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2024 Freelance Economic  
Impact Report

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# The Independent Workforce: Sizing the Top Markets in the United States for Creative, Technical, and Professional Services

# Table of Contents

<b>1.0 Foreword</b>	<b>1</b>
<b>2.0 Background and Objectives</b>	<b>2</b>
<b>3.0 Key Findings</b>	<b>4</b>
<b>4.0 Detailed Findings</b>	<b>8</b>
<b>5.0 Appendix: Methodology</b>	<b>41</b>

# 1.0 Foreword

It's always a highlight of my year when I get the first look at Fiverr's Freelance Economic Impact Report as it provides insights into the importance of the freelance community and the financial impact they have in the top 30 cities we analyze. We are in our 7th year of putting this report together, and year over year, we see more and more people choosing the freelance lifestyle. It confirms my belief that independent work is the future.

Amid layoffs, inflation, and headlines of AI 'stealing' jobs - this report also positions freelancing as an increasingly safe career choice for modern workers. This year, we saw more respondents say they were leaving - or planning to leave - their full-time job to exclusively freelance. I was also encouraged to see the results that two-in-five (43%) freelancers surveyed increased their revenues in 2023, and a majority (55%) expect to earn even more in 2024.

As 'Gen Z' grows up and its participants make up a larger portion of the overall workforce, it's nice to see that most are choosing to freelance and succeeding greatly. Gen Zers are outperforming their counterparts in earnings growth. (Sixty percent of Gen Z freelancers reported increased earnings in 2023, a significant leap compared to the 43% among the broader population of independent workers.) These young professionals underscore the empowerment that comes from setting their own rates and capitalizing on the demand for their skills.

When it comes to emerging tech - including AI - the freelance community continues to be optimistic. Freelancers in the US as a whole, as well as freelancers on Fiverr, are clearly not afraid of adopting this new technology. They see it as essential to enhance their productivity.

Businesses that embrace AI as well as leverage independent workers will stay competitive and innovative in a still uncertain economic environment. The potential for the freelance workforce for 2024 and beyond is enormous and I'm excited about what's to come.

**Micha Kaufman**  
**Founder and CEO**  
**Fiverr**

## 2.0 Background and Objectives

Fiverr™, a leading online marketplace connecting small businesses and Fortune 500 companies with freelance talent offering services across 700 categories, has partnered with Illuminas, a market research firm specializing in the services and technology sectors, for its seventh annual Freelance Economic Impact Report. Fiverr commissioned Illuminas to conduct a study to identify and profile the largest markets in the United States for skilled independent workers. The goals of this study were to:

- Estimate the size and growth of the independent professional workforce in the United States as a whole, and in top markets.
- Provide information on the economic impact of this workforce.
- Uncover independent professional work habits, motivations, and future plans.
- Compare the independent professional workforce in the U.S. as a whole to those that use Fiverr’s platform to sell their services.

To achieve these goals, Illuminas examined multiple secondary government data sources from the U.S. Census Bureau, the Bureau of Economic Analysis, and the Bureau of Labor Statistics. A key data source consists of the Non-Employer Statistics compiled annually by the U.S. Census Bureau. This data aggregates millions of tax returns for non-employer entities with at least \$1,000 in annual receipts, classified by geography and industry, thus providing an estimate of the size and revenue of independent professionals by market and industry categories. Due to availability issues with the source data, the most recently available data the Census Bureau has compiled is calendar year 2020. Illuminas produced estimates for 2021 and 2022 for last year’s report and has updated these estimates as well as produced estimates for 2023 based on more recent macroeconomic data.

This study specifically focuses on a workforce referred to here as “independent professionals”, “independent worker” or “freelancers”. This group consists of individual business entities that earn income outside of traditional employment, do not employ others, and are in the following industries:

- creative services (e.g., artists, video producers),
- skilled technical services (e.g., architecture, computers)
- skilled professional services (e.g., legal, accounting, marketing).

The appendix identifies the specific industries, based on NAICS codes<sup>1</sup>, which define this market.

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<sup>1</sup> North American Industrial Classification System

In addition to profiling independent professional workforce characteristics for the top 30 markets, Illuminas also profiles nine distinct clusters of markets with common characteristics. This exploration is based on a market commonalities analysis that Illuminas conducted last year to statistically align the top 50 markets based on common characteristics.

Next, Illuminas conducted a survey of 801 skilled independent workers in the U.S., drawing participants from an online research panel. Respondents must have worked as independent professionals in creative services, technical services, or professional services and earned at least \$1,000 in revenue from this work in 2023. Data collection took place January 26<sup>th</sup> – February 7<sup>th</sup>, 2024. The data from this survey was weighted by geographic region and type of independent work as defined above to be representative of skilled independent work based on the Nonemployer Statistics data series from the Census Bureau.

Last, in conjunction with Fiverr’s Market Research and Insights team, Illuminas analyzed data from an internal survey of Fiverr sellers in the U.S. Respondents must have been active sellers on the Fiverr platform in the past six months. Data collection for the Fiverr sellers survey took place in February 2024 and resulted in 601 completed surveys from Fiverr freelancers in the U.S. Respondents were not incentivized. The data are unweighted.

## 3.0 Key Findings

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### Independent professionals continue to be an influential economic force

There are an estimated 4.0 million independent professionals in the top 30 markets of the U.S. as of 2023, up 2.4% from 2022. This workforce is estimated to have earned \$191 billion in revenue in 2023, up 6.1% from 2022. Independent professionals represent 4.1% of the U.S. labor force, and their earnings comprise 1.1% of total U.S. gross domestic product (GDP) in 2023.

Despite uncertainty about the health of the U.S. economy, many independent workers continue to find financial success. Two-in-five (43%) increased their revenues in 2023, and a majority (55%) expect to earn even more in 2024. U.S. Fiverr freelancers are even more likely to anticipate an increase in revenue this year; two-in-three (68%) expect to generate more.

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### Independent professionals are concentrated in the top 30 markets in the U.S.

Most of the skilled independent professionals are located in the top 30 MSAs (Metropolitan statistical areas are delineated by the U.S. OMB as having at least one urbanized area with a minimum population of 50,000), which tend to have populations of at least a million residents. The top 30 markets for these workers represent six-in-ten (57%) of all independent professionals in the U.S. and 63% of the revenue. They are estimated to have earned a combined revenue of \$191 billion in 2023.

The top markets in terms of total number of independent professionals and revenue are New York, Los Angeles, and Miami. The top 30 freelance markets are concentrated among metro areas with populations of at least one million residents, with this list of top 30 remaining unchanged from last year. The fastest growing markets in total independent workers from 2018 to 2023 include Orlando, Miami, Las Vegas, Houston, Tampa, and Nashville, while the two fastest growing in total receipts are Miami and Orlando.

There is a wide earnings gap between independent professionals in the top 30 markets and the U.S. as a whole. Among all types of independent professionals, those living in the top 30 markets earn, on average, \$4,334 more than the total U.S. average (\$48,288 compared to \$43,954). The differential is similar regardless of the type of services these independent professionals provide—technical, creative, or professional. The markets with the highest annual receipts per professional are San Jose, San Francisco, and Washington, DC, while the lowest is St. Louis.

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### More independent workers are choosing to exclusively freelance

Three-in-ten (29%) freelancers hold a permanent job in addition to their freelance work. However, more independent workers focused exclusively on freelancing in 2023, rising to 71% (from 64% in 2022 and 61% in 2021). Fiverr sellers in the U.S. are also moving towards full-time freelancing, with 57% reporting they exclusively freelance, up from 52% the year before. Gen Z and Millennial U.S. independent professionals are more likely to hold a

permanent job than those in older generations. However, they too are increasingly moving away from permanent employment, with 57% of Gen Z/Millennials exclusively freelancing in 2023 compared to less than half (47%) in 2022. Freelancers who maintain full-time employment exhibit significantly lower levels of satisfaction with their permanent roles; a striking 75% express high satisfaction with their freelancing endeavors, in stark contrast to 47% who feel similarly about their permanent positions. Given this stark contrast, it is not surprising that many freelancers are looking to reduce the time they spend on their permanent job or even leave permanent employment altogether. Three-in-five (59%) freelancers with a permanent job are at least somewhat likely to reduce the number of hours they spend on it this year. Additionally, 60% of freelancers are very or somewhat likely to walk away from their permanent job altogether and only freelance.

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## Independent workers are in control of their money, and freelancing lets them spend it on the things they value

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Independent professionals continue to be able to charge higher rates/fees for their products and services. Overall, four-in-ten (38%) U.S. independent workers raised their rates in 2023, and half (49%) expect to do so within the next six months. Although the average rate hike is slightly more modest this year, independent professionals charged an average of 21% more in 2023 (down from 29% in 2022). For comparison, 44% of U.S. Fiverr sellers increased their rates in 2023, with an average increase of 32% (down from a 36% increase in 2022). Most clients continue to accept rate increases. Fewer than one-in-ten (8%) U.S. independent workers received a lot of complaints about higher rates, while one-in-five got some pushback. Most (60%) did not receive any complaints, although a smaller proportion than in 2022 feel customers were happy to offer them more (12% versus 19% the year prior).

Most freelancers reinvest in their business to drive additional success. In fact, 94% of independent professionals spent some of their freelancing revenues on their business in 2023. Independent workers are most likely to invest in software/technology (61%), other equipment or materials (58%), and sales/marketing (45%). However, nearly one-in-three (31%) spent money on upskilling, and roughly a quarter (23%) acquired artificial intelligence tools, software, or platforms. Looking ahead to 2024, 36% of independent professionals expect to increase spending on their business, while only one-in-ten plan to spend less.

Although many freelancers choose to spend money on their businesses, revenues generated from freelancing also allow independent professionals to treat themselves and enjoy life. Three-quarters of freelancers (74%) agree the income they earn from freelancing allows them to spend money on the things they value, with even higher agreement rates among Gen Z (88%) and Millennials (79%). Freelancing revenues add fuel to an economy that has proven surprisingly resilient. Seven-in-ten independent workers spent their money on vacation/travel in 2023 or expect to do so in 2024. Also, a majority made, or plan to make, a major purchase in the electronics (58%) or home goods (54%) categories, and 43% bought a motor vehicle or plan to buy one this year. Many freelancers (over four-in-ten) believe these types of major purchases would not have been possible without their freelancing income.

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## Women, in particular, view flexibility as a significant advantage of freelancing

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Of the freelancers surveyed, 51% identify as female and 49% identify as male. Freelancers of both genders frequently began independent work to gain location flexibility, including the ability to work from home (45%) or to work from anywhere while traveling (31%). Many also started freelancing so they could set their own schedule (28%). However, the freedom to work where and when they choose is even more critical to female freelancers, with half (50%) taking up freelancing to work from home (compared to 41% of males) and one-third (34%) to be in control of their own schedule (versus 22% of men). The ability to work remotely is vital to most female freelancers, with 84% indicating location flexibility is very important to them compared to two-in-three (68%) men.

The need to provide care for others is another common reason women require flexibility. Nearly twice as many women (29%, versus 16% of males) think flexibility is important to handle caregiving responsibilities. This need exists across generations; one-quarter (24%) of Gen Z/Millennials and one-in-five (21%) Gen X/Boomers provide care for another person. Younger freelancers are most likely to provide care for a child (75% of Gen Z/Millennial caregivers), whereas nearly half (46%) of Gen X/Boomer caregivers provide care for an aging family member.

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## Independent professionals are enthusiastic about upskilling

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Nine-in-ten freelancers (89%) agree clients want to work with independent professionals who have specialized skills and expertise. In fact, independent workers believe specialized skills are the top factor in their ability to win work. Therefore, it is unsurprising that most independent professionals (65%) engaged in upskilling during 2023. Independent professionals leverage a variety of continuous education resources to improve their professional abilities. Most (54%) used a mix of both free and paid sources, while one-in-three used only free sources, and 13% only used paid sources. The continuous learning boom will likely continue in 2024. Four-in-ten (42%) freelancers believe they will increase the amount of upskilling they do this year, while only 2% plan to decrease their efforts.

Among those who undertake it, upskilling has a significant positive impact on both business and emotional dynamics. Freelancers who upskill are most likely to believe their efforts had a great deal of impact on increasing confidence (62%), improving work quality (60%), experiencing greater personal fulfillment (55%), and boosting productivity (50%). In addition, roughly four-in-ten won more work, and nearly three-in-ten (28%) were able to charge higher rates as a result of improving their skills.

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## Freelancers are embracing artificial intelligence to boost productivity

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Independent professionals have a growing interest in leveraging artificial intelligence to boost their businesses. Two-in-five (40%) freelancers report using AI tools, software, or platforms as part of their freelance work in 2023, with higher usage rates among independent workers providing technical services (47%), males (43%), Gen Z (56%) and Millennials (47%). Freelancers using AI-based tools experienced a significant boost in



productivity, saving an average of 8.1 hours per week. Projecting this time savings to the 2.76 million independent professionals using AI (40% of 6.9M freelancers in total), it is equivalent to over 22 million hours saved, or 10,748 full time jobs. Further, nearly all (98%) of those who applied AI in their work in 2023 plan to do so again in 2024, indicating that freelancers who use AI recognize its clear benefits. Among all U.S. freelancers surveyed, a majority (62%) are at least somewhat likely to apply AI in their work this year, which is slightly more than the 55% of U.S. Fiverr sellers who are at least somewhat likely to do so. The most common AI applications are writing content (45%), generating new ideas (42%), enhancing creative output (40%), researching/summarizing content (37%), and enhancing marketing/sales efforts (36%).

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## Freelancers in Generation Z are thriving

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Six-in-ten (60%) Gen Z freelancers said they made more money in 2023, compared to two-in-five (43%) of the overall population of independent professionals. Young independent workers appear to strongly benefit from the ability to set their own rates. Two-in-three raised their rates/fees in 2023 (versus 38% in total), and three-quarters (76%) are at least somewhat likely to do so in the next six months (compared to 49% overall). Gen Z also took the largest rate increase of all generations, averaging 32% higher rates in 2023 versus the year prior (compared to 21% in total). Freelancers from Gen Z are also especially bullish about future earnings; seven-in-ten expect to make more money from their independent work this year compared to 55% of independent workers in total.

Younger freelancers are also particularly enthusiastic about upskilling and highly likely to reap its benefits. Four-in-five (79%) from Generation Z worked on enhancing their skills in 2023 (versus 65% of all freelancers). Gen Z also stands out as being most likely to ramp up continuous learning in the year ahead, with two-in-three (67%) planning to increase their efforts. Gen Z is also most likely to believe upskilling has had a great deal of impact on multiple aspects of their business and personal wellbeing, including boosting confidence (80%) and productivity (71%), improving work quality (76%), winning more work (71%), feeling personally fulfilled (69%), and being able to charge higher rates (55%).

