



Tracking UK Freelance Workforce Trends 1992-2015

John Kitching¹

Kingston University, UK

Abstract. Using data from the UK Labour Force Survey, the article describes the major trends in freelance workforce numbers during the past 20 years. Operationalising a definition of freelancing in terms of Labour Force Survey categories, the data indicate both a substantial absolute increase in freelancer numbers and growth as a proportion of all workforce jobs. Possible explanations for the increase are discussed, paying particular attention to the demand for freelancers. Although a number of studies suggest a shift towards the adoption of flexible labour strategies, the evidence base on the forces underlying the expansion of freelance working is limited and fragmented. Research questions seeking to explore the trends in greater detail are identified.

Keywords: freelance workers; regulation; organisational restructuring; flexible labour strategies; occupational structure; Labour Force Survey.

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1. Introduction

Most businesses are very small. More than three quarters of the UK's 5.4 million private sector enterprises involve only their owners, working alone or with partners, without employees (Department for Business Innovation and Skills 2015). These 4.1 million 'nano-businesses' are important economic agents, contributing at least £237bn to the UK economy.² Self-employment is now at its highest level in the 40 years official statistics have been produced, with most of the recent growth among own-account workers, those without employees (Office for National Statistics 2014a).³ The significance of this increase for job quality is the subject of considerable debate. Contrast Delloit's (2014a) emphasis on the opportunity for the self-employed to enjoy higher levels of autonomy and

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1. Kingston University, Kingston Hill, Kingston upon Thames, Surrey, KT2 7LB, UK. Phone: +44(0)208 417 5355. Email: J.Kitching@kingston.ac.uk
 2. These estimates exclude the financial intermediation services industry as turnover cannot be calculated on the same basis as for other industries (Department for Business Innovation and Skills 2015).
 3. Some own-account workers are *ex-employers*, having reduced the scale of operations. Delloit (2014a) reports a decline in the number of 2-person businesses in recent years while own-account working has increased. A quarter of businesses without employees in 2012 had employed at least one employee in the past (Allinson et al. 2013).

meaningful work with D'Arcy and Gardiner's (2014) account of their growing insecurity and vulnerability.

An important subset of own-account workers (businesses without employees) is freelancers, variously described as independent professionals (Bögenhold et al. 2014), contractors (Barley and Kunda 2006) or interim managers (e.g. Goss and Bridson 1998). Freelance status is not a legal concept defined either by UK statute or by common law but rather a customary term used by workers, end-users of labour services⁴ and others to refer to particular kinds of worker or work relationships. Official UK data sources do not define freelance work or record freelancer numbers. Neither the quarterly Labour Force Survey (LFS) nor the annual Business Population Estimates explicitly distinguish freelance workers or freelancer-owned businesses. Freelancers are therefore present but hidden within official statistics. It is possible to use LFS data, however, to estimate freelance workforce numbers on a quarterly basis.

Academic researchers typically use the term freelance to refer to own-account workers in particular occupations or sectors, particularly creative and media occupations (Storey et al. 2005; Creative Skillset 2013; Mould et al. 2014), including journalism (Baines 1999), television and radio (Dex et al. 2000; Saundry et al. 2007), film (Davenport 2006; Rowlands and Handy 2012), publishing (Stanworth and Stanworth 1995), photography and make-up artists (Moeran 2009), public relations (Tench et al. 2002), translation services (Fraser and Gold 2001; Dam and Zethsen 2011), design (Henninger and Gottschall 2007), art (Menger 1999) and music (Armstrong 2013). Arguably, there are many more freelancers in the UK than are conventionally described as such.

Much of what is known about freelance workers is confined to those occupations/sectors where the term freelance working is well-established. We know very little about own-account workers in occupations where the term freelance is not widely used but which meet the definition presented here, for instance, medical professionals such as nurses, midwives and health visitors (Drennan et al. 2007). Moreover, many studies of own-account/freelance working date back to the 1990s (e.g. Boyle 1994; Stanworth and Stanworth 1995) and need updating to take account of shifts in the economic, social and political context.

