, faculty, educator	**2600 (Artists and Related Workers)**, 2752 (Musicians and Singers), 2920 (Television, Video, and Film Camera Operators and Editors), 2910 (Photographers), 2360 (Other Teachers and Instructors)

v TABLE 5. Subject descriptions of their employers or their self-employment situation with relevant NAICS classification options

"In one or two sentences, how would you describe the type of business or organization you work for (or describes your business if self-employed)?"	Relevant NAICS codes (Assigned code in bold)
A sole proprietor of a music studio for private voice, piano and acting instruction.	**Promoters of Performing Arts, Sports and Similar Events with Facilities (7111320)**, Fine Arts Schools (611610), Sound Recording Studios (512110), Educational Support Services (611710), Other Commercial and Industrial Machinery and Equipment Rental and Leasing (532490)
Yoga and art studio. I make many kinds of art and teach art, yoga, and have therapies available.	**Dance Companies (711120)**, Independent Artists, Writers and Performers (711510), Offices of All Other Miscellaneous Health Practitioners (621399)
Non-profit theatre education studio and performance company and a Non-profit Disability support group	**Theater Companies and Dinner Theater (711110)**, Educational Support Services (611710), Other Social Advocacy Organizations (813319), Promoters of Performing Arts, Sports and Similar Events with Facilities (7111320), Fine Arts Schools (611610)
Self-employed local yarn store owner, hand dyer, and fiber arts instructor.	**Sewing, Needlework, and Piece Goods Stores (451130)**, Other Clothing Stores (448190), Independent Artists, Writers and Performers (711510), Educational Support Services (611710)

Creative Workers are Concentrated in Creative Organizations, But Widespread In Other Sectors

Arts and culture organizations are the most prominent employers of creative workers. "Independent Artists, Writers and Performers" are the dominant type of firm employing subjects—a catch-all which includes many independent entrepreneurs and gig workers. "Theater Companies and Dinner Theatres," "Museums," and "Musical Groups and Artists" are also prominent employers.

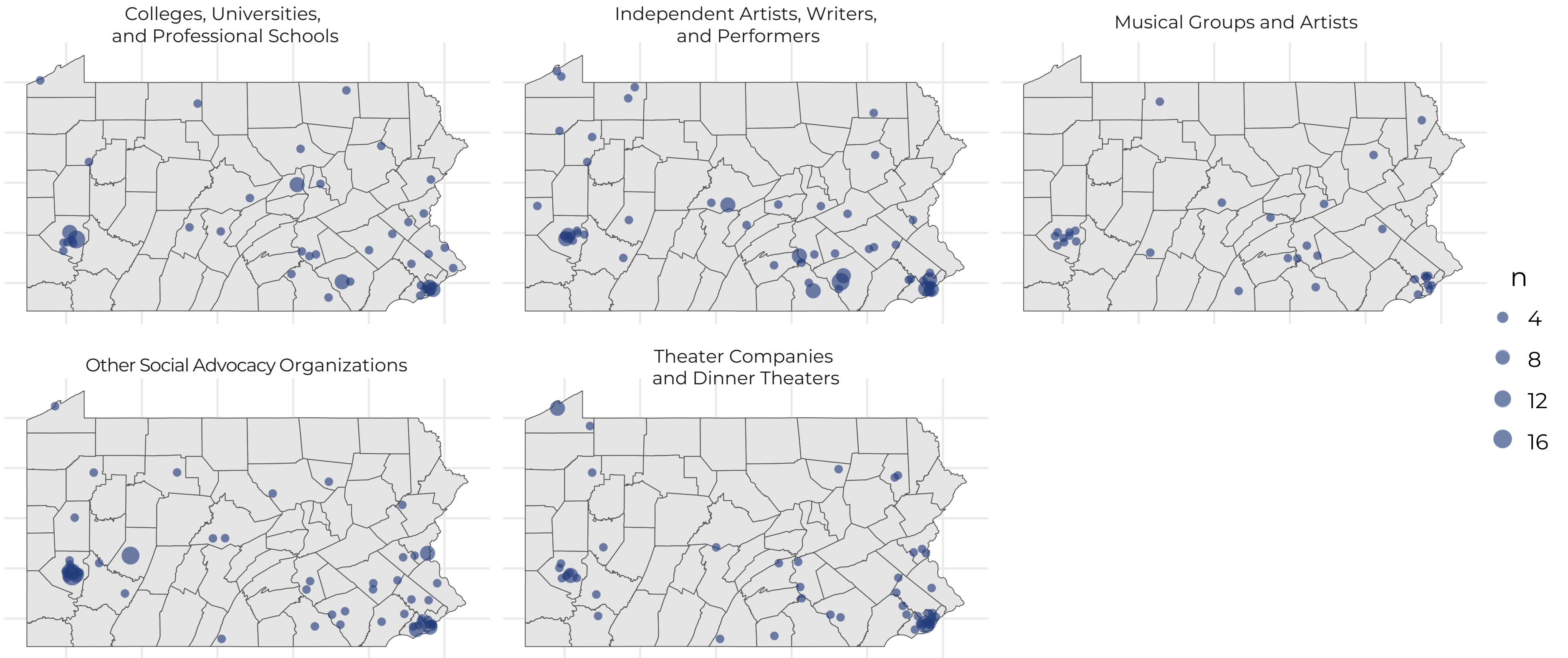
However, subjects report working for a variety of sectors—many of which are *not* primarily arts and culture-oriented. This includes "Professional, Scientific, and Technical Services," "Educational Services," "Civic and Grantmaking Organizations, Health Care, and Administrative and Support Services (Table 6). Subjects reported employers that corresponded to 47 different NAICS codes—fewer than the 65 codes used in the "Core Plus" list of industries from the Industrial Analysis section of this report. However, 21 of the subject-reported 47 industry codes were *not* in the Core Plus list—including particular areas of education, marketing, healthcare, textile manufacture/design, and non-profit sectors, among others (Table 7).

∨ TABLE 6. Top 10 reported NAICS codes. Classified based on free-answer descriptions of firms and organizations reported by survey subjects.

NAICS Sector Code	NAICS Description	NAICS	Count	NAICS Sector
711	Independent Artists, Writers, And Performers	711510	80	Arts, Entertainment, and Recreation
813	Other Social Advocacy Organizations	813319	69	Religious, Grantmaking, Civic, Professional, and Similar Organizations
711	Theater Companies And Dinner Theaters	711110	59	Arts, Entertainment, and Recreation
611	Colleges, Universities, And Professional Schools	611310	54	Educational Services
711	Musical Groups And Artists	711130	38	Arts, Entertainment, and Recreation
611	Elementary And Secondary Schools	611110	26	Educational Services
712	Museums	712110	24	Museums, Historical Sites, and Similar Institutions
711	Promoters Of Performing Arts, Sports, And Similar Events With Facilities	711320	17	Arts, Entertainment, and Recreation
541	Administrative Management And General Management Consulting Services	541611	14	Professional, Scientific, and Technical Services
541	Marketing Consulting Services	541613	13	Professional, Scientific, and Technical Services

∨ TABLE 7. NAICS sectors reported by survey subjects that were not in the “Codes Plus” list used for industrial analysis.

NAICS	NAICS Description
315210	Cut And Sew Apparel Contractors
325411	Medicinal And Botanical Manufacturing
325611	Soap And Other Detergent Manufacturing
327110	Pottery, Ceramics, And Plumbing Fixture Manufacturing
444110	Home Centers
451130	Sewing. Needlework And Piece Goods Stores
453998	All Other Miscellaneous Store Retailers
532490	Promoters Of Performing Arts, Sports, And Similar Events
541611	Administrative Management And General Management Consulting Services
541613	Marketing Consulting Services
611110	Elementary And Secondary Schools
611310	Colleges, Universities, And Professional Schools
611710	Educational Support Services
621399	Offices Of All Other Miscellaneous Health Practitioners
622110	General Medical And Surgical Hospitals
624120	Services For The Elderly And Persons With Disabilities
713110	Amusement And Theme Parks
813219	Other Grantmaking And Giving Services
813319	Other Social Advocacy Organizations
813930	Labor Unions And Similar Labor Organizations
921190	Other General Government Support



∧ FIGURE 18. Geographic distribution (by zip code) of survey subjects based on NAICS code classification. Symbol size corresponds to the number of survey subjects in that zip code. Data: US Census Bureau, 2022b.

Subjects reported working for independent arts businesses and arts in education widely across the Commonwealth. Other top industries are somewhat concentrated in urbanized areas of the state. Employment in non-profits and performance-related industries are more concentrated in resource-dense metros—Philadelphia and Pittsburgh (Figure 18).

Purpose-Driven Organizations are Prominent Employers

Many subjects reported working at purpose-driven organizations. Our survey indicates that the non-profit sector may be a larger employer of creative workers than the 20.2% our occupational analysis of US Census data would suggest. In addition to the 11.8% who report working for organizations that were only classifiable as “Other Social Advocacy Organizations” by virtue of their general nature, a substantial number of subjects report working in other fields where organizations are frequently not-for-profit: education, fundraising, theater, consulting, religious organizations, community outreach, and museum or gallery space.

