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The Skilled Independent Workforce: Sizing the Market in the United States

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1.0 Foreword

When I founded Fiverr, it was with the vision of creating the operating system for the future of work. As new demographics entered the workforce, they were joined by technological, cultural, economic, and societal shifts that fundamentally reshaped how people pursue careers, earn a living, and define success. Traditional career paths have given way to more flexible and independent models of work. Workers sought greater control over their time and income, while businesses increasingly needed specialized skills on demand rather than long-term hires. Flexibility and agility became defining features of both careers and lifestyles, while freelancing quickly moved from the margins of the economy into the mainstream.

Today, Fiverr offers more than 800 categories of work, supporting everything from marketing and design to highly complex projects that require multi-talent orchestration and management.

This year's Freelance Economic Impact Report makes clear that freelancing is no longer a side story in the labor market. Independent professionals are shaping how and where work gets done. They are earning more in major metro areas, fueling the rise of Sunbelt hubs, and leading the adoption of new tools and technologies. The growth and resilience of this workforce demonstrate that freelancing is not only a viable career path but also a vital component of the economy.

The story behind these numbers is one of empowerment, resilience, and innovation. Freelancers are not only setting their own terms, but reshaping the very fabric of the labor market. They are building sustainable careers that give them the freedom to support their families, invest in their communities, and pursue work that aligns with their values. For many, freelancing has become a pathway to financial stability, entrepreneurial growth, and upward mobility, at a time when traditional career structures no longer guarantee the same level of security.

At Fiverr, our mission has always been to support this transformation by building the platform and community that enables freelancers to thrive. What began as a vision has become a global reality. Freelancing is a powerful economic force and a cornerstone of the future of work. This report proves just how central it has already become, and how much potential still lies ahead.

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 800 categories, has partnered with Illuminas, a market research firm specializing in the services and technology sectors, for its eighth annual Freelance Economic Impact Report. Fiverr commissioned Illuminas to conduct a study identifying and profiling 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.

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. The most recent data compiled by the Census Bureau is for calendar year 2023; therefore, Illuminas produced estimates for 2024 based on more recent macroeconomic data. Due to delays in the release of government data in recent years, Illuminas had to make estimates for the years 2021 to 2023 in the 2024 report; with the availability of updated Census Bureau data, this year's report replaced previous years' estimates with the most up-to-date data.

This study specifically focuses on a workforce referred to here as "independent professionals", "independent workers", 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[1], which define this market.

In addition to profiling independent professional workforce characteristics for the top 30 markets, Illuminas also profiles nine distinct clusters of markets with common

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[1] North American Industrial Classification System

characteristics. This exploration is based on a market commonalities analysis conducted by Illuminas to statistically align the top 50 markets based on common characteristics.

3.0 Key Findings

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

In 2024, there were an estimated 6.9 million skilled independent workers in the United States earning a combined $319 billion in revenue. 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 2024.

The majority of skilled independent professionals are located in the top 30 Metropolitan Statistical Areas (MSAs), which typically have populations of at least one million residents. As of 2024, there are an estimated 4.0 million independent professionals in the top 30 U.S. markets, representing a 4.3% increase from 2023. This workforce is estimated to have generated $208 billion in revenue in 2024, representing a 6.8% increase from 2023. The top 30 markets for these workers represent nearly three out of five (58%) of all independent professionals in the U.S. and account for 65% of the revenue.

The top markets, in terms of the 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 2019 to 2024 include Orlando, Miami, Nashville, Las Vegas, San Antonio, and Dallas. Meanwhile, the two fastest-growing markets in total revenues 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, $5,748 more than the total U.S. average ($52,002 compared to $46,254). 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 Las Vegas, Nashville, and Los Angeles, while the lowest is Minneapolis.

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

We've broken down the top 50 metro areas into nine unique groupings. Diverse Professional markets, such as 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, such as 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, Lone Star Boom Towns like Houston, and Rising Tech Hubs like Austin, Atlanta and Denver.

4.0 Detailed Findings

Top 30 Markets

Independent professionals in the U.S. tend to congregate in metropolitan areas with a population of at least one million, with a high degree of concentration in the top 30 markets. It is estimated that in the U.S. in 2024, there were 4.0 million independent professionals in the top 30 markets (up 4.3% from 2023) with a combined revenue of $208 billion (up 6.8% from 2023).[2] The top 30 markets for these workers represent nearly three-in-five (58%) of all independent professionals in the U.S. (6.9 million total) and account for 65% of the revenue ($319 billion total).

