



THE NEW FACE OF THE

*American  
Workforce*

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## Introduction

Uber and Lyft.

Kickstarter and Craigslist.

Freelancer.com and Field Nation.

The names, websites and mobile apps are an increasingly common part of our vocabulary when it comes to talking about work. Whether talking about finding work, finding people to do work for or with us or finding a place where we can grow our own business, these work marketplaces and entrepreneurial applications exist to support the new economy of contract workers, freelancers and independent service providers.

The world of work is changing. The new face of the American workforce and an increasing portion of the international workforce is more independent, more engaged and better able to deliver results, services and products than the traditional monolithic corporation.

In order to better understand the new face of the American workforce, Field Nation has studied three areas that combine to form the nexus of the new reality of work.

This study examines three areas that help business leaders and entrepreneurs alike better understand this emerging transformation. It provides insight into how enterprises and small business can take advantage of the transformation to grow their business while delivering the highest quality results.

This study covers 3 areas:

1. The Shift away from traditional employment and towards contract expertise
2. The Disruption of work as we used to know it
3. The New Engaged Workforce

# The Shift

Outsourcing and globalization in the 1990s and early 2000s whetted enterprise appetite for acquiring expertise at local market (reduced) rates. The rapid evolution of internet collaboration and communication technology in the 2000s created an architecture and infrastructure of accessing outsourced and just-in-time expertise and products. The global recession in the later part of the first decade of the 2000s provided the economic impetus for more organizations to seek out lower, market-based pricing for services and supplies while concurrently inviting, and sometimes forcing, individuals to give freelancing a try. Combined with a cultural shift that encourages people to find work for which they are passionate and a growing dissatisfaction among the traditionally employed, the shift toward a more engaged, more independent, freelance workforce is inevitable and inexorable.

## The Outsourcing Appetizer

The first shift was from inside to outside the organization. Outsourcing and globalization whetted enterprise appetite for expertise at market rates. As economies and countries around the world adopted internet technology, many multi-national corporations and North American-based businesses discovered a highly talented and highly available workforce that was not only less expensive but also now only a mouse-click away.

Results and products that could be electronically or telephonically delivered such as code, copy-writing and customer service, were natural starting points. Businesses, by and large, realized an immediate economic benefit by externalizing some of the costs associated with full-time, in-house, domestic employees. At the same time, they were often able to take advantage of the economic differences between countries. Simply put, one dollar in the emerging technological economies of the Asia-Pacific went farther than it did in America.

Immediate economic benefits drove more appetite for an external workforce. It also exposed new areas of need within enterprises to manage the vast and remote teams. As a result, organizations created new Program Management Offices (PMOs) in house that created or re-engineered business processes and management/accountability structures for engaging remote work forces. The PMOs created new models of interaction and results tracking that became indispensable for coordinating with and ensuring appropriate results from the remote work forces.

## The Organization – Individual Inversion

The second shift was the evolution from engaging an external organization that was trusted to have access to the desired expertise to directly engaging external expertise and using the organization only as a means to facilitate those engagement transactions. This is a subtle but profound shift. It represents an inversion of the organization – individual hierarchy. It used to be the case that enterprises contacted and contracted organizations with good reputations for service, execution and expertise. But increasingly, enterprises desire to engage directly with individuals with whom they have established a relationship based on demonstrated expertise and ability to deliver rather than the more generic organizational reputation. Organizations increasingly took on the role of agents providing access to highly effective experts.

This inversion is the proverbial writing on the wall for organizations whose only value-add is a database of names and talent. Early pioneers in the space became adept at finding individual expertise and assembling the ad-hoc teams they needed for specific projects. With the business practice and process structure emplaced by the PMOs and the increasing ability to engage the specific individuals desired,

enterprises were able to drive out costs associated with fee margins overseas talent shops were baking into their cost structures and rate cards. Similarly, as enterprises became more adept at assembling and managing bespoke talent teams, they were able to easily scale their bid and RFP frameworks down to individuals rather than just big companies. This empowered organizations to further engage with individual experts and bypass larger consulting organizations.

The experiments with outsourcing in the late 1990s and early 2000s were largely successful from a cost and convenience standpoint. Despite some public PR disasters that highlighted some of the challenges with offshore talent management and contracting, the savings were substantial. More and more businesses in North America and around the world traded the higher cost (and, admittedly, the simplicity) of the Master Services Agreement (MSA) for the lower cost and better results of an “elastic expertise” model. If organizations proved willing and able to take on a more active role in managing bespoke teams of project experts then there was substantial cost savings and quality boosts to be had.