The purpose of the article is to examine trends in the size of the UK freelance workforce during the 1992-2015 period and to consider possible explanations. This article draws on, and complements, material presented in Kitching and Smallbone (2008, 2012a, 2012b). Studies of own-account working/freelancing have typically focused on the supply side - on what motivates individuals to work on this basis (Mallon 1998; Ursell 2000; Hughes 2003; Croson and Minniti 2012), the nature of work relationships (Baines and Robson 2001; Johns 2010), how freelancers experience various aspects of their working lives in terms of

4. End-users include employers, who hire workers under contracts *of* service, and clients, who engage workers under contracts *for* services.

autonomy, uncertainty and social isolation (Ekinsmyth 2002; Storey et al. 2005; Clinton et al.; 2006; Rowlands and Handy 2012; Armstrong 2013), levels of commitment to the organisations that hire them (Süss and Kleiner 2012), and building ‘portfolio’ careers (Gold and Fraser 2002). I seek to rebalance this supply-side emphasis with a focus on the demand side of the market: who are the end-users of freelance workers? How frequently or intensively are freelancers used? And for what purposes? I present secondary data on some of these issues but emphasise the limited and fragmented character of the evidence base. Many of the arguments presented may be of wider international relevance as freelancers demonstrate a strong presence in other mature market economies (Rapelli 2012).

The article is organised in four sections. Section 2 defines freelance work and provides details of how this definition might be operationalised using the LFS. Section 3 presents LFS data to describe important trends in freelancer numbers. Section 4 outlines possible explanations for the trends and section 5 identifies gaps in knowledge.

2. Defining and Operationalising Freelance Work

A broad definition of freelance work is proposed, one intended to extend coverage to workers who are not conventionally described in freelance terms (Kitching and Smallbone 2008). Freelancers are defined as those genuinely in business on their own account, working alone or with partners or co-directors, in skilled non-manual occupations. Freelancers may be self-employed proprietors and partners in unincorporated businesses, directors of limited companies or employees in PAYE umbrella companies. While research has focused on creative occupations/sectors where the term freelance is customarily used, own-account workers in a wide range of managerial, professional, scientific and technical occupations might also be treated as part of the freelance workforce.

This definition of freelance work can be operationalised in large part using LFS data.⁵ The UK Standard Occupational Classification (SOC) 2010 distinguishes nine major occupational groups according to skill level and specialisation, defined in terms of the nature and duration of the qualifications, training and work experience required for competent performance (Office for National Statistics 2010). SOC major groups 1 to 3 refer to ‘managers, directors and senior officials’, ‘professional occupations’ and ‘associate professional and technical occupations’ respectively. These three groups are argued to correspond broadly with skilled non-manual occupations and might, therefore, constitute a skill/occupation criterion demarcating freelance work from other types of own-account working. This definition distinguishes freelancers from own-account

5. LFS do not permit identification of umbrella company freelancers. Nor can we be certain that particular individuals classified as freelancers using the LFS would be considered genuinely in business on their own account by the UK tax authorities or by an employment tribunal.

workers in lesser-skilled non-manual occupations and from those in manual jobs. Alternative definitions of freelance work, based on different assumptions, are of course possible; Mould et al. (2014), for example, include some occupations within SOC major groups 5 to 7 as potentially including freelancers too.

The LFS provides quarterly estimates of UK workforce numbers based on interviews with approximately 100,000 adults in 50,000 households. The LFS categorises respondents' work status in main and, if relevant, second jobs during a reference week. Working respondents may be classified as employed, self-employed, on a government scheme or as unpaid family workers; the self-employed are divided into those with and without employees. The self-employed without employees are described as own-account workers here. Results are weighted to be representative of the adult population in terms of age, sex and region. Estimates should, however, be treated with caution as they rely on data sources created for purposes other than quantifying freelancer numbers and are known to be subject to error (Machin 2008).⁶

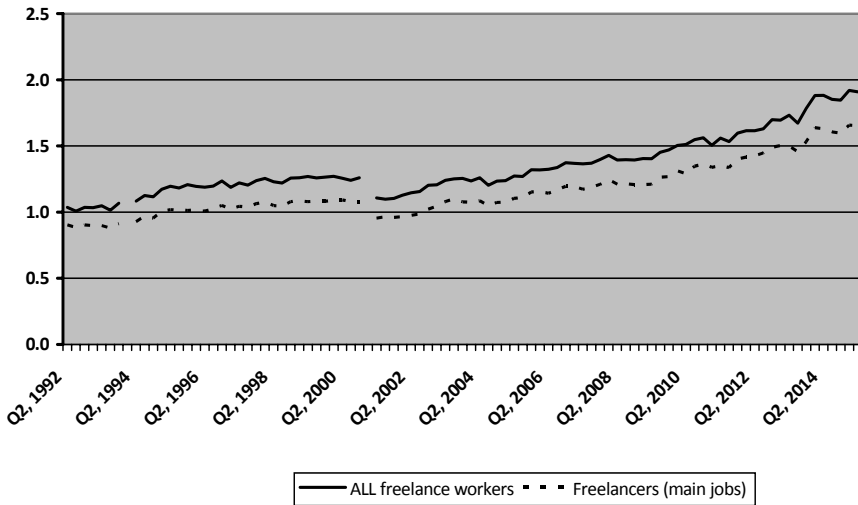
LFS data allow freelancers in main and second jobs to be identified and their numbers estimated. Freelancers are defined as the self-employed without employees, working alone or with partners, in an SOC major group 1-3 occupation in a main job or in a second job with some other status in main jobs (employee; employer; or self-employed without employees, working alone or with partners, in an SOC major group 4 to 9 occupation).