The prominence of non-profits is clear given a few other pieces of evidence. First, grant-writing and administration are key roles (and skills) that were reported in occupational descriptions. Second, access to grants and funding were some of the most pressing issues reported by subjects.

Creative Workers are Well-Educated and Often Formally Trained

The overwhelming majority of subjects (80.7%) reported learning their creative skills in a school setting, with most of the remainder reporting learning done on-the-job or in a self-taught setting. This points to the importance of schooling and formal training in the workforce. Subjects in our survey were, on average, very highly educated—much more so than either the US Civilian labor force in general, or artists nation-wide (Table 8). It is possible this extremely high level of graduate education is related to the strong presence of administrators in our sample.

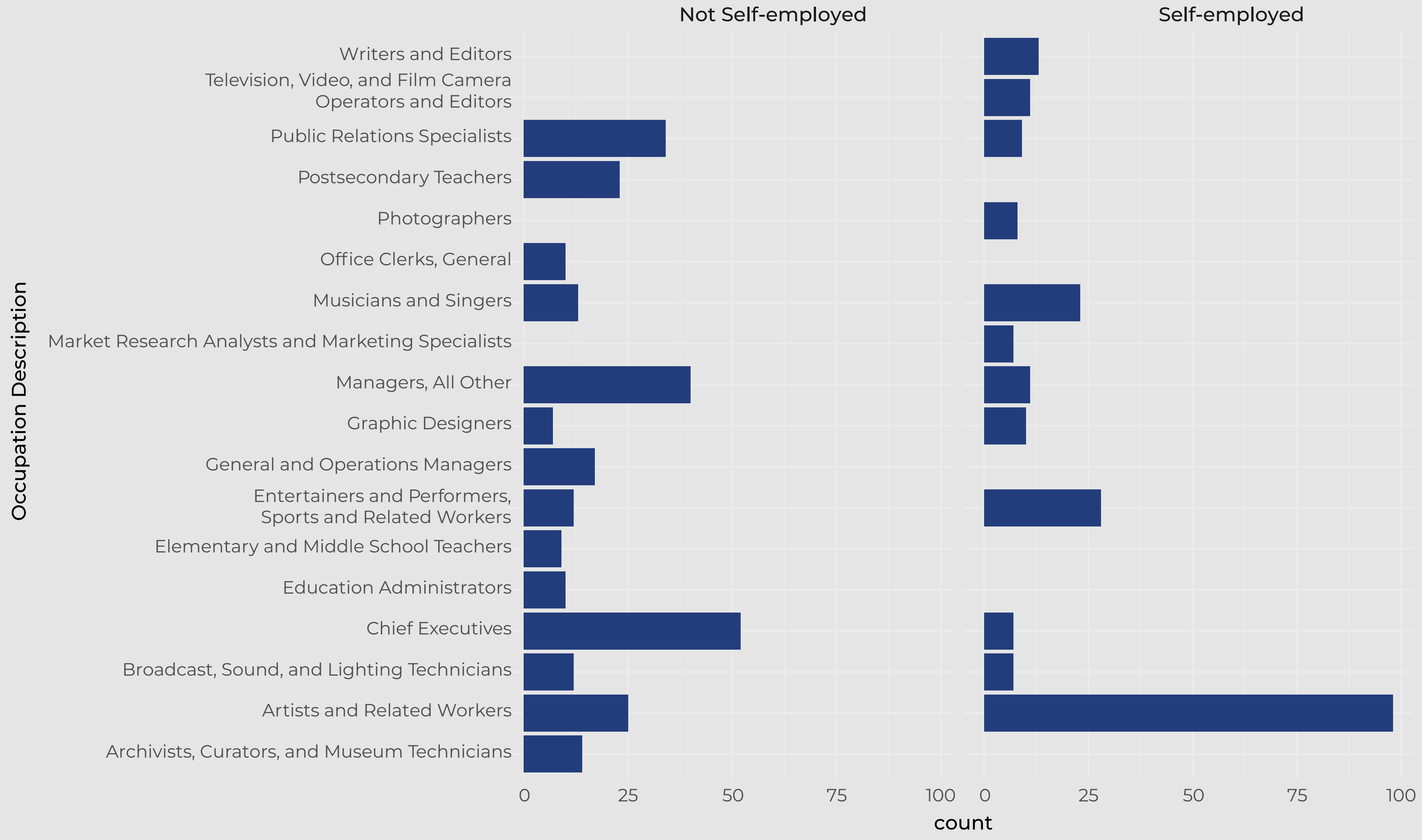
Occupational Description	Bachelors' Degree	Graduate Degree
Artists and Related Workers	53.0%	25.8%
Chief Executives	36.0%	56.0%
Postsecondary Teachers	11.1%	83.3%
Broadcast, Sound and Lighting Technicians	62.5%	25.0%
Total Survey Sample	41.5%	51.6%
PA Civilian Labor Force	28.3%	19.1%
US Civilian Labor Force	21.9%	12.8%
US Artist Labor Force	45.7%	17.1%

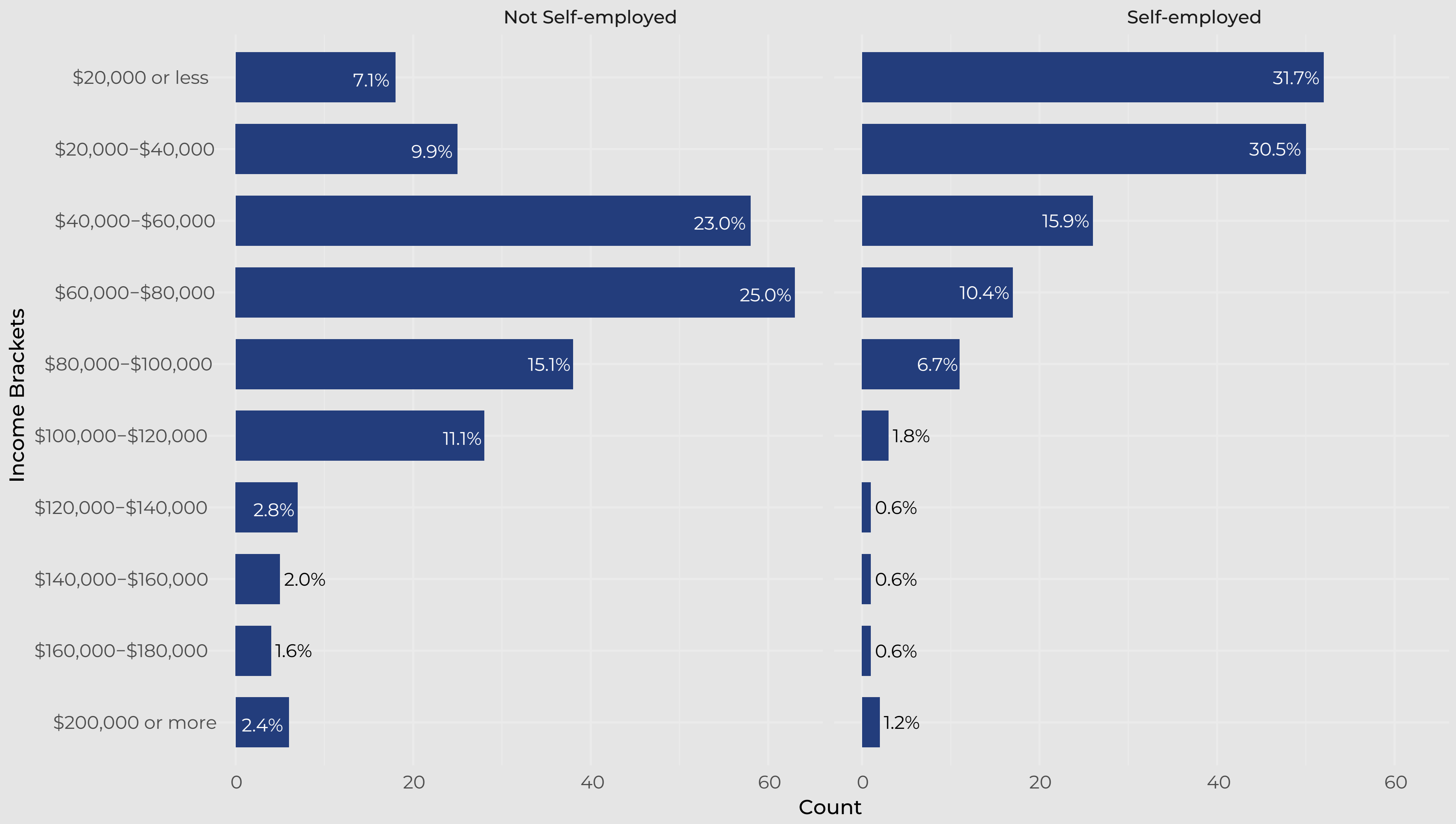
^ TABLE 8. Reported *terminal* higher educational attainment for selected creative worker classifications. Figures on nationwide labor force from Novak-Leonard and Banerjee (2022). Figures on PA Civilian Labor force from US Census American Community Survey 2022 5-year estimates.