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

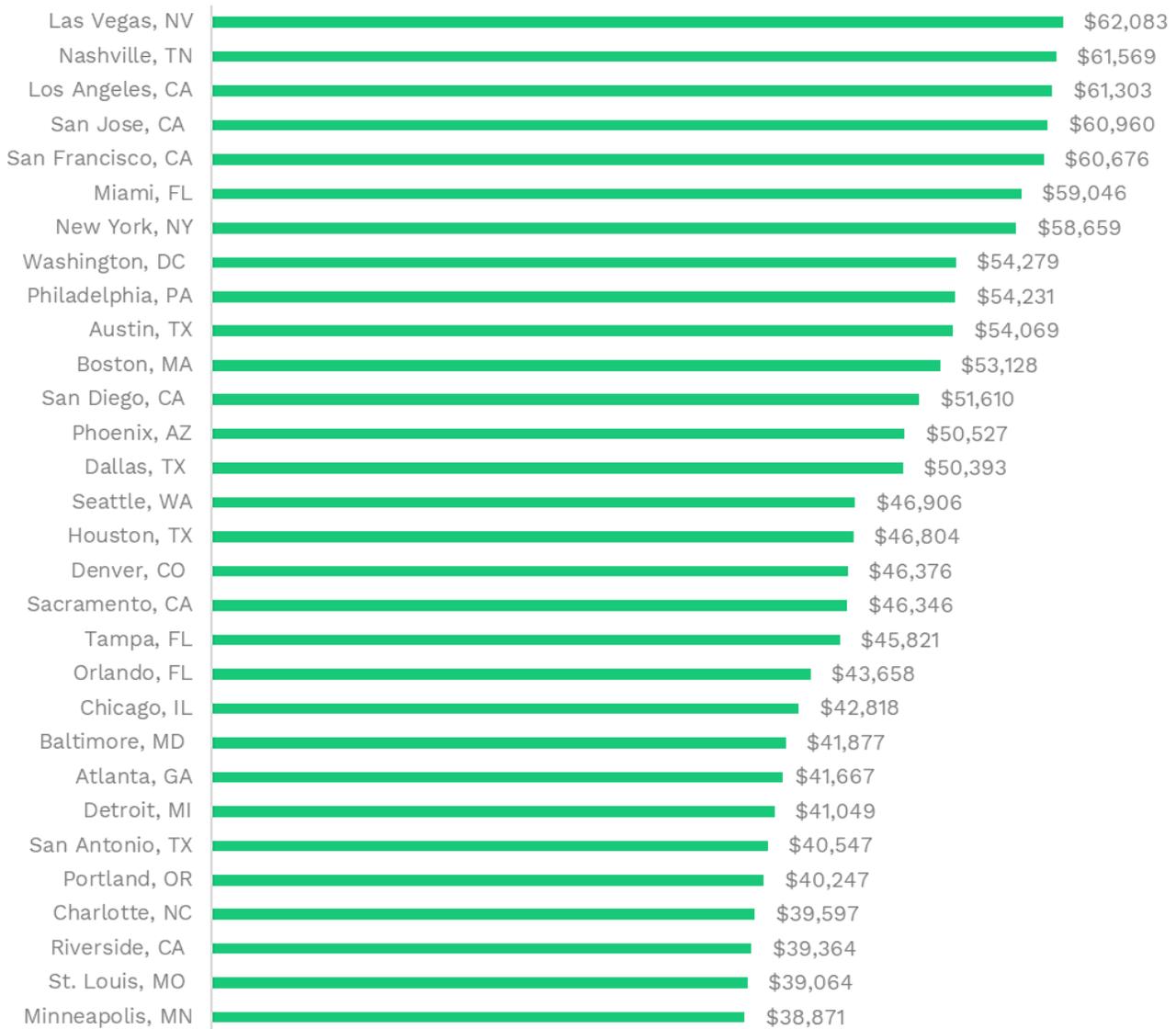| Table 1. Top Markets for Independent Professionals (by order of size of workforce)				
Market (Metropolitan Statistical Area)	Number of Independent Professionals (2024 Projected)	Rank by Number of Independent Professionals	Revenues (2024 Projected)	Rank by Revenues
New York, NY	589,388	1	$34,572,649,585	1
Los Angeles, CA	429,675	2	$26,340,172,732	2
Miami, FL	270,559	3	$15,975,539,319	3
Chicago, IL	211,137	4	$9,040,406,363	6
Dallas, TX	194,352	5	$9,794,007,660	5
Washington, DC	191,352	6	$10,386,474,345	4
Atlanta, GA	178,546	7	$7,439,430,320	9
Houston, TX	167,999	8	$7,863,010,591	8
San Francisco, CA	146,664	9	$8,898,985,016	7
Boston, MA	137,251	10	$7,291,857,433	11
Philadelphia, PA	135,317	11	$7,338,367,786	10
Phoenix, AZ	104,425	12	$5,276,248,472	12
Seattle, WA	93,155	13	$4,369,489,153	15
Denver, CO	90,254	14	$4,185,631,262	17
Minneapolis, MN	88,165	15	$3,427,038,999	20
San Diego, CA	86,082	16	$4,442,664,806	13
Detroit, MI	83,483	17	$3,426,862,507	21
Austin, TX	81,915	18	$4,429,118,879	14
Orlando, FL	76,759	19	$3,351,115,495	22
Tampa, FL	76,262	20	$3,494,403,627	19
Riverside, CA	71,477	21	$2,813,623,970	23
Nashville, TN	70,179	22	$4,320,817,068	16
Portland, OR	65,720	23	$2,645,044,129	26
Baltimore, MD	64,369	24	$2,695,573,285	25
Charlotte, NC	57,029	25	$2,258,210,921	27

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[2] These are estimates because the release of the NES is delayed, and numbers have not been released since 2023.

Las Vegas, NV	56,609	26	$3,514,425,441	18
San Antonio, TX	49,792	27	$2,018,948,511	29
St. Louis, MO	48,253	28	$1,884,949,056	30
San Jose, CA	45,715	29	$2,786,775,428	24
Sacramento, CA	45,436	30	$2,105,782,537	28

Independent professionals in the top 30 markets earn an average of $52,002, approximately $5,748 more than the overall U.S. average for independent professionals. When comparing markets, independent professionals earn an average annual income ranging from $38,871 to $62,083, with the highest receipts in Las Vegas, Nashville, Los Angeles, San Jose, and San Francisco. Independent professionals providing technical services in Las Vegas earned the highest average salary in 2024, at $84,795, while creative professionals in St. Louis earned the lowest average salary, at $21,907.

Figure 1. Skilled Independent Workforce Receipts per Entity (2024 estimated)

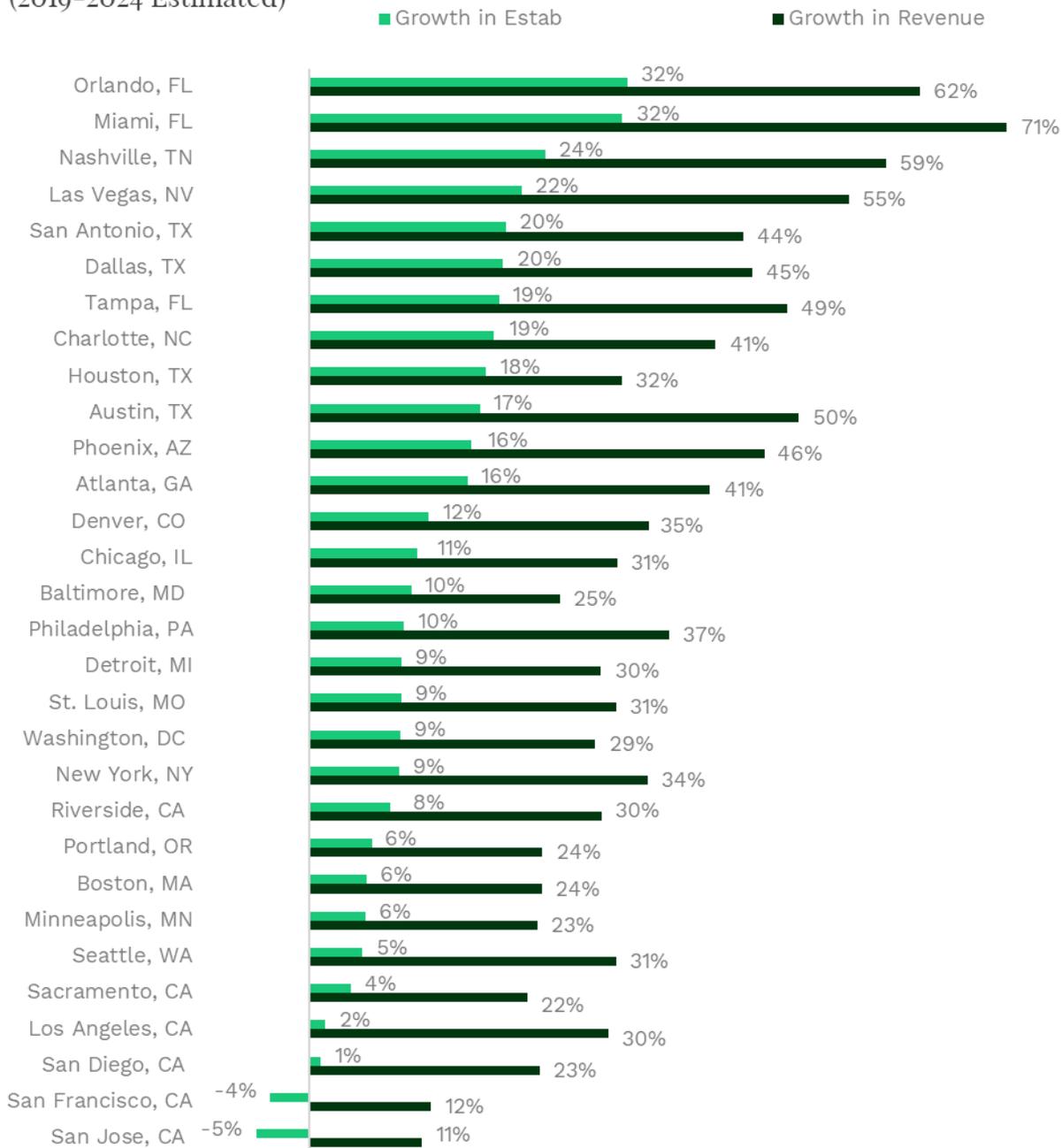| Market	Receipts
Las Vegas, NV	$62,083
Nashville, TN	$61,569
Los Angeles, CA	$61,303
San Jose, CA	$60,960
San Francisco, CA	$60,676
Miami, FL	$59,046
New York, NY	$58,659
Washington, DC	$54,279
Philadelphia, PA	$54,231
Austin, TX	$54,069
Boston, MA	$53,128
San Diego, CA	$51,610
Phoenix, AZ	$50,527
Dallas, TX	$50,393
Seattle, WA	$46,906
Houston, TX	$46,804
Denver, CO	$46,376
Sacramento, CA	$46,346
Tampa, FL	$45,821
Orlando, FL	$43,658
Chicago, IL	$42,818
Baltimore, MD	$41,877
Atlanta, GA	$41,667
Detroit, MI	$41,049
San Antonio, TX	$40,547
Portland, OR	$40,247
Charlotte, NC	$39,597
Riverside, CA	$39,364
St. Louis, MO	$39,064
Minneapolis, MN	$38,871

