



Freelance Economic Impact Report | 2019

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

# Introduction

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Independent work is an increasingly large sector of the workforce in the United States, albeit one that takes many forms. Spanning everything from taxi drivers, to consulting to independent lawyers, this subset of the workforce as a whole can be difficult to parse out and fully understand. This becomes even more difficult when it comes skilled independent workers. Skilled independent workers include lawyers, graphic designers, artists and engineers: anyone who receives a 1099 at the end of the year for work that requires specific skills and abilities.

The U.S. is in the middle of an independent labor explosion. As of 2016, the Bureau of Labor Statistics estimates that there are 15 million independent workers in the United States<sup>1</sup>, and that number has been on a mostly steady growth track since 2000<sup>2</sup>. As of 2017, independent contractors remained the largest of four alternative work arrangements, making up roughly 7 percent of total employment<sup>3</sup>.

For the second year Fiverr commissioned market research firm Rockbridge Associates to analyze a range of secondary data sources, which allowed researchers to approximate that there are 5.6 million skilled freelancers working in creative, technical or professional positions across the country. Over half (54%) of these freelancers live in the 25 metropolitan identified in this report and, combined, this group generated an estimated \$135 billion in the 2018 tax year.

1. "Self-employment in the United States," Bureau of Labor Statistics, <https://www.bls.gov/spotlight/2016/self-employment-in-the-united-states/home.htm>, (March, 2016)

2. "Evaluating the Growth of the 1099 Workforce," Mercatus Center, <https://www.mercatus.org/publication/evaluating-growth-1099-workforce>, (December 10, 2015)

3. "Independent contractors made up 6.9 percent of employment in May 2017," Bureau of Labor Statistics, <https://www.bls.gov/opub/ted/2018/independent-contractors-made-up-6-point-9-percent-of-employment-in-may-2017.htm>, (June 21, 2018)

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## 1.0

# Who are Skilled Independent Workers?

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Within the independent and freelance workforces, there is a specific subgroup that we define as “Skilled Independent Workers.” Skilled workers are independent workers classified under a number of North American Industry Classification System (NAICS) codes who perform knowledge-based labor which requires specialized skill sets and experience.

Skilled independent workers make up a huge swath of the independent workforce: they include software engineers, graphic designers, accountants, lawyers, consultants, and many more. We are interested in specialized independent workers for several reasons:

- Skilled independent workers’ jobs are unlikely to be automated out of existence, thanks to the more creative and service-oriented elements of their work.
- Skilled independent workers are able to earn a living regardless of geographical location, as long as they have reliable access to a fast internet connection.
- Skilled independent workers serve as a major talent driver for both small and large businesses.

While skilled independent workers are, roughly speaking, self-employed professionals, their work can take multiple forms. Hundreds of thousands of Americans are self-employed, full-time professionals; whether they are lawyers, architects, or photographers, they run full-time businesses earning income from professional services. Many more Americans “moonlance” in part-time positions using specialized skills; this category covers everyone from part-time wedding musicians to graphic designers who take on additional work through marketplaces like Fiverr on a regular basis. There is also a large pool of casual specialized workers who take on freelance knowledge-based work on a seasonal or occasional basis.

## 2.0

# About the Study

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For this study, Fiverr teamed up with Rockbridge Associates, a market research firm specializing in the services and technology sectors, to conduct, for the second year, a study identifying and profiling the largest markets in the U.S. for skilled independent workers. The goals of this study include:

- Estimate the size and growth of the skilled independent workforce in the U.S., in particular, in the top markets in the U.S.
- Provide information on the economic impact of this workforce in the top markets in the U.S.
- Provide information on the economic and demographic composition of these top markets.

To achieve these goals, Rockbridge analyzed a range of secondary data sources from the U.S. Census Bureau, U.S. Federal Reserve Bank, and U.S. Department of Labor. A key data source consists of the Nonemployer Statistics (NES) data series compiled annually by the U.S. Census Bureau. This data is based on over 20 million 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 revenues of skilled independent workers by market and by different industry categories. The most recently available data is from calendar year 2016, although this report includes estimates for 2017 and 2018.

This study specifically focuses on a segment termed here as “skilled independent workers.” This consists of individuals who earn income outside of traditional employment, do not employ others, and are in the following industries:

- Creative services (e.g., artists, video producers).
- Technical services (e.g., architecture, computer science).
- Professional services (e.g., legal, accounting, marketing).

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

### 3.0

# Top Markets for Skilled Independent Workers

<i>Market (Metropolitan Statistical Area)</i>	<i>Number of Skilled Independent Workers (2018 Projected)</i>	<i>Revenues (000) (2018 Projected)</i>
New York, NY	559,180	\$25,327,807
Los Angeles, CA	420,300	\$19,221,368
Chicago, IL	192,181	\$6,797,253
Washington, DC	178,751	\$8,082,337
Miami, FL	170,637	\$6,442,678
San Francisco, CA	168,264	\$8,416,103
Dallas, TX	154,617	\$6,378,848
Atlanta, GA	141,648	\$4,715,018
Boston, MA	130,901	\$5,738,286
Philadelphia, PA	122,821	\$5,171,787
Houston, TX	117,260	\$4,114,779
Seattle, WA	92,715	\$3,393,686
Minneapolis, MN	85,459	\$2,727,113
San Diego, CA	85,195	\$3,562,768
Phoenix, AZ	83,129	\$3,219,612
Denver, CO	78,401	\$2,920,212
Detroit, MI	74,757	\$2,569,771
Austin, TX	67,044	\$2,699,266
Riverside, CA	62,544	\$2,001,661
Portland, OR	61,158	\$2,021,105
Baltimore, MD	57,676	\$2,093,895
San Jose, CA	54,710	\$2,722,582
Tampa, FL	53,629	\$1,829,359
Nashville, TN	52,947	\$2,489,932
Orlando, FL	48,949	\$1,503,508

## 4.0

# Key Findings

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### 4.1 Independent work makes an impact on local economies.