Self-Employment is a Defining Characteristic of the Creative Workforce

Creative workers are self-employed at much higher rates than other individuals in the Pennsylvania workforce. Forty-five percent (44.9%) of subjects reported doing creative practice as self-employed individuals. This figure is higher than NEA national estimates of 35% (NEA, 2024a) and our US Census figure of 32% (U.S. Census Bureau, 2023a). The overwhelming majority of those who are self-employed are artists by trade, whereas administrators (executives, grant-writers, managers) tend to be working for others (Figure 19). Relatively few of these people reported having employees besides themselves.

FIGURE 19 >
Self-employment status by occupation description. n = 510





< Figure 20. Reported earnings for the previous tax year for full-time creative workers, by self-employment status. n = 416 (Not Self-employed n = 252, Self-employed n = 164)

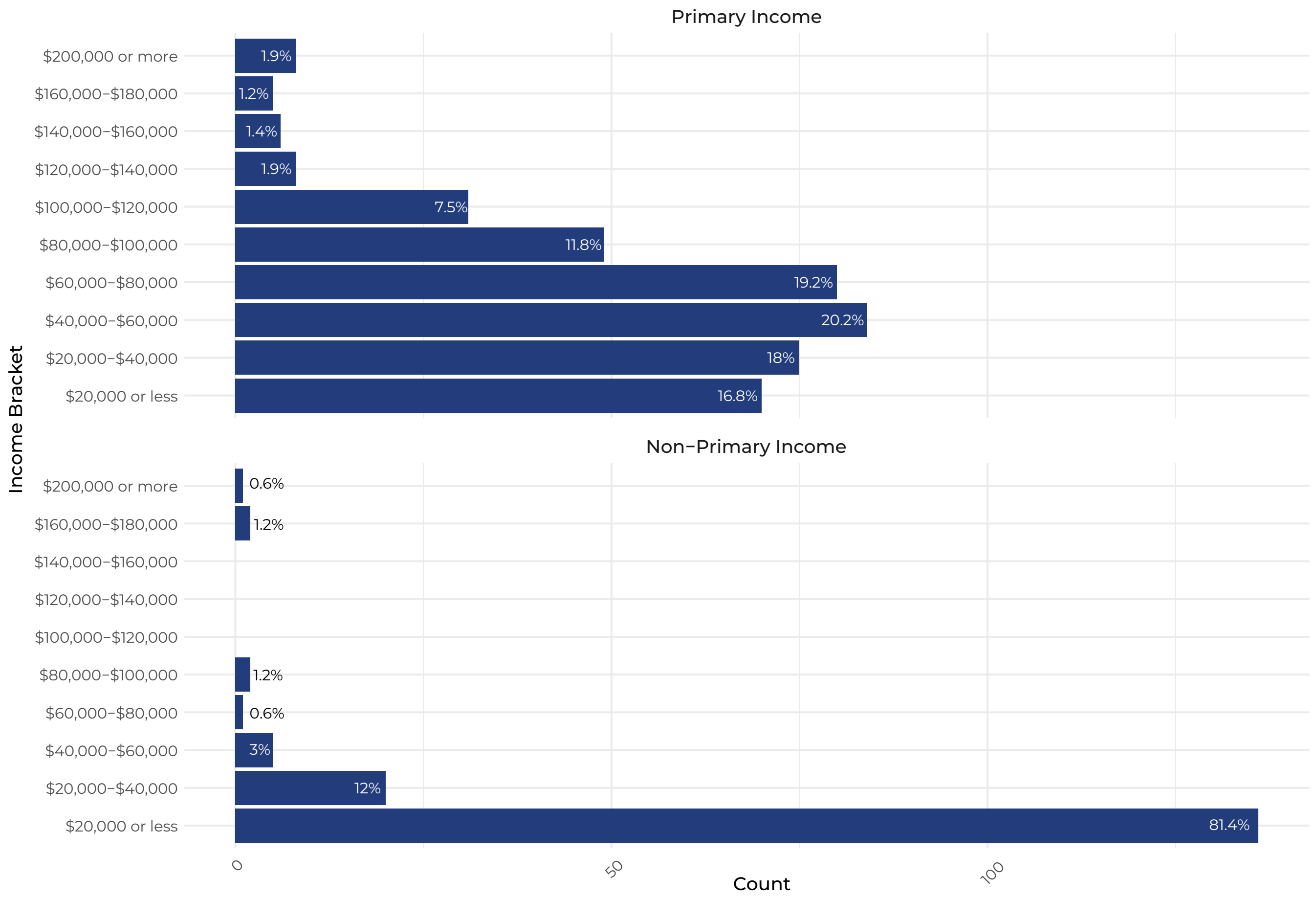


FIGURE 21 >
Income distribution for creative workers facetted by whether creative work is their primary source of income. n = 583 (Primary income n = 416, non-primary income n = 167)

Many Creative Workers Are Economically Precarious

Reported earnings information and sentiments about the nature of work imply that certain groups of creative workers are economically precarious. Some groups reported earning very low wages in the previous tax year. Roughly 35% of individuals reporting that they earn their primary income from employment in creative fields report annual income under $40,000.

Self-employment status is related to earnings. Over 62% of self-employed, full-time subjects report earning less than $40,000 in the last tax year. It seems likely this is related to a divide in profession between those who are self-employed and those who are not. By contrast, only 17% of similar subjects who are *not* self-employed report earnings under $40,000 last year (Figure 20).

Part-time workers tend to report very low yearly earnings, and they are a significant sub-population. Part-timers made up 28.6% of our survey sample. Eighty-one percent (81%) of these subjects reported yearly earnings below $20,000 in the previous tax year (Figure 21). There is likely to be a very wide variability in the intensity of part-time creative work—from quasi-hobbyists to near-full-time. It is unclear the degree to which low wages are preventing part time workers from transitioning to full time.

Some Creatives Are Considering Leaving Pennsylvania

Roughly one-fifth (21.6%) of subjects reported they have considered moving away from Pennsylvania. Subjects gave a variety of reasons for this in free-answer responses—but many wonder if the grass is greener elsewhere. Noting that our occupational analysis found higher concentrations of workers and higher estimated earnings in the arts in neighboring states of New Jersey and New York—these sentiments are reasonable. The cross-section of professions who have considered leaving generally reflects the overall industry, occupation, and income distribution of the survey sample.

The desire to leave is highest in the most populous counties in the state—which also happen to be the densest clusters of activity (Table 10). It's not clear whether this is a cause for alarm or a "normal" level of worker mobility. For purposes of comparison, a 2019 survey of artists and musicians in Philadelphia nightlife reported that 53% had considered leaving the city for better opportunities (24HrPHL, 2019), whereas our data show that thirty percent of a comparable subset (artists, musicians, performers) in Philadelphia have considered leaving the state.

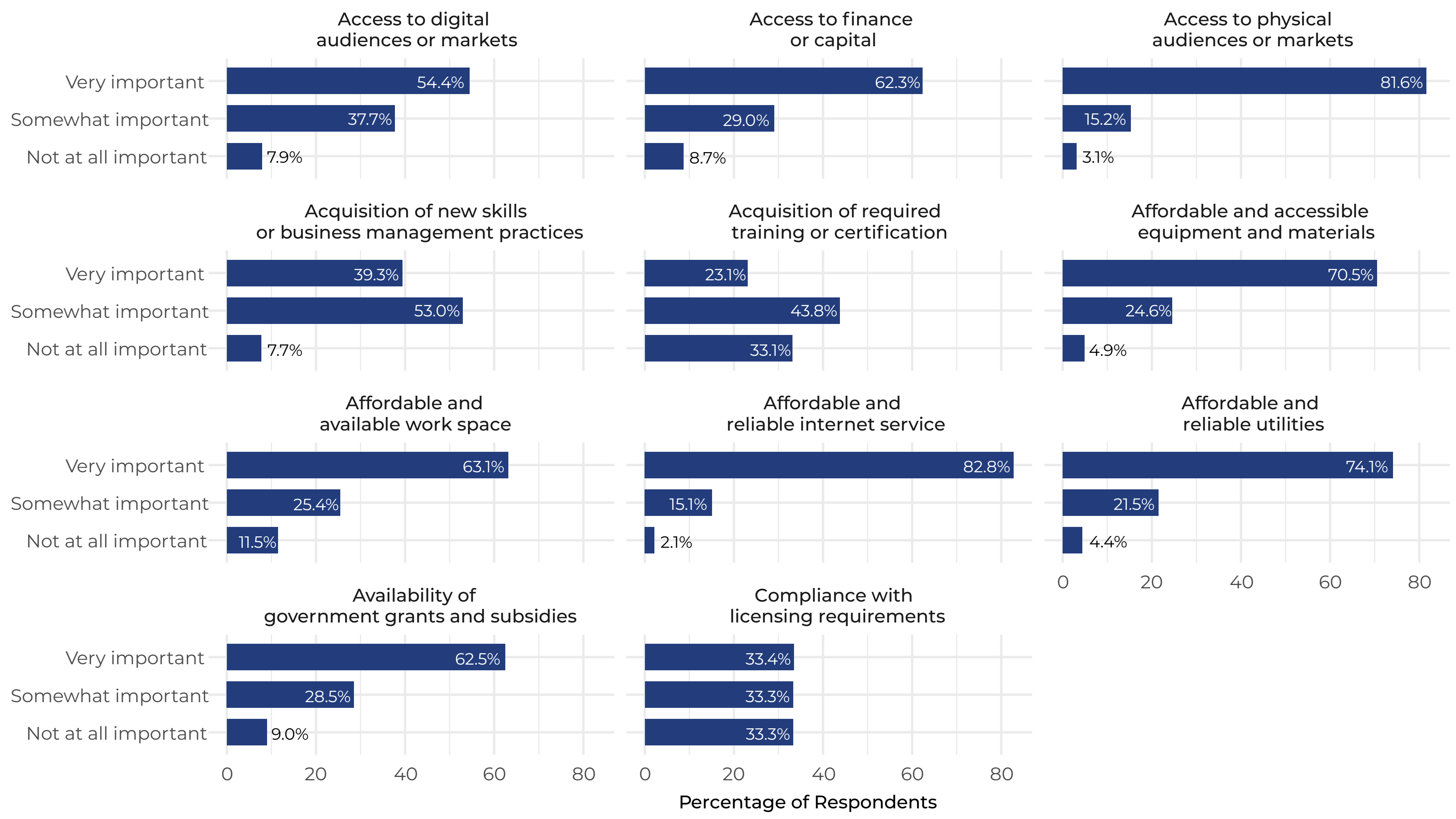
There is also a subset of Pennsylvanians who are interested in moving to one of the Commonwealth's major metros from their region. Some quotes from those who voiced this sentiment can be found in Table 11.

