Upwork commissioned Edelman Intelligence, an independent firm, to conduct the first Freelance Forward study, which is our seventh annual study of the U.S. freelance workforce,\(^1\) with these objectives:

1. Size the freelance workforce, assess how it fits within the overall U.S. economy, and investigate dynamics within it
2. Understand how 2020’s COVID-19 pandemic has impacted the composition of the freelance workforce
3. Deep dive into how freelancing provides economic opportunity
4. Assess the importance of education and skills training in a changing job environment
5. As the US labor market continues to evolve, look ahead to the future of the freelance workforce

This deck is organized in sections to detail results per objective.

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\(^1\) Prior studies of the freelance workforce were co-commissioned with the Freelancers Union under the name Freelancing in America. This study refers throughout to those prior studies, which are available at [https://www.upwork.com/i/freelancing-in-america/](https://www.upwork.com/i/freelancing-in-america/).
METHODOLOGY

• An online survey of 6,001 U.S. adults who have done paid work in the past 12 months
• Data collected June 15, 2020 – July 7, 2020 by independent research firm Edelman Intelligence
  • This is the seventh year the survey has been conducted, allowing for trend data. Data collected in the summers of 2014-2019 is referenced throughout the analysis and indicates the percentage point change compared to previous years.
  • Percentage point differences between waves are noted where applicable and noteworthy in the report.
• Results were weighted to ensure demographic representation in line with the United States Bureau of Labor Statistics’ 2019 Labor Force Statistics from the Current Population Survey and the American Community Survey.
• Margin of error: Overall: ±1.2% at the 95% level of confidence. Freelancers: ±2.1%, Non-freelancers: ±1.6%, Full-time freelancers: ±4.1%, Skilled freelancers: ±3.0%.
• Audiences surveyed:

  U.S. Workers Overall
  U.S. adults 18+ who have earned income from work within the past 12 months, including both freelancers and non-freelancers
  N=6,001

  Freelancers
  Individuals who have engaged in supplemental, temporary, project- or contract-based work, within the past 12 months
  N=2,132

  Non-freelancers
  Individuals who earned income through work but have not engaged in supplemental, temporary, project- or contract-based work, within the past 12 months.
  N=3,869
# Audience Glossary

<table>
<thead>
<tr>
<th>Group</th>
<th>Audience</th>
<th>Definition</th>
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</thead>
<tbody>
<tr>
<td><strong>General</strong></td>
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<tr>
<td><strong>Skilled Freelancing</strong></td>
<td>Skilled freelancers</td>
<td>Individuals that indicate that their current freelance work entails selling skilled services (e.g., computer programming, writing, design, IT, marketing, business consulting, etc.)</td>
</tr>
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<td></td>
<td>Non-skilled freelancers</td>
<td>Individuals who did not indicate that their current freelance work entails selling skilled services; their work includes a combination of selling unskilled services/labor or selling goods.</td>
</tr>
<tr>
<td><strong>Freelancing Status</strong></td>
<td>Full-time Freelancers</td>
<td>Individuals that describe their current freelance work status as “full-time freelancer.”</td>
</tr>
<tr>
<td></td>
<td>Part-time Freelancers</td>
<td>Individuals that describe their current freelance work status as “part-time freelancer.”</td>
</tr>
<tr>
<td><strong>Freelancing Types by COVID-19</strong></td>
<td>Always Freelancers</td>
<td>Individuals who have engaged in supplemental, temporary, project-or contract-based work, within the past 12 months and report still doing so after the onset of the COVID-19 pandemic.</td>
</tr>
<tr>
<td></td>
<td>Paused Freelancers</td>
<td>Individuals who have engaged in supplemental, temporary, project-or contract-based work, within the past 12 months but have not done freelance work since the onset of the COVID-19 pandemic.</td>
</tr>
<tr>
<td></td>
<td>New Freelancers</td>
<td>Individuals who report engaging in supplemental, temporary, project-or contract-based work for the first time since the onset of COVID-19 pandemic.</td>
</tr>
<tr>
<td><strong>Freelancer Classification</strong></td>
<td>Independent Contractors</td>
<td>“Traditional” freelancers who don't have an employer and instead do freelance, temporary, or supplemental work on a project-to-project basis.</td>
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<td>Moonlighters</td>
<td>Professionals with a primary, traditional job who also do freelance work. For example, a corporate-employed web developer who does projects for non-profits in the evening.</td>
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<td>People with multiple sources of income from a mix of traditional employers and freelance work. For example, someone who works part-time at a start-up, manages an Airbnb, and does freelance coding.</td>
</tr>
<tr>
<td></td>
<td>Freelance Business Owners</td>
<td>Freelancers with one or more employees and consider themselves to be a business owner. For example, a marketing guru who hires a team of other marketers to build a small agency, but still identifies as a freelancer.</td>
</tr>
<tr>
<td></td>
<td>Temporary Workers</td>
<td>Individuals with a single employer, client, job, or contract project where their employment status is temporary. For example, a data entry worker employed by a staffing agency who is working on a three-month assignment.</td>
</tr>
</tbody>
</table>
THE SIZE AND SCALE OF THE FREELANCE WORKFORCE IN 2020

59 million Americans freelanced in the past year

This is 36% of the total US workforce

$1.2 trillion in annual earnings from freelancing
COVID-19 has impacted all areas of the economy, including freelancing. As a result, 10% of the US workforce has paused freelancing.

**OF THE FREELANCERS THAT PAUSED...**

They were typically working in industries most impacted by social distancing and were in non-remote working situations.

- 41% were freelancing infrequently, doing so less than once a month.
- But, 88% are likely to freelance in the future.

51% of paused freelancers still have other sources of work, while 28% are on leave/furloughed or unemployed and 17% are students, homemakers, or retirees.
Although some paused, others saw freelancing as an opportunity during the global pandemic.

As a result, 12% of the US workforce started freelancing.

OF THOSE THAT STARTED…

Their motivations for starting are necessity (54%) and financial stability during this recession (75%).

They are more likely to come from tech/business industries and are more likely to be skilled.

Even in the few months they’ve been working, new freelancers report positive financial results and 96% are likely to freelance in the future.
THE IMPACT OF COVID-19: FREELANCERS' OVERALL AND ECONOMIC WELL-BEING

Compared to non-freelancers, freelancers are overall better equipped to weather the COVID-19 storm.

<table>
<thead>
<tr>
<th>Key findings</th>
</tr>
</thead>
<tbody>
<tr>
<td>Freelancers report lower rates of negative impact of COVID-19 on their overall lifestyle, well-being, mental health, and financial well-being.</td>
</tr>
<tr>
<td>An already established remote lifestyle is one of the driving factors behind this.</td>
</tr>
<tr>
<td>Among those still freelancing, business is healthy for many.</td>
</tr>
<tr>
<td>61% of those who freelanced pre- and during COVID-19 have the amount of work they want or more.</td>
</tr>
<tr>
<td>Given the emphasis on remote work, freelancers have had to adjust business development and networking strategies and have even had to consult their clients on ways of working remotely.</td>
</tr>
<tr>
<td>3 in 10 freelancers have applied for financial support and most found the support useful for their business.</td>
</tr>
</tbody>
</table>
Freelancing is a viable option for people in many situations.

Key findings

- Half of the Gen Z workforce have freelanced in the past year, and more than a third (36%) started since COVID-19.
- Even though most are part-time right now, 9 out of 10 Gen Z freelancers overall and those who started during COVID-19 are likely to continue doing freelance work in the future.

Freelancers age 55+ make up more than a quarter of all freelancers (26%), primarily doing skilled and project-based work.

- 65% of freelancers age 55+ see freelancing as a good way to transition into retirement and are less likely to be concerned about saving for retirement than their non-freelancing counterparts.

- 48% of freelancers report being caregivers while 33% report having a disability in their household, surpassing non-freelancers and US workers overall.
- 76% of caregivers who freelance say freelancing gives them more flexibility to be available for their families; 72% of freelancers with a disability in their household say freelancing gives them flexibility to address their personal, mental, or physical needs.

Half of the Gen Z workforce have freelanced in the past year, and more than a third (36%) started since COVID-19.

Even though most are part-time right now, 9 out of 10 Gen Z freelancers overall and those who started during COVID-19 are likely to continue doing freelance work in the future.
Freelancers have a wide portfolio of skills which allows them to build their business. 

- 54% say soft skills like communication and people skills are very important to their work.
- 47% say business skills are very important.

Constant skills education and training is a must - and a standard - for freelancers.

- 59% have participated in skills training in the last 6 months vs. 36% of non-freelancers.
- 51% of freelancers had participated in skills training during the pandemic vs. 28% non-FLs.

Tapping into freelance websites is a key strategy for success.