Revenues from skilled independent workers in the top 25 markets account for over \$135 billion combined and represents 1-2% of GDP depending on the market. However, the total impact of this sector is even greater because these workers are able to both draw revenue from outside their market while at the same time provide highly specialized services that are critical to growing local businesses.

### 4.2 Larger markets for skilled independent workers bring higher paychecks, but may also reflect the local cost of living.

The top markets are characterized by higher than average revenues per skilled independent worker. Of the top 25 markets:

- 60% have a higher average revenue per independent worker compared to the United States as a whole.
- The average revenue for a skilled independent worker in the top 25 markets is about \$39,200, compared to \$36,400 for skilled independents across the United States.
- Skilled independent workers in San Francisco report the highest average revenues of \$50,000 (followed closely by San Jose, CA), while skilled independents in Minneapolis report the lowest average revenues (\$32,100).

The per capita revenue can be a function of the type of profession prevalent in the markets, but may also reflect the general pay scale and cost of living in these top markets. These average revenues do not take into account the amount of time spent on skilled independent work, nor does it account for whether revenues from skilled

independent work is the sole source of a person's income or one of many.

### 4.3 The top 25 markets for skilled independents span the continental U.S.

New York, Los Angeles, and Chicago are the top three markets by number of skilled independent workers. In all, 11 of the top 25 markets have more than 100,000 skilled independent workers, with New York heading the list as the largest market with over half a million. San Jose, Nashville, and Orlando are the smallest of the top 25 markets for skilled independent workers, each having fewer than 50,000 workers as of 2016. The number of skilled independent workers in a market generally tracks with the overall population of the market: the bigger the market, the more skilled independent workers it has. However, certain markets including Austin, San Jose, and Nashville, have sizeable numbers of skilled independent workers despite not ranking in the top 25 markets by total population.

### 4.4 Growth of the Workforce

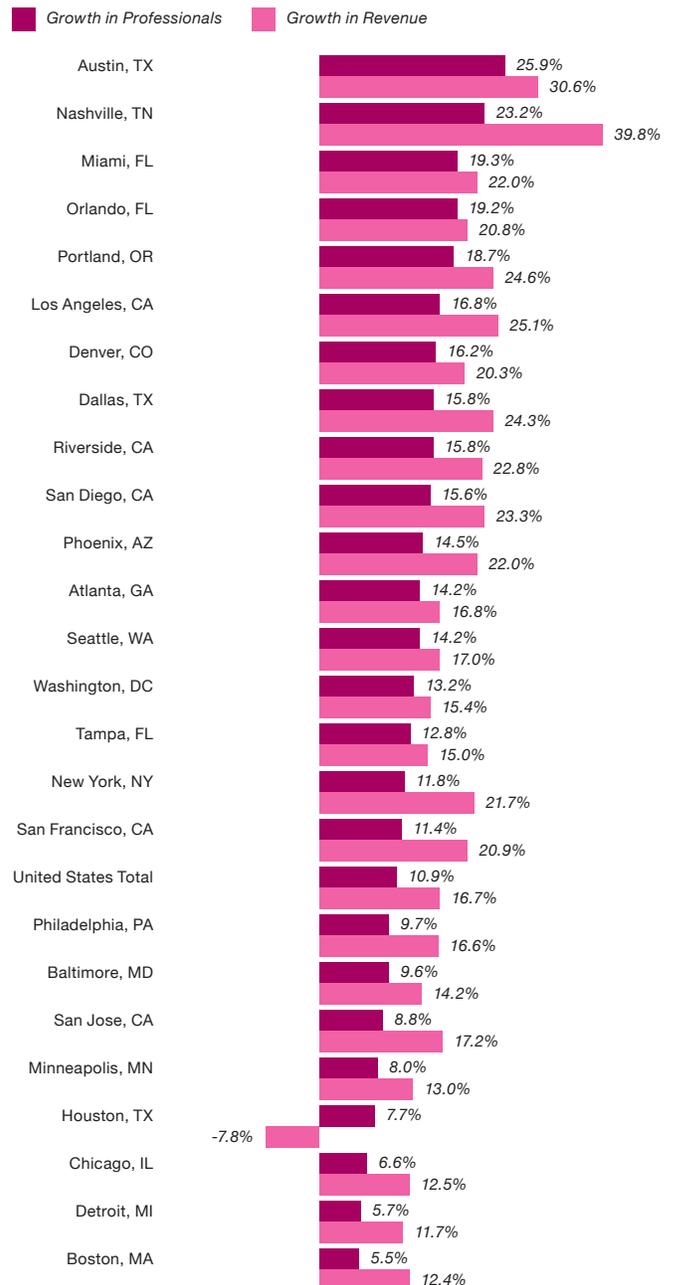
This workforce is here to stay. The average growth rate for skilled independent workers across the top 25 markets was higher than the growth rate for this subset of workers nationwide:

- The population of skilled independent workers grew 14% from 2011 to 2016,

and the average revenue growth for the same time period was 19%.