## The Evolution of Communication and Collaboration Technology

The third shift is how the evolution of communication and collaboration technology bring the offshore outsourcing model home. The social – mobile – local movement has vast implications for the evolution in the way we work. While the offshore outsourcing model was being proven and adopted, the improvement of collaboration technology continued. Mobile, GPS and ecommerce technology continued to put more capability, insight and just-in-time information into the hands of the experts who were on-site delivering on project requirements while it was also delivering extremely granular visibility to PMOs and enterprises about availability, capability and logistics. Advances in collaboration technology from file sharing and content management to internet conferencing, VOIP and real-time communications nullified the distance and time-zone differences that previously governed business interactions and opportunities.

Ecommerce platforms started to leverage local economics. Craigslist, Angie's List, Groupon, PeaPod, Living Social and others established not only the viability of such an approach but also our habit of sourcing goods and services locally when possible. These platforms proved that individuals and businesses alike would engage local resources if they only knew about them. Advances in mobile and GPS technology made possible on-demand cross referencing of skills and expertise

## The Great Recession

The fourth shift started in the U.S. in 2007 with the start of the Great Recession<sup>ii</sup>. The labor market in the U.S. was hit hard throughout 2008 with layoffs, and many businesses stopping hiring.<sup>iii</sup> The Great recession was at the core of a burst of freelancing and contract working in the U.S. As the global economy and U.S. economy suffered through the great recession, more professionals turned to freelancing at least in part, while young, highly educated Millennials turned to entrepreneurship – often in the form of freelancing and contract work in order to work in their field.

One researcher described the perfect storm of trends coming together to spur the freelance economy. Concerns about Obamacare, more Baby-Boomers seeking out supplemental income through contracting after they retired and more Millennials opting for entrepreneurship drive the shift.<sup>iv</sup> In addition to these, the national dialogue on the Affordable Care Act (i.e. Obamacare) brought the terms and concepts of marketplaces back into popular discourse; establishing the context to bring those terms into different (non-healthcare related) discussions. At the same time, Craigslist, Ebay, Airbnb (2008 founded) and Uber (2009 founded) helped consumers and businesses alike become accustomed to searching for and finding specialized local services.

In the technology sector, cloud computing and the entire concept of “elastic computing” hit major milestones in 2006 with the launch of Amazon's Elastic Compute Cloud and then in 2009 with the popularity of web-based application and platform structures.<sup>v</sup> The concept of elastic computing represents an important paradigm shift in business. The concept is that compute power and throughput capacity is available on-demand and only paid for as it is consumed. It can be rapidly spun up for times of peak demand and then spun down when the additional power is no longer needed. The new elastic compute paradigm was a massive mindset shift among IT departments and CIO offices around the world. No longer did technology teams need to purchase and maintain enough hardware and bandwidth and power for peak times; rather they could tap into and pay for the power as needed. This computing paradigm in the IT department laid the groundwork for the same paradigm to be applied to service and delivery technician teams; most often also in or next-to the IT departments.

with location. These advances allowed very specific and proactive connection of local opportunities with local, on-demand expertise.

More specifically, starting around the time of the Great Recession in 2008 and 2009, there was also a boom in online jobs marketplaces that provided a place for individuals and small businesses to list their talents and capabilities as well as location while businesses in need of expertise but without budget to hire full time headcount could engage those individuals.<sup>i</sup>

While the offshore out-sourcing model worked well for deliverables that could be transmitted electronically, it broke down at the “last mile” of delivery. Goods and services that required on-site execution could not be easily externalized. While a blueprint or a web application could be created and coded overseas and delivered via email or file sharing, the construction of the building and set up of the data center still required domestic expertise and execution.

The business-to-consumer and consumer-to-consumer space led the revolution in local expertise sourcing and engagement. Businesses, now accustomed to and accepting of outsourcing and offshoring parts of their expertise supply chain turned their search to home.





At the same time, full-time traditional W2 employees grew increasingly disengaged and dissatisfied with their jobs. Due to economic pressures, competition for top performers, irregularity in schedules (furloughs, wage freezes, greater demand for coverage of unfilled spots) and expectation-resource imbalances, businesses found themselves with a disengagement dilemma.<sup>vi</sup>

Many employees discovered that freelancing and contract work offered more satisfaction, more interesting and varied work and greater independence and control over their own destiny. The technology had evolved by 2009 to facilitate the courageous employee to try his or her hand at a little freelance moonlighting. They found that they liked it.

### An Emerging Culture of Passion

The fifth and final shift was the popular acceptance and personal desire to blend work and passion. As people grew increasingly disengaged and dissatisfied with their daily jobs, the theme of doing what you love grew. In 2005 Apple's Steve Jobs captured this theme in his commencement address to the graduating class of Stanford University.