County	Percentage	Total number
Franklin	33.3%	6
Monroe	33.3%	6
Philadelphia	33.0%	88
Erie	31.3%	16
Lackawanna	30.0%	10
Allegheny	29.8%	94
Delaware	29.8%	24
Bucks	26.7%	15
Dauphin	25.0%	20
Centre	20.0%	20

^ TABLE 10. Ten highest county-level percentages of subjects reporting that they have considered leaving Pennsylvania. For counties with five or more survey responses only.

Free answer replies - "Yes I've considered moving *outside* of Pennsylvania"	Free answer replies - "Yes I've considered moving *within* Pennsylvania"
"Very difficult to continue in the arts sector in Philadelphia -- salaries are extremely low compared to other major cities, and the opportunity to advance in your career is also limited."	"Urban areas have more access to higher paying arts jobs, and have more of them."
"Having worked in the arts in 12 states and three countries on two different continents, I have never lived anywhere with such a lack of public/government support of the arts."	"I've considered moving to Philadelphia for more opportunities."
"Pennsylvania's taxes make work difficult and while Philadelphia has a relatively thriving classical music scene it's not quite as good as New York's"	"Pittsburgh has the best modern/contemporary/concert dance scene in PA."
"There are more opportunities in other states. My locale is very conservative and doesn't support the arts like other places do."	"Larger cities have more opportunities available for nonprofits from a funding standpoint. For larger cities, [there is] more accessibility and openness towards working with people of color. [Accessibility and openness in] smaller cities, with a population of 500k or less are limited in Pennsylvania."
"The music industry in PA is not supported. There is a lack of financial support for local artists to advance our careers. There aren't enough venues that pay a decent wage."	"I want to be closer to NYC and the NE corridor. If I could take an express train from Pittsburgh to NYC, I wouldn't move."
"My workplace has almost no opportunities for meaningful growth or raises (and less with each passing year), but when I look at the job landscape in PA it is all around pretty bleak."	"I love spreading my passion and experience with those in great need within my county and surrounding areas but it is a financial strain and I will most likely have to move to a larger city where there are more opportunities. In places like my county, just the ability to fund my programs is harder."
"I have considered moving outside of PA due to the investment in Arts and Culture in order to cities that are higher. In addition to an increase in pay, I would have an increase in resources, making the work easier and allowing for a more mission-focused work instead of worrying constantly about survival."	"I am in the process of moving from northeastern PA, where the arts are not alive enough, to Lancaster, PA. Much more expensive in all factors but many more people to connect with."

^ TABLE 11. Free answer replies from subjects reporting an interest in moving within or outside of Pennsylvania.



^ FIGURE 22. Responses to the question "How important are the following factors to the success of your work and your organization/business?"

Driver	Percentage of subjects reporting dissatisfaction
Access to digital audiences or markets	13%
Access to finance or capital	47%
Access to physical audiences or markets	14%
Acquisition of new skills or business management practices	14%
Acquisition of required training or certification	16%
Affordable and available work space	27%
Affordable and reliable internet service	11%
Affordable and reliable utilities	15%
Affordable and accessible equipment and materials	24%
Availability of government grants and subsidies	53%
Compliance with licensing requirements	6%

^ TABLE 12. Percentage of subjects reporting that specific drivers were "Very" or "Somewhat" important to their work who reported being "Dissatisfied" or "Very Dissatisfied" with said drivers.

There is General Satisfaction With "Drivers of Development" Except on Matters of Finance

There were some main points of agreement in subjects' level of satisfaction about the training, supplies, space, and resources that people bring to their work, and some similarities in sentiments about the quality of these "drivers of development." Subjects reported that utilities, materials, and access to workspaces and physical markets were the most universally important drivers in their work (Figure 22). Satisfaction with these factors tended to exceed 80%. One notable aberration—subjects describing themselves as "Artists and Related Workers" registered above average discontent with availability of workspaces—a fact which contributed to a 27% overall level of dissatisfaction rate for this indicator.

However, satisfaction with finance and funding-related drivers was much lower. For those who stated that access to and availability of grants, finance, and capital were important to their work, levels of dissatisfaction were roughly 50% (Table 12). There was minor variability in the level of dissatisfaction by type of finance, profession, and industry, but sample sizes by industry and profession are too small to draw clear conclusions.

UNCLE DAVE'S ART STUDIO. Dave Howard, an artist with autism and dyslexia, motivates others on the spectrum through his studio, which offers handmade gifts and art classes. He is an ACRE artist. *Image Credit: Bridge Perspective.*

Subject Interviews

Subject Interviews

METHODOLOGY

In the summer of 2024, the research team conducted an introductory client interview, asking Pennsylvania Creative Industries staff questions regarding their policy goals, funding, programs, and strategies. The research team also asked for help from the Pennsylvania Creative Industries team to identify key stakeholders who could be interviewed in order to motivate research themes and survey questions. These interviews were designed to understand likely classifications of workers omitted from in traditional labor reporting on arts and culture.

Some key themes were used to guide the identification of interviewees. The interview list was designed to identify individuals who could collectively cover as many of the following themes and subthemes as possible:

- Geography (rural, urban, secondary cities, Northern tier)
- Industries (fashion, design, architecture, content creation, craft manufacturers, film and video, photography, live arts, artisans and craft)
- Sectors (museums, education, volunteer)
- Programs (work readiness, entrepreneurship, technical training)
- Other considerations (artists in non-art institutions, minority communities, gender gap)

The Pennsylvania Creative Industries team generated a list of organizations and individuals they considered candidates for the interviews. The research team, having outlined a plan to conduct roughly a half-dozen, identified the following interviewees, who spoke with researchers in the Fall of 2024.

- Adam Kenney, Chief Program Officer, Bridgeway Capital
- Ryan Haggerty, Academy Director, the Pop District at the Warhol Academy
- Mamie Stein, President, International Alliance of Theatrical Stage Employees (IATSE) Local #3
- Abby Peters, COO, Pennsylvania Wilds Center and Cooperative (PA Wilds)
- Sharon Huizinga, Program Director, Academy of Live Technology, Rock Lititz
- Abigail Young, Executive Director, Pennsylvania Music Educators Association (PMEA)
- Sara Havekotte, Membership Director, American Institute of Graphic Arts (AIGA) Philadelphia

Conducted by Michael Fichman and Dyan Castro, all conversations followed similar guidelines and question lists. They were recorded for transcription and synthesis.

JESSICA LYN PORTRAIT's > mission is to help clients heal, unravel, build self-confidence, and push limits in a positive and uplifting way. Jessica is a creative worker participating in Bridgeway Capital's ACRE initiative. *Image Credit: Bridge Perspective.*

SYNTHESIS AND CONTEXT

Economic Instability is a Key Creative Workforce Challenge

All interviewees cited precarity and economic instability as major challenges for the workforce. Across multiple sectors, creative professionals face a sense of job insecurity. Freelancers and independent contractors are particularly vulnerable, dealing with unreliable income streams and the pressure of multiple gigs to stay afloat. Whether it's the competition for funding in rural areas (Peters, 2024) or the challenges of contract-to-hire work in design (Havekotte, 2024), the creative workforce is often in a "perpetual start-up" phase with few guarantees for long-term sustainability. Creative workers face challenges like managing taxes, health insurance, and high student loan burdens. Entertainment industry professionals reportedly struggle with the perception that creative work is undervalued.