- Across the United States, the growth in skilled independent workers was 11% and revenue growth was 17% for the same time period.

#### Growth in Skilled Independent Workers and Revenues (2011-2016)



## 4.5 Breaking Down That Growth

From 2011 to 2016, several markets within the top 25 saw double-digit growth in the skilled independent workforce:

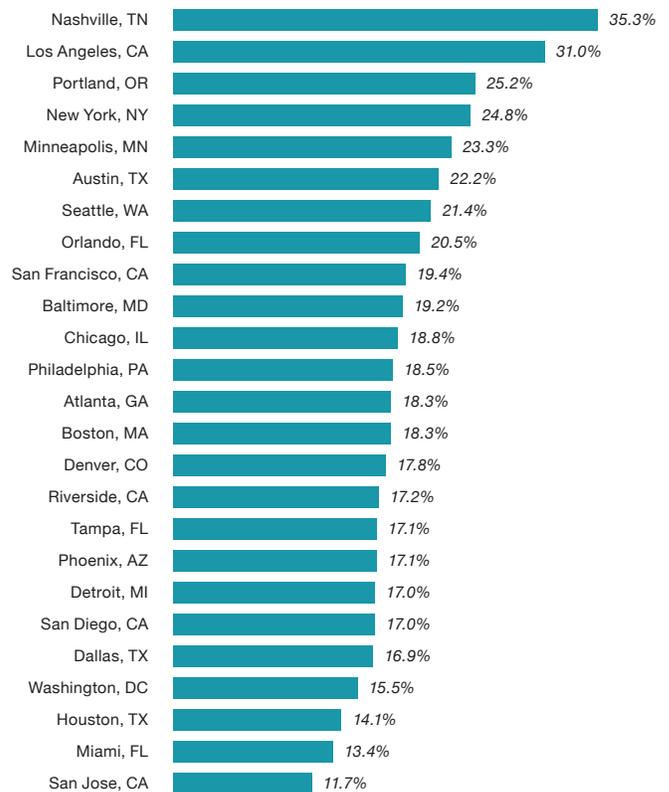
- The number of skilled independent workers in Austin and Nashville each grew by more than 20% during this time.
- Boston, Detroit, and Chicago had the slowest growth in the skilled independent workforce, which is line with overall population trends for these markets.

Similar to last year when we analyzed 2013-2015 growth rates, revenues grew faster than the number of workers. This growth in revenue suggests that demand for the existing skilled independent workforce is increasing. This revenue growth may also indicate that the skilled independent workforce is increasing productivity, enabling them to grow their businesses over time.

## 4.6 Creative, Technical and Professional Services

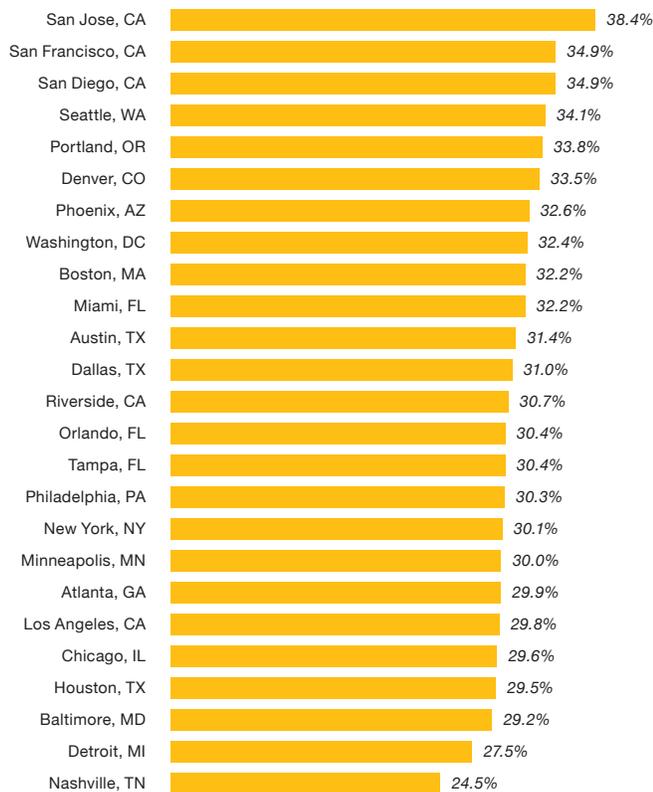
One in five skilled independents work in creative services (700,000 workers in the top 25 markets). Nearly four in 10 skilled independent workers providing creative services in the top 25 markets live in either New York or Los Angeles. Chicago and San Francisco also have sizeable numbers of skilled independent creatives (more than 30,000 in each market). Tampa and San Jose have the fewest number of skilled independent creatives, with less than 10,000 in each market. In both Los Angeles and Nashville, creative skilled independents represent more than three in ten of all skilled independent workers in each market. Portland and New York also each have around a quarter of all skilled independent workers providing creative services.