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## Markets where independent professionals live can be categorized into 9 groups based on their freelance workforce, revenues, economy, and demographic make-up

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We've broken down the top 50 metro areas into nine unique groupings. Diverse Professional Markets like New York and Creative Destinations like Los Angeles and Nashville have a high concentration of creative professionals who earn high average revenues. Upscale Brain Markets like Boston and Big Tech Centers like Seattle have highly educated populations and technology oriented freelance workforces. The fastest growing freelance market groups in the past 5 years have been the Sunbelt Professional Havens like Miami, Rising Tech Hubs like Atlanta, and Lone Star Boom Towns like Houston, markets that tend to be rich in sunshine and diversity, have a high representation of financial services jobs, and whose freelancers are skewed towards professional services.

## 4.0 Detailed Findings

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### Introduction

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Our Freelance Economic Impact reporting finds that independent workers continue to enjoy career success, and their freelancing income often makes purchasing the things they value possible and boosts their ability to enjoy life. We also find that independent workers strongly value the flexibility independent work provides and are increasingly unwilling to accept the constraints that come with permanent employment. Further, independent workers are enthusiastic about improving their professional abilities through upskilling and are increasingly willing to embrace artificial intelligence to enhance their productivity.

We also explore the unique needs of women independent professionals, many of whom have taken up independent work to gain more flexibility than a permanent job can offer them. Additionally, we examine differences in the way each generation wants to work and sets their career priorities. One thing is clear: independent professionals have emerged from the turmoil of the pandemic years and are not looking back. They refuse to accept the restrictions of traditional permanent employment and value the freedom and control that a freelancing career provides.

In this report, Illuminas explores how freelancing working habits and priorities have evolved in the past year, describes the top markets in the United States for these workers, and uncovers similarities in these top markets.

### Overview

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Based on the 2020 Nonemployer Statistics (NES) data and additional more recent data from the Bureau of Economic Analysis, we estimate that there were 4.0 million skilled independent workers in creative, technical, and professional services in the top 30 markets of the U.S. earning \$191 billion in revenues last year. These estimates are subject to a margin of error of plus or minus 2.5% for total workers and plus or minus 4.0% for total revenue.

Illuminas categorizes the independent professional workforce into three groups to uncover distinctions between them in the U.S. and the top 30 markets: Creative Services, Technical Services, and Professional Services. The NAICS industry codes associated with each category are listed in the Appendix, Table A. Professional services continue to make up the largest portion of the services in this market while creative services account for the smallest. Altogether, these skilled independents are estimated to earn about 1.1% of the U.S.'s GDP in revenue and make up 4.1% of the civilian labor force.

Figure 1. Creative, Technical, and Professional Skilled Independent Workforce in the U.S. (2023 Projected)

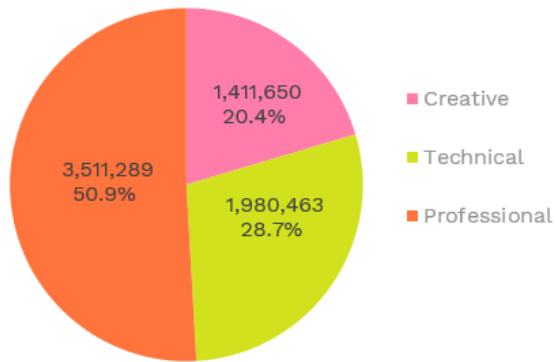
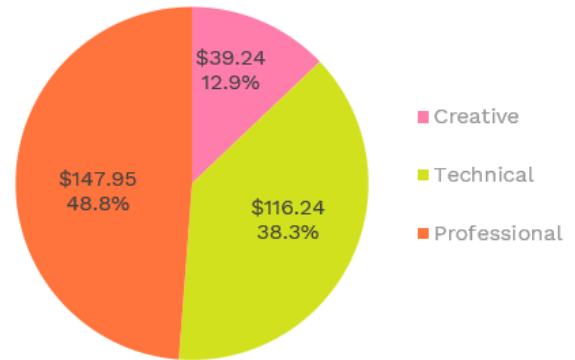
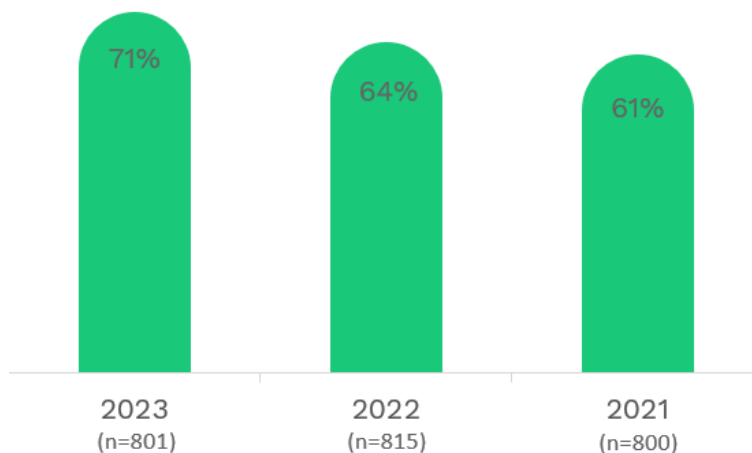


Figure 2. Creative, Technical, and Professional Skilled Independent Revenues in the U.S. (2023 Projected in Billions)



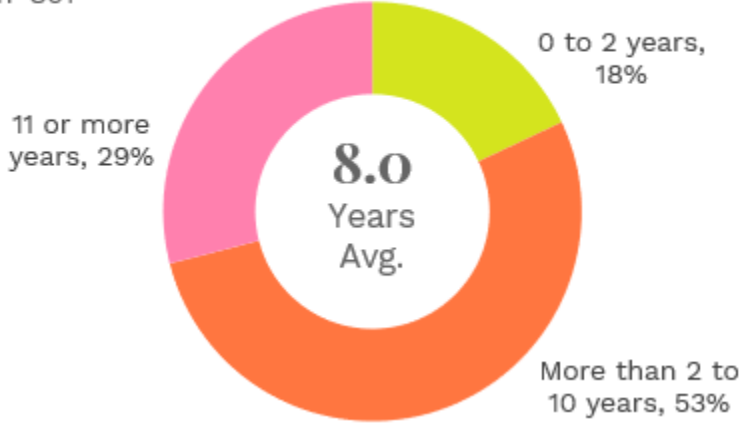
In 2023, three-in-ten (29%) freelancers held a permanent job in addition to their freelance work, with 15% working a full-time permanent job and 13% holding a part-time position. However, more independent workers focused exclusively on their freelance endeavors in 2023, rising to 71% (from 64% in 2022 and 61% in 2021). Fiverr sellers in the U.S. are also shifting to full-time freelancing, with 57% reporting they exclusively freelance, up from 52% the year before. The trend towards exclusive independent work is driven by a sharp decrease in the proportion of U.S. technical services freelancers who also held a permanent job in 2023, likely due to the environment of cost cutting and layoffs in the tech industry during this time. Half (52%) of technical services freelancers held a permanent job in 2022 compared to only 38% in 2023. Despite this change, technical services freelancers are still more likely to hold a permanent job than freelancers providing creative or professional services (28% and 24% respectively). Differences in permanent employment rates also exist by generation. Gen Z and Millennial independent professionals are more likely than the older generations to hold a permanent job. However, they too are increasingly moving away from their permanent work, with 57% exclusively freelancing in 2023 compared to less than half (47%) in 2022.

Figure 3. Percentage of Independent Workers who Exclusively Freelance



Three-in-ten (31%) freelancers have more than one business entity, with younger freelancers more likely to have multiple businesses (39% of GenZ/Millennials). Freelancers in our survey have an average of 8.0 years of experience working independently. By comparison, independent workers who sell their products and services on Fiverr have an average of 5.2 years of experience. U.S. independent workers providing technical services tend to have shorter business tenure; 22% have more than 10 years of experience (versus 29% of freelancers in total). Independent workers offering professional services are most likely to have at least 10 years of experience (32%).

**Figure 4. Number of Years Worked Independently**  
Total | n=801

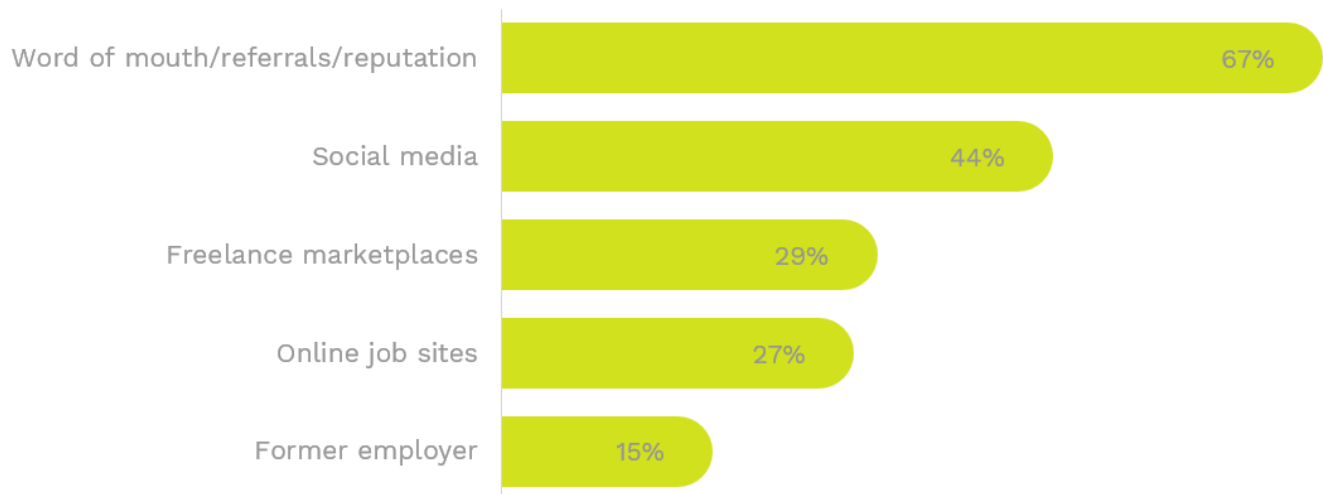


Among all three industry groups, word of mouth/referrals/reputation continues to be the most common way independent professionals acquire their work assignments (67%). Other top sources include social media (44%), freelance marketplaces (29%), and online job sites (27%). Independent workers providing technical services are most likely to leverage a variety of methods to generate business. Additionally, freelancers of different generations rely more heavily on differing sources to find work. Gen Z is most likely to use social media (68%) to find work, while Boomers<sup>2</sup> are most likely to rely on word of mouth (75%). Millennials more commonly leverage freelance marketplaces (44%) and online job sites (39%) to obtain professional assignments.

<sup>2</sup> “Boomers” also includes a small number of freelancers from the Silent Generation (n=180 Boomers, n=15 Silent Generation)

Figure 5. Top 5 Ways Independent Professionals Get Work Assignments

Total | n=801



Independent professionals providing technical services continue to be more likely to use freelance marketplaces (44%) and online job sites (37%) than those providing creative or professional services. However, technical services freelancers used these methods less often in 2023, while their usage of word of mouth/referrals/reputation increased (to 63% from 52% in 2022). The reliance on freelance marketplaces was higher among males (34%), those living in urban areas (34%) and those who hold a permanent job in addition to freelancing (44%). In total, usage of the two most popular platforms, Fiverr and Upwork, remained consistent year over year, with six-in-ten (59%) independent professionals using Fiverr and half (52%) using Upwork. However, some platforms experienced significant usage declines, including freelancer.com (39% versus 53% in 2022) and LinkedIn Services Marketplace (27% versus 36% in 2022).

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## Freelancers continue to find success and have a positive future outlook

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Despite uncertainty about the health of the U.S. economy, most independent workers continue to flourish and have a positive outlook about their future. Two-in-five (43%) increased their revenues in 2023, with Gen Z and Millennial freelancers even more likely to have made more money (60% and 53% respectively). However, turmoil in the technology sector likely contributed to a decline in the proportion of technology services freelancers experiencing revenue growth. Still, about half (49%) working in tech saw their revenues increase (down from 64% reporting so last year). Looking ahead, the majority of independent workers (55%) expect to earn even more this year, with similar proportions in each industry expecting to make more money. U.S. Fiverr freelancers are even more likely to anticipate an increase in revenue compared to the broader freelance population surveyed; two-in-three (68%) Fiverr sellers expect to generate more. Younger U.S. freelancers are again especially bullish about their future earnings. Seven-in-ten (70%) Gen Z and six-in-ten (61%) Millennials expect to make more money from their independent work this year.

Figure 6. Expectation for Revenue in 2024 versus 2023  
Total | n=801

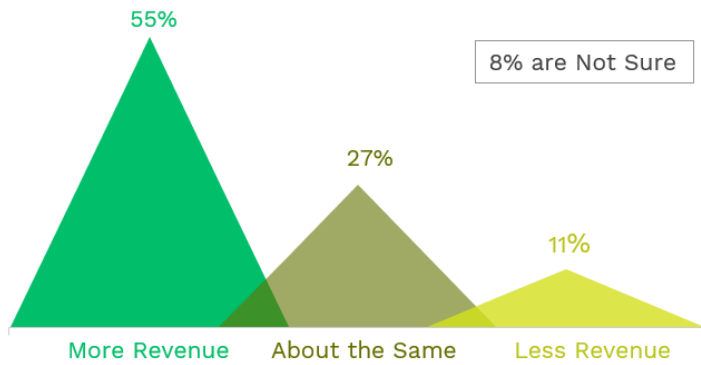
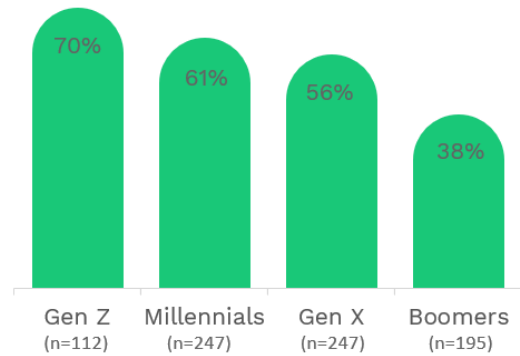


Figure 7. Independent Workers by Generation Expecting to Make More Revenue in 2024



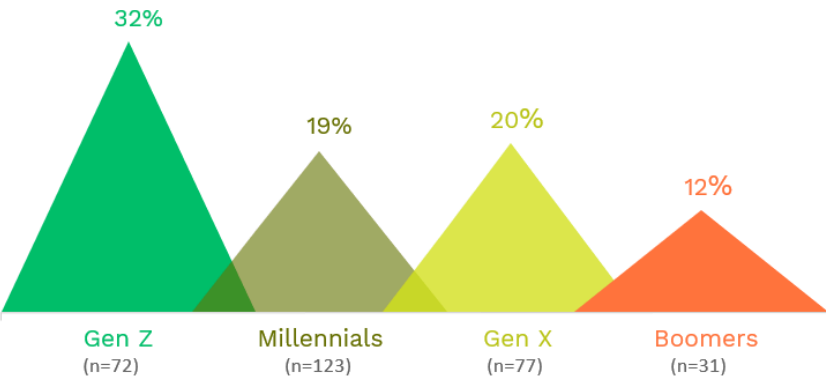
In 2023, U.S. freelancers spent an average of 30.6 hours per week on their independent work, which is similar to the 29.4 hours averaged in 2022. By comparison, U.S. Fiverr freelancers worked more hours in 2023 than in the year prior, increasing from an average of 22.1 to 24.4 hours. In total, just over one-quarter of U.S. freelancers (27%) spent more hours freelancing in 2023 than in 2022. Gen Z and Millennials are more likely to report increasing the number of hours they freelanced, with about four-in-ten reporting they worked more hours than before (40% Gen Z, 37% Millennials). Additionally, the gender gap in the number of hours worked closed in 2023. More than half (52%) of female freelancers spent at least 30 hours on their independent businesses (up from 45% in 2022), and similar proportions of males (27%) and females (26%) report they spent more time freelancing compared to the year prior. Among U.S. Fiverr sellers, 60% of women expect to freelance more hours in the year ahead versus 53% of men. U.S. Independent workers are also optimistic when looking ahead to 2024; 43% expect to devote additional time to freelancing this year. Younger independent workers are especially confident, with 56% of Gen Z and 54% of Millennials expecting to spend more time freelancing in 2024.