Before the pandemic, 1 in 4 skilled freelancers typically found work through freelance websites.

91% of skilled freelancers who have used freelance websites before and during the pandemic would recommend them to anyone starting out because…

✓ They can find work that is meaningful
✓ They can find trustworthy clients
✓ They can have access to tools/resources that help with project management and efficiency.
Remote work plays a role in driving consideration to freelancing

58% of non-freelancers new to remote work are considering freelancing in the future

They would consider it because…

✔ Remote working has made them more productive workers (73%)
✔ They want to continue working remote instead of returning to a traditional worksite (74%)
✔ They can earn extra income to cope with the impact of the pandemic on their personal finances (85%)

Freelancers themselves are positive about the future

86% of all freelancers say the best days are ahead for freelancing, 90% among new freelancers

71% say perceptions of freelancing as a career are becoming more positive, 74% among skilled freelancers
Section 1

STATE OF THE FREELANCE WORKFORCE
TO UNDERSTAND THE FREELANCE WORKFORCE, WE MUST FIRST ASSESS THE DAMAGE OF COVID-19 ON THE OVERALL US WORKFORCE - UNEMPLOYMENT RATES REACHED DOUBLE DIGITS AT A RAPID PACE

US Civilian Unemployment Rate

Showing civilian unemployment rate, seasonally adjusted, 16 years or older
Note: Shaded area represents recession, as determined by the National Bureau of Economic Research

In 18 months, unemployment rate jumped 4.5ppts

Dec '07: 5%
Ju '09: 9.5%

Between February and June 2020, unemployment rate jumped by 7.6ppts

Feb '20: 3.5%
Apr '20: 14.7%

Note: June 2020 is when the survey was fielded

Data sourced from Bureau of Labor Statistics
Showing civilian unemployment rate, seasonally adjusted, 16 years or older
ECONOMIC OPTIMISM IN THE US HAS SIGNIFICANTLY DROPPED

CURRENT ECONOMIC INDEX
Reflects respondent perceptions of current economic climate, ability to make household purchases, job security, and investment confidence.

EXPECTATIONS INDEX
Reflects respondent attitudes regarding the future local economy, future financial situation, and job loss expectations.

Since beginning of 2020, Americans’ confidence in the current economy dropped by 19.2 index points.

Data sourced from Ipsos Consolidated Economic Indicators report, collected in a monthly survey of consumers via Ipsos’ Global advisor online survey platform. Data is based on 1,000+ individuals in the United States, aged 18-74. For more details on methodology here.
BUT DESPITE RECENT SHORT-TERM HIGH US LABOR MARKET UNEMPLOYMENT - THOSE WHO FREELANCED IN THE PAST YEAR REMAINS STABLE AT 36%

<table>
<thead>
<tr>
<th>Year</th>
<th>Total Freelancers</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>2014</td>
<td>53M</td>
<td>34%</td>
</tr>
<tr>
<td>2015</td>
<td>53.7M</td>
<td>34%</td>
</tr>
<tr>
<td>2016</td>
<td>55M</td>
<td>35%</td>
</tr>
<tr>
<td>2017</td>
<td>57.3M</td>
<td>36%</td>
</tr>
<tr>
<td>2018</td>
<td>56.7M</td>
<td>35%</td>
</tr>
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<tr>
<td>2020</td>
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</table>

36% of American workers freelance.
WHILE THE OVERALL FREELANCE WORKFORCE SIZE HAS REMAINED CONSISTENT IN THE PAST YEAR, THE PROPORTION OF THOSE WHO REPORT FREELANCING FULL-TIME IS GROWING

Level of Freelance Work
(% calculated among total freelancers)

- Full-time freelancers
- Part-time freelancers
- Full-time employees who earn extra income from freelance work


Full-time freelancers: 19% (59%), 20% (50%), 25% (51%), 29% (53%), 28% (50%), 28% (44%), 25% (48%) +4ppts since 2019 36% +8ppts since 2014 +19ppts since 2014

Part-time freelancers: 26% (17%), 25% (20%), 29% (19%), 28% (16%), 28% (20%), 28% (25%), 14% -11 ppts since 2019

Full-time employees who earn extra income from freelance work: 14% (19%), 20% (16%), 25% (20%), 28% (28%), 44% (48%)
THIS TREND IS REFLECTED IN THE EXPANSION OF “DIVERSIFIED WORKER” FREELANCERS AND THE CONTRACTION OF FREELANCERS WHO HAVE A PRIMARY JOB BUT FREELANCE ON THE SIDE

Freelancer Classification
(% calculated out of total freelancers)

-5 ppts since 2019

- Temporary Workers, 5%
- Freelance Business Owners, 6%

+6 ppts since 2019

- Moonlighters 21%
- Diversified Workers 36%
- Independent Contractors 32%

Professionals with a primary, traditional job who also do freelance work. For example, a corporate-employed web developer who does projects for non-profits in the evening.

People with multiple sources of income from a mix of traditional employers and freelance work. For example, someone who works part-time at a start-up, manages an Airbnb and does freelance coding.

“Traditional” freelancers who don’t have an employer and instead do freelance, temporary, or supplemental work on a project-to-project basis.

Base: Total Freelancers n=2132
As a freelancer now, do you earn more or less than when you had an employer?  
[Freelancers who left an employer to freelance]

- More: 65% (+5 ppts since 2019)
- Less: 25%
- Same: 10%

How long did it take you to earn more as a freelancer than you did with an employer?  
[Freelancers who make more after quitting a job in order to freelance]

- Immediately: 34%
- Less than 6 months: 23%
- 6 months to 1 year: 18%
- 1 to 2 years: 9%
- More than 2 years: 16%

3 in 10 freelancers quit or left a job with an employer in order to freelance (30%)
MANY ARE FREELANCING MORE FREQUENTLY AND, ON AVERAGE, HAVE MORE CLIENTS THAN IN 2019

**Frequency of Freelance Work**
 (% calculated among total freelancers)

- **Daily**: 37%
- **Weekly**: 32%
- **Bi-weekly**: 11%
- **Monthly**: 10%
- **Less than monthly**: 10%

+6 points since 2019
+11 points since 2014

**Number of Clients in Past 6 Months**
 (% calculated among total freelancers)

- **5+ clients**
  - 2019: 55%
  - 2020: 58%
- **<5 clients**
  - 2019: 45%
  - 2020: 42%

+3 points since 2019

---

Q24: How often do you engage in freelancing?

Q31_8: Approximately, how many different clients have you had in the past six months as part of your freelance work?

Base: Total freelancers n=2132
FREELANCERS HAVE CONTRIBUTED MORE THAN A TRILLION DOLLARS TO THE US ECONOMY IN ANNUAL EARNINGS – A 22% INCREASE IN CONTRIBUTED EARNINGS SINCE 2019

$1.2 trillion
(calculated among total freelancers)
in annual earnings from freelancing
(vs. $984 billion in annual earnings reported in 2019)

$20.00
Median hourly rate among freelancers overall

$25.00
Median hourly rate among skilled freelancers

45% Are paid on a fixed fee
23% Both fixed/hourly
32% Are paid hourly

(% calculated among total freelancers)

-3 points since 2019
+3 points since 2019

Q31_2: Over the past year, how much money did you earn in total from freelancing, before taxes or other deductions? Annual earnings calculated by multiplying the total number of freelancers by the average annual income from freelance work. / Q31_2b_19: How do you typically get paid for your work? / Q31_2c_19: How much do you currently charge on an hourly basis? (If you currently get paid with a fixed fee, please convert that into an hourly figure as best you can) // Base: Freelancers n=2132
...AND MOST FREELANCERS FEEL THEY MAKE THE SAME OR MORE THAN THEY WOULD BE MAKING AT A TRADITIONAL EMPLOYER

3 in 5 (60%)

freelancers say they make the same or more than they’d make working for a traditional employer

+7 points since 2019

More than half (57%)

of skilled freelancers say they set their own prices

More than 2 in 5 (44%)

skilled freelancers say they have raised their rates during the past year

Q29b_19: Do you think you currently make more or less as a freelancer than you’d make working for a traditional employer? / Q31_2a_19: Who typically sets the price for your work? / Q31_3: Did you raise your rate (i.e., how much you charge for your freelancing work) during the past year?
Base: Freelancers n=2132, Skilled freelancers n=1067
FOR MANY, FREELANCING CONTINUES TO BE A LONG-TERM CAREER CHOICE

Which is closer to how you view freelancing?
[calculated among total freelancers]

Temporary  Long-term career

Which is closer to how you view freelancing?
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THE COMPOSITION OF THE FREELANCING WORKFORCE IS ALSO CHANGING...