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 $39,318 on average compared to $32,543 in the U.S. overall. Independents in the top 30 markets who provide technical services earn $68,574, compared to $62,778 in the U.S. Finally, independents in the top 30 markets providing professional services earn an estimated $48,594 annually, compared to $43,711 for the U.S.

The number of independent professionals is estimated to have increased between 2019 and 2024 in all markets except San Jose and San Francisco. The fastest growing markets include Orlando, Miami, Nashville, Las Vegas, San Antonio, and Dallas. All markets within the top 30 experienced double-digit growth in revenues from the skilled independent workforce from 2019 to 2024, fueled by a combination of natural growth and general inflation, which led to

increased service prices. Some markets are estimated to have experienced a loss in total numbers over a 5-year period, which is likely due to economic conditions and relocation patterns resulting from the pandemic. However, the trend has reversed, and in the past year, all markets have experienced growth in total independents.

Figure 2. Total Growth in Skilled Independent Workers and Revenues (2019-2024 Estimated)

Legend: ■ Growth in Estab ■ Growth in Revenue

Market	Growth in Estab	Growth in Revenue
Orlando, FL	32%	62%
Miami, FL	32%	71%
Nashville, TN	24%	59%
Las Vegas, NV	22%	55%
San Antonio, TX	20%	44%
Dallas, TX	20%	45%
Tampa, FL	19%	49%
Charlotte, NC	19%	41%
Houston, TX	18%	32%
Austin, TX	17%	50%
Phoenix, AZ	16%	46%
Atlanta, GA	16%	41%
Denver, CO	12%	35%
Chicago, IL	11%	31%
Baltimore, MD	10%	25%
Philadelphia, PA	10%	37%
Detroit, MI	9%	30%
St. Louis, MO	9%	31%
Washington, DC	9%	29%
New York, NY	9%	34%
Riverside, CA	8%	30%
Portland, OR	6%	24%
Boston, MA	6%	24%
Minneapolis, MN	6%	23%
Seattle, WA	5%	31%
Sacramento, CA	4%	22%
Los Angeles, CA	2%	30%
San Diego, CA	1%	23%
San Francisco, CA	-4%	12%
San Jose, CA	-5%	11%

Creative, Technical, and Professional Services

Independent professionals can be categorized into three main groups: creative, technical, and professional (see Appendix for definitions). In the top 30 markets, professional services comprise the largest group of independent workers, accounting for more than half of the workers (51%) and nearly half of the revenues (47%). The share accounted for by these independent professionals is similar nationwide, accounting for 51% of workers and 48% of revenues. Technical services workers represent nearly three-in-ten skilled independent workers in the top 30 markets (27%), and more than one-third of the dollars in skilled independent worker revenues (36%) in 2024, compared to 26% and 36% respectively for the U.S overall. The smallest group, independent professionals who provide creative services, make up an estimated one-fifth (22%) of skilled independent workers in the top 30 markets in 2024, but only about one of every six (17%) dollars in revenue, compared to 22% and 16% respectively for the U.S overall. The following discussion provides greater detail on the three independent occupations, listed in order of size: professional services, technical services, and creative services.
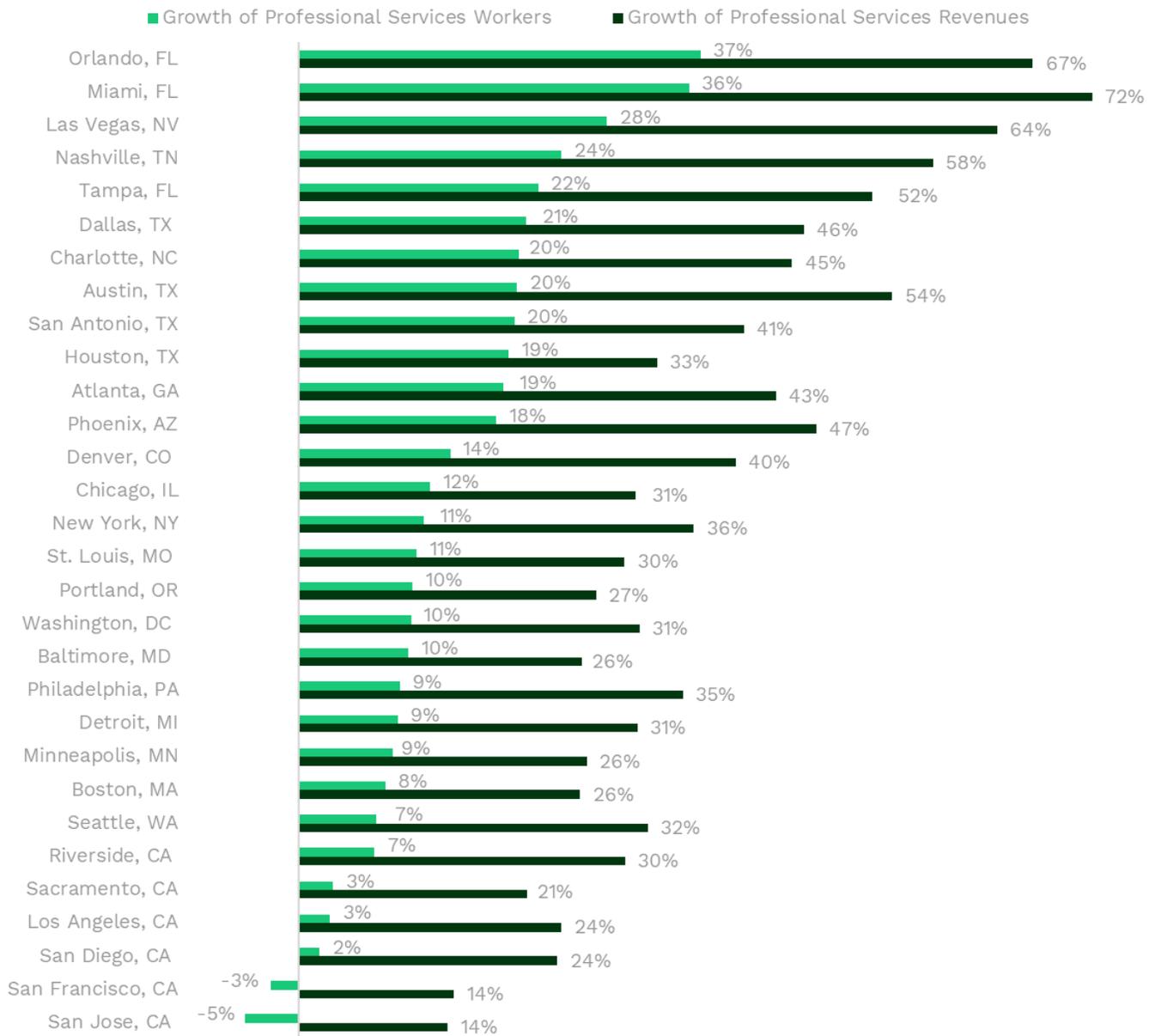
Professional Services