## Freelancers are in control of their finances and able to spend money on the things they value

Independent professionals continue to be able to charge higher rates/fees for their products and services. Overall, four-in-ten (38%) U.S. independent workers raised their rates/fees in 2023, and half (49%) expect to do so within the next six months. However, the average rate increase was slightly more modest this year, at 21% (down from 29% in 2022). For comparison, 44% of Fiverr sellers increased their rates in 2023, with an average increase of 32% (down from 36% in 2022). Among those who charged more, top reasons continue to be higher personal costs of living (58%) and general inflation in the economy (59%). Both motivations were mentioned with similar frequency to last year despite cooling inflation rates. However, a higher proportion this year attribute their rate increases to developing additional professional experience (46% up from 39% last year), with Gen Z most likely to cite this factor as a reason for charging clients more (58%). U.S. Fiverr freelancers are especially likely to have raised their rates due to gaining more experience, with 70% reporting additional experience as a reason they charged more.

Among U.S. independent professionals providing technical services, rate increases were less common than in 2022. Still, four-in-ten (42%) raised their rates in 2023 (compared to 58% the year before). Most technical services freelancers are at least somewhat likely to raise their rates over the next six months (58%), making them more likely to do so than freelancers in the other industries. Gen Z independent workers, in particular, benefit from the ability to set their own rates, with two-thirds (65%) reporting they raised their rates/fees in 2023 and a full three-quarters (76%) likely to do so in the next six months. Gen Z freelancers also took the largest rate increase, averaging 32% higher rates in 2023 compared to 2022.

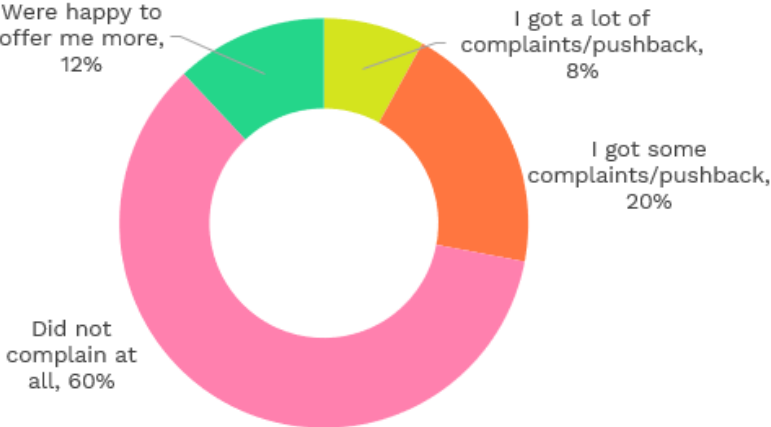
Figure 8. Percentage Rate increase in 2023 by Generation



Most clients continue to be understanding of rate/fee increases. Similar to last year, fewer than one-in-ten (8%) independent workers received a lot of complaints about higher rates, while one-in-five got some pushback. The majority (60%) did not receive any complaints, although a smaller proportion than in 2022 felt customers were happy to offer them more (12% versus 19% prior).

Figure 9. Impact of Raising Rates on Client Relationships

Among those who raised rates/fees in 2023 | n=303



Freelancing also helps independent professionals expand geographic reach for their products and services and fuels local economies by bringing in outside revenue. Most independent workers (77%) obtain at least some revenue from outside of their local/metro



area. Those providing technical services have the widest reach, selling an average of 44% of their services beyond their immediate locale (compared to 42% for creative services and 36% for professional services).

Most freelancers choose to reinvest revenues in their business to drive further success. In fact, 94% of independent professionals spent some of their freelancing revenues on their business in 2023, with an average reinvestment rate of 32%. Independent workers are most likely to invest in their business by purchasing software/technology (61%), buying other equipment or materials (58%), and boosting sales and marketing efforts (45%). However, nearly one-in-three (31%) invested in upskilling or continuous education, especially those new to freelancing (39% of those starting in the past two years). Nearly one-quarter (23%) spent their money on artificial intelligence tools, with spending in this area even more prevalent among Gen Z (33%) and those providing technical services (28%). Gen Z was also more likely to invest in their business by outsourcing work to others (22% versus 13% total). Millennials focused more heavily on sales/marketing (54%) and paying off business-related debt (33% versus 25% in total). Looking ahead to 2024, 36% of independent professionals expect to spend more on their business, while only one-in-ten plan to decrease expenditures. The younger generations are especially likely to reinvest their earnings to grow their business (57% of Gen Z, 45% of Millennials).

Figure 10. Top Ways Freelancers Spent Money on Their Businesses in 2023  
Among those who reinvested revenue in their business | n=755

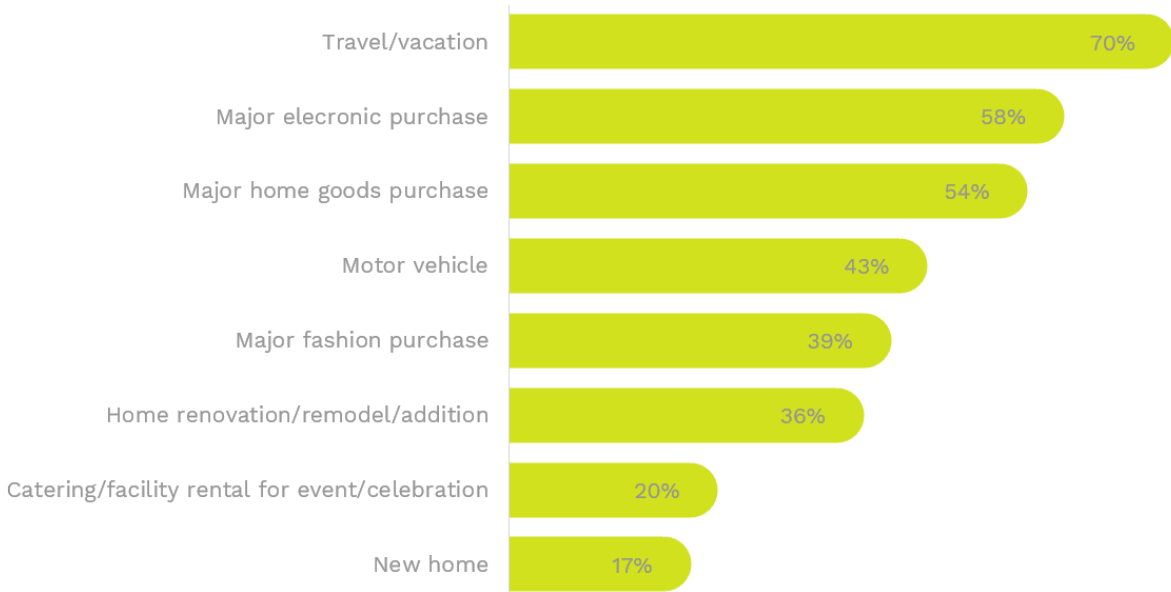


Although many freelancers choose to spend money on their businesses, freelancing revenues also allow independent professionals to treat themselves and enjoy life. Three-quarters of freelancers (74%) agree that the income they earn from freelancing allows them to spend money on the things they value, with even higher agreement rates among Gen Z (88%) and Millennials (79%). Freelancing revenues add fuel to an economy that has been surprisingly resilient despite the past several years of economic uncertainty.



Seven-in-ten (70%) independent workers spent their money on vacation/travel in 2023 or expect to do so in 2024. A majority made, or plan to make, a major purchase in the electronics (58%) or home goods (54%) categories, and 43% bought a motor vehicle or plan to buy one this year. Many (over four-in-ten) believe these major purchases would not have been possible without the income they make from freelancing. Although less common, one-in-six (17%) freelancers bought a new home in 2023 or plan to buy one in 2024. At one-in-three (32%), Gen Z is twice as likely to purchase a new home, and nearly two-in-three (63%) from Gen Z feel this major life milestone would not have been possible without their freelancing career.

Figure 11. Percentage of Freelancers Making Major Purchases in 2023/2024  
Total | n=801



## Flexibility is a significant advantage of independent work, especially among women

Independent professionals strongly value the flexibility that a freelance career provides. Both genders frequently started freelancing to gain location flexibility, including the ability to work from home (45%) or to work from anywhere while traveling (31%). Many also took up freelancing to achieve greater flexibility in their work schedule (28%). However, the freedom to work where and when they choose is even more critical to female freelancers, with half choosing to freelance to work from home (compared to 41% of males) and one-third (34%) to set their own work schedule (compared to 22% of men).

More than four-in-five female freelancers believe schedule (87%) and location (84%) flexibility are very important in how they want to work. While most male freelancers believe these types of flexibility are very important, they are less likely than females to feel this way (81% schedule, 68% location). Independent workers are most likely to find flexibility important because it helps them achieve work/life balance (76%) and allows them to work during the hours they are most productive (67%). Nearly half (45%) want to avoid commuting

to an office, especially older freelancers (52% of Gen X/Boomers). Additionally, one-in-three (34%) independent workers value flexibility to manage their mental health needs, with Gen Z and Millennials more likely to have this need (44%).

Figure 12. Percentage Indicating Flexibility is Very Important by Gender



The need to provide care is another common reason flexibility is critical. One-in-three females (29%) and one-in-six males (16%) report they require flexibility in how they work to accommodate caregiving responsibilities. This need exists across generations; one-quarter (24%) of Gen Z/Millennials and one-in-five (21%) Gen X/Boomers provide care for another person. Among caregivers, younger freelancers are most likely to provide care for a child (75% of Gen Z/Millennial caregivers), whereas older freelancers are most frequently a caregiver for a family member over age 65 (46% of Gen X/Boomer caregivers).

*Comments from those who feel flexibility is very important:*

*"I help with caregiving for my parents who are 90. I also like to visit my kids so flexibility makes it so I can travel and work."*  
 - Female, Age 61, Providing Professional Services in California

*"I like to be able to spend time with my family or with friends whenever I want. I like the ability to be able to take care of personal tasks (i.e. laundry) while I am working. I like the money I save in not having to commute to an office. And I love being able to support my son at all of his school and sporting events."*  
 - Male, Age 45, Providing Professional Services in Utah

*"[Freelancing] allows me to work to the max without wasting time. Flexibility has been a key aspect of my success."*  
 - Male, Age 25, Providing Technical Services in Texas

*"I want to have a good work/life balance and be able to participate, when I can, in things I enjoy."*  
 - Female, Age 48, Providing Technical Services in Washington

*"I have problems with anxiety and depression, and some days I have zero energy and need to take time to rest and recharge. Other days I feel great and can focus and work for hours on end."*  
 - Female, Age 34, Providing Creative Services in Texas

Among freelancers who also have a permanent job, most (42%) follow a hybrid work schedule for their permanent employment, while one-third (34%) are always remote, and one-quarter (24%) work fully in-office. Permanent working arrangements tend to vary by gender. Women are more likely than men to hold a fully remote permanent job (44%) compared to only one-quarter (27%) of men. Differing trends in work location also emerge by generation. Gen Z is most likely to work fully in-office (40%), whereas Millennials most frequently follow a hybrid schedule (49%), and Gen X is most commonly fully remote (52%). Independent professionals who do their permanent job from home at least part of the time are unlikely to keep that job if they are forced to return to the office full-time. Refusal to return to an office is especially strong among women. Four-in-five female freelancers would be somewhat or much less likely to keep their permanent job if they were unable to work from home at least part of the time (compared to 56% of men).

Figure 13. Percentage of Women Very/Somewhat Less Likely to Keep Permanent Job if Fully In Office  
Among those with full/part-time perm job | n=79

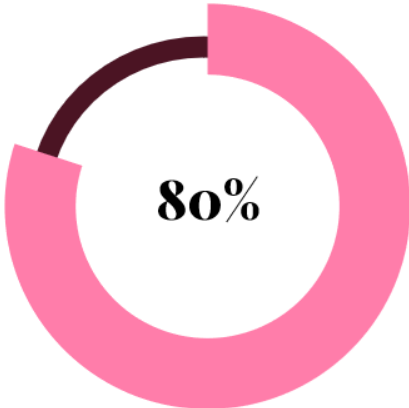
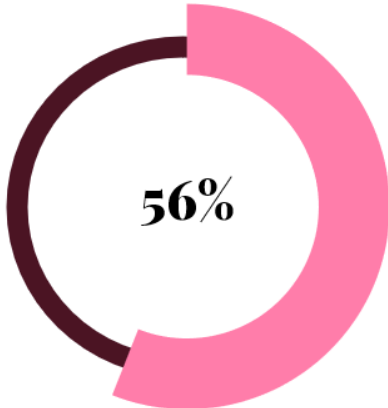


Figure 14. Percentage of Men Very/Somewhat Less Likely to Keep Permanent Job if Fully In Office  
Among those with full/part-time perm job | n=96



Freelancers who maintain full-time employment exhibit significantly lower levels of satisfaction with their permanent roles; a striking 75% express high satisfaction with their freelancing endeavors, in stark contrast to 47% who feel similarly about their permanent positions. Additionally, most U.S. independent workers (66%) who exclusively freelance do not want to have a permanent job. The proportion desiring permanent employment declines as freelancers become more established and generate higher revenues. While four-in-ten (40%) of those who make less than \$10,000 annually want a permanent job, only 24% of those making at least \$50,000 want one. Among freelancers with more than five years of experience, only one-quarter (24%) want a permanent job in addition to their freelancing vocation.