3. The Expansion of Freelancing

The UK freelance workforce has expanded from 1.04m workers in Q2, 1992 (the first period for which quarterly data are freely available online to subscribers to the UK Data Archive) to 1.91m in Q2, 2015 (Figure 1). This constitutes a substantial 84 per cent increase over the period. During the same period, workforce jobs, defined as all main and second jobs in the UK economy, have increased from 25.8 to 32.1 millions, an increase of approximately 24 per cent. As a proportion of all workforce jobs, therefore, freelance jobs have risen markedly from 4.0 to 6.0 per cent.

6. LFS relies on self-report data and respondents may report incorrectly, often leading to over-reporting of self-employment. Second, approximately one quarter of responses are obtained from proxy respondents, although follow-up studies suggest this does not affect estimates of work status (Office for National Statistics 2006). Third, LFS excludes certain groups - temporary foreign workers, those with three or more jobs and those with work engagements outside the survey reference period - leading to an underestimation of self-employment.

Figure 1: UK Freelance Workforce 1992-2015 (m)



Notes: Includes the self-employed without employees, either working alone or with a partner, in main jobs and second jobs. Data weighted according to age, sex and region of residence in order to be nationally representative. Data missing for Q1, 1994 and for Q1, 2001.

Source: calculations derived from Labour Force Survey, various quarters.

The increase in freelancer numbers has been broadly linear across the 1992-2015 period (Figure 1). The principal exception relates to the 2000-1 period, for which data are missing. Freelance worker numbers in Q4, 2000 were estimated to be 1.26m; for Q2, 2001, the figure was 1.11m, a decline of approximately 12 per cent. The reasons for this sharp fall are unclear although it might relate to the issue of ‘IR35’, a tax measure which came into force in April 2000.⁷ The purpose of IR35 is to eliminate the avoidance of tax and National Insurance Contributions through the use of intermediaries. Freelancers operating as limited companies would be caught by IR35 where the tax authorities believed that the individual ought to be taxed as an employee of the organisation to which they were providing services. Payments to intermediaries such as limited companies are treated as employment income. It is possible that some LFS respondents redefined themselves as employees rather than as self-employed as a consequence of the introduction of IR35.

The upper line in Figure 1 represents all freelance workers in both main and second jobs; the lower line shows the trend for freelancers in main jobs only. Both trend lines have increased at broadly the same rate across the 1992-2015 period. Hence the proportion of freelancers in main jobs as a proportion of all

7. <https://www.gov.uk/guidance/ir35-find-out-if-it-applies>

freelancers has remained broadly constant at approximately 84-89 per cent in every quarter throughout the period. It is important to note that the distinction between main and second jobs does not equate to the distinction between full- and part-time jobs. Both main and second jobs could be part-time with regard to hours of work. Indeed, in Q2, 2015, 41 per cent of freelancers in main jobs worked basic usual hours of 30 or fewer per week.

Finally, freelancers have grown as a proportion of all own-account workers, from 39 per cent in 1992 to 45 per cent in 2015 (Figure 2, upper line). This proportion has fluctuated considerably around the trend line during the period. The proportion reached a low-point of 38 per cent in 1993 and peaked at 47 per cent in 2000. There was a noticeable decline from 47 to 41 per cent during 2000-1, for which one quarter's data is absent. A similar picture of fluctuation around a broad upward trend is evident for freelancers as a proportion of all self-employed too. Freelancers have increased from 28 to 38 per cent of all self-employed, with a marked dip from 35 to 31 per cent in 2000-1.

Figure 2: Freelancers as a Proportion of the Self-Employed



Notes: as for Figure 1.

Source: calculations derived from Labour Force Survey, Q2, each year

The focus has been on identifying the principal trends in freelancer numbers. Yet the freelance workforce is highly diverse, varying in terms of personal, household and work characteristics. The LFS permits identification of constituent subgroups with particular characteristics, for example, freelance workers in particular occupations, or disaggregated by gender, age or region, each of which might be the subject of separate analyses. For instance, the LFS distinguishes 90

minor occupation groups and 328 individual occupations; numbers for each might be tracked over time.