For 2024, we estimate that there were 3.5 million skilled independent professionals providing professional services (i.e., legal, accounting/bookkeeping, management consulting, marketing, and business support) in the U.S., earning combined revenues of $155 billion and an average annual income of $43,711 from their independent work. The top 30 markets capture 57% of independent professionals providing services and 64% of the revenues in the U.S. New York, Los Angeles, and Miami are the top professional independent markets in terms of the number of workers and revenues.

Table 2. Top Markets for Professional Services				
Market (Metropolitan Statistical Area)	Number of Independent Professionals (2024 Projected)	Rank by Number of Independent Professionals	Revenues (2024 Projected)	Rank by Revenues
New York, NY	281,859	1	$15,447,149,977	1
Los Angeles, CA	175,493	2	$9,525,626,971	2
Miami, FL	157,741	3	$8,058,595,000	3
Chicago, IL	112,794	4	$4,693,657,480	6
Dallas, TX	105,021	5	$5,049,274,863	5
Washington, DC	102,340	6	$5,209,363,508	4
Houston, TX	98,862	7	$4,338,544,245	7
Atlanta, GA	96,601	8	$3,738,481,325	10
Boston, MA	71,090	9	$3,844,846,349	9
San Francisco, CA	70,957	10	$4,298,804,928	8
Philadelphia, PA	70,062	11	$3,572,619,297	11
Phoenix, AZ	55,667	12	$2,709,073,768	12
Detroit, MI	47,070	13	$1,890,444,442	17
Denver, CO	45,812	14	$2,138,429,839	15
Seattle, WA	43,419	15	$2,021,147,214	16
Minneapolis, MN	43,122	16	$1,698,634,306	19
San Diego, CA	43,038	17	$2,236,352,921	13
Tampa, FL	41,825	18	$1,782,674,563	18
Orlando, FL	40,990	19	$1,667,367,236	21
Austin, TX	40,047	20	$2,139,132,288	14
Riverside, CA	37,024	21	$1,360,935,160	24
Baltimore, MD	33,704	22	$1,311,944,987	25
Charlotte, NC	30,125	23	$1,112,932,902	27
Nashville, TN	29,227	24	$1,472,274,639	22
Portland, OR	28,836	25	$1,191,220,836	26
San Antonio, TX	28,137	26	$1,085,579,691	28
Las Vegas, NV	27,694	27	$1,669,651,213	20
St. Louis, MO	24,835	28	$958,547,046	30
San Jose, CA	23,445	29	$1,366,681,160	23
Sacramento, CA	22,998	30	$1,048,890,456	29

Orlando, Miami, Las Vegas, and Nashville are estimated to have grown the fastest in their professional independent workforces within the past five years, followed by Tampa and Dallas. Revenues are estimated to have grown at an even faster pace, with the most growth also being in Miami, Orlando, Las Vegas, and Nashville. In all markets, revenue growth in the professional services category far outpaced growth in the number of independent professionals, 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 3. Growth of Independents Providing Professional Services and Their Revenues
in Top 30 Markets (2019-2024 Estimated)

Growth of Professional Services Workers ▪ Growth of Professional Services Revenues