They’re getting younger

% of US Workers doing Freelance Work by Generation
(% calculated out of total US workers in each generation group)

<table>
<thead>
<tr>
<th>Generation</th>
<th>Freelance (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Gen Z (18-22)</td>
<td>50%</td>
</tr>
<tr>
<td>Millennials (23-38)</td>
<td>44%</td>
</tr>
<tr>
<td>Gen X (39-54)</td>
<td>30%</td>
</tr>
<tr>
<td>Boomers (55+)</td>
<td>26%</td>
</tr>
</tbody>
</table>

HOW TO READ: 50% of Gen Z workers have done freelance work in the past year

+4pps since 2019

They’re becoming more “skilled”

Freelance work typically entails...
(% calculated out of total freelancers)

<table>
<thead>
<tr>
<th>Service Type</th>
<th>Freelance (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Providing skilled services</td>
<td>50%</td>
</tr>
<tr>
<td>Providing unskilled services</td>
<td>37%</td>
</tr>
<tr>
<td>Selling goods</td>
<td>28%</td>
</tr>
<tr>
<td>Other activities</td>
<td>17%</td>
</tr>
</tbody>
</table>

Note: Responses do not add up to 100% as multiple selections are allowed

+5pps since 2019

Post-grads are most likely to freelance

Percentage of workers among each education group who freelance
(% calculated out of total US workers)

<table>
<thead>
<tr>
<th>Education Level</th>
<th>Freelance (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>HS grad or less</td>
<td>37%</td>
</tr>
<tr>
<td>Some college + associate degree</td>
<td>32%</td>
</tr>
<tr>
<td>Bachelor’s degree</td>
<td>32%</td>
</tr>
<tr>
<td>Post grad</td>
<td>45%</td>
</tr>
</tbody>
</table>

HOW TO READ: 40% of post-grads are freelancers

+4pps since 2019

More are living in urban areas

Area Living In
(% calculated out of total freelancers)

<table>
<thead>
<tr>
<th>Area</th>
<th>Freelance (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Urban</td>
<td>43% +7 ppts</td>
</tr>
<tr>
<td>Suburban</td>
<td>41% -3 ppts</td>
</tr>
<tr>
<td>Rural</td>
<td>16% -4 ppts</td>
</tr>
</tbody>
</table>

Note: Responses do not add up to 100% as multiple selections are allowed

Q2: What is your current age? // Base: Gen Z workers n=482, Millennial workers n=2086, Gen X workers n=1992, Boomer+ workers n=1440
Q71: What type of area do you currently live in?; Q22b_19: What does your freelance work entail? / Q68: What is the highest level of school you have completed or the highest degree you have received? // Base: Freelancers n=2132, Total US Workers n=6001

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Section 2

THE CHANGING FREELANCE WORKFORCE DUE TO COVID-19
AMIDST COVID-19, FREELANCING OFFERS CONSISTENCY AND NEW CAREER OPPORTUNITIES

36% of the American workforce are freelancers

PAUSED FREELANCERS: Did freelance work in past year, but not since the onset of the pandemic

28% Paused Freelancers (10% of total US workers surveyed)

NEW FREELANCERS: Started doing freelance work as of March 2020, at the onset of the pandemic

34% New Freelancers (12% of total US workers surveyed)

ALWAYS FREELANCERS: Did freelance work in the past year and still freelancing during the pandemic

39% Always Freelancer (14% of total US workers surveyed)

January February March April May June

COVID-19

NEW FREELANCERS:

AMIDST COVID-19, FREELANCING OFFERS CONSISTENCY AND NEW CAREER OPPORTUNITIES

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January February March April May June

COVID-19

NEW FREELANCERS:
WHY HAVE SOME FREELANCERS PAUSED THEIR FREELANCING WORK?
THOSE WHO PAUSED FREELANCING SKEW IN OCCUPATIONS IMPACTED BY SOCIAL DISTANCING WHILE NEW FREELANCERS ARE IN FINANCE & BUSINESS OPERATIONS AND COMPUTERS & MATH

Paused freelancers skew more towards...

New freelancers skew more towards...

How to Read: Paused FLs are 7% more likely than new FLs to be in education

How to Read: New FLs are 4% more likely than paused FLs to be in finance
FREELANCERS WHO WERE NOT WORKING REMOTELY BEFORE COVID-19 WERE TWICE AS LIKELY TO HAVE PAUSED FREELANCING COMPARED TO THOSE WORKING REMOTELY

Pre-COVID, did you do any work remotely? (% calculated among total freelancers)

- Remote: 44%
- Not Remote: 36%

44% of freelancers not working remotely before COVID-19 have paused freelance work since the onset of the pandemic (vs. 20% of freelancers working remotely who paused freelance work)

Q23a_19: Thinking about your work pre-COVID (before March 2020), did you do any work remotely?
Q28_20: Due to the COVID-19 pandemic, have you been required to work remotely from your home?
Base: Total Freelancers n=2132, Paused FLs n=591
**THE MAJORITY OF NEW FREELANCERS ARE WORKING REMOTELY**

Remote Working Status Pre & During COVID-19

- **Always FLs**: 24% Remote and Still Remote, 20% Not Remote and STILL Remote, 11% Remote and Not Remote Anymore, 45% Not Remote and Still NOT Remote
- **Paused FLs**: 40% Remote and Still Remote, 17% Not Remote and Now Remote, 17% Remote and Not Remote Anymore, 26% Not Remote and Still NOT Remote
- **New FLs**: 82% are currently remote, 9% are currently NOT remote, 10% are currently NOT remote

**Q23a_19**: Thinking about your work pre-COVID (before March 2020), did you do any work remotely?

**Q28_20**: Due to the COVID-19 pandemic, have you been required to work remotely from your home?

Base: Total Freelancers n=2132, Always FLs n=827, Paused FLs n=591, New FLs n=714
TWO IN FIVE PAUSED FREELANCERS WERE TYPICALLY FREELANCING LESS THAN ONCE PER MONTH

Frequency of Freelancing

- **Daily**
  - Always FLs: 19%
  - Paused FLs: 41%
  - New FLs: 47%
- **Weekly**
  - Always FLs: 26%
  - Paused FLs: 34%
  - New FLs: 34%
- **Bi-weekly**
  - Always FLs: 10%
  - Paused FLs: 14%
  - New FLs: 10%
- **Monthly**
  - Always FLs: 10%
  - Paused FLs: 15%
  - New FLs: 6%
- **Less than monthly**
  - Always FLs: 5%
  - Paused FLs: 26%
  - New FLs: 4%

Q24: How often do you engage in freelancing?
Base: Always FLs n=827, Paused FLs n=591, New FLs n=714
“DIVERSIFIED WORKERS” HAD THE LARGEST INCREASE IN FREELancers DUE TO COVID-19, WHILE “TEMPORARY WORKERS,” “MOONLIGHTERS,” AND “INDEPENDENT CONTRACTORS” HAD THE LARGEST DECLINES

% Always, Paused, and New Freelancers Across Classifications (% calculated out of each freelancer classification group)

Those who paused freelancing were typically doing projects on a contract basis (Independent Contractors) or had a full-time job and were freelancing on the side (Moonlighters)

HOW TO READ: 58% of all “Diversified Workers” started freelancing during COVID-19

New FLs: Green
Paused FLs: Red
Always FLs: Orange

% of Freelancers:

- Independent Contractor:
  - New FLs: 16%
  - Paused FLs: 33%
  - Always FLs: 51%

- Moonlighter:
  - New FLs: 22%
  - Paused FLs: 33%
  - Always FLs: 45%

- Diversified Worker:
  - New FLs: 58%
  - Paused FLs: 17%
  - Always FLs: 25%

- Temporary Worker:
  - New FLs: 18%
  - Paused FLs: 60%
  - Always FLs: 22%

- Freelance Business Owner:
  - New FLs: 28%
  - Paused FLs: 22%
  - Always FLs: 50%

Base: Total Freelancers n=2132, Paused FLs n=59, New FLs = 714
TOP REASONS WHY SOME PAUSED FREELANCING - BY FREELANCER CLASSIFICATION
Some industries were temporarily hit harder by COVID-19 than others

<table>
<thead>
<tr>
<th>PAUSED INDEPENDENT CONTRACTORS</th>
<th>PAUSED Moonlighter</th>
<th>PAUSED Diversified Workers</th>
<th>PAUSED Temporary Workers</th>
<th>PAUSED Business Owners</th>
</tr>
</thead>
<tbody>
<tr>
<td>60% are in jobs that can't be made remote</td>
<td>80% still have their main employer to lean on</td>
<td>“Diversified workers” are the least impacted by COVID-19 because they have multiple employers, leading to flexibility</td>
<td>Those whose short-term freelance contract has ended</td>
<td>Those impacted were small business owners (1-5 employees) in industries like art or construction</td>
</tr>
<tr>
<td>Occupations like transportation, maintenance, arts &amp; design, entertainment, and personal care (e.g. hairdressing) were most impacted</td>
<td>They have put a pause on their freelance work while waiting for the pandemic to subside with 90% expecting to do freelance work in the future</td>
<td>89% expect to do freelance work in the future</td>
<td>Fluctuations in freelance work is a regular part of life for these “temporary workers”</td>
<td></td>
</tr>
<tr>
<td>88% expect to do freelancing work in the future</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Base: Total Freelancers n=2132, Paused FLs n=591
Employment Status During COVID-19
[\% calculated among paused and total freelancers, multiple responses accepted]