4. Explaining the Trends

Much has been made of the increase in own-account working in developed economies in recent decades in terms of individual choices to become, and remain, own-account/freelance workers (Knell 2000; Kunda et al. 2002; Philips 2008; Deloit 2014a). But such explanations provide a one-sided view if they focus exclusively on workers' motivations and omit proper consideration of the broader context of choice. Individuals' decisions to become and remain freelance workers might reflect deeper socio-cultural influences that shape preferences but these must be situated within the context of the broader economic, political and social forces that influence the demand for freelancers' labour services.

Political/regulatory, market and technological developments have arguably all contributed to the growth of UK freelancing in recent decades as well as socio-cultural influences. Public policy has played a major role in creating opportunities for self-employment and small business, and in influencing public attitudes to taking up such opportunities (Armstrong 2005; Bennett 2014). Such enterprise policies, in their original incarnation in the 1980s, have at least two distinct dimensions: the remodeling of organisations along the lines of the commercial enterprise, including the transfer of publicly owned organisations to the private sector; and the acquisition and exercise of particular 'enterprising' qualities (Keat 1991). The privatisation programme of the 1980s led to a shift of jobs from the public to the private sector. Reforms in the regulation of public service broadcasting, for instance, generated changes in industrial structure and contractual arrangements, leading to a proliferation of small production and service companies, many of them single-person, freelance operators supplying production, camera, sound, lighting, and editing services (Dex et al. 2000; Baumann 2002; Antcliff 2005). Changes in public sector employment practices might also exert an indirect influence on freelancing by encouraging professionals to quit their jobs and take up freelancing (Drennan et al. 2007). Recent cuts in public expenditure to reduce the national debt have also coincided with the significant expansion of own-account working.

As in developed economies throughout the world, the UK occupational structure has continued the shift towards non-manual occupations in recent decades. In 1992, those in SOC major groups 1 to 3 constituted 33 per cent of all employees and 38 per cent of all own-account workers in main jobs. These figures compare with 43 per cent of employees and 44 per cent of own-account workers in 2015.⁸ Such compositional changes in the aggregate workforce would tend to increase the proportion of freelancers independently of any changes in individual preferences to work on a freelance basis.

The UK regulatory framework is permissive. There are few legal limits on employer/end-users' capacity to design contractual arrangements with workers as they wish. National regulatory frameworks vary in the restrictions they impose on end-users regarding types of work contract and employment rights. The UK ranks high in OECD national listings with regard to the flexibility employment protection regulation permits to employers, as measured by legislative restrictions on the use and dismissal of permanent and temporary workers (OECD 2013). UK-based organisations are able to contract with workers in a variety of ways to suit their particular requirements - as permanent employees (full- or part-time) or as various forms of temporary worker, whether as employees, agency workers or as self-employed subcontractors, including freelancers.

Several studies demonstrate that organisations have sought to restructure their operations in order to match labour inputs more closely to commercial requirements with a view to achieving numerical flexibility and cost savings; studies include survey (Purcell and Purcell 1998; Houseman 2001; Kalleberg et al. 2003; van Wanrooy et al. 2013) and case study work (Stanworth and Stanworth 1997; Burke 2012; Watson 2013). Using freelancers is one means of achieving flexibility, alongside a range of flexible working practices, including part-time, temporary, fixed-term, agency, annual hours, zero hours, shift and home-based working. The UK Workplace Employment Relations Study found that use of freelancers increased from 11 per cent of private sector workplaces (with five or more employees) in 2004 to 15 per cent in 2011 (van Wanrooy et al. 2013).⁹ External labour strategies are not the exclusive preserve of large organisations; small employers use flexible labour practices too (Burke 2011). A recent survey suggests that 55 per cent of the self-employed would prefer to work with freelancers rather than employ someone on payroll (Dellot 2014b). Commercial contracts have replaced employment contracts in many cases, as organisations have made employees redundant and then re-engaged them as freelancers (Boyle 1994; Baines 1999).

Freelance working has become deeply institutionalised in particular occupations/sectors. Work organised on a project or commission basis in creative occupations/sectors, for instance, in publishing, film and television, art, music and translation services has been the historical home of freelance workers (Fraser and Gold 2001; Ekinsmyth 2002; Storey et al. 2005; Mould et al. 2014). Organisations operating in these sectors expect to be able to draw on a pool of external freelancers in order to meet their labour requirements; individuals knowing such opportunities exist are willing to supply their labour on freelance terms. In sectors where freelance work is less well-established, or where the term

8. For those in second jobs, the figures were 27 per cent of employees and 49 per cent of own-account workers in 1992, and 34 per cent of employees and 64 per cent of own-account workers in 2015.