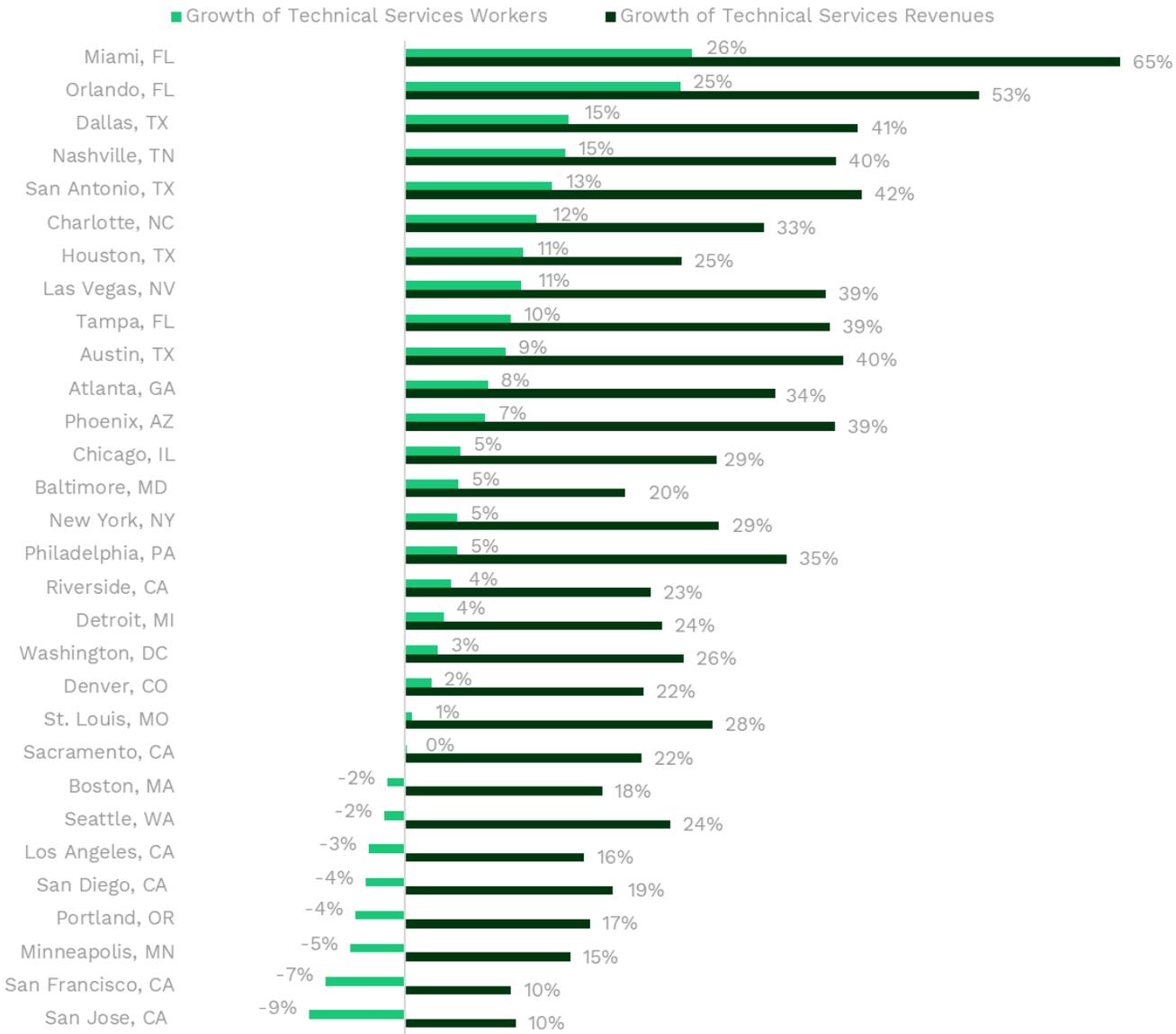| Market	Workers	Revenues
Orlando, FL	37%	67%
Miami, FL	36%	72%
Las Vegas, NV	28%	64%
Nashville, TN	24%	58%
Tampa, FL	22%	52%
Dallas, TX	21%	46%
Charlotte, NC	20%	45%
Austin, TX	20%	54%
San Antonio, TX	20%	41%
Houston, TX	19%	33%
Atlanta, GA	19%	43%
Phoenix, AZ	18%	47%
Denver, CO	14%	40%
Chicago, IL	12%	31%
New York, NY	11%	36%
St. Louis, MO	11%	30%
Portland, OR	10%	27%
Washington, DC	10%	31%
Baltimore, MD	10%	26%
Philadelphia, PA	9%	35%
Detroit, MI	9%	31%
Minneapolis, MN	9%	26%
Boston, MA	8%	26%
Seattle, WA	7%	32%
Riverside, CA	7%	30%
Sacramento, CA	3%	21%
Los Angeles, CA	3%	24%
San Diego, CA	2%	24%
San Francisco, CA	-3%	14%
San Jose, CA	-5%	14%

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 1.8 million in 2024. These workers earn $62,778 annually from their independent activities, more than professional services and creative services independents. Three in five (60%) technical services freelancers are located in the top 30 markets, and these workers generate 66% of the revenue from all similar workers in the U.S. New York, Los Angeles, and Miami are the top markets in terms of both the number of workers and revenue.

Table 3. Top Markets for Technical Services				
Market (Metropolitan Statistical Area)	**Number of Technical Independent Professionals (2024 Projected)**	**Rank by Number of Independent Professionals**	**Revenues (2024 Projected)**	**Rank by Revenues**
New York, NY	161,670	1	$12,396,435,028	1
Los Angeles, CA	114,810	2	$7,556,874,089	2
Miami, FL	78,500	3	$6,284,686,915	3
Washington, DC	55,763	4	$4,277,378,519	4
Chicago, IL	54,732	5	$3,261,917,632	7
Dallas, TX	53,650	6	$3,731,734,333	5
San Francisco, CA	46,650	7	$3,558,680,190	6
Atlanta, GA	45,249	8	$2,660,347,627	11
Houston, TX	43,166	9	$2,869,104,308	9
Boston, MA	38,840	10	$2,699,628,228	10
Philadelphia, PA	37,163	11	$2,934,025,294	8
Phoenix, AZ	28,323	12	$1,933,272,422	12
Seattle, WA	27,468	13	$1,661,910,779	14
San Diego, CA	26,727	14	$1,694,920,075	13
Denver, CO	25,395	15	$1,536,033,618	16
Minneapolis, MN	22,226	16	$1,179,279,377	20
Austin, TX	22,132	17	$1,595,140,518	15
Orlando, FL	20,187	18	$1,201,555,661	19
Detroit, MI	20,106	19	$1,144,606,791	22
Tampa, FL	20,007	20	$1,297,750,729	17
Riverside, CA	19,776	21	$1,024,926,909	24
Portland, OR	18,214	22	$960,516,410	26
Baltimore, MD	16,907	23	$1,066,868,496	23
San Jose, CA	16,125	24	$1,265,415,288	18
Charlotte, NC	15,385	25	$839,940,720	27
Nashville, TN	14,075	26	$1,011,202,526	25
Las Vegas, NV	13,905	27	$1,179,096,251	21
Sacramento, CA	13,005	28	$810,039,756	28
St. Louis, MO	11,974	29	$675,695,815	30
San Antonio, TX	11,585	30	$691,775,576	29

Miami and Orlando are estimated to have grown the fastest in their technical independent professional workforces. Miami and Orlando also experienced the highest growth in technical independent revenues. On the other hand, eight markets have seen a decline in the number of technical independents over the past five years: San Jose, San Francisco, Minneapolis, Portland, San Diego, Los Angeles, Seattle, and Boston. The growth decline in these markets may have been a result of a variety of factors, including workers relocating during the pandemic and a downturn faced by large tech companies headquartered in these markets. More recently, these losses have declined or stabilized in these markets.

Figure 4. Growth of Technical Independent Professionals and Their Revenues in Top 30 Markets (2019-2024 Estimated)

Legend: ■ Growth of Technical Services Workers ■ Growth of Technical Services Revenues