**Share of Creative Workers in Top 25 Markets (2018 estimated)**

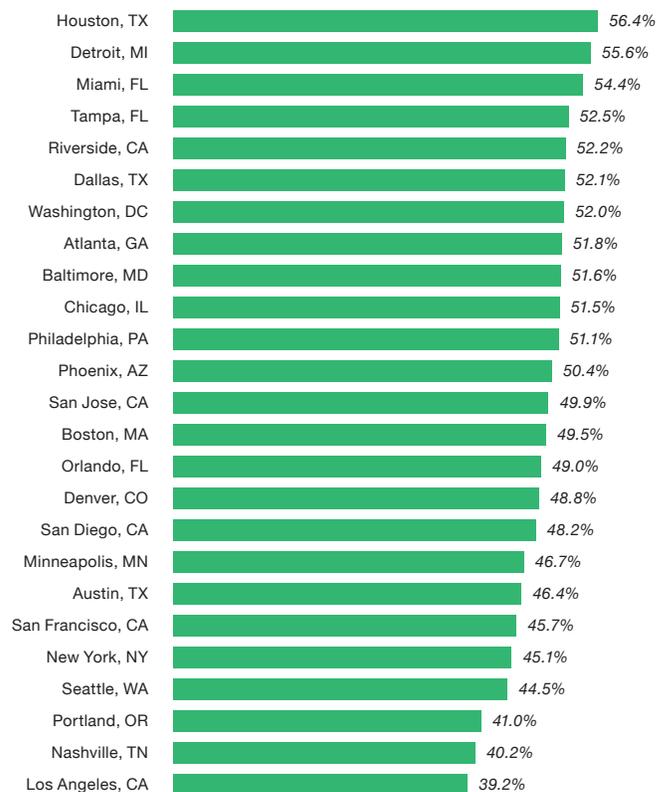


Technical service providers make up about one third of the skilled independent workforce (1 million workers in the top 25 markets); more than a quarter of these workers in the top 25 markets reside in either New York or Los Angeles. San Francisco, Washington D.C., Chicago, and Miami all have at least 50,000 skilled independent technical workers. That said, these workers are mostly concentrated in the western U.S. Seven of the top ten markets with the highest shares of technical independents are in California, Washington, Colorado, and Arizona. San Jose has the highest share at almost 40 percent, while only roughly a quarter of Nashville's skilled independent workers are in technical services.

**Share of Technical Services Workers in Top 25 Markets (2018 estimated)**



**Share of Professional Services Workers in Top 25 Markets (2018 estimated)**

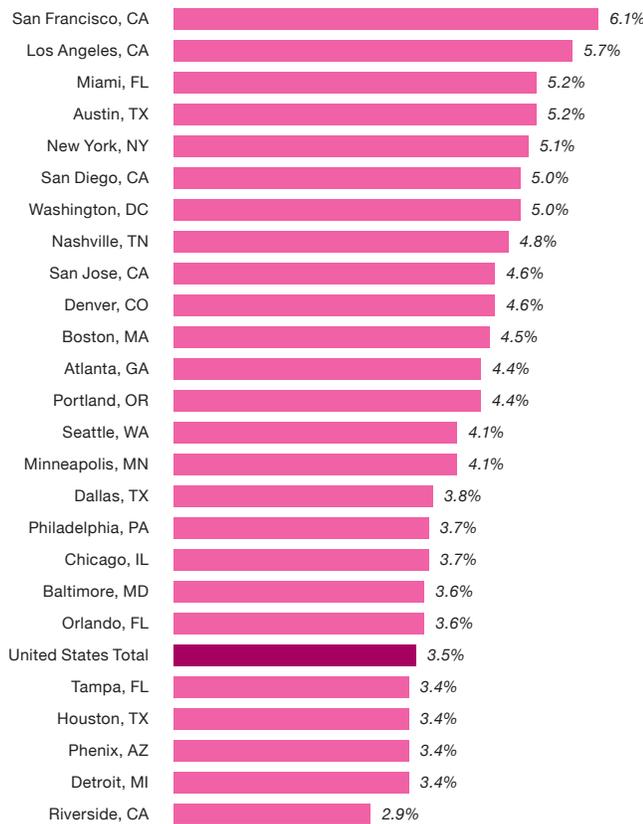


Almost half of the skilled independent workforce works in professional services (almost 1.6 million workers in the top 25 markets), which includes skilled service categories such as management consulting, legal, marketing and educational services. Houston, Detroit, and Miami have the greatest percentage of their skilled independent workforce working in professional services. On the other hand, in Los Angeles, less than 40 percent of the skilled independent worker population works in professional services.

## 4.7 Skilled Independent Workers as a % of Labor Force (2016)

The top 11 markets each have at least 100,000 skilled independent workers across creative, technical, and professional services, and all but Orlando, FL, have at least 50,000 skilled independent workers. Across the top 25 markets, these workers represent 2.9-6.1% of the labor force. Interestingly, California is home to both the markets with the most skilled independent workers relative to the overall workforce, San Francisco and Los Angeles. The implication is that certain markets have a unique dependency on skilled independent work in their local economies.