Figure 15. Satisfaction with Independent Versus Permanent Job

% Rating 6-7 on a 7-point scale where 7 is Very Satisfied

Among those who have a permanent job in addition to freelancing | n=233



*Comments from those who also hold a permanent job:*

*"I can use the talents that I learned when I was [fully] employed and use them to work independently and set my own schedule. I can work as hard as I want to for a short period of time, and then take off when I am ready without having to answer to someone who manages my every move."*

**- Male, Age 48, Providing Technical Services in Texas**

*"I am my own boss. I run the company. I make all the decisions. I come and go as I please. I can hire people to help me if I need some free time. I love the freedom this work gives me."*

**-Female, Age 77, Providing Professional Services in Texas**

*"Becoming a freelance writer/editor, seeing my work published and enjoyed by others--this has been my lifelong dream and satisfies a deep-seated need in my life, even if I make more money in other manners."*

**-Male, Age 65, Providing Creative Services in Pennsylvania**

*"I can make extra money and at the same time do something that I really enjoy."*

**- Female, Age 43, Providing Technical Services in New York**

*"I love the flexibility and control over my life. I am my own boss."*

**- Male, Age 39, Providing Professional Services in California**

Given the stark contrast in satisfaction rates between permanent and independent jobs, it is not surprising that many freelancers are looking to reduce emphasis on their permanent job, change jobs, or even leave permanent employment altogether. Three-in-five (59%) freelancers with permanent employment are at least somewhat likely to reduce the number of hours they spend working their permanent job in 2024. Independent professionals providing technical services are most likely to cut their hours, while those providing professional services are least likely to do so (at 49%). Freelancers making at least \$50,000 annually are also more likely to reduce the amount of time they spend on their permanent job, likely due to their proven ability to support themselves without one. While a majority (57%) are very or somewhat likely to look for a different permanent job this year, a full three-quarters (77%) of Gen Z believe they are likely to change jobs in 2024. Additionally, a significant proportion of freelancers plan to walk away from their permanent job altogether.

Three-in-five (60%) are at least somewhat likely to stop working their permanent job in 2024 and only freelance. Millennials are the generation most likely to leave permanent employment behind, with two-in-three (68%) expressing this intent.

## Freelancers are enthusiastic about upskilling to drive business success

Freelancers of all ages and genders agree that clients want to work with independent professionals who have specialized skills and expertise (89% in total). Three-in-four (73%) agree upskilling is critical to their success as a freelancer, with Gen Z and Millennials even more likely to agree (85% and 80% respectively). In fact, three-quarters (74%) of independent professionals believe having specialized skills is a very important factor in their ability to win work, followed by up-to-date skills (69%), making these the top two factors. Similarly, 73% of U.S. Fiverr sellers believe up-to-date skills are very important in their ability to grow their business. While Boomer freelancers in the U.S. are most likely to believe years of experience (73%) and level of education (46%) are very important factors in winning work, Gen Z/Millennials place less importance on these traditional measures of ability (53% and 36% respectively).

Figure 16. Independent Workers by Generation Who Agree Upskilling is Critical to Freelancing Success

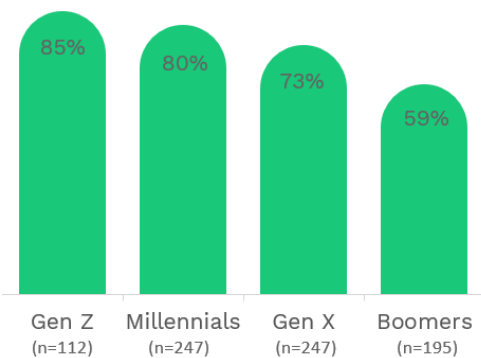
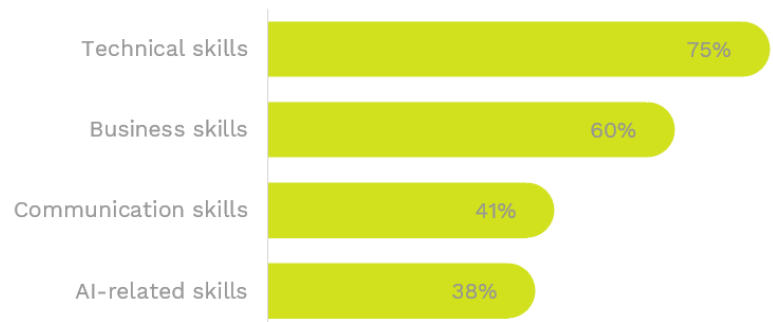


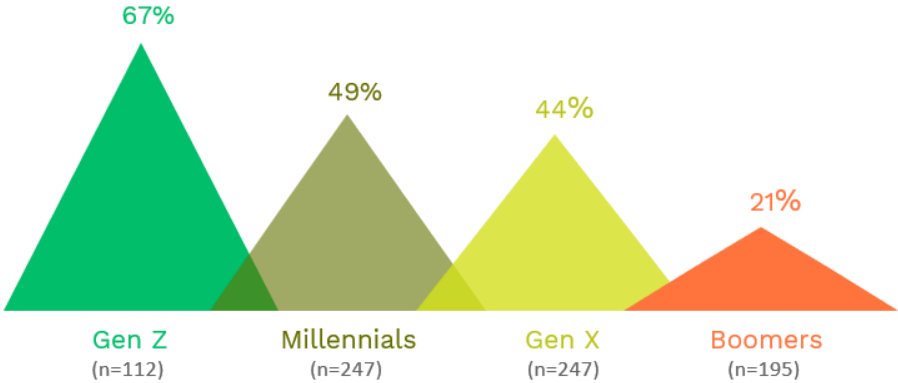
Figure 17. Percentage Upskilling in 2023 by Area Among those who upskilled | n=518



Freelancers recognize the positive difference that upskilling makes on their careers and have embraced continuous learning. The majority of independent professionals (65%) engaged in upskilling related to their freelance work in 2023. Those providing technical services were most likely to upskill (72%), while those offering professional services were least likely (61%). Younger freelancers were also more likely to engage in continuous education, with 79% of Gen Z and 73% of Millennials reporting they worked on enhancing their skills. U.S. independent workers were most likely to enhance their technical (75%) and business skills (60%). However, roughly four-in-ten improved their communication abilities (41%) and understanding of Artificial Intelligence (38%). Freelancers providing creative services were more likely to focus on technical skills (83%), while those offering professional services more commonly worked on business skills (68%). Skill emphasis also differs by generation. Gen Z is most likely to have enhanced their business (77%) and communication (62%) skills. While Boomers are least likely to have upskilled in 2023, about half (54%) did some continuous learning, with most of those who did so choosing to strengthen their technical skills (86%).

Independent professionals are leveraging a variety of sources to improve their skills. Most (54%) used a mix of both free and paid sources, while one-in-three (33%) used only free sources, and 13% used only paid sources. Usage of free learning resources is more common among males (37% compared to 29% females) and older freelancers (38% Gen X/Boomers versus 28% Gen Z/Millennials). This trend towards skill enhancement will continue in 2024, with 42% of freelancers believing they will increase the amount of time they spend upskilling this year. Only 2% plan to decrease their upskilling efforts in 2024. Gen Z stands out as the generation most likely to increase continuous learning, with two-in-three (67%) planning to do more upskilling in 2024 than they did in 2023.

Figure 18. Percentage Expecting to Increase Upskilling in 2024 by Generation



Among those who undertake it, upskilling has a significant positive impact on both business and emotional dynamics. Six-in-ten (61%) independent workers who upskilled in 2023 anticipate an increase in revenues during 2024, compared to 42% of those who did not enhance their skills. Freelancers who upskill are most likely to believe their efforts had a great deal of impact on increasing confidence (62%), improving work quality (60%), being personally fulfilled (55%), and boosting productivity (50%). In addition, roughly four-in-ten won more work and expanded their service offerings (40% and 43% respectively), and nearly three-in-ten (28%) were able to charge higher rates as a result of improving their skills. Gen Z and those new to freelancing are most likely to believe their upskilling has greatly impacted multiple aspects of their business and personal wellbeing. Female freelancers are also more likely than males to attribute a great deal of impact in most areas.

Freelancers are choosing to advance their careers and professional knowledge in a wide variety of ways. The most common approaches are reading industry blogs (46%), building their network (45%), attending an event (43%), updating their profile (41%), taking an online course (40%), and adding to their portfolio (38%). U.S. Fiverr sellers are particularly likely to have added to their portfolio and updated their profile with new skills (at 65% and 55% respectively), making these the most frequently taken actions during 2023. However, the focus of these activities varies by industry and age. U.S. creatives are more likely to add to their portfolio (61%), build their network (53%), follow social media influencers (40%), and participate in an online community (36%). However, those offering professional services tend to prioritize attending an event (48%) or taking an online course (45%). By generation,



younger independent professionals (Gen Z/Millennials) are more likely to follow social media influencers (40% versus only 18% of Gen X/Boomers) and to enroll in a university course (14% versus 4% of Gen X/Boomers). Millennials are particularly likely to enroll in an online course (46%), update their profile with new skills (46%), add to their portfolio (45%), and take a skills test (32%).

Independent professionals believe enhancing their network building ability is the most valuable skill they can have as a freelancer (39%), followed by technical skills to deliver their products and services (32%), communication skills (31%), and social media management/marketing abilities (30%). Again, priorities differ by industry, with creative independent professionals more likely to emphasize social media abilities (46%) and building a brand (36%). Freelancers providing technical services are more likely to value technical skills (42%) and software training (30%), whereas professional services freelancers are more likely to believe communication skills are highly valuable (38%). Additionally, Gen Z is the generation most likely to believe social media skills and business financials are the most valuable skills a freelancer can have (38% and 30% respectively).

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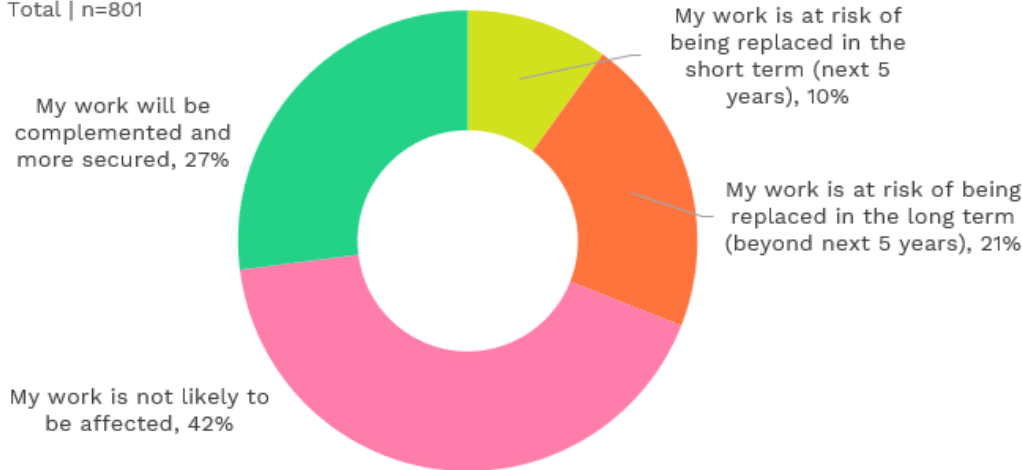
## Independent professionals are embracing artificial intelligence

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While most freelancers continue to feel hopeful about how artificial intelligence (AI), machine learning, and deep learning will impact their work, nearly one-in-three (31%) feel more fearful about these technologies, up from one-quarter (25%) last year. Freelancers in the creative industry continue to be most likely to feel fear regarding the use of AI (42% up from 31% last year), whereas four-in-five (79%) of those providing technical services feel more hopeful than fearful. Males and the younger generations are also more likely to feel hopeful about these new technologies. Three-in-four males (73%) and younger freelancers (75% of Gen Z/Millennials) are more hopeful than fearful regarding AI versus two-thirds of females (65%) and older independent workers (64% of Gen X/Boomers). Perhaps due to considerable media coverage surrounding the recent rise of artificial intelligence, fewer this year believe their job will be unaffected by AI (42% compared to 53% last year). While 31% view their job as being at risk in the short (10% within five years) or long-term (21% beyond the next five years), more freelancers are feeling confident that their work will be complemented by AI and become more secure (27% up from 20% last year).

Figure 19. How Freelancers Think Work Will be Impacted by Artificial Intelligence (AI)

Total | n=801



Freelancers have a growing interest in leveraging artificial intelligence to boost their independent businesses. Two-in-five (40%) independent workers report using AI tools, software, or platforms in their freelance work during 2023. Usage is even more common among those providing technical services (47%), males (43%), Gen Z (56%), Millennials (47%), and those with higher revenues (53% of those making at least \$50,000 annually). Freelancers using AI-based tools experienced a significant boost in productivity; they saved an average of 8.1 hours per week by using them. Further, nearly all (98%) of those who applied AI in their work in 2023 plan to do so again in 2024, indicating that freelancers who use AI recognize clear benefits. Among all freelancers, the majority (62%) are at least somewhat likely to use AI this year, again with higher proportions of those in the tech industry (72%), males (66%), and younger freelancers (75%) intending to tap into AI tools for their business. The majority of U.S. Fiverr sellers (55%) are also at least somewhat likely to use AI in their work in 2024.

Figure 20. Percentage of Freelancers Who used AI in 2023

Total | n=801

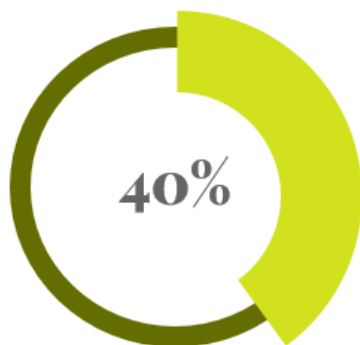
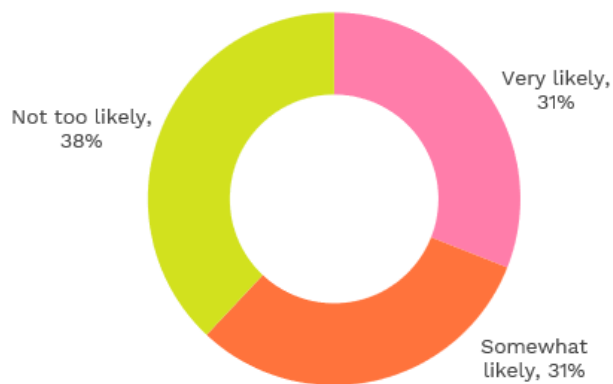


Figure 21. Freelancer Likelihood to Use AI in 2024

Total | n=801

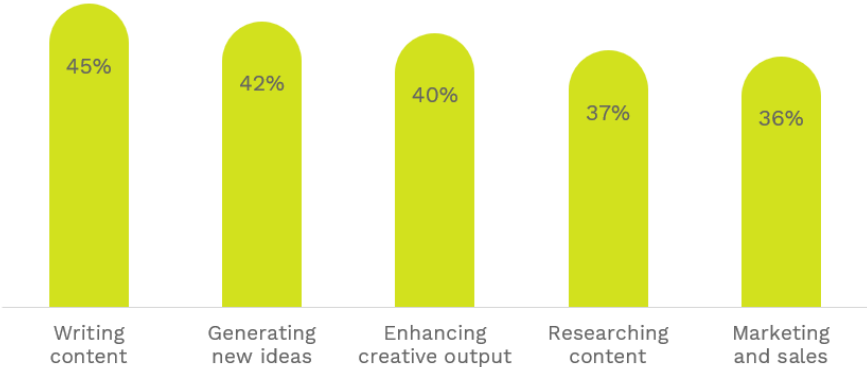


Independent professionals use AI in a variety of ways. The most common applications are writing content (45%), generating new ideas (42%), enhancing creative output (40%), researching/summarizing content (37%), and enhancing marketing/sales efforts (36%).