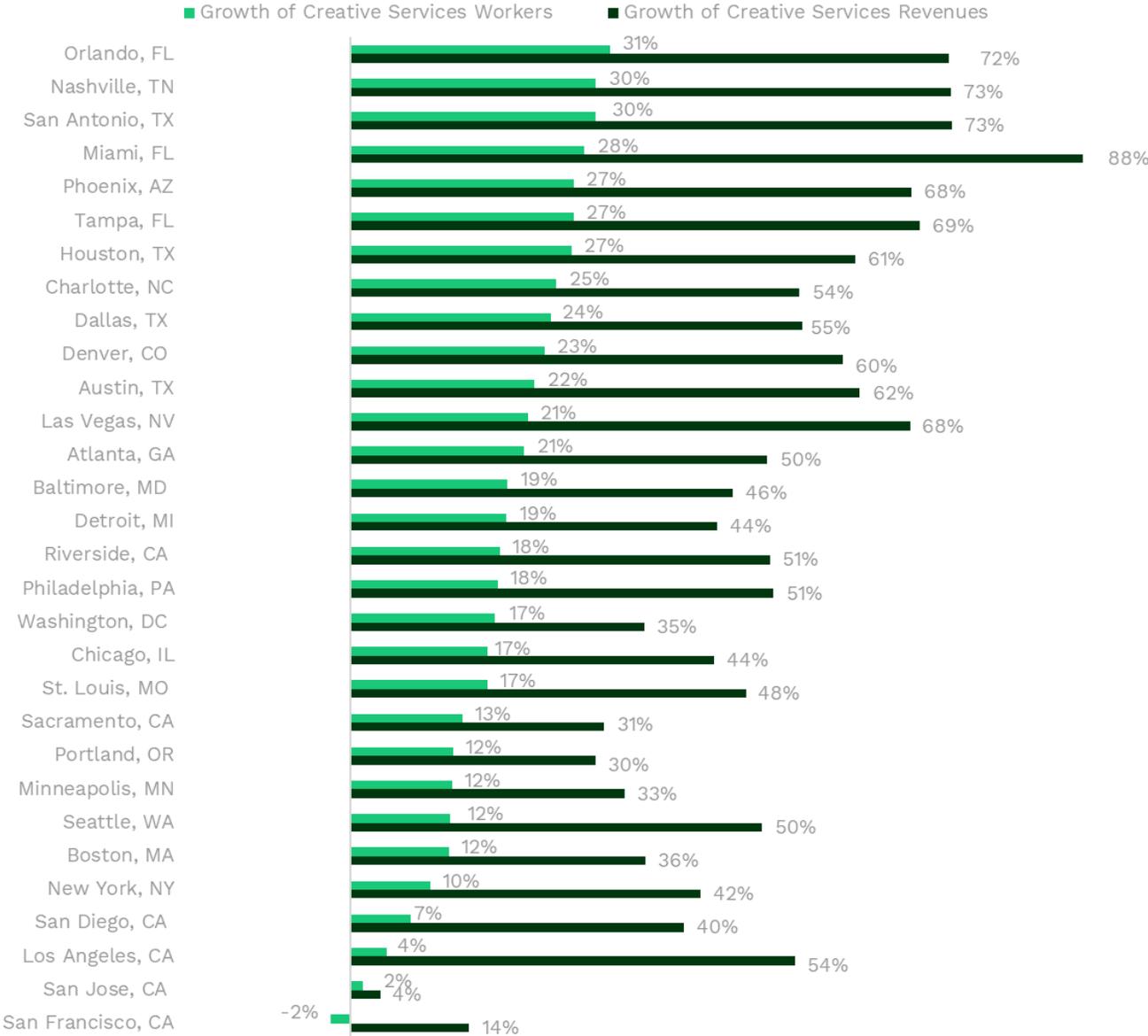| Market	Growth of Technical Services Workers	Growth of Technical Services Revenues
Miami, FL	26%	65%
Orlando, FL	25%	53%
Dallas, TX	15%	41%
Nashville, TN	15%	40%
San Antonio, TX	13%	42%
Charlotte, NC	12%	33%
Houston, TX	11%	25%
Las Vegas, NV	11%	39%
Tampa, FL	10%	39%
Austin, TX	9%	40%
Atlanta, GA	8%	34%
Phoenix, AZ	7%	39%
Chicago, IL	5%	29%
Baltimore, MD	5%	20%
New York, NY	5%	29%
Philadelphia, PA	5%	35%
Riverside, CA	4%	23%
Detroit, MI	4%	24%
Washington, DC	3%	26%
Denver, CO	2%	22%
St. Louis, MO	1%	28%
Sacramento, CA	0%	22%
Boston, MA	-2%	18%
Seattle, WA	-2%	24%
Los Angeles, CA	-3%	16%
San Diego, CA	-4%	19%
Portland, OR	-4%	17%
Minneapolis, MN	-5%	15%
San Francisco, CA	-7%	10%
San Jose, CA	-9%	10%

Creative Services

In 2024, there were an estimated 1.5 million creative independent professionals in the U.S. with combined receipts of $50.1 billion. The creative category includes artists, writers, and performers, as well as video and sound professionals. Six-in-ten (57%) creative independent professionals are based in the top 30 markets, and 69% of the revenue comes from the top 30. Creative independent professionals earn $32,543 on average in the U.S. overall, but those in the top 30 markets earn an average of $39,318. 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				
Market (Metropolitan Statistical Area)	Number of Creative Independent Professionals (2024 Projected)	Rank by Number of Independent Professionals	Revenues (2024 Projected)	Rank by Revenues
New York, NY	145,859	1	$6,729,064,580	2
Los Angeles, CA	139,372	2	$9,257,671,673	1
Chicago, IL	43,611	3	$1,084,831,251	5
Atlanta, GA	36,696	4	$1,040,601,368	7
Dallas, TX	35,681	5	$1,012,998,465	8
Miami, FL	34,318	6	$1,632,257,404	4
Washington, DC	33,248	7	$899,732,318	9
San Francisco, CA	29,057	8	$1,041,499,898	6
Philadelphia, PA	28,092	9	$831,723,196	10
Boston, MA	27,321	10	$747,382,856	11
Nashville, TN	26,876	11	$1,837,339,904	3
Houston, TX	25,972	12	$655,362,037	15
Minneapolis, MN	22,817	13	$549,125,327	17
Seattle, WA	22,267	14	$686,431,160	13
Phoenix, AZ	20,435	15	$633,902,282	16
Austin, TX	19,736	16	$694,846,073	12
Denver, CO	19,047	17	$511,167,805	19
Portland, OR	18,670	18	$493,306,884	20
San Diego, CA	16,316	19	$511,391,811	18
Detroit, MI	16,307	20	$391,811,273	24
Orlando, FL	15,582	21	$482,192,598	21
Las Vegas, NV	15,010	22	$665,677,978	14
Riverside, CA	14,678	23	$427,761,900	22
Tampa, FL	14,430	24	$413,978,335	23
Baltimore, MD	13,758	25	$316,759,802	25
Charlotte, NC	11,519	26	$305,337,299	26
St. Louis, MO	11,444	27	$250,706,195	27
San Antonio, TX	10,070	28	$241,593,244	29
Sacramento, CA	9,433	29	$246,852,325	28
San Jose, CA	6,145	30	$154,678,980	30

Orlando, Nashville, and San Antonio all experienced at least a 30% growth in their creative independent workforces from 2019 to 2024. The slowest-growing markets for the number of creative independent professionals are San Francisco, San Jose, and Los Angeles, with San Francisco being the only market to experience a negative growth rate. Miami, San Antonio, Nashville, and Orlando experienced the highest growth in creative independent revenues.