Policy and funding environments were a significant concern. In the film industry, IATSE union workers are concerned with Pennsylvania's prospects in the competition between states for tax credits (Stein, 2024). There is also a perception that there is persistent underfunding in arts education and in rural creative initiatives. Haggerty (2024) discussed persistent gaps in funding and resources for creative workers, while Young (2024) reported that arts educators face limited budgets despite increasingly heavy teaching roles.

Many artists and creatives are thought to struggle to develop their craft into a sustainable business. There is a perceived lack of structured guidance, mentorship, and data to help them make informed business decisions. Kenney (2024) highlighted how many artists lack clear business strategies when venturing to start their own business from their artistic or creative pursuits.

Systemic Barriers Are Believed to be Affecting Many Creative Sub-Populations

Many interviewees expressed the need for increased inclusivity in the support systems for creatives and in mission-driven arts organizations. Haggerty (2024) described concerns about underrepresented groups, especially emerging and minority artists, being overlooked in the creative sector, a sentiment also shared by Stein in her discussions about the need for better representation in unionized workforces (2024).

Some interviewees described an Urban-Rural divide that vexes some creative workers. Rural creatives might lack access to resources like broadband, quality studio spaces, and market opportunities. Although organizations such as the PA Wilds Center fills some of these gaps by supporting rural creatives through infrastructure development and professional networks (Peters, 2024).

Systemic barriers to access, whether related to class, age, race, or geographic location, prevent many artists from fully participating in or benefiting from creative opportunities. Interviewees believe priority should be given to efforts to diminish such barriers. Peters of the PA Wilds Center (2024) discussed the importance of building access for

< ROSIE MARKETING WORKSHOP
The PA Wilds Center held professional development workshops as part of the PACE (Plan, Accelerate, Commit, Expand) Program for rural entrepreneurs. Donnie Rosie, owner of Rosie Marketing, provides a lesson about the power of photography in content marketing. *Photo Credit: The Pennsylvania Wilds Center for Entrepreneurship*

rural artists in northern Pennsylvania. As the membership director of AIGA Philadelphia, Havekotte (2024) reflected on the broader challenges that many mid-career designers face in terms of access to funding and opportunities.

Creatives Desire Support and Acceptance from Peers and Colleagues

Strong networks of mentorship and peer support are widely seen as critical to the success of creative entrepreneurs. These connections help artists, designers, and other creatives navigate business challenges, gain access to resources, and amplify impact of initiatives. Kenney (2024) described Bridgeway Capital's role in connecting artists throughout the Commonwealth to mentorship and resources to bridge the gap for artists who experience a lack of formal support system; if and when growth opportunities emerge from that intermediary work, Kenney stated that Bridgeway Capital offers the Creative Business Loan Fund to provide patient and flexible financing that catalyzes greater impact (Kenney, 2024).

Whether it's through physical spaces or online platforms, building a sense of community is vital for creatives to thrive. This includes both local artist collectives and broader networks that share resources, knowledge, and opportunities. Peters (2024) discussed the importance of the Pennsylvania Wilds Center and Cooperative, which connects artists across rural areas through a shared platform and offers professional development. AIGA Philadelphia is creating a support system for mid-career and emerging designers (Havekotte, 2024).

Mental health and social acceptance were recurring topics amongst interviewees when asked about the needs and supports of their stakeholders. Isolation, long hours, and precarious work environments take a toll on creative workers' mental well-being. Many workers often feel undervalued and need greater societal and institutional acknowledgment of their contributions. Artists often face pressure to commercialize their work, feeling forced to prioritizing marketable products over original pieces. The PA Wilds Center emphasizes community support and mental health initiatives to help artists thrive (Peters, 2024). Music educators report feeling excluded from "core" subject discussions in schools (Young, 2024).

"I think there's a lack of community and reverence for the arts in smaller cities in PA – I'd like to see more funding to simply make these areas more accessible and inspirational for folks interested in pursuing the arts. I also think AI has taken a huge toll on creativity and desire to create and share it. I don't have a solution for that, but it's something to watch and consider"

–FREE ANSWER SURVEY RESPONSE, OPTIONAL "ADDITIONAL COMMENTS" SECTION

Emerging Technologies Present Opportunities … and Pose Challenges

The COVID-19 pandemic accelerated the necessity of digital literacy for educators and creatives. For example, PMEA's virtual Crescendo conference demonstrates how technology can engage students creatively (Young, 2024). Huizinga (2024) and Haggerty (2024) discussed how they have observed technology as helping advance creative fields without overshadowing the artistry behind them.

There was an agreement that Artificial Intelligence (AI) has the potential to transform certain elements of the creative industries. AI tools are increasingly being integrated into creative workflows, particularly in design and music. While some fear job loss, others see it as an opportunity to enhance creativity and efficiency. However, the impact on entry-level roles is a source of concern, as automation may devalue or replace simpler tasks traditionally handled by junior staff. Havekotte (2024) of AIGA noted that AI tools in interface design have the potential to reduce the need for entry-level designers by automating tasks like wireframing.

Access to technology is seen as increasingly important for all creatives. This includes affordable broadband in rural areas and the tools that allow artists to reach global audiences or collaborate effectively. Peters (2024) identified broadband access as a major barrier for artists in rural Pennsylvania. Stein (2024) discussed how the film industry struggles with access to technology, despite its technical nature.

Sustainable Investments in the Workforce are Desired

Interviewees suggest the need for support systems that go beyond short-term funding or solutions. Subjects suggest both financial support (e.g., multi-year grants, tax credits) and systemic changes (e.g., more inclusive policies). Huizinga's work at Rock Lititz shows how creating a sustainable creative cluster, with both educational and professional components, helps to foster long-term success in the entertainment industry (Huizinga, 2024).

There is a perceived need for greater opportunities in training and skill development—in creative practice but also in business skills, entrepreneurship, and marketing. Trained creatives often lack skills to run a business effectively. Initiatives like workshops, mentorships, and business incubators help address this, and enables them to thrive in an increasingly complex and competitive market. The Academy of Live Technology at Rock Lititz provides students with industry-specific skills to help them enter the workforce, emphasizing the importance of practical experience in fostering professional success (Huizinga, 2024), while Bridgeway Capital highlights the need for business education and actionable data to empower artists (Kenney, 2024).

Trainings and mentorships were cited as useful tools for emerging creatives, particularly in industries like film and entertainment. IATSE members benefit from practical training programs and apprenticeship opportunities (Stein, 2024).

NATE WEISS METALSMITHING is a metalsmith specializing in pre-industrial blacksmithing. He uses hand-driven techniques and a modern design sense to create tools, hardware, and fantastical objects. He is a creative worker in the ACRE initiative. *Image Credit: Bridge Perspective.*

Points of Focus

Points of Focus

WATERHOUSE POTTERY > focuses on handmade functional wares for your home and garden. Alex Watrous earned her BFA in Ceramics at Edinboro University and has since worked professionally in the ceramics industry through manufacturing, retail supply, gallery management and sales, as well as arts administration. She is an ACRE artist. *Image Credit: Bridge Perspective.*

IDENTIFYING STRATEGIC OPPORTUNITIES TO FOCUS POLICY AND INVESTMENT

Pennsylvania faces both challenges and opportunities with respect to its creative workforce. The Commonwealth has a strong set of creative industries and a robust creative workforce. That being said, a weakening labor market, and rising cost of living throughout the state pose challenges to the viability of creative work, especially for self-employed creative workers and primary school level educators.

In this section, the research team highlights five Points of Focus, based on the findings in this report. Note that these Points of Focus have been identified as potential, high impact areas for policy development.

1. Focus on Workforce Retention and Competitive Wages in the Major Metros.

Salaries in creative occupations and workforce density lag behind peer states, and roughly 1-in-3 creative workers in the Pittsburgh and Philadelphia regions say they have considered moving elsewhere. A focus on the growth of a cluster of creative workers and industries will allow for positive economic benefits to accrue across professions. For example, cities like Nashville and Atlanta have been successful in concentrating artists, designers, musicians and other creatives in ecosystems with music, media, and allied industries that have complimentary demand for creative workers.

Given the high rate of self-employment among creative workers, policies that help small business owners and sole proprietors maintain sustainability and competitiveness are one option to support creative workers. Relatedly, the major pressure point in the Commonwealth's larger metropolitan areas are housing prices. Metropolitan and state leaders should consider programs for home ownership support for artists and creative workers or consider re-examining land use regulations that prohibit artists from operating small galleries or classes in their homes. Key informants also cite the interstate competition for tax credits and subsidies as a key driver of Pennsylvania's competitiveness in industries like film and television.