- **Employed full-time**
  - Total Freelancers: 49\%
  - Paused Freelancers: 35\%
- **Employed part-time**
  - Total Freelancers: 19\%
  - Paused Freelancers: 16\%
- **Full-time students, homemakers, or retirees**
  - Total Freelancers: 17\%
  - Paused Freelancers: 10\%
- **On leave or furloughed temporarily**
  - Total Freelancers: 9\%
  - Paused Freelancers: 4\%
- **Unemployed or out of the labor force**
  - Total Freelancers: 19\%
  - Paused Freelancers: 9\%

- **Pause Freelancers**
  - 33\%

Note: Full-time students, homemakers, or retirees are defined as those not employed. Similarly, those unemployed or out of the labor force don’t include those who are students, homemakers, or retirees. Answer choices not listed above include Other, Freelancer, and Contractor.

Base: Total Freelancers n=2132, Paused FLs n=591

Q3a_20: We understand that COVID-19 may have impacted your employment status. Which of the following best describes your current employment status?

- Employment Status During COVID-19
- 51\% of paused freelancers are currently employed elsewhere
- 28\% of paused freelancers are on leave/furloughed or unemployed
PAUSED FREELANCERS ARE MOST LIKELY TO VIEW THEIR FREELANCE CAREERS AS TEMPORARY

Which is closer to how you view freelancing?

- **A long-term career choice**
  - Total Freelancers: 47%
  - Always Freelancers: 54%
  - Paused Freelancers: 36%
  - New Freelancers: 48%

- **Temporary way of making money**
  - Total Freelancers: 53%
  - Always Freelancers: 46%
  - Paused Freelancers: 64%
  - New Freelancers: 52%

Q36: Which is closer to how you view freelancing? Options: A temporary way to make money; A long-term career choice

Q29_20: Which is closest to the reason you started freelancing since the onset of the COVID-19 pandemic in early March 2020? Options: Choice; Necessity

Base: Total Freelancers n=2132, Always FLs n=827, Paused FLs n=591, New FLs n=714
GIVEN THAT MANY PAUSED THEIR FREELANCING WORK DUE TO THE PANDEMIC, MOST PLAN TO RETURN IN THE FUTURE

88% of paused freelancers are likely to do freelance work in the future (54% are very likely)

Q21C_19: In general, how likely are you to do any freelance work in the future?
Base: Total Freelancers n=2132, Paused FLs n=591
WHO IS THIS NEW WAVE OF FREELANCERS?
**This new wave of freelancers skew male, millennial, and urban**

- **72% Male**
  - vs. 62% Always freelancers who are male

- **67% are caregivers**
  - vs. 38% Always freelancers who are caregivers

- **60% Urban**
  - vs. 35% Always freelancers who live in urban areas

**Generations by Always and New FLs**
- **New FLs**:
  - Gen Z (18-22):
    - Always FLs: 9%
    - New FLs: 37%
  - Gen X (39-54):
    - Always FLs: 30%
    - New FLs: 30%
  - Millennials (23-38):
    - Always FLs: 24%
    - New FLs: 27%
  - Boomers (55+):
    - Always FLs: 12%
    - New FLs: 3%

**Education Levels by Always and New FLs**
- **New FLs**:
  - Some college or Associate Degree:
    - Always FLs: 37%
    - New FLs: 21%
  - Bachelor's Degree:
    - Always FLs: 27%
    - New FLs: 15%
  - Post Graduate Degree:
    - Always FLs: 24%
    - New FLs: 18%

**Caregiver Status by Always and New FLs**
- **Yes – to my parents**:
  - Always FLs: 13%
  - New FLs: 25%
- **Yes – to a child/children**:
  - Always FLs: 24%
  - New FLs: 44%
- **No**:
  - Always FLs: 62%
  - New FLs: 33%

*Note: Multi-Select Question*
NEW FREELancers HAVE ALSO TAKEN ON MORE SKILLED JOBS THAN ALWAYS OR PAUSED FREELancers

What does your freelance work entail?  
[multiple responses accepted]

<table>
<thead>
<tr>
<th></th>
<th>Selling skilled services/labor</th>
<th>Selling unskilled services/labor</th>
<th>Selling goods</th>
<th>Other activities</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Always Freelancer</strong></td>
<td>29%</td>
<td>23%</td>
<td>10%</td>
<td>6%</td>
</tr>
<tr>
<td><strong>Paused Freelancer</strong></td>
<td>29%</td>
<td>23%</td>
<td>10%</td>
<td>6%</td>
</tr>
<tr>
<td><strong>New Freelancer</strong></td>
<td>29%</td>
<td>23%</td>
<td>10%</td>
<td>6%</td>
</tr>
</tbody>
</table>

Q22b_19: What does your freelance work entail?  (Multiple responses accepted)

Note: Total % who do this type does not always add up because of rounding
Base: Total Freelancers n=2132, Always FLs n=827, Paused FLs n=591, New FLs n=714
MORE THAN HALF OF NEW FREELANCERS BEGAN FREELANCING DUE TO MAJOR LIFE EVENTS SUCH AS FINISHING THEIR EDUCATION OR BEING LAID OFF

When did you start freelancing?
(showing top 5 reasons, % calculated among each freelancer group)

- **New FLs**
- **Always FLs**

<table>
<thead>
<tr>
<th>Reason</th>
<th>New FLs</th>
<th>Always FLs</th>
</tr>
</thead>
<tbody>
<tr>
<td>During or right after finishing my education</td>
<td>32%</td>
<td>19%</td>
</tr>
<tr>
<td>Unrelated to a major life event</td>
<td>8%</td>
<td>26%</td>
</tr>
<tr>
<td>After being laid off/losing a job</td>
<td>22%</td>
<td>16%</td>
</tr>
<tr>
<td>After a significant family change other than becoming a caregiver / parent</td>
<td>13%</td>
<td>8%</td>
</tr>
<tr>
<td>After becoming a parent and / or needing to focus more time on my child(ren)</td>
<td>8%</td>
<td>7%</td>
</tr>
</tbody>
</table>

Base: Always FLs n=827, New FLs n=714
DRIVEN BY FINANCIAL NECESSITY, THIS NEW GROUP SHOWS HOW FREELANCING CAN BE A Viable SOLUTION FOR SOURCING NEW INCOME

85%

Of new freelancers say they are likely to consider freelancing in the future as an extra source of income to cope with the impact of the pandemic on their personal finances (vs. 79% always freelancers)

Q48: Which is closer to the reason you originally started freelancing? Options: Choice; Necessity / Q29_20: Which is closest to the reason you started freelancing since the onset of the COVID-19 pandemic in early March 2020? Options: Choice; Necessity / Q35b: In general, please indicate the degree to which each of the following is a reason why you freelance? / Q80_20POST: Due to the many ways the COVID-19 pandemic has impacted Americans, please indicate how likely you are to do any freelance work in the future for the following reasons. // Base: Always FLs n=827, New FLs n=714
EVEN IN A FEW SHORT MONTHS, FREELANCING IS PROVING TO BE A LUCRATIVE OPPORTUNITY FOR NEW FREELANCERS

59% of new freelancers feel they make more money as a freelancer than they’d be making from a traditional employer

More than a third of new freelancers have more work than they want during the pandemic (37%)

72% of new freelancers believe their income will increase in the coming year

---

Q29b_19: Do you think you currently make more or less as a freelancer than you’d make working for a traditional employer? Q30c_20: Which of the following best describes the amount of work you currently have during the COVID-19 pandemic? / Q44_2: Please indicate your agreement with the following statements about freelancing. I expect my income from freelancing to increase in the coming year. Base: Always FLs n=827, New FLs n=714
NEARLY HALF OF NEW FREELANCERS ARE ALREADY SEEING FREELANCING AS BOTH A FULL-TIME AND LONG-TERM CAREER OPPORTUNITY

Freelance Work Status

- Full-time freelancer
- Part-time freelancer
- Full-time employee who earns extra income from freelance work

Always FLs

- 56%
- 40%

New FLs

- 48%
- 11%

48% of new freelancers say they view freelancing as a long-term career choice (54% always freelancers)

Q31: Which of the following best describes your current freelance work? (Asked among those still freelancing during COVID-19) / Q36: Which is closer to how you view freelancing? Options: A temporary way to make money; A long-term career choice

Base: Always FLs n=827, New FLs n=714
96% of new freelancers are likely to do more freelance work in the future

60% of new freelancers agree that there is no amount of money that would convince them to take a traditional job

Q21C_19: In general, how likely are you to do any freelance work in the future?
Q44_2: Please indicate your agreement with the following statements about freelancing- There is no amount of money that would convince me to take a traditional job.
Base: New FLs n=714
HOW IS COVID-19 IMPACTING FREELANCERS’ OVERALL WELLBEING?
ACROSS THE BOARD, FREELANCERS REPORT A LOWER NEGATIVE IMPACT FROM COVID-19 COMPARED TO NON-FREELANCERS ON THEIR...