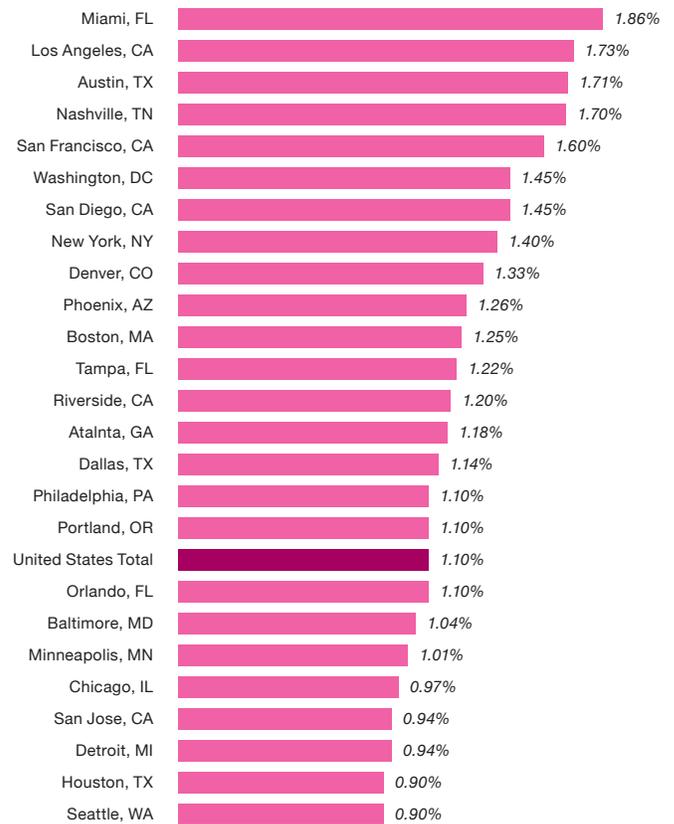
**Skilled Independent Workers as a % of Labor Force (2016)**



## 4.8 Skilled Independent Workforce Revenue as a % of GDP (2016)

Across the top 25 markets, skilled independent workers receive over \$135 billion in revenue, which translates to approximately 1-2% of each market's GDP (see Figure 2). Across the United States, this revenue from skilled independent workers represents 1.1% of total U.S. GDP. Most of the top 25 markets produce more revenue from skilled independents relative to GDP compared to the United States average, with the biggest contributions occurring in Miami, Los Angeles, Austin, Nashville, and San Francisco.

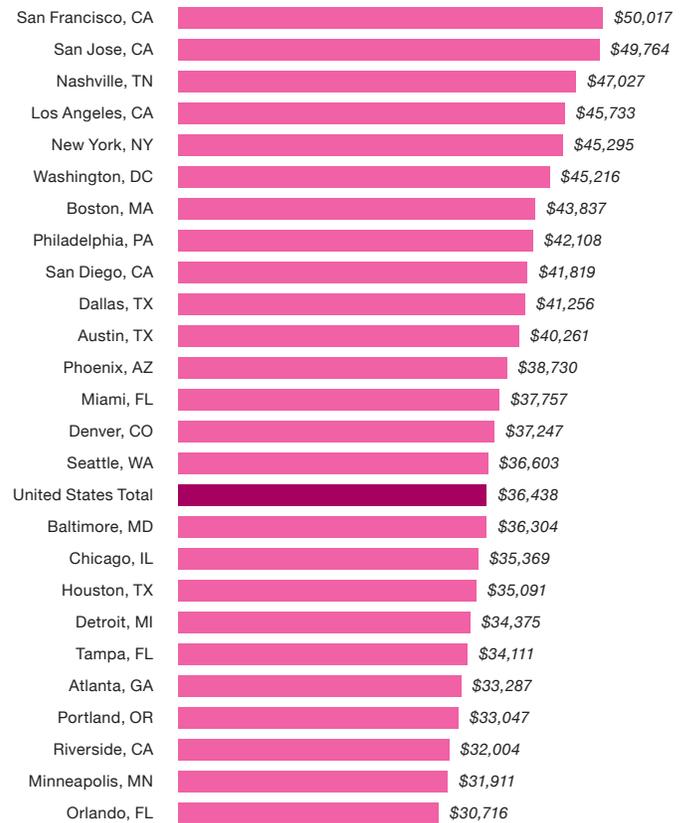
**Skilled Independent Workforce Revenue as a % of GDP (2016)**



However, strong contributions to a market’s GDP do not necessarily mean skilled independent workers are earning more revenue compared to other markets. Though skilled independent workers in Austin and Miami put the markets at the top of the list in contribution to GDP, they rank lower in receipts per establishment.

Skilled independents in San Francisco generate the most revenue, at \$50,017, whereas those in Austin and Miami generate \$40,261 and \$37,757, respectively. The range for revenues per establishment is wide for the top 25 markets: at the bottom is Orlando, with \$30,716, which could be due to factors like the cost of living. The average for skilled independent workers across the United States is \$36,438.