2. Support professional network-building

Creative and artistic work depends upon personal networks between individuals and larger organizations more than most chosen fields. This is doubly important in our rural areas with dispersed populations and fewer existing creative organizations. The Commonwealth can focus on building out and strengthening networks of creative workers. This can include partnering with existing creative organizations that act as connectors or working with local workforce or economic development organizations. This could range from relatively simple interventions such as hosting local arts programs in civic buildings to partnering with larger employers seeking creative workers, such as in television and movie production.

3. Focus on supporting the self-employed.

A significant percentage of the Commonwealth's creative workforce is self-employed. These self-employed individuals report relatively low yearly incomes and often report doing a wide variety of gigs. Promoting small-business trainings, including classes/support for incorporation where applicable, is one way to allow these self-starters to get ahead by making smart financial decisions and learning how to do the non-creative elements of creative business. Many subjects in our study reported that their personal feelings of well-being are associated with their financial well-being—in order to improve personal well-being and promote success in creative entrepreneurship, governments and non-governmental actors can work to reduce the level of risk for these creatives. Several focii include the expansion of access to affordable health, housing, and other basic needs, and the expansion of the access to finance. The City of Philadelphia's "Illuminate The Arts" grants provide a unique example of a local program designed to offer easily accessible funding to independent creatives.

< SARAH HUNTER is a multi-disciplinary artist, teacher, curator, and community volunteer for the arts. She serves on the Executive Board and Gallery Committee at the Greensburg Art Center, curates the Westmoreland Art Nationals shows, and serves as Eco-System Coordinator for ACRE Greensburg. Her work focuses on the beauty and complexity of nature and humanity and can be found in various galleries throughout the region. Sarah Hunter participates in Bridgeway Capital's Alliance for Creative Rural Economies (ACRE) initiative, which provides opportunities to creative workers in rural Western Pennsylvania and Northern West Virginia. *Image Credit: Bridge Perspective.*

4. Grow Pennsylvania's tourism economy

The growth of live arts and the prominence of museums and institutions in major metros presents a confluence of opportunities to bring more consumers to Pennsylvania that can enrich the Commonwealth's artisans, performers, and other creative workers. Informant interviews regarding the rural creative economy point to the major impact of seasonal or yearly downturns in regional tourism—a factor that adds uncertainty to some already precarious fields. Regional and national marketing campaigns that shine a light on creative regional attractions and experiences can direct attention to creative economies and can be leveraged to generate lasting reputational advantages for the Commonwealth as a tourism destination.

5. Future-proof Pennsylvania's Creative Workforce

Given the explosive growth in generative AI technologies, Pennsylvania's creative workers face unprecedented risks, and opportunities, in what will be a dramatically reshaped labor market. Routine activities that make up the bulk of many workers' every day activities are likely to be eliminated or highly reduced with the use of generative AI applications making the value proposition of workers less about their ability to competently perform basic skills and more about their ability to think creatively, to contribute actively to firm innovation and to recognize new opportunities and areas for growth. Key informants in the design industries registered particular concern on this subject in our research.

Creative workers are particularly exposed, but they are not unique. Bolstering the skills of all workers in the Commonwealth will be a necessary focus over the next decade as we face this new round of economic restructuring. The Commonwealth would be well served to take these patterns seriously and to consider the role of more active labor market policies as an adaptation to what is already a highly disruptive technological transition.

"I think it is important to make the case that PA creates and attracts many artists and arts administrators, however, it does not have the financial resources to keep talented folks here. The field is rapidly dying due to the underinvestment and the strain on the limited resources statewide."

– FREE ANSWER SURVEY RESPONSE
OPTIONAL "ADDITIONAL COMMENTS" SECTION

GREEN BEACON GALLERY is a volunteer-run art & music space working to "make Greensburg a place!" They provide a platform for local artists and are part of ACRE. *Image Credit: Bridge Perspective.*

Conclusion

THIS YEAR PHOTO CO. captures life's moments through authentic videography and photography. They are a creative worker participating in Bridgeway Capital's ACRE. *Image Credit: Bridge Perspective.*

Conclusion

Creative workers are a robust and important part of the Commonwealth's workforce, but perhaps more importantly, they make life in Pennsylvania interesting, meaningful, and rich. When you ask hundreds of creative individuals to tell you about their work, the answers are as various and unexpected as the colors on a painter's palette. There are musical therapists, textile makers, industrial filmmakers, dance educators, arts summer camp administrators, television graphic designers—the list goes on and on. These people toil to bring art into the everyday lives of Pennsylvanians—and bring their creative energy to the life of our big cities and small towns.

Pennsylvania's creative workforce is made up of people who have the hard-working ethic that reflects our self-image as a Commonwealth. The way our survey subjects and interviewees define their character through their work brings to mind the spirit of historically iconic Pennsylvania professions like mill-work, tradecraft, mining, and agriculture.

Pennsylvania is a nationally competitive player in fields of artistic enterprise, in part because of its size (fifth-largest by population), cultural history, and location. It has the nation's sixth-largest arts labor force (NEA, 2024b) and its fifth-largest music industry (Stoner & Dutra, 2020). However, the state of Pennsylvania's creative workforce is not completely strong. First, disparities in pay between educational, sex, and employment groups are striking. Second, when it comes to the *relative* size of the creative labor force—Pennsylvania is an underperformer—with fewer arts workers per capita than the national average, and significantly less than peer states like New York, New Jersey, California, DC, and Massachusetts (Stoner & Dutra, 2020). This presents a significant risk—20% of creative Pennsylvanians told us they were thinking of leaving the Commonwealth, and this was more acute in big cities, where it has likely not eluded peoples' notice that neighboring states and peer cities have proportionately larger cultural workforces and higher wages.

Pennsylvanians take a great deal of pride in their work, and the nature of creating art or running a small business is that it is intensely personal. The success and failure of creative enterprise seems linked to the mental, emotional, and financial well-being of workers. The precarity of creative work means exposure to risks that are not specifically financial—a fact that raises the stakes. There is also a risk that a lack of stability and well-being for Pennsylvania's creative workforce creates a driver to leave the state or the creative labor force.

The other thing that's particularly notable about the state's creative workers is that lots of them are hiding in plain sight—inside non-profits and schools, at administrative jobs, in retail businesses, or in between a variety of entrepreneurial hustles. This means that creative workers are hard to quantify, but also potentially inaccessible. Given the common financial needs that were expressed across industries, professions and geographies—reaching all of Pennsylvania's various stakeholders with support or funding opportunity seems a tall task. Fortunately, Pennsylvania has arts and culture leaders who are doing outreach and community-engaged work—a great basis to finding and providing opportunity to those who are hard-to-reach.

THE ALLEGORY GALLERY is a creative space in Ligonier, serving as a bead store, jewelry boutique, art gallery, and gift shop. It promotes artisan craftspeople and offers classes. The Gallery is in the ACRE network. *Image Credit: Bridge Perspective.*

Appendices

APPENDIX I – CENSUS OCCUPATIONAL CODES FOR OCCUPATIONAL ANALYSIS

BLS SOC	PUMS OCC	OCC Title
151251	1010	Computer programmers
151252	1021	Software developers
151254	1031	Web developers
151255	1032	Web and digital interface designers
171011	1305	Architects, except landscape and naval
171012	1306	Landscape architects
251031	2205	Postsecondary teachers
254012	2400	Archivists, curators, and museum technicians
271011	2600	Artists and related workers
271021	2631	Commercial and industrial designers
271022	2632	Fashion designers
271023	2633	Floral designers
271024	2634	Graphic designers
271025	2635	Interior designers
271026	2636	Merchandise displayers and window trimmers
271027	2640	Set and exhibit designers
272011	2700	Actors
272012	2710	Producers and directors
272031	2740	Dancers and choreographers
272041	2751	Music directors and composers
272042	2752	Musicians and singers
272091	2755	Disc jockeys, except radio
272099	2770	Entertainers and performers, sports and related workers, all other
273011	2805	Broadcast announcers and radio disc jockeys
273041	2830	Editors
273042	2840	Technical writers
273043	2850	Writers and authors
274011	2905	Broadcast, sound, and lighting technicians
274021	2910	Photographers
274031	2920	Television, video, and film camera operators and editors
393021	4435	Motion picture and film projectionists
395091	4525	Makeup artists, theatrical and performance
516051	8350	Tailors, dressmakers, and sewers
519071	8750	Jewelers and precious stone and metal workers

APPENDIX II – NAICS CODES FOR INDUSTRIAL ANALYSIS

ACPSA description	ACPSA 2 digit	NAICS code	NAICS title
Performing arts	35	711110	Theater companies and dinner theaters
		711120	Dance companies
		711130	Musical groups and artists
		711190	Other performing arts companies
Independent artists, writers, and performers	38	711510	Independent artists, writers, and performers
Agents/managers for artists	37	711410	Agents and managers for artists, athletes, entertainers, and other public figures
Promoters of performing arts and similar events	36	711310	Promoters of performing arts, sports, and similar events with facilities
		711320	Promoters of performing arts, sports, and similar events without facilities
Museums	39	712110	Museums
		712120	Historical sites
Advertising	30	541810	Advertising agencies
Architectural services	23	541310	Architectural services
Landscape architectural services	24	541320	Landscape architectural services
Interior design services	25	541410	Interior design services
Industrial design services	26	541420	Industrial design services
Graphic design services	27	541430	Graphic design services
All other design services	28	541490	Other specialized design services
Computer systems design	29	541511	Custom computer programming services
Photography and finishing services	31	541921	Photography studios, portrait
		541922	Commercial photography
		812921	Photofinishing laboratories (except one-hour)
Fine arts education	34	611610	Fine arts schools
Rental and leasing	22	532282	Video tape and disc rental