However, freelancers in different industries are leveraging AI differently. Half (52%) of creatives who used AI in 2023, did so to enhance creative output (52%). Independent workers providing professional services were more likely to use it for marketing/sales efforts (43%) and managing business financials (30%), while those providing technical services were more likely to adopt AI to get upskilling recommendations (32%). There are also differences in how each generation uses artificial intelligence. While roughly one-in-five freelancers who used AI did so for project management and business financials (21% and 23% respectively), over one-in-three in Gen Z used AI in these areas (37% and 35% respectively). Gen X is most likely to use artificial intelligence for writing content (55%), while Boomers most commonly use it to research and summarize content (48%).

Figure 22. Top 5 Uses of Artificial Intelligence in 2023  
 Among those who used AI | n=505



One-in-five (19%) U.S. freelancers have no concerns about using AI as part of their independent work. Among the four-in-five who see potential issues, most worry about ethical use (38%), feel the technologies are not yet proven (37%), have security concerns (36%), or anticipate lower data quality (30%). Boomers are most likely to have at least one concern (at 89%), especially issues around lack of trust (52%), ethical use (49%), and security (45%). It is also more common for Boomers to believe they have other more important priorities (24%) or to be concerned that they do not currently have the skills to use AI tools (17%). Among U.S. Fiverr sellers, 20% report having no concerns about using AI. Fiverr sellers who do have concerns express the same top apprehensions as the broader U.S. freelance population. Half (48%) of U.S. Fiverr sellers have ethical concerns, 45% worry about data quality, 33% believe the technology is not yet proven, and 28% have security concerns.

## Top 30 Markets

Independent professionals in the U.S. tend to congregate in metropolitan areas with at least one million inhabitants with a high degree of concentration in the top 30 markets. It is estimated that in the U.S. in 2023, there were 4.0 million independent professionals in the top 30 markets (up 2.4% from 2022) with a combined revenue of \$191 billion (up 6.1% from 2022).<sup>3</sup> The top 30 markets for these workers represent nearly six-in-ten (57%) of all independent professionals in the U.S. and account for 63% of the revenue.

The top markets by both the number of independent professionals and their revenues are New York, Los Angeles, and Miami.

**Table 1. Top Markets for Independent Professionals  
(by order of size of workforce)**

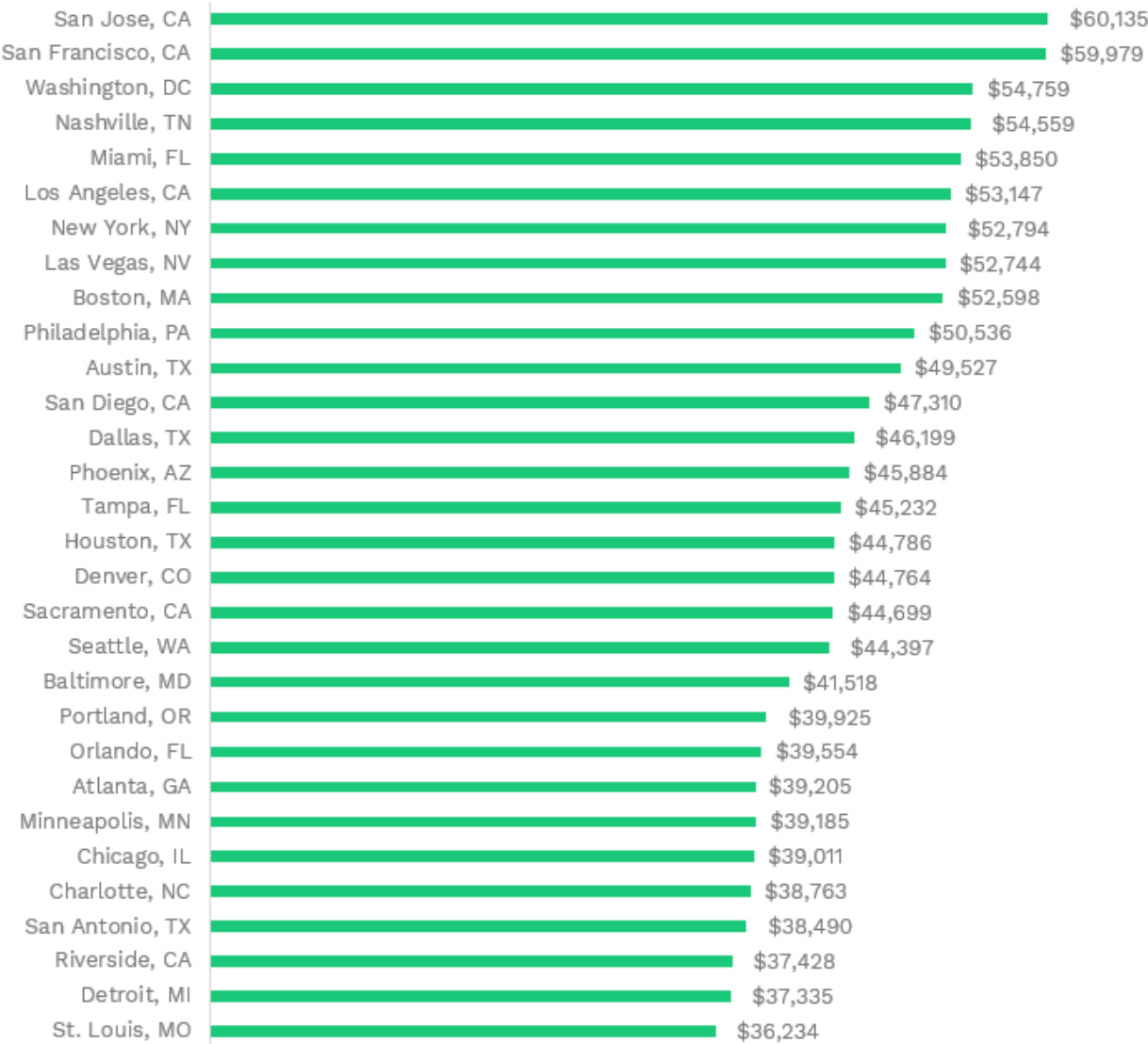
<b>Market (Metropolitan Statistical Area)</b>	<b>Number of Independent Professionals (2023 Projected)</b>	<b>Rank by Number of Independent Professionals</b>	<b>Revenues (2023 Projected)</b>	<b>Rank by Revenues</b>
New York, NY	574,989	1	\$30,356,247,155	1
Los Angeles, CA	417,685	2	\$22,198,541,206	2
Miami, FL	291,321	3	\$15,687,788,406	3
Chicago, IL	201,947	4	\$7,878,098,522	8
Dallas, TX	195,969	5	\$9,053,620,596	6
Houston, TX	188,882	6	\$8,459,360,530	7
Atlanta, GA	179,930	7	\$7,054,160,300	9
Washington, DC	176,560	8	\$9,668,332,941	4
San Francisco, CA	156,085	9	\$9,361,812,425	5
Boston, MA	132,348	10	\$6,961,305,451	10
Philadelphia, PA	124,708	11	\$6,302,232,135	11
Phoenix, AZ	103,098	12	\$4,730,545,165	12
Seattle, WA	91,515	13	\$4,062,971,588	13
Denver, CO	84,222	14	\$3,770,135,398	17
San Diego, CA	83,123	15	\$3,932,567,188	15
Orlando, FL	82,707	16	\$3,271,357,003	19
Detroit, MI	80,711	17	\$3,013,339,707	22
Austin, TX	80,151	18	\$3,969,592,796	14
Tampa, FL	78,885	19	\$3,568,120,184	18
Minneapolis, MN	77,790	20	\$3,048,200,669	21
Riverside, CA	69,649	21	\$2,606,844,377	24
Nashville, TN	69,301	22	\$3,781,025,773	16
Las Vegas, NV	61,912	23	\$3,265,504,956	20
Portland, OR	61,558	24	\$2,457,705,024	25
Baltimore, MD	58,291	25	\$2,420,089,338	26
Charlotte, NC	53,540	26	\$2,075,375,135	27
San Jose, CA	48,268	27	\$2,902,577,606	23
San Antonio, TX	47,715	28	\$1,836,540,094	28
St. Louis, MO	44,511	29	\$1,612,823,375	30

<sup>3</sup> These are estimates because the release of the NES is delayed, and numbers have not been released since 2020.

Sacramento, CA	40,727	30	\$1,820,471,374	29
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Independent professionals in the top 30 markets earn \$48,288 on average, around \$4,334 more than the U.S. average across the different types of independent professionals. When comparing markets, independent professionals earn an average of anywhere from \$36,234 to \$60,135 annually from their work, with receipts being the highest in San Jose, San Francisco, Washington, DC, Nashville, Miami, and Los Angeles. Independent professionals providing technical services in Washington, DC earned the most in 2023 at \$75,255 on average, while creative professionals in St. Louis earned the least at \$19,250, on average.

Figure 23. Skilled Independent Workforce Receipts per Entity (2023 estimated)

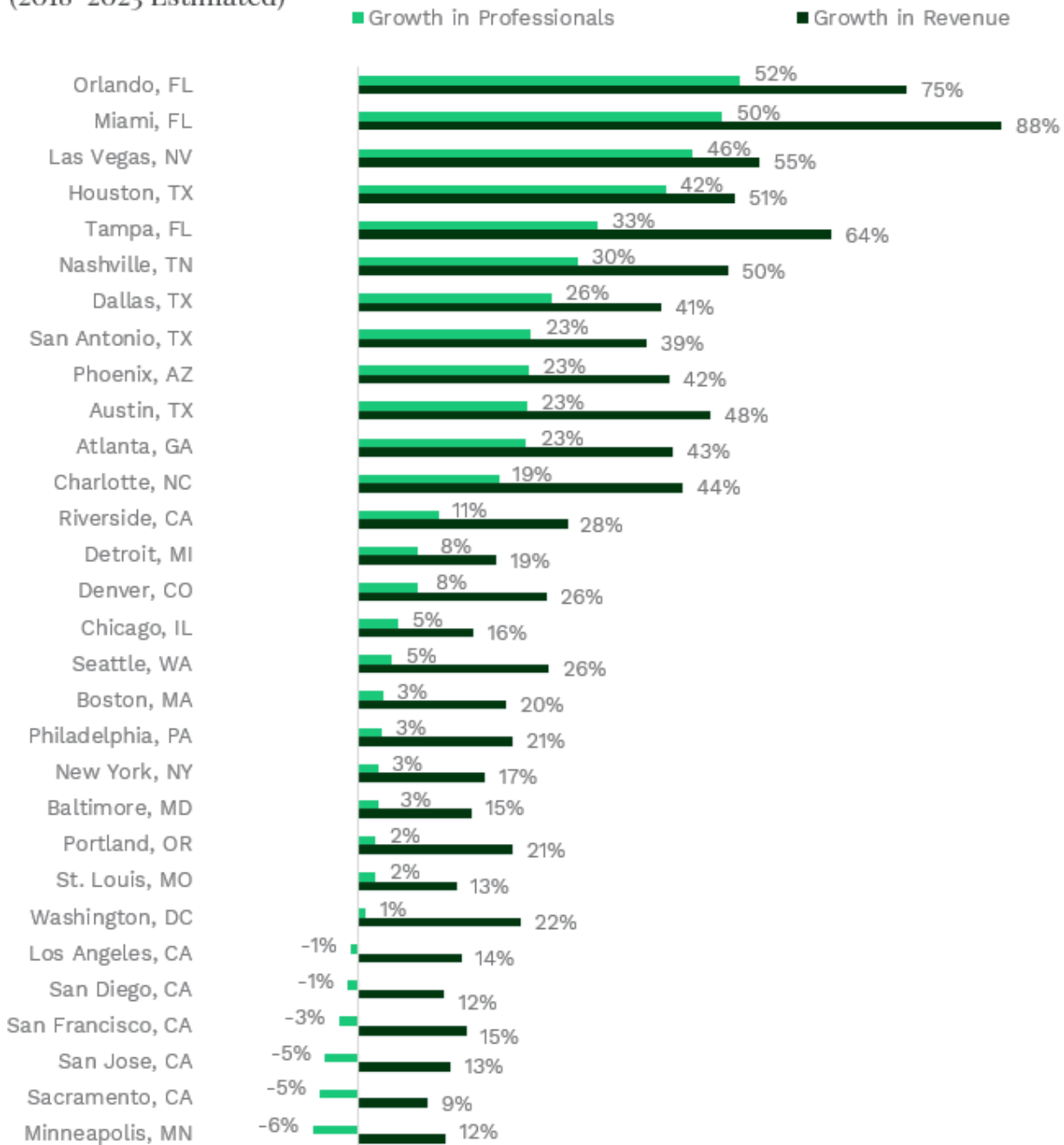


The advantage in earnings in the top 30 markets is consistent across occupations. Independents providing creative services in the top 30 markets earn an estimated \$32,085 on average compared to \$27,797 in the U.S. overall. Independents in the top 30 markets who

provide technical services earn \$63,345, compared to \$58,693 in the U.S. Finally, independents in the top 30 markets providing professional services earn an estimated \$46,046 annually, compared to \$42,136 for the U.S.

The number of independent professionals is estimated to have increased between 2018 and 2023 in all markets except Minneapolis, Sacramento, San Jose, San Francisco, San Diego, and Los Angeles. The fastest growing markets include Orlando, Miami, Las Vegas, Houston, Tampa, and Nashville. All markets within the top 30 experienced double-digit growth in revenues from the skilled independent workforce from 2018 to 2023, fueled by a combination of natural growth and general inflation that led to increased service prices. Some markets are estimated to have experienced some loss in total numbers over a 5-year period, which we believe is due to the economic conditions and relocation patterns resulting from the pandemic; the trend has reversed, and in the past year, all markets have experienced growth in total independents.