Figure 5. Growth of Creative Independent Professionals and Their Revenues in Top 30 Markets (2019-2024 Estimated)

■ Growth of Creative Services Workers   ■ Growth of Creative Services Revenues

Market	Growth of Creative Services Workers	Growth of Creative Services Revenues
Orlando, FL	31%	72%
Nashville, TN	30%	73%
San Antonio, TX	30%	73%
Miami, FL	28%	88%
Phoenix, AZ	27%	68%
Tampa, FL	27%	69%
Houston, TX	27%	61%
Charlotte, NC	25%	54%
Dallas, TX	24%	55%
Denver, CO	23%	60%
Austin, TX	22%	62%
Las Vegas, NV	21%	68%
Atlanta, GA	21%	50%
Baltimore, MD	19%	46%
Detroit, MI	19%	44%
Riverside, CA	18%	51%
Philadelphia, PA	18%	51%
Washington, DC	17%	35%
Chicago, IL	17%	44%
St. Louis, MO	17%	48%
Sacramento, CA	13%	31%
Portland, OR	12%	30%
Minneapolis, MN	12%	33%
Seattle, WA	12%	50%
Boston, MA	12%	36%
New York, NY	10%	42%
San Diego, CA	7%	40%
Los Angeles, CA	4%	54%
San Jose, CA	2%	4%
San Francisco, CA	-2%	14%

Commonalities Among Top Markets: The 9 Types of Freelancer Markets

Independent professionals can be found in a variety of distinct markets, characterized by the nature of independent work, growth rates, earning levels, local economies, and demographic makeups. 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 tend to form groupings that share more similarities with each other than with markets in other groups – for example, Los Angeles has more in common with Nashville than with Chicago, and New York has more in common with Baltimore than with Boston. An example of a market group is Creative Destinations (including Los Angeles, Las Vegas, and Nashville), which 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

Market Grouping	Markets (MSAs)
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 nearly 811,000 independent professionals estimated to live in these markets in 2024. The second largest grouping is Affordable Heartland Cities, which includes Minneapolis, Chicago, Detroit, Cleveland, and Pittsburgh, among others. There are 788,000 independent professionals estimated to be living in these markets as of 2024. At the other end of the spectrum, Big Tech Centers such as San Jose, Seattle, and Portland comprise the smallest market grouping, with over 204,000 independent professionals estimated for 2024.

Figure 6. Market Groupings Distribution by Number of Independent Professionals
(2024 Estimated)

- Big Tech Centers, 4%
- Middle Income Oases, 6%
- Lone Star Boomtowns, 9%
- Rising Tech-hubs, 11%
- Upscale Brain Markets, 11%
- Creative Destinations, 12%
- Sunbelt Professional Havens, 12%
- Affordable Heartland Cities, 17%
- Diverse Professional Markets, 17%
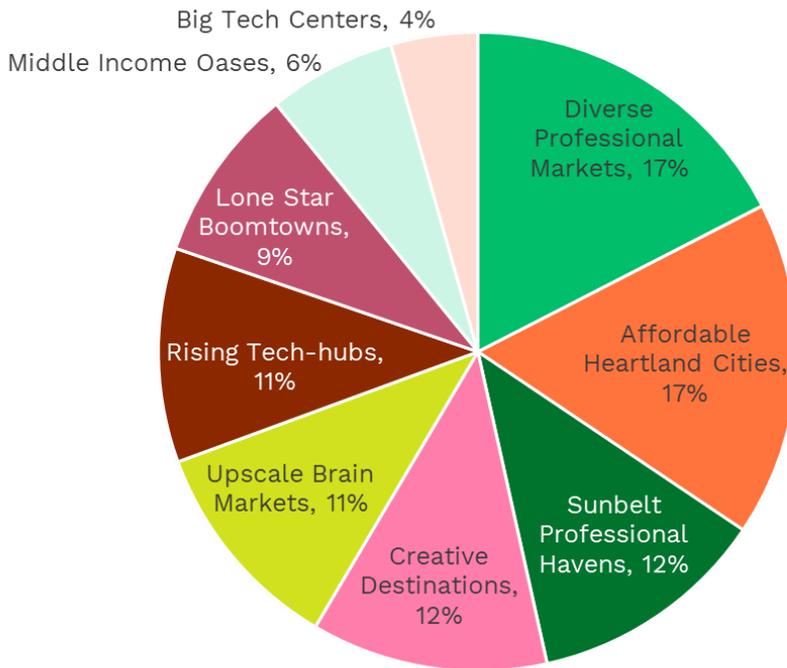
Figure 7. Market Groupings Distribution by Revenue
(2024 Estimated)

- Big Tech Centers, 4%
- Middle Income Oases, 6%
- Lone Star Boomtowns, 8%
- Rising Tech-hubs, 9%
- Upscale Brain Markets, 12%
- Sunbelt Professional Havens, 13%
- Affordable Heartland Cities, 14%
- Creative Destinations, 15%
- Diverse Professional Markets, 19%
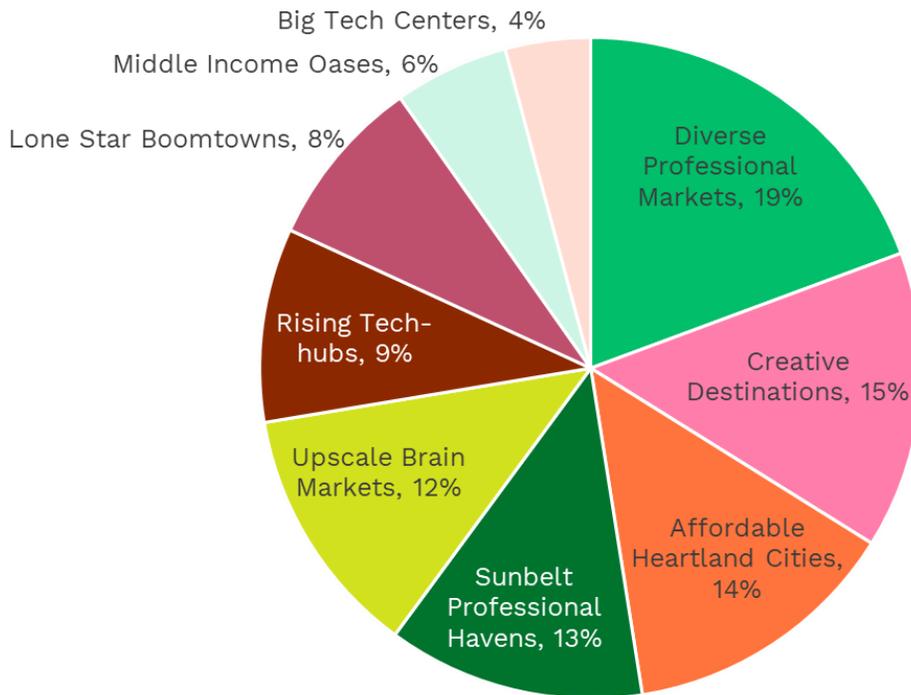
Diverse Professional Markets *(Baltimore, New Orleans, New York, and Philadelphia)* – Four large metropolitan areas make up this group, including some of the largest cities in the U.S. There are close to 811,000 independent professionals living in these markets, earning $45 billion estimated in 2024. The growth in the independent professional workforce and revenue in these markets over the past 5 years is average compared to other types of markets – they are neither the fastest nor the slowest growing. This group has a higher share of creative, independent professionals and revenue compared to the national average. With a large population base including major markets such as New York, Philadelphia and Baltimore, this group has contributed to the overall growth in the 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 788,000 independent professionals in this group, earning $32 billion in revenue as of 2024. These markets have a higher-than-average concentration of workers and revenues in the professional services category, accounting for more than half of the workers and revenue among independents; however, these markets generally are not known for being creative or tech hubs. They have the lowest per capita revenue for independent professionals. With some exceptions, they are the least ethnically diverse, have among the lowest population mobility rates, and exhibit a higher concentration of manufacturing employment. These heartland cities, traditionally manufacturing centers, have lower costs of living and the potential to attract future talent as independent workers seek places that are affordable and offer room to live. Over a five-year period, these markets have demonstrated above-average growth in total independent workers and revenues. With many markets in this group serving as manufacturing centers, they were particularly hard hit by the pandemic five years ago, but they are now rebounding and creating opportunities for independents.