ACPSA description	ACPSA 2 digit	NAICS code	NAICS title
Publishing	17	511110	Newspaper publishers
		511120	Periodical publishers
		511130	Book publishers
		511191	Greeting card publishers
		511199	All other publishers
		511210	Software publishers
Motion pictures	18	512110	Motion picture and video production
		512120	Motion picture and video distribution
		512131	Motion picture theaters
		512132	Drive-in motion picture theaters
		512191	Teleproduction and other postproduction services
		512199	Other motion picture and video industries
Sound recording	19	512230	Music publishers
		512240	Sound recording studios
		512250	Record production and distribution
		512290	Other sound recording industries
Broadcasting	20	515111	Radio networks
		515112	Radio stations
		515120	Television broadcasting
		515210	Cable and other subscription programming
Other information services		519110	News syndicates
		519120	Libraries and archives
		519130	Internet publishing and broadcasting and Web search portals

ACPSA description	ACPSA 2 digit	NAICS code	NAICS title
Printed goods manufacturing	12	323111	Commercial printing (except screen and books)
		323113	Commercial screen printing
		323117	Books printing
		323120	Support activities for printing
Jewelry and silverware manufacturing	13	339910	Jewelry and silverware manufacturing
Musical instrument manufacturing	14	339992	Musical instrument manufacturing
Custom architectural woodwork and metalwork manufacturing	15	332323	Ornamental, sheet, and architectural metal work manufacturing
		337122	Nonupholstered wood household furniture manufacturing
		337212	Custom architectural woodwork and millwork manufacturing
Other goods manufacturing	11	327212	Other pressed and blown glass and glassware manufacturing
		327215	Glass product manufacturing made of purchased glass
		339940	Office supplies (except paper) manufacturing (this includes artists' paint and artists' supplies)
Wholesale and transportation industries	91	423410	Photographic equipment and supplies wholesaler
		424920	Book, periodical, and news merchant wholesalers
Retail industries	92	451140	Musical instrument and supplies stores
		451211	Book stores
		451212	News dealers and newsstands
		453110	Florists
		453920	Art dealers

APPENDIX III – CREATIVE INDUSTRY FIRM COUNT, PER-CAPITA DENSITY AND GROWTH BY PENNSYLVANIA COUNTY. RANKED BY NUMBER OF FIRMS.

County	Number of Firms	Number of firms per 10,000 people	Pct Change in Firms 2017-2022
Philadelphia County	1,740	10.9	11.7%
Allegheny County	1,514	12.2	-3.3%
Montgomery County	1,272	14.9	-3.3%
Bucks County	833	12.9	-2.8%
Lancaster County	708	12.8	16.4%
Chester County	656	12.2	-0.2%
Delaware County	531	9.2	-9.4%
Berks County	383	8.9	7.9%
Lehigh County	361	9.6	8.4%
York County	358	7.8	-1.6%
Westmoreland County	307	8.7	-3.5%
Dauphin County	304	10.6	-1.3%
Luzerne County	295	9.1	-11.7%
Erie County	285	10.5	-3.7%
Northampton County	262	8.3	-1.5%
Cumberland County	260	10	-5.1%
Lackawanna County	256	11.9	0.4%
Centre County	208	13.1	-3.7%
Butler County	202	10.4	1.5%
Washington County	168	8	0.6%
Lycoming County	145	12.7	0%
Monroe County	143	8.5	11.7%

County	Number of Firms	Number of firms per 10,000 people	Pct Change in Firms 2017-2022
Blair County	138	11.3	-9.2%
Lebanon County	124	8.7	-8.8%
Beaver County	112	6.7	5.7%
Cambria County	110	8.3	-7.6%
Franklin County	109	7	-7.6%
Schuylkill County	107	7.5	16.3%
Adams County	102	9.8	-5.6%
Mercer County	82	7.4	-2.4%
Fayette County	79	6.2	-2.5%
Indiana County	77	9.2	-8.3%
Lawrence County	73	8.5	-11.0%
Wayne County	72	14.1	7.5%
Clearfield County	61	7.7	-4.7%
Crawford County	60	7.2	-1.6%
Northumberland County	56	6.1	9.8%
Union County	56	13.1	-3.4%
Venango County	55	10.9	-3.5%
Bradford County	54	9	0%
Pike County	53	9	23.3%
Columbia County	50	7.7	-9.1%
Bedford County	49	10.3	-3.9%
Carbon County	49	7.5	4.3%
Somerset County	45	6.1	-22.4%
Jefferson County	44	9.9	-4.3%
Elk County	40	13	17.6%
Tioga County	40	9.7	-4.8%

County	Number of Firms	Number of firms per 10,000 people	Pct Change in Firms 2017-2022
McKean County	36	8.9	20.0%
Snyder County	35	8.8	-12.5%
Susquehanna County	35	9.1	40.0%
Mifflin County	34	7.4	3.0%
Warren County	34	8.8	-12.8%
Huntingdon County	33	7.5	-17.5%
Armstrong County	31	4.7	-18.4%
Clarion County	29	7.7	7.4%
Clinton County	26	6.9	0%
Wyoming County	26	9.9	-16.1%
Greene County	23	6.4	0%
Juniata County	22	9.3	-8.3%
Perry County	22	4.8	-8.3%
Montour County	18	9.9	5.9%
Potter County	13	7.9	-23.5%
Fulton County	9	6.2	-10.0%
Sullivan County	8	13.6	-20.0%
Cameron County	6	13.2	-33.3%

APPENDIX IV – SURVEY RESULTS BY QUESTION

Block	Question Number	Question	Answers
Sorting Questions	1_zipcode	Are you a resident of the Commonwealth of Pennsylvania?	I am a resident of Pennsylvania (if so, please enter your zip code) (n = 596; 97.7%)
			I am not a resident of Pennsylvania but I work in Pennsylvania (please enter home zip code) (n = 14; 2.3%)
			None of the above (n = 0; 0%)
	Skip To: End of Survey If Are you a resident of the Commonwealth of Pennsylvania? = None of the above		
	2_age	What is your age?	Under 18 (n = 0; 0%)
			18 – 24 (n = 5; 0.8%)
			25 – 34 (n = 63; 10.3%)
			35 – 44 (n = 134; 22.0%)
			45 – 54 (n = 159; 26.1%)
			55 – 64 (n = 135; 22.1%)
			65 – 74 (n = 0; 0%)
			75 – 84 (n = 0; 0%)
			85 or older (n = 0; 0%)
	Skip To: End of Survey If What is your age? = Under 18		
Creative Work	3_creative_in_nature	Have you earned income in the last year from work you consider "creative" in nature?	Yes (n = 584; 95.7%)
			No (n = 26; 4.3%)
	Skip To: 5_employer_creative If Have you earned income in the last year from work you consider "creative" in nature? = No		
	4_primary_income	Is this work your primary source of income?	Yes (n = 416; 68.2%)
			No (n = 168; 27.5%)
	Skip To: End of Block If Is this work your primary source of income? = Yes		
	Skip To: 5a_pt_creatives If Is this work your primary source of income? = No		
	5_employer_creative	In the last year, was your primary income earned working for an employer whose core business or mission is in an artistic or creative field?	Yes (n = 26; 4.3%)
			No (n = 584; 95.7%)
	Skip To: End of Survey If In the last year, was your primary income earned working for an employer whose core business or m... = No		
	Skip To: End of Block If In the last year, was your primary income earned working for an employer whose core business or m... = Yes		

Creative Work, cont'd	5a_pt_creatives	Please answer the following questions in reference to the business where you do your "creative" work, which you indicated is not your primary source of income. If you have multiple creative jobs, please answer based on the one that brings you the most income.	Written Response*
Work Category	6_occupation	In one or two sentences, how would you describe the nature of your work? We will use this information to try to categorize your occupation, detail is helpful. Examples: a freelance lighting technician for films and commercials, a financial administrator for a theater company, a part-time violin teacher doing private lessons, a wood furniture maker.	Written Response*
	7_self_employed	Are you self-employed?	Yes (n = 274; 44.9%)
			No (n = 336; 55.1%)
	Skip To: End of Block If Are you self-employed? = No		
	8_employees	Do you have employees besides yourself? If so, how many?	No (n = 223; 36.6%)
			1-5 (n = 41; 6.7%)
			6-10 (n = 4; 0.7%)
			11-50 (n = 5; 0.8%)
			51 + (n = 0; 0%)
Workplace	Display this question: If Have you earned income in the last year from work you consider "creative" in nature? = Yes And Is this work your primary source of income? = Yes Or If Have you earned income in the last year from work you consider "creative" in nature? = No And In the last year, was your primary income earned working for an employer whose core business or m... = Yes		
	9_employer	In one or two sentences, how would you describe the type of business or organization you work for (or describes your business if self-employed)? We will use this information to try to categorize your employer. Detail is helpful. Examples: An agency that manages actors, a large hospital system, a non-profit that provides art classes to children, a part time business teaching violin lessons.	Written Response*
	Display this question: If Have you earned income in the last year from work you consider "creative" in nature? = Yes And Is this work your primary source of income? = No		