**Skilled Independent Workforce Receipts per Establishment (2018 estimated)**



## 5.0

# Demographic and Economic Characteristics of Top Markets

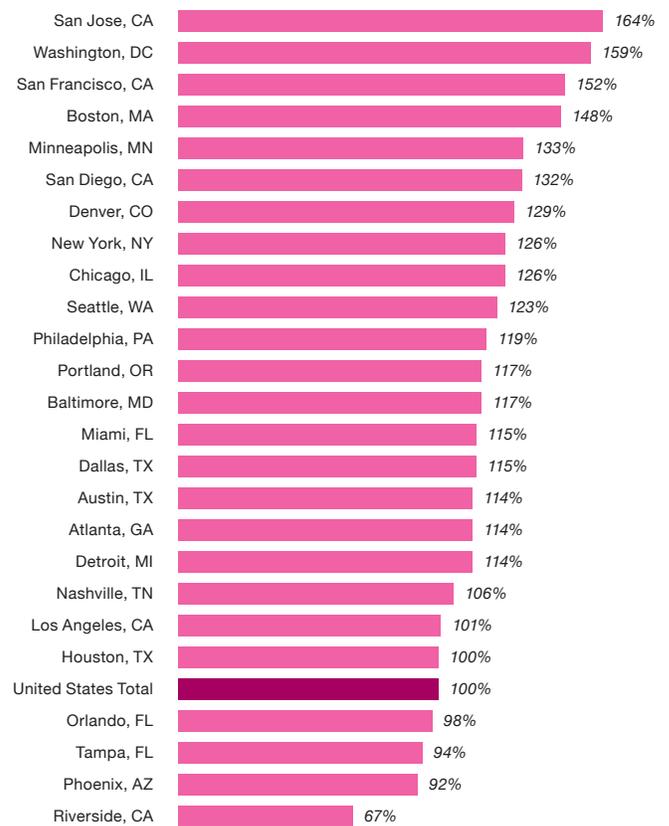
Given the freedom that skilled independent workers have to live and work from anywhere, factors other than market strength and revenue potential may influence the decision of where to base. To that end, Fiverr and Rockbridge examined additional data from the U.S. Census Bureau's Current Population Survey for information related to diversity, education, young adult population and gender in these markets. We found that the top markets for skilled independents are highly diverse, have high levels of education, and youthful adult populations.

### 4.1 Higher Education Index (% with a Bachelor's Degree or Higher Compared to U.S. as a Whole)

Across the United States, a full third (33%) of the adult population holds a Bachelor's degree or higher. Most of the top 25 markets for skilled independent workers are more highly educated relative to the United States as a whole. The figure below shows the education level of the markets with an index, where 100 means the same as the U.S. and greater than 100 means a higher

proportion than the U.S. Within these top markets, San Jose, the Washington DC-metro area, and San Francisco, have the highest relative share of the adult

#### Higher Education Index (Bachelor's Degree or Higher Compared to U.S. as a Whole)

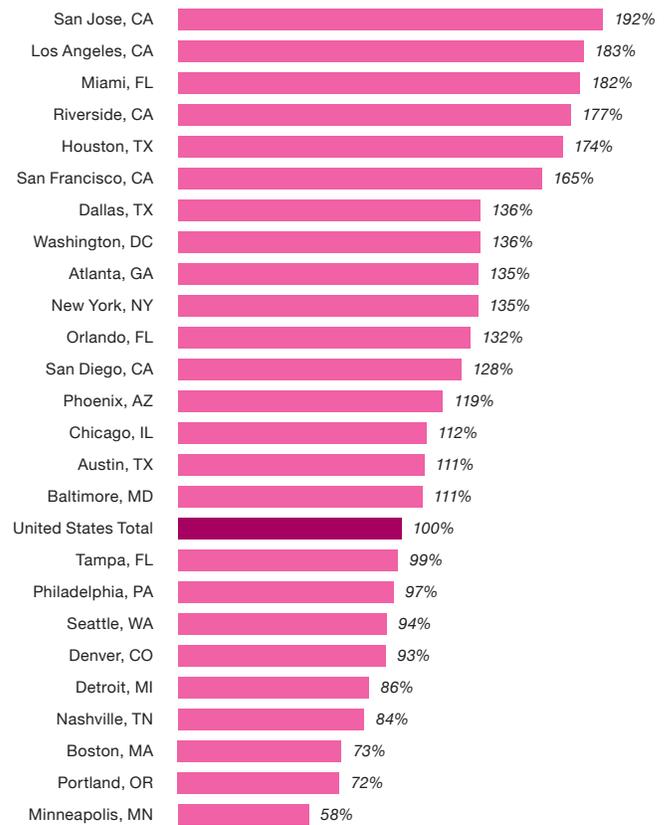


population holding a Bachelor's degree or higher. Just four of the top markets for skilled independent workers have a lower share than the U.S. of adults holding at least a Bachelor's degree: Orlando, Tampa, Phoenix, and Riverside. Note that these numbers apply to the markets as a whole, and do not necessarily mean that the skilled independents in the markets follow the same patterns.

## 5.2 Diversity Index (% of Population that is Not Non-Hispanic White Compared to U.S. as a Whole)

Skilled independent workers in top markets may also look for racial and ethnic diversity where they choose to live and work, or, such diversity may create an environment conducive to independent worker activity. This is evidenced by the fact that two-thirds of the top 25 markets are more diverse than the United States as a whole, as measured by the percentage of the adult population that is non-white or Hispanic. San Jose, Los Angeles, and Miami rank as the most diverse markets out of the top 25, while Minneapolis, Portland, and Boston rank as the least diverse relative to the total United States.

*Diversity Index (Population that is Not Non-Hispanic White Compared to U.S. as a Whole)*



## 6.0

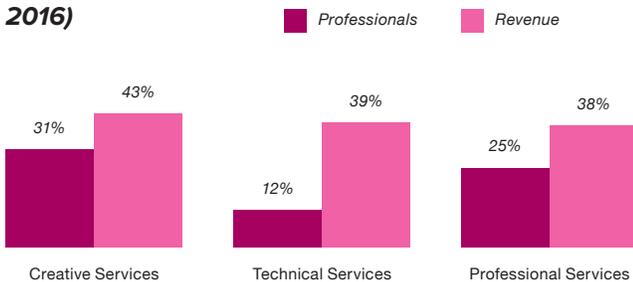
# Select Market Snapshots

## 6.1 Nashville, TN

Nashville, TN, is the fastest growing market for skilled independent workers revenue and the second-fastest growing market for the population (2011-2016).