Figure 24. Total Growth in Skilled Independent Workers and Revenues (2018–2023 Estimated)



## Creative, Technical, and Professional Services

Independent professionals fall into three categories: creative, technical, and professional (see Appendix for definitions). In the top 30 markets, professional services comprise the largest group of independent workers, comprising half the workers (50%) and nearly half the revenues (48%). The share accounted for by these independent professionals is similar for the total U.S., accounting for 51% of workers and 49% of revenues. Technical services workers represent three-in-ten skilled independent workers in the top 30 markets (29%), and nearly four-in-ten dollars in skilled independent worker revenues (39%) in 2023, compared to 29% and 38% respectively for the U.S. The smallest group, independent professionals who provide creative services, make up an estimated one-fifth (20%) of skilled independent workers in the top 30 markets in 2023, but only about one of every seven (14%) dollars in revenue, compared to 20% and 13% respectively for the U.S. The following discussion delves into greater detail for the three independent occupations in order of their size: professional services, technical services, and creative services.

### Professional Services

For 2023, we estimate that there were 3.5 million skilled independents providing professional services (i.e., legal, accounting/bookkeeping, management consulting, marketing, and business support) in the U.S., earning combined revenues of \$148 billion and an average \$42,136 annually from their independent work. The top 30 markets capture 57% of independents who provide professional services and 62% of the revenues in the U.S. New York, Los Angeles, and Miami are the top professional independent markets in terms of number of workers and revenues.

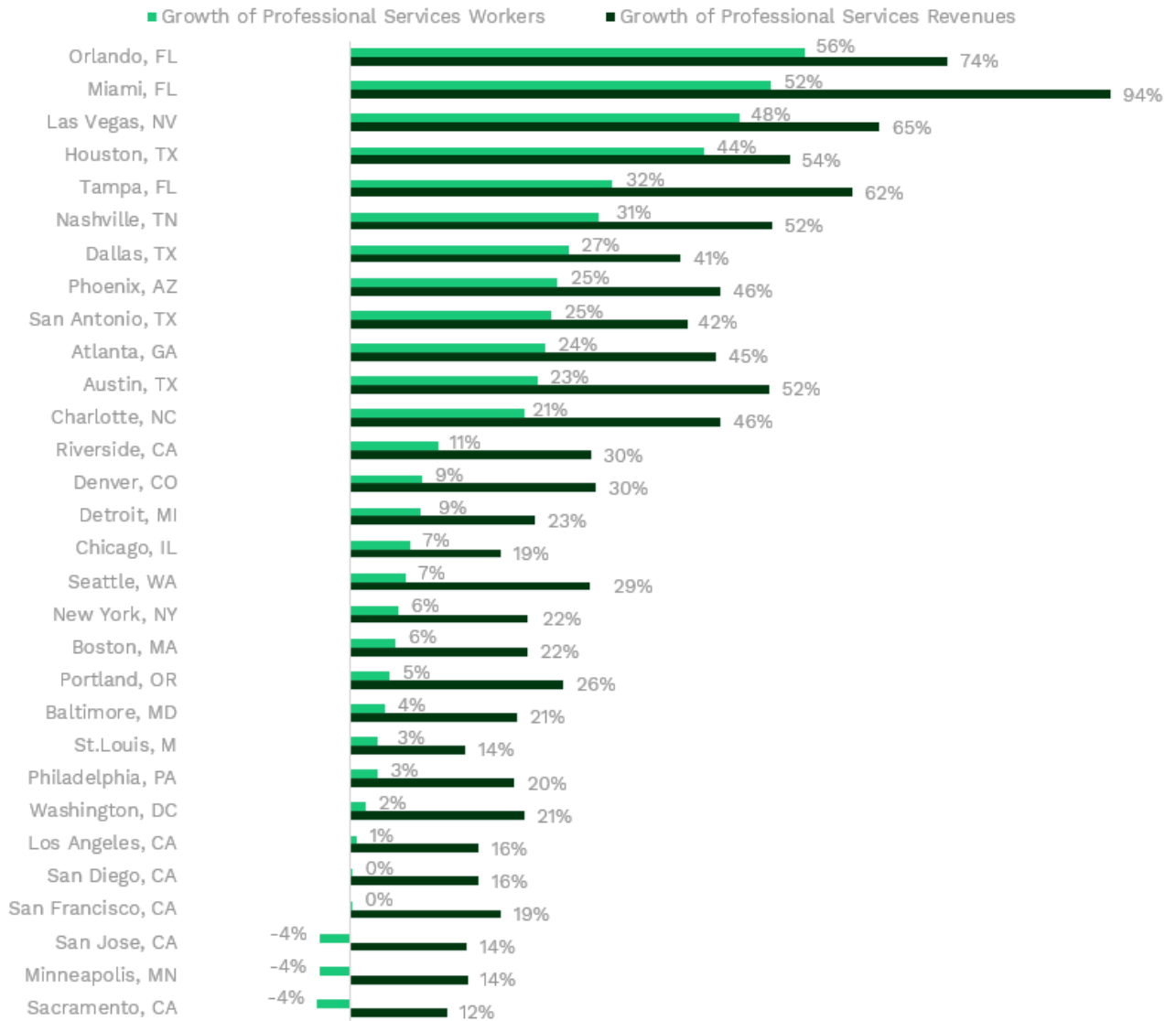
Table 2. Top Markets for Professional Services

Market (Metropolitan Statistical Area)	Number of Independent Professionals (2023 Projected)	Rank by Number of Independent Professionals	Revenues (2023 Projected)	Rank by Revenues
New York, NY	271,921	1	\$13,693,210,623	1
Los Angeles, CA	169,447	2	\$8,508,235,437	2
Miami, FL	165,537	3	\$8,031,974,513	3
Houston, TX	110,136	4	\$4,668,708,935	5
Chicago, IL	107,308	5	\$4,163,509,895	8
Dallas, TX	104,621	6	\$4,625,154,546	6
Atlanta, GA	95,695	7	\$3,497,851,515	10
Washington, DC	93,820	8	\$4,776,763,826	4
San Francisco, CA	74,823	9	\$4,534,861,617	7
Boston, MA	67,786	10	\$3,671,547,975	9
Philadelphia, PA	64,419	11	\$3,094,066,004	11
Phoenix, AZ	54,075	12	\$2,418,694,567	12
Detroit, MI	45,693	13	\$1,657,892,550	18
Orlando, FL	43,122	14	\$1,591,034,820	19
Tampa, FL	42,207	15	\$1,785,260,687	17
Denver, CO	42,179	16	\$1,886,761,651	14
Seattle, WA	41,958	17	\$1,878,139,941	15

San Diego, CA	41,349	18	\$2,005,685,047	13
Austin, TX	38,166	19	\$1,874,060,921	16
Minneapolis, MN	37,606	20	\$1,497,295,733	21
Riverside, CA	36,372	21	\$1,256,003,577	24
Baltimore, MD	30,705	22	\$1,193,797,223	25
Las Vegas, NV	29,113	23	\$1,542,981,140	20
Nashville, TN	28,554	24	\$1,317,228,581	23
Charlotte, NC	28,081	25	\$1,006,251,318	28
San Antonio, TX	26,940	26	\$1,008,683,968	27
Portland, OR	26,358	27	\$1,095,550,560	26
San Jose, CA	24,506	28	\$1,399,735,739	22
St. Louis, MO	22,751	29	\$834,627,039	30
Sacramento, CA	20,944	30	\$940,043,748	29

Orlando, Miami, Las Vegas, and Houston are estimated to have grown the fastest in their professional independent workforces within the past five years, followed by Tampa and Nashville. Revenues are estimated to have grown at an even faster pace, with the most growth in Miami, Orlando, Las Vegas, and Tampa. In all markets, revenue growth in the professional services category far outpaced growth in the number of independents, attributed primarily to inflation and consequently, increasing service prices. However, the difference in growth rates varies by market, suggesting that the ability to increase fees is not consistent.

Figure 25. Growth of Independents Providing Professional Services and Their Revenues in Top 30 Markets (2018–2023 Estimated)





## Technical Services

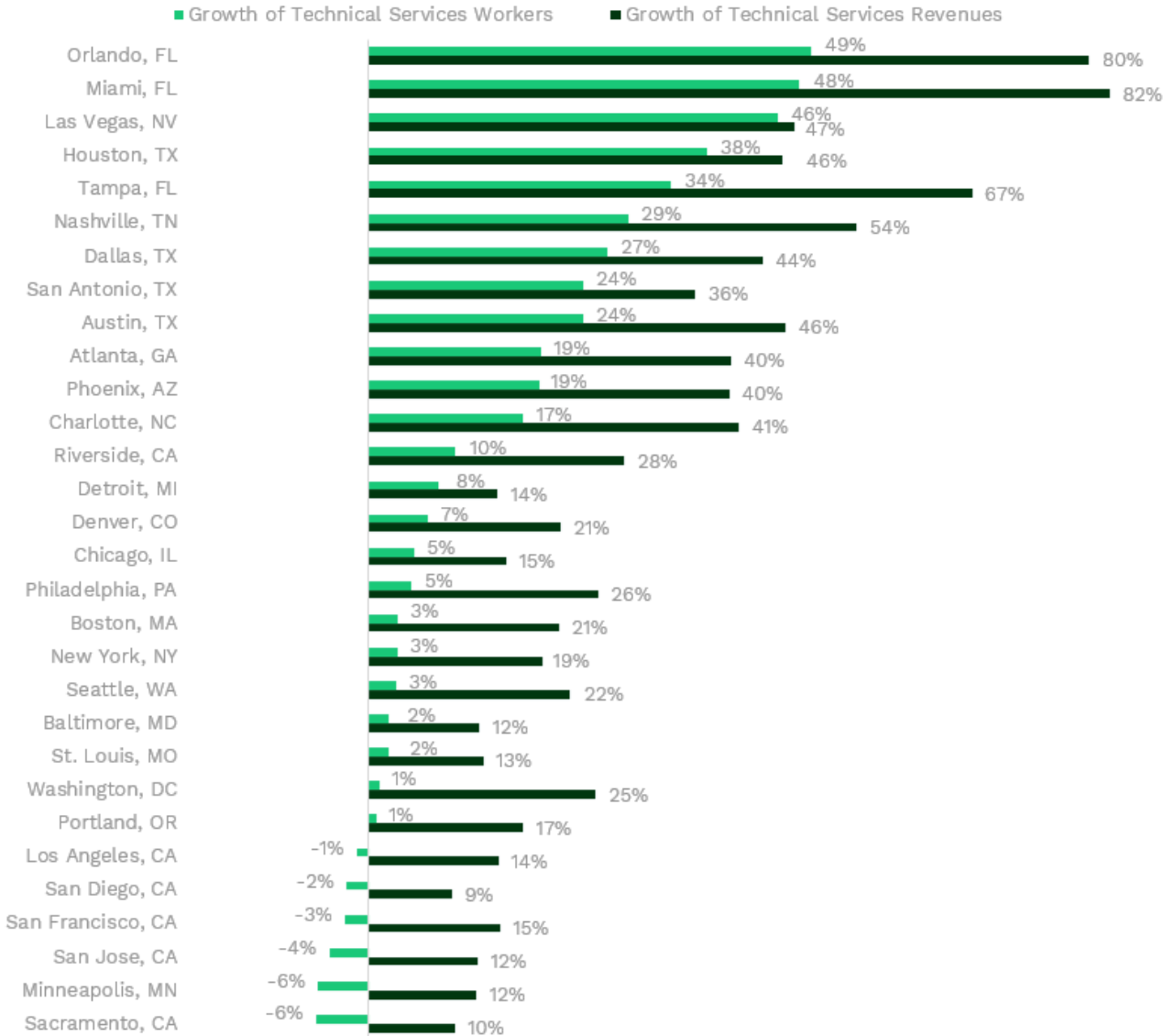
Technical services include independent professionals who provide data processing, architecture, design, engineering, computer/IT, and scientific services. This group represents the second largest share of all professional independents in the U.S., estimated at 2.0 million in 2023. These workers earn \$58,693 annually from their independent activities, more than professional services and creative services independents. Six-in-ten (59%) of technical services freelancers are located in the top 30 markets, and these workers generate 63% in revenue from all similar workers in the U.S. New York, Los Angeles, and Miami are the top markets in terms of number of workers and revenue.

Table 3. Top Markets for Technical Services

Market (Metropolitan Statistical Area)	Number of Technical Independent Professionals (2023 Projected)	Rank by Number of Independent Professionals	Revenues (2023 Projected)	Rank by Revenues
New York, NY	167,862	1	\$11,643,107,584	1
Los Angeles, CA	119,348	2	\$7,308,935,126	2
Miami, FL	88,993	3	\$6,389,778,409	3
Dallas, TX	57,570	4	\$3,621,460,100	6
Chicago, IL	56,698	5	\$2,935,687,322	8
Washington, DC	55,350	6	\$4,165,366,833	4
San Francisco, CA	52,851	7	\$3,897,456,566	5
Houston, TX	51,741	8	\$3,220,107,672	7
Atlanta, GA	49,080	9	\$2,702,431,223	10
Boston, MA	41,302	10	\$2,733,055,054	9
Philadelphia, PA	37,028	11	\$2,657,411,621	11
Phoenix, AZ	30,739	12	\$1,868,891,363	12
Seattle, WA	29,579	13	\$1,649,868,330	13
San Diego, CA	27,664	14	\$1,571,113,450	14
Denver, CO	26,366	15	\$1,532,240,888	16
Austin, TX	23,924	16	\$1,559,991,437	15
Orlando, FL	23,204	17	\$1,268,234,859	19
Tampa, FL	22,767	18	\$1,430,085,526	17
Minneapolis, MN	22,379	19	\$1,135,239,581	21
Detroit, MI	20,914	20	\$1,073,759,670	22
Riverside, CA	20,562	21	\$1,043,854,511	24
Portland, OR	19,186	22	\$945,850,282	26
San Jose, CA	18,180	23	\$1,358,250,458	18
Las Vegas, NV	16,918	24	\$1,218,807,940	20
Baltimore, MD	16,519	25	\$998,433,591	25
Charlotte, NC	15,563	26	\$825,616,824	27
Nashville, TN	15,530	27	\$1,048,969,894	23
Sacramento, CA	12,354	28	\$710,899,257	28
St. Louis, MO	12,219	29	\$594,524,256	30
San Antonio, TX	12,107	30	\$656,168,131	29

Orlando, Miami, and Las Vegas are estimated to have grown the fastest in their technical independent professional workforces. The slowest growing markets for number of technical independent professionals are Sacramento, Minneapolis, San Jose, and San Francisco. Orlando and Miami experienced the highest growth in technical independent revenues.