Workplace, cont'd	9a_employer	In one or two sentences, how would you describe the type of business or organization you work for (or describes your business if self-employed)? This refers to the business where you do the "creative" work you indicated is not your primary source of income. We will use this information to try to categorize your employer. Detail is helpful. Examples: A part time business teaching violin lessons, a sound rental company, a non-profit that provides art classes to children.	Written Response*
Drivers of Development	We will now ask you some questions about the nature of your work – your skills, training, and the things you feel you need to be successful.		
	10_skills	Where did you learn the skills needed for your work? (Choose all that apply)	School (e.g., college, university, high school) → if selected, please specify degree or program (optional) (n = 492; 80.7%)
			Family (n = 11; 1.8%)
			Apprenticeship (formal or informal) (n = 15; 2.5%)
			On-the-job learning (n = 66; 10.9%)
			Specialist training program (n = 21; 3.4%)
			Self-taught (n = 88; 14.4%)
			Other (please specify) (n = 20; 3.3%)
	11_drivers	How important are the following factors to the success of your work and your organization/ business? This applies whether your role involves direct creative work or supports a creative organization.	See on next page
	Skip To: 13_income If How important are the following factors to the success of your work and your organization/busines... [Very important] (Count) < 1		
	Carry Forward Selected Choices from "How important are the following factors to the success of your work and your organization/business? This applies whether your role involves direct creative work or supports a creative organization."		
	12_satisfaction	You indicated that the following factors were most important to the success of your work or your business/organization. How satisfied are you with the quality of these factors?	See on next page

11_drivers	Not at all important (1)	Somewhat important (2)	Very important (3)
Access to physical audiences or markets (1)	n = 19; 3.1%	n = 93; 15.2%	n = 498; 81.6%
Access to digital audiences or markets (2)	n = 48; 7.9%	n = 230; 37.7%	n = 332; 54.4%
Affordable and available work space (3)	n = 70; 11.5%	n = 155; 25.4%	n = 385; 63.1%
Affordable and accessible equipment and materials (4)	n = 30; 4.9%	n = 150; 24.6%	n = 430; 70.5%
Affordable and reliable internet service (5)	n = 13; 2.1%	n = 92; 15.1%	n = 505; 82.8%
Affordable and reliable utilities (6)	n = 27; 4.4%	n = 131; 21.5%	n = 452; 74.1%
Access to finance or capital (7)	n = 53; 8.7%	n = 177; 29.0%	n = 452; 74.1%
Availability of government grants and subsidies (8)	n = 55; 9.0%	n = 174; 28.5%	n = 381; 62.5%
Acquisition of new skills or business management practices (9)	n = 47; 7.7%	n = 323; 53.0%	n = 240; 39.3%
Acquisition of required training or certification (10)	n = 202; 33.1%	n = 267; 43.8%	n = 141; 23.1%
Compliance with licensing requirements (11)	n = 203; 33.3%	n = 203; 33.3%	n = 204; 33.3%

12_satisfaction	Very Dissatisfied (1)	Dissatisfied (2)	Neutral (3)	Satisfied (4)	Very Satisfied (5)
Access to physical audiences or markets (1)	n = 2; 0.4%	n = 68; 13.7%	n = 127; 25.5%	n = 232; 46.6%	n = 69; 12.9%
Access to digital audiences or markets (2)	n = 1; 0.3%	n = 42; 12.7%	n = 87; 26.2%	n = 161; 48.5%	n = 41; 12.3%
Affordable and available work space (3)	n = 25; 6.5%	n = 79; 20.5%	n = 76; 19.7%	n = 141; 36.6	n = 64; 16.6%
Affordable and accessible equipment and materials (4)	n = 12; 2.8%	n = 94; 21.9%	n = 123; 28.6%	n = 143; 33.3%	n = 58; 13.5%
Affordable and reliable internet service (5)	n = 10; 2.0%	n = 47; 9.3%	n = 116; 23.0%	n = 215; 42.6%	n = 117; 23.2%
Affordable and reliable utilities (6)	n = 10; 2.2%	n = 60; 13.3%	n = 122; 27.0%	n = 170; 37.6%	n = 90; 20%
Access to finance or capital (7)	n = 60; 15.8%	n = 120; 31.6%	n = 110; 29.0%	n = 79; 20.8%	n = 11; 2.9%
Availability of government grants and subsidies (8)	n = 53; 14.0%	n = 149; 39.1%	n = 101; 26.6%	n = 63; 16.5%	n = 53; 13.9%
Acquisition of new skills or business management practices (9)	n = 5; 2.1%	n = 29; 12.1%	n = 98; 40.8%	n = 87; 36.2%	n = 21; 8.8%
Acquisition of required training or certification (10)	n = 2; 1.4%	n = 21; 14.9%	n = 46; 32.6%	n = 53; 37.6%	n = 19; 13.5%
Compliance with licensing requirements (11)	n = 4; 2.0%	n = 9; 4.4%	n = 67; 32.9%	n = 90; 44.1%	n = 34; 16.7%

Drivers of Development, cont'd	13_income	What was your pre-tax personal income related only to your work in creative practice or industries in 2024 (to the best of your knowledge)?	$20,000 or less (n = 211; 34.59%)
			$20,000-$40,000 (n = 99; 16.23%)
			$40,000-$60,000 (n = 95; 15.57%)
			$60,000-$80,000 (n = 85; 13.93%)
			$80,000-$100,000 (n = 54; 8.85%)
			$100,000-$120,000 (n = 33; 5.41%)
			$120,000-$140,000 (n = 8; 1.31%)
			$160,000-$180,000 (n = 8; 1.31%)
			$140,000-$160,000 (n = 7; 1.15%)
			$180,000-$200,000 (n = 1; 0.16%)
			$200,000 or more (n = 9; 1.48%)
	14_relocating	Have you considered moving to a new place to advance your career? If so, please briefly tell us where and why.	No, I have not considered moving (n = 417; 68.36%)
			Yes, I've considered moving within Pennsylvania (n = 61; 10.00%)
			Yes, I've considered moving outside of Pennsylvania (n = 132; 21.64%)
We have just a few more questions about your personal background, and then we're done! This section is completely optional, and your responses will remain confidential. Any information you choose to share will only be used to better understand and refine our survey results.			
Demographics	15_gender	How would you identify your gender?	Woman (n = 387; 64.82%)
			Man (n = 194; 32.50%)
			Non-binary (n = 14; 2.35%)
			Another Gender Identity Not Listed (n = 2; 0.34%)
	16_hispanic	Do you identify as being of Hispanic, Latino or Spanish ethnicity?	Yes (n = 29; 4.89%)
			No (n = 564; 95.11%)
	17_race	How would you identify your racial background (choose as many as apply)?	White (n = 472; 83.25%)
			Black or African American (n = 44; 7.76%)
			American Indian or Alaska Native (n = 1; 0.18%)
			Asian (n = 21; 3.70%)
			Native Hawaiian or Pacific Islander (n = 0; 0%)
			Middle Eastern or North African (n = 0; 0%)
			Prefer not to answer (n = 13; 2.29%)
			Other (n = 16; 2.82%)

Demographics, cont'd	18_dependents	Do you have children under 18 or adult dependents living in your household?	Yes (n = 176; 29.33%)
			No (n = 424; 70.67%)
	19_education	What is the highest degree or level of schooling you have completed?	Some High School (n = 0; 0%)
			High School (or Equivalent) (n = 0; 0%)
			Associate Degree (n = 39; 6.79%)
			Bachelor's Degree (n = 239; 41.64%)
			Graduate Degree (n = 296; 51.57%)
Get Connected	20_comms	Would you like to be notified about the results of this study or contacted about opportunities by the Pennsylvania Council on the Arts? If so, please input your email address (which will be separated from your survey answers).	Written Response*
	comments	Thank you for taking the time to complete this survey! Your responses will help us better understand and support creative workers in Pennsylvania. Our analysts will review all responses once the survey closes. If you think we may have missed something important, or if you have additional insights, please let us know below!	Written Response*

*Due to the breadth of written responses (over 500), they were left out of the appendix

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GEAR PLAYGROUND. Tech25's tuition-free programs provide hands-on training for youth and adults, helping bridge equity and access gaps in Pittsburgh's creative industries workforce. *Image Credit: Chris Sprowls.*

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