% Negative Impact from Pandemic

Overall Well-being
- Non-freelancers: 38%
- Freelancers: 47%

Overall Lifestyle
- Non-freelancers: 58%
- Freelancers: 47%

Mental Health
- Non-freelancers: 49%
- Freelancers: 41%

Economic/Financial Well-being
- Non-freelancers: 50%
- Freelancers: 44%

Q80_20: How much of an impact has the coronavirus pandemic had on your...
Base: Total Freelancers n=2132, Non-Freelancer= 3869
In 2019, we saw that freelancers and non-freelancers reported similar levels of concern around things like saving for retirement, saving money, accessing healthcare, etc., but in 2020 non-freelancers are more concerned about…

(\% showing very or somewhat concerned, among total freelancers and non-freelancers)

FREELANCERS ALSO REPORT BEING LESS CONCERNED ABOUT THE FUTURE THAN NON-FREELANCERS

Q78_1_19: Please indicate to what extent you are concerned about each of the following issues.
Base: Total Freelancers n=2132, Non-Freelancer= 3869
WHY IS THIS THE CASE? IT COULD BE THAT FREELANCERS WERE MORE ACCUSTOMED TO THE WAYS OF REMOTE WORK PRE-COVID

Which best describes your work, pre-COVID? (% calculated among remote workers)

- All of my work was done remotely: 54%
- 50% or more of my work was done remotely: 74%
- About 50% of my work was done remotely: 9%
- Less than 50% of my work was done remotely: 7%
- Remote work was done highly occasionally on a case-by-case basis: 2%
- No work done remotely: 4%

Freelancers vs. Non-freelancers

Q23a_19: Thinking about your work pre-COVID (before March 2020), did you do any work remotely?
Q23b_20: Which of the following typically best describes your work, pre-COVID (before March 2020)?
Base: Remote workers pre-COVID: Freelancers n=1372, Non-freelancers n=1025
55% of freelancers agree that due to the unpredictable nature of being a freelancer, they feel it has prepared them to cope with the uncertainty of the coronavirus pandemic better than those in traditional jobs (67% among full-time freelancers).

% Who worked remotely pre-COVID and post onset of COVID-19
(% calculated among total freelancers and non-freelancers)

- Freelancers:
  - Pre: 36% worked remotely, 64% did not
  - Post: 39% worked remotely, 61% did not

- Non-freelancers:
  - Pre: 74% worked remotely, 26% did not
  - Post: 59% worked remotely, 41% did not

15ppts increase among non-freelancers in remote work from pre to post onset of COVID-19
**THE SHIFT TO REMOTE WAYS OF LIFE DUE TO THE PANDEMIC HAS IMPACTED FREELANCERS’ ABILITY TO FIND WORK THROUGH NETWORKING**

*Networking was a main channel for finding work pre-COVID, but since then, sourcing work through these channels has declined*

- **Pre-COVID:** 76% of *always* and *paused* freelancers have typically found work through professional contacts, friends/family, or previous employers/clients
- **During COVID-19:** 60% of *always* and *new* freelancers have found work through those same sources since the onset of COVID-19

---

**Q59:** Where do you typically go to find freelance work? (asked among Always and Paused freelancers only)

**Q60_20:** Through which of the following resources, if any, have you found freelance work since the onset of COVID-19 (since early March 2020)? (asked of Always and New freelancers only)

Base: Total Freelancers n=2132, Always and Paused FLs n=1418, Always and New FLs n=1541
SINCE NETWORKING IS AN IMPORTANT TOOL FOR FINDING FREELANCE WORK, SOME FREELANCERS HAVE HAD TO REEVALUATE THEIR BUSINESS DEVELOPMENT MODELS IN A REMOTE WORKING ENVIRONMENT

- **34%** of all freelancers have had to understand how their industry is changing due to the COVID-19 environment (+3ppts among freelancers new to remote working)

- **24%** of all freelancers have had to strengthen or learn how to network in a remote environment (+6ppts among freelancers new to remote working)

- **20%** of all freelancers have had to strengthen or learn how to rebuild their client network in a remote work environment

Q74_20: What skills or areas have you had to strengthen or learn due to the COVID-19? Base: Total Freelancers n=2132, Freelancers new to remote working n=251
BUT DESPITE NOT BEING ABLE TO NETWORK IN THEIR TYPICAL WAYS, ACTIVE FREELANCERS ARE ADAPTING WELL TO THIS NEW ENVIRONMENT - THEY ARE FINDING NEW CLIENTS AND JUMPING ON NEW OPPORTUNITIES

61%

of those who *freelanced pre- and during COVID-19* feel they have the amount of work they want or more work than they want during the pandemic

65%

of skilled freelancers who were freelancing pre- and during COVID-19 say their hours have either stayed the same or increased since the onset of the pandemic

45%

of skilled freelancers who were freelancing pre- and during COVID-19 say that they do more skilled work since the onset of the pandemic

30%

of new freelancers who started amidst COVID-19 saw a business opportunity unique to the pandemic

Q30a_20: Which of the following statements describe your working hours since the onset of COVID-19 (i.e., since early March 2020)? (asked only among Always freelancers) / Q30c_20: Which of the following best describes the amount of work you currently have during the COVID-19 pandemic? / Q27_20: How has the amount of skilled or unskilled freelance work you do changed since the start of the COVID-19 pandemic in early March 2020? // Always FLs n=827, Always Skilled FLs n=430, New FLs n=714
89% of freelancers say that they are likely to continue freelancing in the future because “working remotely has made me a more productive worker”

(85% of among freelancers new to remote working)
During COVID-19, active freelancers have had to consult or train their clients on how to...

40% Work remotely

29% Manage projects online

27% Appropriately use online communication or video conferencing platforms

Q76: Since the onset of the COVID-19 pandemic in early March 2020, what areas, if any, have you had to consult or train your clients on? (Asked among Always and New freelancers only) Base: Always and New FLs n=1541
2 in 5 (43%) freelancers say COVID-19 has had a negative impact on their economic and financial wellbeing.

1 in 5 (21%) freelancers have had to withdraw from their savings or retirement fund.

1/3 (33%) of those freelancing pre- and during COVID-19 say that their work hours have decreased since the onset of COVID-19.

DESPITE FREELANCERS ADAPTING WELL TO THE COVID-19 ENVIRONMENT, FINANCIAL SECURITY HAS STILL BEEN A CHALLENGE FOR SOME
REGARDLESS OF PERSONAL EXPERIENCES DURING COVID-19, OVERALL, FREELANCERS REPORT FEELING SUPPORTED BY AVAILABLE FINANCIAL RESOURCES

3 in 10 (30%) freelancers have applied for financial support due to COVID-19

- 12% applied for a personal finance loan
- 12% applied for the Paycheck Protection Program (PPP)
- 11% applied for a small business loan or grant through the federal government
- 9% applied for a small business loan or grant through their state

Of those that sought support through these channels, a majority found them useful – Unemployment Insurance was the least useful with 12% still waiting for a response to their unemployment claims and 19% not finding the program useful.

Most freelancers feel supported by local, state, and government officials

Significantly more than non-freelancers, across the board
Section 3

FREELANCING OPPORTUNITIES ACROSS DEMOGRAPHICS
AMIDST THE TOUGH JOB MARKET FOR GRADS, COLLEGE AGE WORKERS HAVE SOUGHT OUT FREELANCING OPPORTUNITIES

36% of Gen Z freelancers started during COVID-19
among total Gen Z Freelancers

Vs. 44% Millennials, 33% Gen X, 6% Baby Boomers+

When did you start freelancing?
[among freelancers within each generation]

- During or right after finishing my education
- Unrelated to a major life event
- After being laid off/losing a job
- After a significant family change other than becoming a caregiver/parent
- After becoming a parent and/or needing to focus more time on my child(ren)

Gen Z
- 36%
  - 42% among New Gen Z FLs*
  - 28%
  - 19%
  - 8%

Millennials
- 20%
  - 17%
  - 18%
  - 24%

Gen X
- 11%
  - 19%
  - 17%

Boomers+
- 7%
  - 11%
  - 9%
  - 6%
  - 7%
  - 5%

Base: Gen Z freelancers n=240, Millennial freelancers n=923, Gen X freelancers n=595, Baby Boomers+ freelancers n=374, *New Gen Z freelancers n=87 (small base size, directional data)
Most Gen Z freelancers, who typically freelance part-time, see it as a money-making strategy for now.