9. No definition of 'freelancers' is provided so it is impossible to say whether it corresponds to the one presented here.

is not conventionally used to describe independent, skilled non-manual contractors, there is less evidence on the demand for, and use of, such workers.

Technological changes have made it possible for freelance workers and other small business operators to deliver services efficiently at low levels of scale. Freelancers can serve clients effectively working at or from home (Bögenhold et al. 2014), armed only with a portable computer and a broadband connection. In the UK, there are an estimated 4.2 million homeworkers, including both self-employed and employees, an increase of 1.3 million since 1998 (Office for National Statistics 2014b). One and half million people work at home or in the same grounds or building; a further 2.7 millions work in different places using home as a base. More than two thirds of homeworkers are self-employed and almost three quarters work in high-skilled (SOC major groups 1 to 3) occupations. Freelancers can perform much of their work at home, remotely from the end-users of their services (Baines 2002). LFS data suggest that in 2015, 1.15m freelancers in main jobs (69 per cent of all such freelancers) work mainly at or from their own home.

5. Unanswered Questions

While such data are useful for explaining change in particular occupations/sectors, we still lack a comprehensive analysis of the forces underlying freelance workforce trends. Research on end-users' flexible labour practices often does not distinguish the use of freelancers from the use of own-account workers, agency workers, or even from temporary workers in general. This section briefly outlines a research agenda of unanswered questions, paying particular attention to the demand for freelance workers. Where end-users are asked questions about the use of freelancers, there is a need to clarify to whom they refer. Respondents may confine the term to those conventionally defined as such and thereby possibly under-state use.

Survey data exploring whether organisations use freelancers or not provide quite limited insights into the demand for freelancers. It tells us nothing of who the end-users are, the frequency or intensity of use, what jobs freelancers do and the functions they perform, or how the use of freelancers relates to users' strategic aims. End-users might be organisational or personal clients; we do not know, for instance, how many freelancers work for each client type, or both. While it is tempting to focus on organisational end-users, as these are perhaps more visible, and assumed to be dominant numerically, it might be easy to overlook the important economic contribution made by freelancers serving a predominantly personal client base. Organisational end-users likely operate in the private, public and voluntary sectors, in particular industries, and are of different sizes – but, again, we lack precise data on the distribution of freelance workers across types of end-user.

Second, we lack extensive data on end-user motivations for engaging freelance workers and the broader circumstances of use. Answers to such questions move us towards developing explanations of freelancing rather than simply describing patterns of use. For instance, are freelancers used to provide *quantitative* flexibility, that is, to match labour demand to variations in customer demand and thereby to reduce labour costs? Or are they used to provide *qualitative* flexibility, to provide different kinds of knowledge and skills, or to perform quite different functions to the existing workforce? To answer these questions, empirical data is needed on the scale, intensity and purpose of use of freelancers by particular end-users in particular contexts. Organisations operate in a wide variety of industry settings, face different product market and cost pressures and have different labour requirements. Burke's (2012) case studies of 23 organisations found use of freelancers to vary with the requirements of specific projects. Many organisations were intensive users of freelancers, hiring them to produce innovations themselves or to enable the innovative activities of others. Mould et al. (2014) also emphasise the contribution of freelance workers to the creative industries as a whole and not just to individual end-users. But beyond these studies little is known of freelancers' qualitative contributions to end-users' products and business processes.

One important issue is whether organisations use freelance workers as an element of a novel strategy for resourcing labour requirements or as a reactive, pragmatic response to particular circumstances, one likely to be reversed if and when environmental conditions change. End-users might face contradictory pressures with regard to meeting their labour needs, partly as a response to changing product and labour market opportunities and constraints. How organisations respond to these conflicting pressures increases or reduces opportunities for freelance working. Case study evidence suggests that organisations, large and small, are using freelance labour more strategically to drive product and process innovation (Burke 2011 and 2012). But how typical such findings are is unknown.

6. Conclusions

The UK freelance workforce has increased markedly over the past 20 years but we lack a comprehensive understanding of the forces underlying this increase. No doubt political/regulatory, market, technological and socio-cultural forces impact different occupations/sectors variably, so the interaction of end-user demand for freelancers with the supply of individuals willing to work on a freelance basis generates diverse effects. Explanation of overall trends needs to be sensitive to the heterogeneity of freelance work and the variable historical trajectories of specific occupations/sectors. Indeed, freelancer numbers may decline in some occupations/sectors; these changes require explanation too.

Collectively, these forces give rise to an overall trend in freelance working. At present, we can only sketch out the broadest outlines of how these forces have produced the trends observed. Further research is required to explore the role and significance of this important, expanding business and labour market group.

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