- This growth is largely driven by skilled independents in creative services (with a 31% increase), followed by skilled independents providing professional services (25% increase).
- The number of skilled independent workers providing technical services grew much more modestly at 11%, though revenue growth was similarly high across all three groups.

### Growth in Workers & Revenue—Nashville (2011 to 2016)



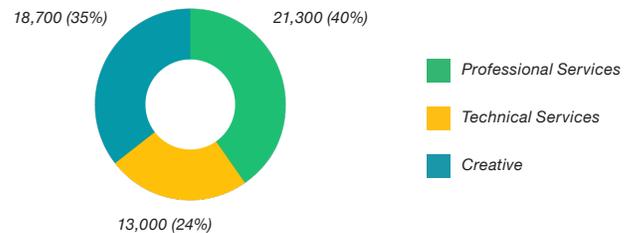
Nashville has a disproportionate number of creative skilled independent workers compared to the top 25 markets and the United States as a whole.

- In fact, though it ranks 24th out of the 25 top markets for total number of skilled independents

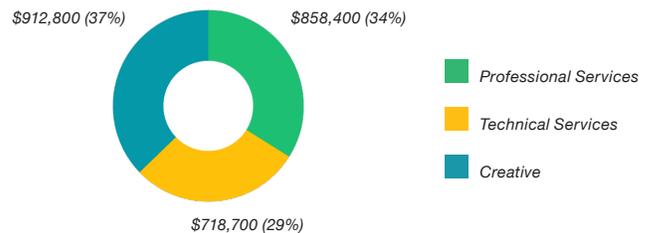
and 20th for total revenue, it ranks 13th for number of creative skilled independent workers and 4th for revenue from creative services.

- Nashville's skilled independents generate more revenue from creative services than either technical or professional services.

### Number of Workers by Category—Nashville (2018 Projected)



### Revenues (000s) by Category—Nashville (2018 Projected)



## 6.2 Austin, TX

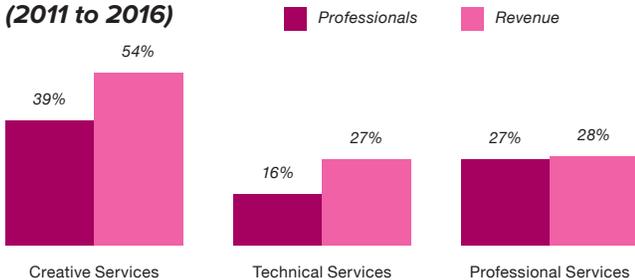
Austin, TX has the fastest growing population of skilled independent workers, and the second fastest growing for revenue.

- Austin is the fastest growing market for skilled independent workers, growing by 26% from 2011-2016. Austin is the second-fastest growing market on revenue, growing by 31% during that time.
- It is also the fastest growing market in total population of the top 25 markets for skilled independents, growing by 15% during the same time period.

Austin may be particularly appealing to skilled independent workers for its young adult population: it ranks first among the top 25 markets for its percentage of the adult population under the age of 40 (relative to the United States overall). This growth that Austin is experiencing is largely driven by skilled independents in creative services (with a 39% increase in the number and a 54% increase in revenues), such as performers and writers, significantly outpacing the growth of skilled independent workers in technical or professional services.

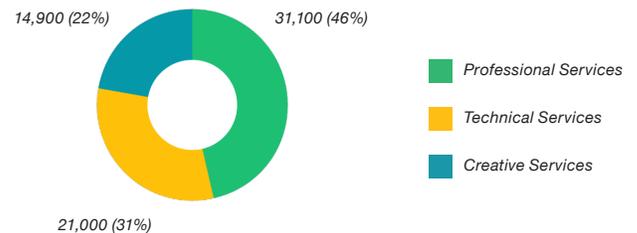
### Growth in Workers & Revenue—Austin

(2011 to 2016)

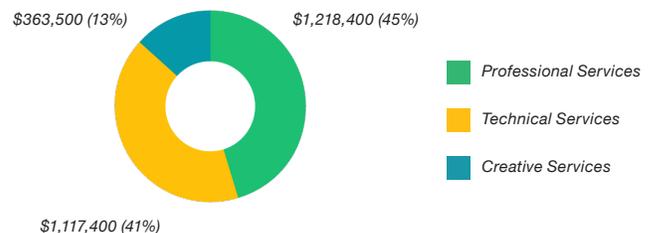


Despite the high growth in creative services, this group of skilled independent workers still lags technical and professional services in terms of number of workers and generates less than a third of the revenue that either independent technical services or professional services workers generate in Austin. Austin ranks 11th in revenues per worker at \$40,300; independent workers in this market generate about 10% more revenue per worker compared to the United States as a whole.

### Number of Workers by Category—Austin (2018 Projected)



### Revenues (000s) by Category—Austin (2018 Projected)

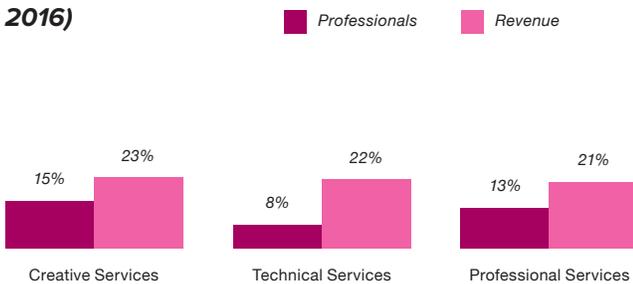


## 6.3 New York, NY

New York is the largest market for skilled independent workers by both number of workers and their revenues, but not the fastest growing.