59% of Gen Z freelancers are freelancing part-time [among total freelancers by generation]

64% of Gen Z freelancers see freelancing as a temporary way of making money [among total freelancers by generation]
MOST FREELANCE BY CHOICE AND ARE HIGHLY LIKELY TO CONTINUE FREELANCING IN THE FUTURE

71% of Gen Z freelancers started freelancing by choice, over necessity

[among total freelancers by generation]

Choice

Gen Z
62%

Millennials
57%

Gen X
68%

Baby Boomers+

Necessity

Gen Z
29%

Millennials
38%

Gen X
43%

Baby Boomers+
32%

9 out of 10 of Gen Z freelancers overall are likely to do freelance work in the future

(89% likely overall, 51% very likely)

&

of new Gen Z freelancers (who started during COVID-19) are likely to do freelance work in the future*

(90% likely overall, 47% very likely)

Q48: Which is closer to the reason you originally started freelancing?

Q21C_19: In general, how likely are you to do any freelance work in the future?
Base: Gen Z freelancers n=240, Gen Z New freelancers n=94, Millennial freelancers n=923, Gen X freelancers n=595, Baby Boomers+ freelancers n=374, *New Gen Z freelancers n=87 (small base size, directional data)
GEN Z-ERS THAT ARE CURRENTLY NOT FREELANCING ARE MORE LIKELY THAN OTHER GENERATIONS TO CONSIDER IT, PARTICULARLY AS A WAY TO COPE WITH RECESSIONARY PERIODS

3 in 4 (73%) of Gen Z non-freelancers are likely to consider doing freelance work in the future

3 in 4 (76%) of Gen Z non-freelancers say they are likely to do freelance work in the future to earn extra income to cope with the impact of the pandemic on their personal finances

Q21C_19: In general, how likely are you to do any freelance work in the future? / Q80_20POST: Due to the many ways the COVID-19 pandemic has impacted Americans, please indicate how likely you are to do any freelance work in the future for the following reasons.

Base: Gen Z non freelancers n=242, Millennial non-freelancers n=1163, Gen X non-freelancers n=1398, Baby Boomers+ non-freelancers n=1066
FREELANCING ISN’T JUST SOMETHING RESERVED FOR YOUNGER GENERATIONS, THOSE AGES 55+ HAVE ALSO BEEN TAPPING INTO THE BENEFITS OF FREELANCING

More than a quarter of workers ages 55+ have done freelance work in the past year

They are typically skilled freelancers

[among total Baby Boomer+ freelancers]

They are mostly “independent contractors,” meaning they do work on a project to project basis

[among total Baby Boomer+ freelancers]

(55%)

(5%)

(14%)

(7%)

(6%)

(vs. 30% Gen Z, 22% Millennials, 34% Gen X freelancers)
65% of Boomers who freelance agree that freelancing is a good way to transition into retirement...

vs. 43% Gen Z, 60% Millennials, 56% Gen X workers who freelance

62% of Boomers who freelance are concerned about saving for retirement vs. 73% Non-freelancer Boomers

72% of non-freelancing Boomers would consider it to earn additional income in retirement...

and those freelancing are less likely to be concerned about saving for retirement than non-freelancers
2 in 5 (42%)  
Boomers that freelance say their hours spent on freelancing have decreased since the onset of COVID-19  
Vs. 21% Gen Z, 27% Millennials, 35% Gen X workers who freelance

1 in 2 (47%)  
Boomers that freelance say they have less work than they want during the COVID-19 pandemic  
Vs. 32% Gen Z, 30% Millennials, 39% Gen X workers who freelance

Boomer freelancers are most likely to be negatively impacted by COVID-19  
53% say their economic or financial well-being has been negatively impacted  
Vs. 37% Gen Z, 40% Millennials, 49% Gen X workers who freelance
SEVERAL FACTORS COULD POINT TO WHY BOOMERS HAVE LESS WORK THAN DESIRED: A DEPENDENCE ON NON-REMOTE WORK AND LESS FREQUENT SKILLS TRAINING

<table>
<thead>
<tr>
<th>Remote Work Status During COVID-19</th>
<th>% Participated in Skills Training Within Past Year</th>
</tr>
</thead>
<tbody>
<tr>
<td>Not working remote</td>
<td>Gen Z: 83%</td>
</tr>
<tr>
<td></td>
<td>Millennials: 76%</td>
</tr>
<tr>
<td></td>
<td>Gen X: 63%</td>
</tr>
<tr>
<td></td>
<td>Baby Boomers+: 46%</td>
</tr>
<tr>
<td>Working remote</td>
<td>Gen Z: 43%</td>
</tr>
<tr>
<td></td>
<td>Millennials: 31%</td>
</tr>
<tr>
<td></td>
<td>Gen X: 38%</td>
</tr>
<tr>
<td></td>
<td>Baby Boomers+: 60%</td>
</tr>
</tbody>
</table>

Boomer freelancers were the most likely to be non-remote before COVID-19 (49% did not work remotely vs. 40% Gen Z, 31% Millennials, 33% Gen X freelancers).

41% of Boomer freelancers report they have not strengthened or learned any skills amid COVID-19 (vs. 11% Gen Z, 12% Millennials, 21% Gen X)
MANY CAREGIVERS AND INDIVIDUALS WITH DISABILITIES TURN TO FREELANCING FOR ECONOMIC OPPORTUNITY

Compared to US workers and non-freelancers overall, a higher proportion of freelancers are **caregivers** or have a **disability** (they or someone in their family does)...

- Freelancers
  - Caregivers: 48%
  - Disability: 33%

- Caregivers
  - (to child, parent, elderly relative, or someone else)

- Disability
  - (they or someone in family is living with a disability)

Those that have one themselves (16%) include:
- Physical disability (37%)
- Suffering from chronic illness (30%)
- Learning/intellectual disability (29%)
Among freelancers who are caregivers...

- 76% say freelancing gives them more flexibility to be more available as a caretaker for their family.
- 71% say freelancing has given them more control of their life overall.
- 69% say freelancing provides them an alternative that can allow one to support a family without a traditional job.

Among freelancers with a disability or one in their family...

- 72% say freelancing has given them more control over their life overall.
- 72% say freelancing gives them the flexibility to address their personal, mental, or physical health needs.
- 69% say that because of personal circumstances they are not able to work for a traditional employer, but freelancing gives them the flexibility they need.
FREELANCERS WITH THESE PERSONAL CIRCUMSTANCES VIEW FREELANCING AS A LONG-TERM SOLUTION

<table>
<thead>
<tr>
<th>% See Freelancing as a Long-Term Career Choice</th>
<th>% Very Likely to do Freelance Work in Future</th>
</tr>
</thead>
<tbody>
<tr>
<td>[among freelancers within each group]</td>
<td>[among freelancers within each group]</td>
</tr>
<tr>
<td>Caregivers</td>
<td>Caregivers</td>
</tr>
<tr>
<td>51%</td>
<td>72%</td>
</tr>
<tr>
<td>Non-caregivers</td>
<td>Non-caregivers</td>
</tr>
<tr>
<td>43%</td>
<td>66%</td>
</tr>
<tr>
<td>Disability themselves or in family</td>
<td>Disability themselves or in family</td>
</tr>
<tr>
<td>53%</td>
<td>69%</td>
</tr>
<tr>
<td>No disability in family</td>
<td>No disability in family</td>
</tr>
<tr>
<td>44%</td>
<td>68%</td>
</tr>
</tbody>
</table>

Q36: Which is closer to how you view freelancing?  
Q21C_19: In general, how likely are you to do any freelance work in the future?  
Base: Freelancers who are caregivers n=958, Freelancers who have a disability or someone in their family does n=710
2 in 3 (64%) of non-freelancers say they would consider freelancing as a career option to take care of a family member.

1 in 2 (49%) of non-freelancers say they would consider freelancing to take care of aging parents who will need general care.