Figure 26. Growth of Technical Independent Professionals and Their Revenues in Top 30 Markets (2018-2023 Estimated)



## Creative Services

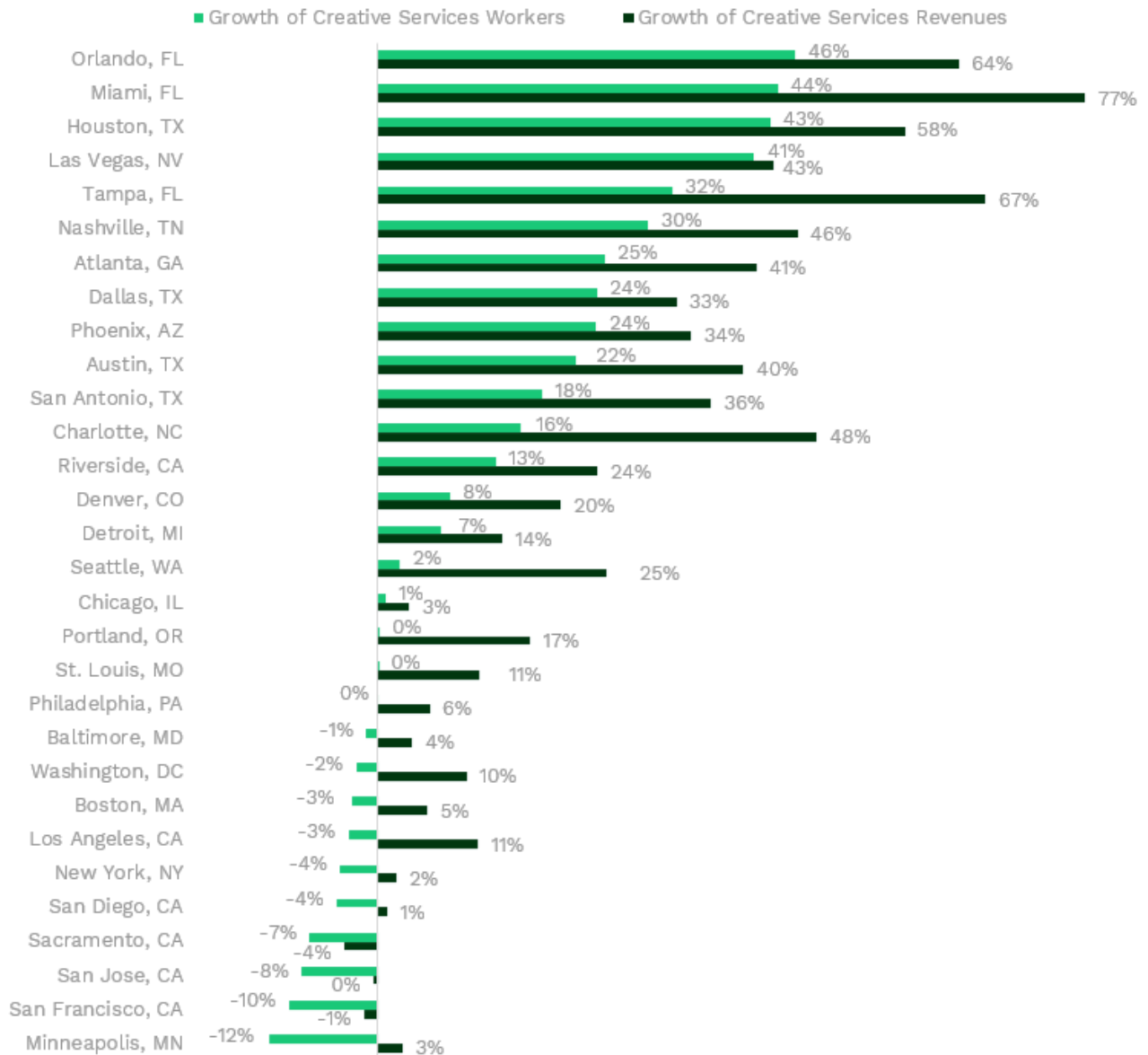
In 2023, there were an estimated 1.4 million creative independent professionals in the U.S. with combined receipts of \$39.2 billion. The creative category includes artists, writers, and performers, as well as video and sound professionals. Six-in-ten (57%) of creative independent professionals are based in the top 30 markets, and 66% of the revenue comes from the top 30. Creative independent professionals earn \$27,797 on average in the U.S., but those in the top 30 markets earn an average of \$32,085. The top markets in terms of total workforce include New York and Los Angeles, both much larger than all other markets; each has over three times the number of creatives as third ranked Chicago. The top four markets in terms of revenue are Los Angeles, New York, Nashville, and Miami.

**Table 4. Top Markets for Creative Services**

<b>Market (Metropolitan Statistical Area)</b>	<b>Number of Creative Independent Professionals (2023 Projected)</b>	<b>Rank by Number of Independent Professionals</b>	<b>Revenues (2023 Projected)</b>	<b>Rank by Revenues</b>
New York, NY	135,206	1	\$5,019,928,949	2
Los Angeles, CA	128,890	2	\$6,381,370,644	1
Chicago, IL	37,940	3	\$778,901,304	8
Miami, FL	36,791	4	\$1,266,035,485	4
Atlanta, GA	35,155	5	\$853,877,562	6
Dallas, TX	33,778	6	\$807,005,951	7
San Francisco, CA	28,410	7	\$929,494,243	5
Washington, DC	27,391	8	\$726,202,282	9
Houston, TX	27,005	9	\$570,543,923	10
Nashville, TN	25,217	10	\$1,414,827,298	3
Philadelphia, PA	23,261	11	\$550,754,510	12
Boston, MA	23,260	12	\$556,702,422	11
Seattle, WA	19,978	13	\$534,963,318	14
Phoenix, AZ	18,284	14	\$442,959,234	16
Austin, TX	18,060	15	\$535,540,439	13
Minneapolis, MN	17,805	16	\$415,665,355	18
Orlando, FL	16,381	17	\$412,087,324	19
Portland, OR	16,014	18	\$416,304,182	17
Las Vegas, NV	15,882	19	\$503,715,876	15
Denver, CO	15,677	20	\$351,132,858	22
San Diego, CA	14,110	21	\$355,768,692	20
Detroit, MI	14,104	22	\$281,687,486	24
Tampa, FL	13,911	23	\$352,773,971	21
Riverside, CA	12,715	24	\$306,986,288	23
Baltimore, MD	11,067	25	\$227,858,524	26
Charlotte, NC	9,896	26	\$243,506,993	25
St. Louis, MO	9,542	27	\$183,672,080	27
San Antonio, TX	8,668	28	\$171,687,996	28
Sacramento, CA	7,429	29	\$169,528,368	29
San Jose, CA	5,582	30	\$144,591,409	30

Orlando, Miami, Houston, and Las Vegas all experienced at least a 40% growth in their creative independent workforces from 2018 to 2023. The slowest growing markets for the number of creative independent professionals are Minneapolis, San Francisco, San Jose, and Sacramento. Miami, Tampa, and Orlando experienced the highest growth in creative independent revenues.

Figure 27. Growth of Creative Independent Professionals and Their Revenues in Top 30 Markets (2018-2023 Estimated)



## Commonalities Among Top Markets: The 9 Types of Freelancer Markets

Independent professionals can be found in a variety of different markets that are distinctive by the nature of independent work, growth rates, earning levels, local economy, and demographic make-up. Illuminas researchers classified the top 50 markets into nine groupings, each telling a story about what freelancers might expect if they lived in those markets (see Table 5). The results show that independent professional markets fall into groupings that have more in common with each other than markets in other groups – for example, Los Angeles has more in common with Nashville than Chicago, and New York has more in common with Baltimore than Boston. An example of a market group consists of Creative Destinations (including Los Angeles, Las Vegas, and Nashville) that represent magnets for creative independent professionals, whether they are actors or writers in Los Angeles, entertainers in Las Vegas, or singers and songwriters in Nashville. As another example, the Upscale Brain Markets of Boston, Bridgeport, San Francisco, and Washington, DC, present a contrast to the Creative Destinations. These markets have well-established but slower-growing independent professional workforces with higher shares providing technical and professional services. These markets also have more highly educated populations than average in the top 50 as well as higher incomes and higher living costs.

**Table 5. Market Groupings**

<b>Market Grouping</b>	<b>Markets (MSAs)</b>
Diverse Professional Markets	Baltimore, MD New Orleans, LA New York, NY Philadelphia, PA
Affordable Heartland Cities	Chicago, IL Cincinnati, OH Cleveland, OH Columbus, OH Detroit, MI Hartford, CT Indianapolis, IN Kansas City, MO Louisville, KY Milwaukee, WI Minneapolis-St. Paul, MN Pittsburgh, PA Providence, RI St. Louis, MO
Creative Destinations	Las Vegas, NV Los Angeles, CA Nashville, TN
Upscale Brain Markets	Boston, MA Bridgeport, CT San Francisco, CA Washington, DC
Sunbelt Professional Havens	Jacksonville, FL Miami, FL Orlando, FL Phoenix, AZ

	Tampa, FL
Rising Tech Hubs	Atlanta, GA Austin, TX Charlotte, NC Denver, CO Raleigh, NC Richmond, VA Salt Lake City, UT
Lone Star Boom Towns	Dallas, TX Houston, TX San Antonio, Tx
Middle Income Oases	Memphis, TN Oklahoma City, OK Oxnard-Thousand Oaks-Ventura, CA Riverside-San Bernardino-Ontario, CA Sacramento, CA San Diego, CA Virginia Beach-Norfolk-Newport News, VA
Big Tech Centers	Portland, OR San Jose, CA Seattle, WA

The largest grouping is Diverse Professional Markets, including Baltimore, New Orleans, New York, and Philadelphia, with over 786,000 independent professionals estimated to live in these markets in 2023. The second largest is Affordable Heartland Cities, which includes Minneapolis, Chicago, Detroit, Cleveland, and Pittsburgh, among others. There are nearly 722,000 independent professionals estimated to be living in these markets as of 2023. At the other end of the spectrum, Big Tech Centers such as San Jose, Seattle, and Portland comprise the smallest market grouping, with over 203,000 independent professionals estimated for 2023.

Figure 28. Market Groupings Distribution by Number of Independent Professionals (2023 Estimated)

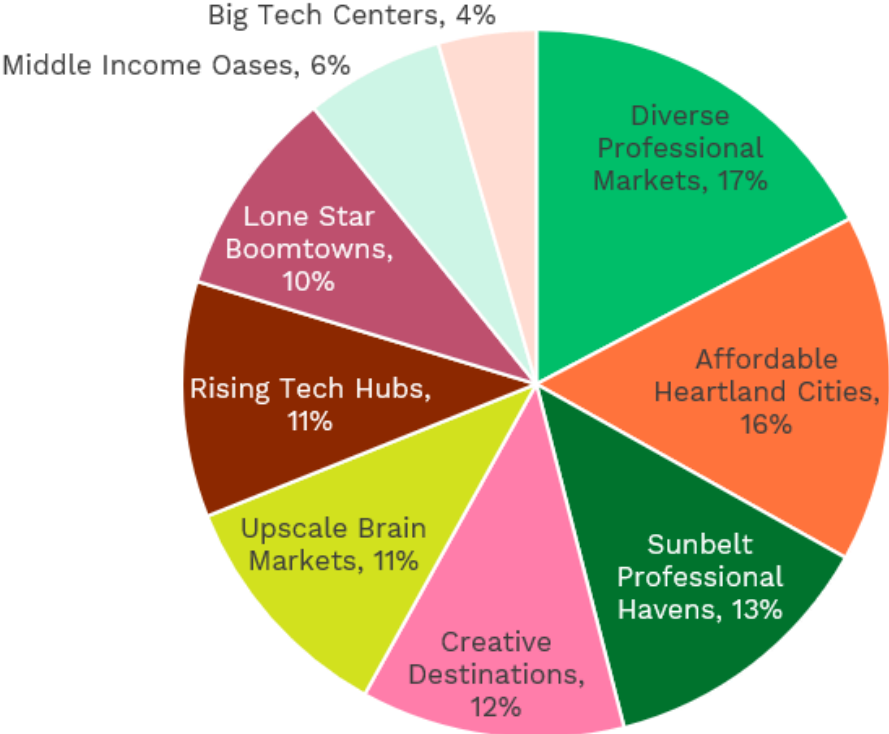
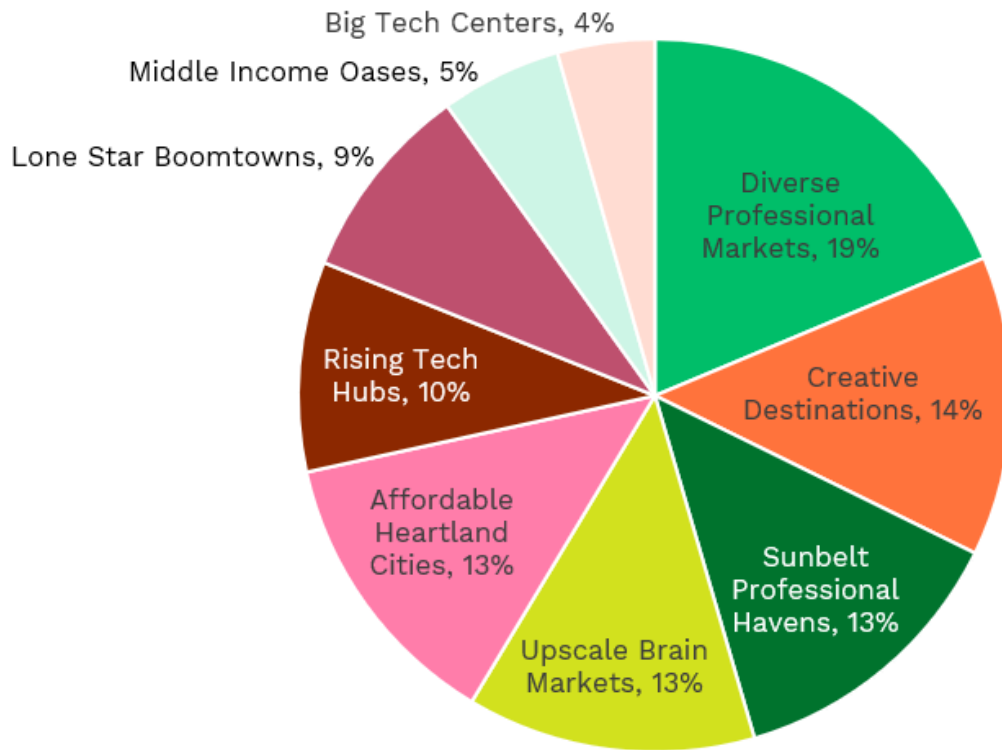


Figure 29. Market Groupings Distribution by Revenue  
(2023 Estimated)



**Diverse Professional Markets** (*Baltimore, New Orleans, New York, and Philadelphia*) – Four large metropolitan areas make up this group, including some of the largest cities in the U.S. There are over 786,000 independent professionals living in these markets earning over \$40 billion estimated in 2023. These markets have seen growth in their independent professional workforce in the past 5 years, but at a slower rate than other market categories. This group has a higher share of creative independent professionals and revenue, compared to nationwide. With a large population base, this group has potential for growth in its independent professional workforce. Further, this group of markets has a higher-than-average concentration of jobs in the health and education sector and is one of the most ethnically diverse.