- Skilled independent workers in New York earn over \$45,000 from their independent work per year, about \$9,000 more than the U.S. average for skilled independent workers.
- The market saw double digit growth in the number of creative and professional services skilled independent workers from 2011 to 2016, but growth in technical services lagged at only 8 percent.
- Sixty percent of the top 25 markets grew faster than New York from 2011 to 2016 by number of workers.

### Growth in Workers & Revenue—New York (2011 to 2016)

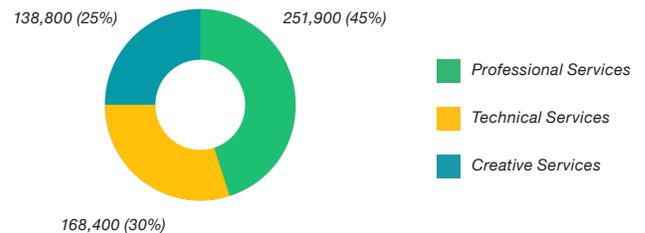


Despite lower growth in the number of skilled independents providing technical services, their revenue growth during the same time period was on par with that of those providing professional and creative services. This might suggest that the technical service workforce is more established compared to

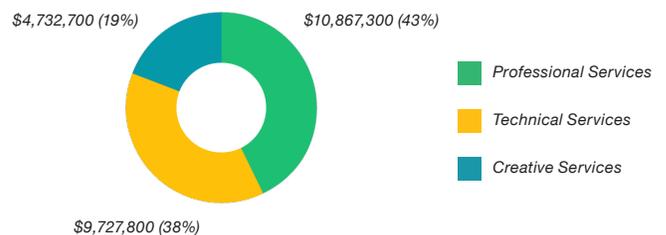
professional and creative services in New York. By revenue, New York's skilled independent workforce grew faster than 60 percent of the top 25 markets.

As the largest market for skilled independent workers, New York has a quarter of a million skilled independents working in professional services and over 100,000 each working in technical and creative services. However, skilled independents in professional services make up a smaller share of all skilled independent workers in New York compared to the average for the top 25 markets, and skilled independents in creative services make up a larger share compared to that average.

### Number of Workers by Category—New York (2018 Projected)



### Revenues (000s) by Category—New York (2018 Projected)



## Appendix

# Methodology

At the outset of the project, Rockbridge Associates 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 1. 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)
52122	Sound Recording Industries (C)	5416	Management, Scientific, and Technical Consulting Services (PS)
518		5418	Advertising, Public Relations, and Related Services (PS)
5191	Data Processing, Hosting, and Related Services (TS)	54191	Marketing Research and Public Opinion Polling (PS)
5411	Other Information Services (TS)	54192	Photographic Services (C)
5412	Legal Services (PS)	54199	Translation and Interpretation Services (TS)
54132	Accounting, Tax Preparation, Bookkeeping, and Payroll Services (PS)	5611	All Other Professional, Scientific, and Technical Services (TS)
54133	Architectural Services (TS)	56141	Office Administrative Services (PS)
54134	Landscape Architectural Services (TS)	56149	Document Preparation Services (PS)
54136	Engineering Services (TS)	611	
54137		7115	
5414		81292	

Rockbridge then analyzed annual datasets from 2011-2016 from the Non-Employer 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 over 20 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>3</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.

To identify the top 25 markets for skilled independent workers, Rockbridge first identified and analyzed the top 50 most populous metropolitan statistical areas in the United States, 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 50 metropolitan areas varies widely enough to ensure confidence that none are missing from the top 25 identified.

NES data for particular NAICS codes may be withheld from publication in the NES datasets for two reasons. First, the data will be suppressed if there are fewer than three non-employer businesses for any level of geography. Second, the data will be suppressed if more than 40 percent of either the receipts or establishments are from firms with an imputed industry classification.<sup>4</sup> For the years that Rockbridge examined in this analysis, the percentage of records that were suppressed ranged from 7% (2016) to 14% (2011-2014). Less than one percent of records were suppressed due to imputed industry classifications. When data for a particular NAICS industry were withheld from publication in the NES datasets for either reason, Rockbridge imputed the data using the percentage that the NAICS industry code makes up nationwide in the NES dataset.

Because NES data are released approximately 18 months after the end of the reference year, 2017 data

will not be available until June 2019 and 2018 data will not be available until June 2020. To estimate the number of skilled independent workers and their receipts in 2017 and 2018, Rockbridge utilized the most recently available market-level and US GDP data to apply a balancing weight to the growth rates for skilled independent workers from 2014-2016 to predict 2016-2018 growth rates, and then applied that to the actual number of workers and their receipts from 2016, the most recent year data are available.

### Table B. Sources

Independent workforce establishments and receipts (2011-2016)	U.S. Census Bureau. <i>Non-Employer 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> .
Top 50 metropolitan statistical areas by population (2016)	U.S. Census Bureau. <i>Population Division, Annual Estimates of the Resident Population: April 1, 2010 to July 1, 2015</i> . Retrieved from <a href="https://factfinder.census.gov/faces/tableservices/jsf/pages/productview.xhtml?src=bkmk">https://factfinder.census.gov/faces/tableservices/jsf/pages/productview.xhtml?src=bkmk</a> .
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[1] The NES data series uses the 2012 NAICS codes definitions.