Q37_20: Would you be willing to consider freelancing as a career option for the following personal reasons?
Base: Non-freelancers n=3869

EVEN NON-FREELANCERS CONSIDER FREELANCING AS AN OPTION SHOULD THEY BECOME CAREGIVERS DOWN THE ROAD.
Section 4

HONING BUSINESS SKILLS AND STAYING AHEAD
WHILE CLIENT SERVICES AND TECHNICAL KNOWLEDGE ARE CENTRAL TO FREELANCE WORK, SOFT AND BUSINESS SKILLS ARE JUST AS IMPORTANT

What percentage of your time on freelance work is spent on…? [% calculated among total freelancers]

- Business building activities (marketing your services, networking, prospecting new clients)
  - Very Important: 25%
  - Somewhat Important: 23%

- Administrative activities (i.e., invoicing, paperwork, managing finances)
  - Very Important: 55%
  - Somewhat Important: 33%

- Billable work (i.e., client work)
  - Very Important: 52%
  - Somewhat Important: 35%

How important are the following skills to your work? [% calculated among total freelancers]

- Hard Skills (i.e., technical skills and knowledge of facts needed to complete a job)
  - Very Important: 54%
  - Somewhat Important: 35%

- Soft Skills (i.e., people and social skills like communication, critical thinking, leadership, collaboration, etc.)
  - Very Important: 47%
  - Somewhat Important: 35%

- Freelance Business Skills (i.e., skills relating to marketing, managing finances, negotiation, finding clients/work, etc.)
  - Very Important: 52%
  - Somewhat Important: 35%

Q25a: Approximately what % of your time on freelance work is spent on the following?
Q21_19: How important are the following skills for your work?
Base: Freelancers n=2132
KEEPPING THESE SKILLS SHARP REQUIRES CONTINUOUS EDUCATION

When was the last time you participated in any skill-related education or training?

[\% calculated among total freelancers and non-freelancers]

- 59% participated in the last 6 months
- 66% among those who are skilled FLs
- 36% participated in the last 6 months

Q21_3: When was the last time you participated in any skill-related education or training?

Q21d_19: Please indicate whether you agree or disagree with the following statements.

Base: Freelancers n=2132, Non-freelancers n=3869, Skilled freelancers n=1067
They feel there should be more emphasis on soft and business skills...

% agree, calculated among total freelancers and non-freelancers

- Freelancers
- Non-freelancers

I would support my children choosing skills training rather than college
85% 85%

As people increasingly do freelance work, I wish education better prepared us for this way of working
85% 90%

There should be more education available on the soft skills necessary to be successful professionally
83% 83%

There should be more education on how to start and run your own business
79% 80%

...and the education system should better align with job opportunities today

% agree, calculated among total freelancers and non-freelancers

- Freelancers
- Non-freelancers

The education system is broken and needs to change to better fit the job opportunities out there today
81% 82%

Traditional college degrees are too expensive to be justifiable for many of the job opportunities available today
81% 83%
While most freelancers feel the education they received in college was useful to the work they do now. ... 

81% agree

Among those with associate's degree or higher, vs 75% non-freelancers with associate's degree or higher

While still finding value in their college education, in hindsight freelancers would focus their education to be better aligned with their current work

...they would prioritize more specialized education or training, more so than non-freelancers

(% agree, calculated among freelancers and non-freelancers who have Associate's degree or higher)

Freelancers | Non-freelancers

- While I got a 4-year college education, I wish I would've instead obtained a 2-year degree at a community college and supplemented with online training
- If I could go back, I would replace my college education entirely with training tailored to my current work
- If I could go back, I would change the focus of my college education to something closer to what I do now
ENSURING SUCCESS ALSO MEANS TAPPING INTO ONLINE RESOURCES TO FIND WORK – PARTICULARLY FREELANCE WEBSITES

1 in 4
always skilled freelancers typically find work through general freelance websites (26%)

new freelancers have found work through general freelance websites since the onset of COVID-19 (25%)

91% of all skilled freelancers who use freelance websites are likely to recommend them to those just starting out

Why freelance websites?
[\% calculated among all skilled freelancers who use websites to find work]

- I can find work that is interesting or meaningful to me: 47%
- I can find more trustworthy clients: 45%
- It offers me the tools and resources to help me manage my projects efficiently: 44%
- I can reach more potential clients than I can through other channels: 43%
- I am looking for specific types of work or specialized projects: 43%
- I can ensure that I am getting paid for the work I do on time: 42%
Section 5
FUTURE OF FREELANCING
58% of non-freelancers new to remote work say that they are likely to consider freelance work in the future.

Non-freelancers new to remote work are considering freelancing because...

- Working remotely has made me a more productive worker: 73%
- I would like to continue working remotely instead of returning to a traditional on-site workplace: 74%
- Freelancing serves as an extra source of income to cope with the impact of the pandemic on my personal finances: 85%

Q21C_19: In general, how likely are you to do any freelance work in the future?
Q80_20POST: Due to the many ways the COVID-19 pandemic has impacted Americans, please indicate how likely you are to do any freelance work in the future for the following reasons. Base: Non-freelancer new to remote work n=841, Non-freelancers new to remote work and considering freelancing n=487
FREELANCERS ARE OPTIMISTIC ABOUT THE FUTURE OF THEIR WORK AS THEY EXPERIENCE FIRSTHAND THE BENEFITS THAT COME WITH IT

86%
of freelancers say that the best days are ahead (90% among new freelancers)

71%
of freelancers say that perceptions of freelancing as a career is becoming more positive (74% among skilled freelancers)

Reasons Why They Freelance
(% calculated among total freelancers)

- To have flexibility in my schedule: 71%
- To be in control of my own financial future: 66%
- To work from the location of my choosing: 66%
- To be my own boss: 66%
- To be able to pursue work I am passionate about or find meaningful: 64%
- To be able to spend more time with my family: 55%

Q57: How do you see the future of freelancing in general?
Q53: What do you think is different about the freelance job market today compared to 3 years ago?
Q35b: In general, please indicate the degree to which each of the following is a reason why you freelance?
Base: Total freelancers n=2132, New freelancers n=714, Skilled freelancers n=1067
APPENDIX WITH SUPPLEMENTARY DATA
PERCENTAGE OF US WORKERS FREELANCING IN EACH REGION

% of US workers in Regions Doing Freelance Work
(% calculated out of total US workers in each region)

<table>
<thead>
<tr>
<th>Region</th>
<th>2019</th>
<th>2020</th>
</tr>
</thead>
<tbody>
<tr>
<td>Northeast</td>
<td>33%</td>
<td>36%</td>
</tr>
<tr>
<td>Midwest</td>
<td>31%</td>
<td>27%</td>
</tr>
<tr>
<td>South</td>
<td>37%</td>
<td>38%</td>
</tr>
<tr>
<td>West</td>
<td>39%</td>
<td>39%</td>
</tr>
</tbody>
</table>

-4ppts since 2019

Q70Region: Regional roll-up
Base: Total US workers n=6001, Freelancers n=2132
% of US Workers doing Freelance Work by Generation
(% calculated out of total US workers in each generation group)

HOW TO READ:
50% of Gen Z workers have done freelance work in the past year

50%  44%  30%  26%
Gen Z (18-22) Millennials (23-38) Gen X (39-54) Boomers (55+)

S105: PRE/POST COVID FREELANCER CODING; Q2: What is your current age?
Base: Gen Z workers n=482, Millennial workers n=2086, Gen X workers n=1992, Boomer+ workers n=1440
% of Always, Paused, and New Freelancers by Generation
(% calculated out of freelancers in each generation group)

HOW TO READ:
33% of Gen Z Freelancers overall, are New Freelancers

Types of Freelancers by Generation

<table>
<thead>
<tr>
<th>Generation</th>
<th>Always Freelancers</th>
<th>Paused Freelancers</th>
<th>New Freelancers</th>
</tr>
</thead>
<tbody>
<tr>
<td>Gen Z (18-22)</td>
<td>30%</td>
<td>33%</td>
<td>36%</td>
</tr>
<tr>
<td>Millennials (23-38)</td>
<td>33%</td>
<td>22%</td>
<td>44%</td>
</tr>
<tr>
<td>Gen X (39-54)</td>
<td>42%</td>
<td>25%</td>
<td>33%</td>
</tr>
<tr>
<td>Boomers (55+)</td>
<td>53%</td>
<td>41%</td>
<td>6%</td>
</tr>
</tbody>
</table>

S105: PRE/POST COVID FREELANCER CODING; Q2: What is your current age?
Base: Gen Z workers n=482, Millennial workers n=2086, Gen X workers n=1992, Boomer+ workers n=1440
How do you prefer to describe the group of people who freelance?