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. As of 2024, there are an estimated 556,000 independent professionals in these markets, including more than 181,000 who provide creative services. Independent professionals living in these markets are estimated to earn $34 billion annually, with $11.8 billion coming from those providing creative services, a higher-than-average share among the top markets and compared to the nation as a whole. Collectively, these markets boast the highest per capita revenue for independent professionals. Nashville and Las Vegas are among the fastest-growing freelance markets in the U.S., although the slower growth in Los Angeles brings down the combined growth rate for this group.

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. Comprising some large cities on both coasts, such as Boston, San Francisco, and Washington, DC, their independent workforces for technical and professional services have grown in the past, but they have one of the lowest growth rates in independent professionals among all market groups. There are an estimated 507,000 independent professionals living in these markets, earning $28.9 billion as of 2024.

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 that there are approximately 563,000 independent professionals in this group of markets, earning $29.5 billion in 2024. 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 the number of independent professionals and revenues over the past 5 years. The grouping includes the top two fastest-growing markets, Orlando and Miami.

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 that includes children in the household, this group may be the next tech hub for freelancers as the tech economy shifts from large tech centers to smaller cities. There are an estimated 504,000 independent professionals who call these markets home in 2024, earning $22.3 billion in revenues. This market group was the third fastest growing among the nine groups in independent workers and the second fastest in 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 include 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 412,000 independent professionals in these three markets alone in 2024, earning $19.7 billion in revenues. This is the second-fastest-growing market group, based on the number of independent professionals, and the third-fastest in revenue. The smallest market in this group, San Antonio, is the fifth fastest growing market in the U.S.

Middle-Income Oases *(Memphis, Oklahoma City, Oxnard, Riverside, Sacramento, San Diego, and Virginia Beach)* – This group is defined by its smaller population centers, which have more diverse, less educated, and female-dominated populations. Their economies depend more on jobs in the government sector, including those in two state capitals. There are just 301,000 independent professionals residing in this group of markets, estimated in 2024,

earning $13.2 billion. Despite lower-than-average growth rates and revenues, these markets are important because they are home to a sizable share of independent professionals, so they clearly have something to offer. Four of the markets in this group are in California and may have been affected by a trend of moving to other states due to factors like the pandemic and high living costs, but this trend has stabilized recently and the markets may even benefit from migration from larger markets in the state.

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. According to our 2024 estimates, there are more than 204,000 independent professionals residing in these markets, earning a combined $9.8 billion annually from their independent work. However, these markets have experienced lower-than-average growth in independent workers and revenues over the past five years. The recent downturn in the technology sector, coupled with high living costs and a shift to remote work, has not favored their growth. The group has the lowest growth rate in the number of workers. While Portland and Seattle showed modest growth, San Jose experienced negative growth in independents over the past five years.

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

Table 5. Characteristics of Market Groupings (2024 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	9.0% (5)	33.7% (5)	Creative	Creative	$56,095 (3)	Educ/Health	Diverse, Low Mobility
Affordable Heartland Cities	9.6% (4)	31.2% (4)	Professional	Professional	$40,649 (9)	Manufacturing, Educ/Health	Low Diversity
Creative Destinations	5.7% (7)	35.6% (6)	Creative	Creative	$61,412 (1)	Leisure	Diverse, Low Mobility
Upscale Brain Markets	3.8% (8)	21.6% (9)	Technical	Technical	$57,019 (2)	Professional, Educ/Health	Highly Educated
Sunbelt Professional Havens	26.3% (1)	61.0% (1)	Professional	Professional /Technical	$52,504 (4)	Finance, Leisure	Diverse
Rising Tech Hubs	16.0% (3)	42.0% (2)	Professional	Professional	$44,265 (7)	Finance, Info, Professional	High Mobility
Lone Star Boom Towns	19.0% (2)	39.4% (3)	Professional	Professional	$47,743 (6)	Finance	Diverse, Young
Middle Income Oases	5.8% (6)	25.4% (7)	Technical	Professional	$43,745 (8)	Government	Diverse, Lower Education
Big Tech Centers	2.9% (9)	22.9% (8)	Technical	Technical	$47,930 (5)	Manufacturing, Info, Professional	Diverse, Highly Educated

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 comprise the study's definition of skilled independent workers are listed 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 2013-2023 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 approximately 30 million businesses across 450 NAICS industries that have no paid employees 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.[3] 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.

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[3] 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[4], 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 imputed industry totals[5]. 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.

The latest available data is from 2023, so our report provides estimates of the total number and revenues for 2024. Each year, we update the numbers for years that are estimated to reflect the most recently available data; for example, 2021, 2022, and 2023 in last year's report are 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 2021-2023 to predict 2024 growth rates. The balancing weight is then applied that to the actual number of workers and their receipts from 2023[6], the most recent year data are available. We have calibrated our estimates as carefully as 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[7].

Table B. Sources

Independent workforce establishments and receipts (2013-2023)	U.S. Census Bureau. *Nonemployer Statistics (NES)*. Retrieved from https://www.census.gov/programs-surveys/nonemployer-statistics.html.
Top 50 metropolitan statistical areas by population (2019)	U.S. Census Bureau. *Population Division, Estimates of Resident Population Change and Rankings: July 1, 2016 to July 1, 2017*. Retrieved from https://factfinder.census.gov/faces/tableservices/jsf/pages/productview.xhtml?src=bkmk.
FIPS codes for metropolitan statistical areas	U.S. Census Bureau. *Metropolitan and Micropolitan*. Retrieved from https://www.census.gov/programs-surveys/metro-micro.html.
GDP for metropolitan statistical areas by year	U.S. Department of Commerce. *Total Gross Domestic Product (MSA)*. Retrieved from https://fred.stlouisfed.org/categories/27281.
United States GDP by year	U.S. Department of Commerce. *Current-dollar and "real" GDP*. Retrieved from https://www.bea.gov/national/index.htm#gdp.
2022 NAICS codes definitions[8]	U.S. Census Bureau. *North American Industry Classification System*. Retrieved from https://www.census.gov/naics/?58967?yearbck=2022.

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[8] 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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