**Affordable Heartland Cities** (*Cincinnati, Columbus, Cleveland, Kansas City, Minneapolis, St. Louis, Chicago, Detroit, Indianapolis, Louisville, Milwaukee, Hartford (CT), Pittsburgh, and Providence (RI)*) – This group of markets is comprised of fourteen mid-size metro areas in the Midwest and Eastern United States. There are an estimated 722,000 independent professionals in this group, earning almost \$28 billion in revenue as of 2023. These markets have a higher-than-average concentration of workers and revenues in the professional services category, accounting for more than half of revenue among independents; these markets generally are not creative or tech hubs. Collectively, these markets have had lower rates of growth in independent professional establishments and revenues and the lowest per capita revenue for independent professionals. With some exceptions, they are the least



ethnically diverse, are among the lowest in population mobility, and have a higher concentration of manufacturing employment. Despite lower growth rates and revenues, these markets are important because they are home to a large share of independent professionals, so they clearly have something to offer. These heartland cities, traditionally manufacturing centers, have lower costs of living and the potential to attract future talent as independents who are unshackled by the need to work in physical locations seek places that are affordable with room to live.

**Creative Destinations** (*Los Angeles, Las Vegas, Nashville*) – These markets represent the United States’ entertainment meccas, where creative- and entertainment-related opportunities for independent professionals abound. The markets sport diverse populations, growing and changing landscapes and large leisure-dominated economies, making them attractive to creative freelancers. Future growth for freelancers shows great promise for these cities. There are an estimated 547,000 independent professionals in these markets, including nearly 170,000 providing creative services, as of 2023. Independent professionals living in these markets are estimated to earn close to \$29.2 billion annually, \$8.3 billion of which comes from those providing creative services, a higher-than-average share among the top markets and compared to the nation as a whole.

**Upscale Brain Markets** (*Boston, Bridgeport (CT), San Francisco, Washington, DC*) – These markets are characterized by their highly educated populations, higher costs of living, and higher per capita income. Comprised of some large cities on both coasts like Boston, San Francisco, and Washington, DC, their independent workforces for technical and professional services grew in the past, but they have had the lowest growth rate in independent professionals among all the market groups. There are an estimated 495,000 independent professionals living in these markets, earning nearly \$28.1 billion as of 2023.

**Sunbelt Professional Havens** (*Miami, Orlando, Tampa, Jacksonville, and Phoenix*) – Large, sun-drenched, rapidly growing metro areas in Florida and Arizona comprise this group of markets. We estimate there are 586,000 independent professionals in this group of markets, earning \$28.3 billion in 2023. They have a higher-than-average share of independent workers and revenues in the professional services category. These markets stand out for their rising, diverse populations, compared to other large MSAs, and their economies that have a higher-than-average representation of leisure and financial service jobs. In general, this group of markets has a higher share of older residents, since the sunbelt also attracts retirees. Among the nine market groups, this group experienced the fastest growth in number of independent professionals and revenues over the past 5 years.

**Rising Tech Hubs** (*Austin, Denver, Atlanta, Charlotte, Raleigh, Richmond (VA), and Salt Lake City*) – This group represents seven fast growing metro areas with economies driven by financial services, information services, and professional jobs. With a highly educated, relatively young population with kids in the household, this group may be the next tech-hub for freelancers as the tech economy in general shifts from the large tech centers to smaller cities. There are an estimated 489,000 independent professionals who call these markets home in 2023, earning nearly \$20.5 billion in revenues. This market group was the third fastest growing among the nine groups in independent workers and revenue.

**Lone Star Boomtowns** (*Dallas, Houston, and San Antonio*) – This group contains Dallas, Houston, and San Antonio, which are among the largest cities in Texas and includes two of the largest cities in the U.S. Each is a quickly expanding market for independent professionals, and a large base particularly for those providing professional services. These markets are also young, with higher percentages of their total population falling under the age of 35 compared to other markets, and more diverse, but have slightly fewer females in the general population compared to other markets. There are an estimated 433,000 independent professionals in these three markets alone in 2023, earning nearly \$19.4 billion in revenues. These are the second fastest growing markets based on number of independent professionals and revenue.

**Middle Income Oases** (*Memphis, Oklahoma City, Oxnard, Riverside, Sacramento, San Diego, and Virginia Beach*) – This group is defined by its smaller population centers with more diverse, less educated, and female-dominated populations. Their economies depend more on jobs in the government sector, including two that are state capitals. There are just 288,000 independent professionals residing in this group of markets estimated in 2023, earning \$11.8 billion.

**Big Tech Centers** (*Portland (OR), San Jose, Seattle*) – This group represents the top destinations for technology freelancing opportunities. Highly educated, more diverse, and relatively younger populations make these markets a big draw for freelancers. Among the total population (not just independent professionals), these markets boast a higher-than-average per capita income. There are nearly 203,000 independent professionals residing in these markets in our 2023 estimates, and they earn a combined \$9.5 billion annually from their independent work. However, these markets experienced lower than average growth in independent workers and revenues in the past 5 years, and the recent downturn in the technology sector coupled with high costs of living and a shift to remote work does not favor their growth.

The defining and differentiating characteristics of these nine market groupings are summarized in the table below.

**Table 6. Characteristics of Market Groupings  
(2023 Estimated)**

Market Grouping	5 Year Growth Rate (Rank, 1=fastest)		High Indexing Categories		Average Revenue (Rank, 1=highest)	High Indexing Employers	High Indexing Demographics
	Number of Workers	Revenue	Number of Workers	Revenue			
Diverse Professional Markets	2.9% (6)	17.4% (7)	Creative	Creative	<b>\$51,034 (3)</b>	Educ/Health	Diverse, Low Mobility
Affordable Heartland Cities	2.0% (8)	16.6% (8)	Professional	Professional	\$38,588 (9)	Manufacturing, Educ/Health	Low Diversity
Creative Destinations	5.7% (4)	21.0% (4)	Creative	Creative	<b>\$53,297 (2)</b>	Leisure	Diverse, Low Mobility
Upscale Brain Markets	0.6% (9)	18.8% (6)	Tech	Tech	<b>\$56,738 (1)</b>	Professional, Educ/Health	Highly Educated
Sunbelt Professional Havens	<b>39.9% (1)</b>	<b>70.5% (1)</b>	Professional	Professional	\$48,443 (4)	Finance, Leisure	Diverse
Rising Tech Hubs	<b>18.4% (3)</b>	<b>39.6% (3)</b>	Average	Average	\$41,789 (7)	Finance, Info, Professional	High Mobility
Lone Star Boom Towns	<b>32.5% (2)</b>	<b>45.3% (2)</b>	Professional	Professional	\$44,682 (6)	Finance	Diverse, Young
Middle Income Oases	4.3% (5)	16.6% (9)	Average	Professional	\$40,815 (8)	Government	Diverse, Lower Education
Big Tech Centers	2.5% (7)	20.9% (5)	Tech	Tech	\$46,641 (5)	Manufacturing, Info, Professional	Diverse, Highly Educated

## 5.0 Appendix: Methodology

### Nonemployer Statistics (NES) Data Series Analysis

At the outset of the project, Illuminas and Fiverr jointly defined the skilled independent workforce based on the type of work being done independently, capturing work that is creative, technical, and professional in nature. The 26 NAICS industry codes that make up the study’s skilled independent worker definition are represented in table A below. These NAICS codes are further classified by type of independent work: creative (C), technical services (TS), and professional services (PS), noted in parentheses below.

Table A. Independent Workforce NAICS Codes

5121 – Motion Picture and Video Industries (C)	54151 – Computer Systems Design and Related Services (TS)
5122 – Sound Recording Industries (C)	5416 – Management, Scientific, and Technical Consulting Services (PS)
518 – Data Processing, Hosting, and Related Services (TS)	5418 Advertising, Public Relations, and Related Services (PS)
5191 – Other Information Services (TS)	54191 Marketing Research and Public Opinion Polling (PS)
5411 – Legal Services (PS)	54192 Photographic Services (C)
5412 – Accounting, Tax Preparation, Bookkeeping, and Payroll Services (PS)	54193 Translation and Interpretation Services (TS)
54131 – Architectural Services (TS)	54199 All Other Professional, Scientific, and Technical Services (TS)
54132 – Landscape Architectural Services (TS)	5611 Office Administrative Services (PS)
54133 – Engineering Services (TS)	56141 Document Preparation Services (PS)
54134 – Drafting Services (TS)	56149 All Other Business Support Services (PS)
54136 – Geophysical Surveying and Mapping Services (TS)	611 Educational Services (PS)
54137 – Surveying and Mapping (except Geophysical) Services (TS)	7115 Independent Artists, Writers, and Performers (C)
5414 – Specialized Design Services (TS)	81292 Photofinishing (C)

Illuminas then analyzed annual datasets from 2013-2020 from the Nonemployer Statistics (NES) data series, published by the U.S. Census Bureau annually approximately 18 months after the end of the reference year. This data series compiled by the Census Bureau is based on tax filings from nearly 30 million businesses among 450 NAICS industries that have no paid employment or payroll, are subject to federal income taxes, and have receipts of \$1,000 or more. The data are available at the national, state, county, metropolitan statistical area, and combined statistical area geography levels.<sup>4</sup> The data set is based on the number of “establishments,” or individual tax filings, based on the address of the entity. It should be noted that the unit in the NES dataset is not exactly the same as skilled independent workers but can be considered a good approximation.

<sup>4</sup> <https://www.census.gov/programs-surveys/nonemployer-statistics/about.html>

To identify the top 30 markets for skilled independent workers, Illuminas first identified and analyzed the most populous metropolitan statistical areas in the United States, defined as those with at least one million residents as identified by the U.S. Census Bureau's Population Division. This ensured that the top markets for independent professionals would not be missed, and the range in size of the skilled independent workforce in each of those top metropolitan areas varies widely enough to ensure confidence that none are missing from the top 30 identified.

NES data for particular NAICS codes may be withheld from publication in the NES datasets for two reasons. Starting with the 2018 data, the number of firms and receipts in a data cell can be published for any level of geography only if the cell contains three or more non-employer businesses. In all other cases, the cell is removed from publication. However, this data is included in higher level totals<sup>5</sup>, and thus did not meaningfully impact our analysis. For 2013-2017 data, the data are suppressed if there are fewer than three non-employer businesses for any level of geography or if more than 40 percent of either the receipts or establishments are from firms with an imputed industry totals<sup>6</sup>, when data for a particular NAICS industry were withheld from publication in the NES datasets for either reason, Illuminas imputed the data using the percentage that the NAICS industry code makes up nationwide in the NES dataset.

Starting in 2018, the Census Bureau updated the methodology used to assign NAICS codes in the NES data. This change resulted in a large number of sole proprietorships being reclassified from NAICS Sector 81 (Other Services, except Public Administration) to other NAICS sectors for 2018.<sup>7</sup> While the Census Bureau cautions that data users should use caution when making comparisons between 2018 and other reference years, we do not believe this change fundamentally impacted our analysis.

Recently, there have been delays in NES data being released, the result being that the latest available data is from 2020. To address lags in the release of data, our report provides estimates of total number and revenues for 2021, 2022, and 2023. Each year, we update the numbers for years that are estimated to reflect the most recently available data; for example, numbers in this year's report use revised estimates for 2021, 2022, while 2020 in last year's report is replaced with actual numbers from the NES. We should note that estimating the impact for the past few years without recent data from the Census Bureau is more challenging than in the past due to the impact of the pandemic. Illuminas utilized the most recently available market-level and U.S. GDP data to apply a balancing weight to the growth rates for skilled independent workers from 2018-2020 to predict 2021-2023 growth rates, and then applied that to the actual number of workers and their receipts from 2020, the most recent year data are available. We have calibrated our estimates as carefully as

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<sup>5</sup> <https://www.census.gov/data/datasets/2020/econ/nonemployer-statistics/2020-ns.html>

<sup>6</sup> <https://www.census.gov/data/datasets/2020/econ/nonemployer-statistics/2020-ns.html>

<sup>7</sup>

[https://www.census.gov/programs-surveys/nonemployer-statistics/technical-documentation/methodology.html#par\\_textimage\\_379462313](https://www.census.gov/programs-surveys/nonemployer-statistics/technical-documentation/methodology.html#par_textimage_379462313)

possible by refining our estimation models and incorporating other data sources, including GDP growth and Bureau of Labor Statistics (BLS) data on labor force size.<sup>8</sup>

Table B. Sources	
<b>Independent workforce establishments and receipts (2013–2020)</b>	U.S. Census Bureau. <i>Nonemployer Statistics (NES)</i> . Retrieved from <a href="https://www.census.gov/programs-surveys/nonemployer-statistics.html">https://www.census.gov/programs-surveys/nonemployer-statistics.html</a> .
<b>Top 50 metropolitan statistical areas by population (2019)</b>	U.S. Census Bureau. <i>Population Division, Estimates of Resident Population Change and Rankings: July 1, 2016 to July 1, 2017</i> . Retrieved from <a href="https://factfinder.census.gov/faces/tableservices/jsf/pages/productview.xhtml?srcc=bkmk">https://factfinder.census.gov/faces/tableservices/jsf/pages/productview.xhtml?srcc=bkmk</a> .
<b>FIPS codes for metropolitan statistical areas</b>	U.S. Census Bureau. <i>Metropolitan and Micropolitan</i> . Retrieved from <a href="https://www.census.gov/programs-surveys/metro-micro.html">https://www.census.gov/programs-surveys/metro-micro.html</a> .
<b>GDP for metropolitan statistical areas by year</b>	U.S. Department of Commerce. <i>Total Gross Domestic Product (MSA)</i> . Retrieved from <a href="https://fred.stlouisfed.org/categories/27281">https://fred.stlouisfed.org/categories/27281</a> .
<b>United States GDP by year</b>	U.S. Department of Commerce. <i>Current-dollar and “real” GDP</i> . Retrieved from <a href="https://www.bea.gov/national/index.htm#gdp">https://www.bea.gov/national/index.htm#gdp</a> .
<b>2017 NAICS codes definitions<sup>9</sup></b>	U.S. Census Bureau. <i>North American Industry Classification System</i> . Retrieved from <a href="https://www.census.gov/cgi-bin/sssd/naics/naicsrch?chart_code=51&amp;search=2017%20NAICS%20Search">https://www.census.gov/cgi-bin/sssd/naics/naicsrch?chart_code=51&amp;search=2017%20NAICS%20Search</a> .

<sup>8</sup> Quarterly Census of Employment and Wages, Bureau of Labor Statistics, December 2022.

<sup>9</sup> The NES data series uses the 2017 NAICS codes definitions for years 2017 and 2018, and 2012 for years 2013–2016. There were no changes to the NAICS codes used in this analysis from the 2012 definitions to the 2017 definitions.



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