How do you prefer to describe the group of people who freelance? [% calculated among total freelancers]

Full-time vs Part-time Freelancers

<table>
<thead>
<tr>
<th>Description</th>
<th>Full-time FLs</th>
<th>Part-time FLs</th>
</tr>
</thead>
<tbody>
<tr>
<td>The freelance economy</td>
<td>45%</td>
<td>50%</td>
</tr>
<tr>
<td>The on-demand economy</td>
<td>20%</td>
<td>16%</td>
</tr>
<tr>
<td>The sharing economy</td>
<td>17%</td>
<td>12%</td>
</tr>
<tr>
<td>The gig economy</td>
<td>14%</td>
<td>19%</td>
</tr>
<tr>
<td>Other</td>
<td>4%</td>
<td>4%</td>
</tr>
</tbody>
</table>

Skilled vs Unskilled Freelancers

<table>
<thead>
<tr>
<th>Description</th>
<th>Skilled FLs</th>
<th>Unskilled FLs</th>
</tr>
</thead>
<tbody>
<tr>
<td>The freelance economy</td>
<td>49%</td>
<td>44%</td>
</tr>
<tr>
<td>The on-demand economy</td>
<td>18%</td>
<td>19%</td>
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<tr>
<td>The sharing economy</td>
<td>12%</td>
<td>14%</td>
</tr>
<tr>
<td>The gig economy</td>
<td>17%</td>
<td>19%</td>
</tr>
<tr>
<td>Other</td>
<td>3%</td>
<td>3%</td>
</tr>
</tbody>
</table>

Q21_5_19: Which of the following are the top three reasons why you participate in skill-related education or training?

Base: Freelancers n=2132, Skilled Freelancer n=1067, Unskilled Freelancer n=793
THE MAJORITY OF NEW FREELANCERS ARE “DIVERSIFIED WORKERS,” WHILE PAUSED FREELANCERS SPAN ACROSS A VARIETY OF FREELANCE TYPES (E.G. “MOONLIGHTER,” “TEMPORARY WORKER,” ETC.)
# FREQUENCY OF FREELANCING: BY TOTAL, ALWAYS, PAUSED, AND NEW FREELANCERS

### Among Total Freelancers

<table>
<thead>
<tr>
<th>Frequency</th>
<th>Total</th>
<th>Always</th>
<th>Paused</th>
<th>New</th>
</tr>
</thead>
<tbody>
<tr>
<td>Daily</td>
<td>37%</td>
<td>19%</td>
<td>11%</td>
<td>31%</td>
</tr>
<tr>
<td>Weekly</td>
<td>32%</td>
<td>26%</td>
<td>26%</td>
<td>29%</td>
</tr>
<tr>
<td>Bi-weekly</td>
<td>11%</td>
<td>10%</td>
<td>10%</td>
<td>14%</td>
</tr>
<tr>
<td>Monthly</td>
<td>10%</td>
<td>14%</td>
<td>10%</td>
<td>16%</td>
</tr>
<tr>
<td>Less than monthly</td>
<td>10%</td>
<td>10%</td>
<td>4%</td>
<td>16%</td>
</tr>
</tbody>
</table>

### Among Total, Always, Paused, and New FLs

<table>
<thead>
<tr>
<th>Frequency</th>
<th>Total FLs</th>
<th>Always FLs</th>
<th>Paused FLs</th>
<th>New FLs</th>
</tr>
</thead>
<tbody>
<tr>
<td>Daily</td>
<td>41%</td>
<td>37%</td>
<td>19%</td>
<td>11%</td>
</tr>
<tr>
<td>Weekly</td>
<td>34%</td>
<td>32%</td>
<td>26%</td>
<td>26%</td>
</tr>
<tr>
<td>Bi-weekly</td>
<td>14%</td>
<td>10%</td>
<td>10%</td>
<td>10%</td>
</tr>
<tr>
<td>Monthly</td>
<td>10%</td>
<td>10%</td>
<td>10%</td>
<td>10%</td>
</tr>
<tr>
<td>Less than monthly</td>
<td>4%</td>
<td>10%</td>
<td>6%</td>
<td>15%</td>
</tr>
</tbody>
</table>
FREELANCE WORK RECENCY BY TOTAL, ALWAYS, PAUSED, AND NEW FREELANCERS

Among Total Freelancers

- **My work is ongoing**: 53%
- **Within the past week**: 36%
- **Within the last month**: 22%
- **2-3 months ago**: 20%
- **4-6 months ago**: 13%
- **6-12 months ago**: 9%

Among Total, Always,Paused, and New FLs

- **Within the past week**
  - **Total FLs**: 36%
  - **Always FLs**: 9%
  - **Paused FLs**: 22%
  - **New FLs**: 25%
- **Within the last month**
  - **Total FLs**: 25%
  - **Always FLs**: 12%
  - **Paused FLs**: 25%
  - **New FLs**: 20%
- **2-3 months ago**
  - **Total FLs**: 19%
  - **Always FLs**: 19%
  - **Paused FLs**: 29%
  - **New FLs**: 20%
- **4-6 months ago**
  - **Total FLs**: 12%
  - **Always FLs**: 7%
  - **Paused FLs**: 30%
  - **New FLs**: 13%
- **6-12 months ago**
  - **Total FLs**: 9%
  - **Always FLs**: 4%
  - **Paused FLs**: 20%
  - **New FLs**: 6%

Q20: When was the last time you did any freelance, temporary, or supplemental work, including work done on a project- or contract-based basis?

Base: Total freelancers n=2132, Always FLs n=827, Paused FLs n=591, New FLs n=714
FREELANCERS VALUE SKILLS TRAINING FOR A VARIETY OF REASONS

% Among Top Three Reasons for Skill-Related Education or Training

[% calculated among total freelancers]

- To stay up-to-date with developments in my field: 37%
- To learn the basic skills necessary for my work: 35%
- To keep up with changing technologies: 34%
- To expand my professional network: 32%
- To earn more by learning higher-paying skills: 30%
- To learn how to manage a freelance business: 21%
- To transition to a new field: 18%

Q21_5_19: Which of the following are the top three reasons why you participate in skill-related education or training?

Base: Freelancers n=2132
Where do you typically find work? [% calculated among total Always and Paused FLs]

- Friends and family: 48% (Always), 46% (Paused)
- Previous client (freelance): 36% (Always), 46% (Paused)
- Social media: 38% (Always), 42% (Paused)
- Professional contacts: 33% (Always), 31% (Paused)
- Online ads/classifieds: 25% (Always), 24% (Paused)
- Online job boards: 20% (Always), 22% (Paused)
- General freelance websites: 17% (Always), 22% (Paused)
- Specialized freelance websites: 13% (Always), 15% (Paused)
- Previous employer (full-time): 18% (Always), 14% (Paused)
- Sharing economy websites or apps (such as Uber, Airbnb, Taskrabbit, and other companies that allow people to share their goods or time with): 12% (Always), 12% (Paused)
- Local newspaper: 11% (Always), 10% (Paused)
- Employment agency / staffing firm: 12% (Always), 10% (Paused)

Q59: Where do you typically go to find freelance work?  
Base: Always Freelancers n=827, Paused Freelancers n=591
FREELANCERS COULD USE MORE RESOURCES PROVIDED BY THEIR COMMUNITY AND STATE/FEDERAL GOVERNMENT THAT ARE SPECIFICALLY TAILORED FOR FREELANCERS LIKE THEM

<table>
<thead>
<tr>
<th>Statement</th>
<th>% Agree</th>
</tr>
</thead>
<tbody>
<tr>
<td>I prefer private loans or grants for my business over state or federal programs (like the Paycheck Protection Program or Pandemic Unemployment Assistance program) because these resources are made available more quickly to me.</td>
<td>58%</td>
</tr>
<tr>
<td>I feel that the currently available state or federal programs have sufficiently protected freelance workers from the current economic downturn</td>
<td>58%</td>
</tr>
<tr>
<td>Currently available state or federal programs should be more tailored to the specific needs of freelancers instead of designed to help all kinds of workers.</td>
<td>48%</td>
</tr>
<tr>
<td>I wish there were more resources in my community specifically for freelancers like me to protect my business from the economic impact of the pandemic.</td>
<td>38%</td>
</tr>
<tr>
<td>I wish there were more resources provided by the federal government specifically for freelancers like me to protect my business from the economic impact of the pandemic.</td>
<td>37%</td>
</tr>
</tbody>
</table>

Q34_20: How much do you agree or disagree with the following statements? Base: Freelancers n=2132
FREELANCERS ARE MORE LIKELY TO FEEL PRODUCTIVE IN REMOTE SETTINGS THAN NON-FREELANCERS

In which setting do you feel most productive in?

[%, calculated among remote workers]

 Freelancers Non-freelancers

On-site in a traditional office (for example: at an office space you're based in or at a client's office)

38% 46%

Remotely (for example: from home, at a co-working space, or at a coffee house)

62% 54%

Q24_19_New: In which setting do you feel you are more productive in? We understand that productivity may have changed since the COVID-19 pandemic, so please try to think about your general productivity before the COVID-19 pandemic.

Base: Remote workers pre-COVID: Freelancers n=1372, Non-freelancers n=1025