You've got to find what you love. And that is as true for your work as it is for your lovers. Your work is going to fill a large part of your life, and the only way to be truly satisfied is to do what you believe is great work. And the only way to do great work is to love what you do. If you haven't found it yet, keep looking. Don't settle. As with all matters of the heart, you'll know when you find it. And, like any great relationship, it just gets better and better as the years roll on. So keep looking until you find it. Don't settle.<sup>vii</sup>



The conspicuous success of new companies run by Millennials that were started with little more than an idea and a confidence borne of personal passion, drive increasing numbers of people hungry for that kind of purpose, autonomy and success to jump on the 'me too' bandwagon. All employees had an idea – if only how to improve business processes and operations in their daily experience. Freelancing and contract work gave them the opportunity to do more of what they wanted and what they were passionate about. This is proven through the massive growth in the world of online staffing platforms that are forecast to see a compound annual growth rate between 40% to 60%.<sup>viii</sup>

Taken together, these five shifts in the traditional employment landscape have radically disrupted both the expectation and practice of the way we work. The growth of independent contracting, communications and collaboration technology in the wake of the Great Recession comes at exactly the time that employees are seeking greater purpose, meaning and autonomy in their work and enterprises have proven to themselves that an outsourced elastic expertise model can work for them.

# The Disruption

Two main areas of employment disruption have emerged from the shifts described above. Disengagement has disrupted productivity at the traditional office while independent contracting has disrupted traditional full time work.

## The Disengagement Disruption

Traditional full-time, W2 employees have become much more aware of their own dissatisfaction at work. From office jobs to field services, employees are feeling the pinch that stems from the Great Recession, demands that outpace time and resources and general uncertainty. Against this background, employees are more aware than ever that their passions lay elsewhere and that the technology and processes in the office are not as good as what they have at home. All the emphasis on doing what you love, combined with many business seeking to cut costs through consolidation of cost centers and departments, have driven dramatic numbers in disengaged, dissatisfied and disgruntled employees around the world.

One joint Carnegie – MSW Research report on employee engagement found that erosion of the employee's relationship with the immediate supervisor, belief in senior leadership and pride in working for the company contribute to heightened disengagement.<sup>x</sup> Each of these characteristics speak to one single concept: visibility of purpose. As an employee's visibility into their individual purpose and the larger purpose of the organization is obscured, his or her engagement erodes. Whether through lack of engaging supervisors or because of a cognitive distance from purposes understood at an executive level, an inability to understand and internalize why they are there leads to a disinterest in delivering great results or even staying around.

The Gallup organization finds the disengagement trend is at critical levels. In late 2013 their State of the Global Workplace report found

that only 13% of traditional full-time workers around the world are engaged in their jobs.<sup>x</sup> That means more that 4 of 5 workers are disengaged at work. The results in the U.S. are little better. In America, 70% of traditional full-time workers are disengaged or actively disengaged in their jobs, according to Gallup's State of the American Workplace study.<sup>xi</sup>

This goes beyond boredom in the boardroom and nodding off in a cubicle. Gallup estimates that employee disengagement costs the U.S. economy between \$450 billion and \$500 billion in lost productivity.

<sup>xii</sup> The cost is staggering, but the rationale for the disengagement dilemma is sound.

Consider the 2004 clinical psychology study which found that workers with support for their autonomy and competence were the happiest, most engaged and most productive. In environments where autonomy, competence and relatedness were valued and supported, people were much more engaged, productive and satisfied with their work. The inverse was also true.<sup>xiii</sup> The study concludes by outlining the primary importance of "...the work environment for effective performance."<sup>xiv</sup> In short, the engaged workforce is highly autonomous, characterized by competence and engaged (i.e. relatedness) with their stakeholders.

There is one notable segment of the workforce that breaks these disengagement trends – the highly autonomous, competent and engaged freelance and independent contractor workforce.

## Freelance Disrupts Full Time

Today it is possible, profitable and preferable to both be a career contractor and to hire contractors to provide product and service for an established business. The shift that has advanced matching, and management collaboration technology has made it possible for independents to find and engage opportunity right where they live while enterprises are able to locate expertise wherever their business take them. The economic climate of the early 2000s and 2010s combined with the successful outsourcing experiments have made it profitable for businesses and individuals alike to go the freelance route. The transcendence of the individual expert over the organizational reputation and the emergent culture of passion made it preferable for people to focus on doing what they love and for the enterprise to engage them in an elastic expertise model.

Today more than 53 million people in the U.S. are performing freelance and independent contracting work<sup>xv</sup>. In 2006 the U.S. Bureau of Labor Statistics found that roughly 31% of the workforce was contingent or freelance<sup>xvi</sup>. In 2014 that number is over 34%, and it is projected to grow to more than 40% by the end of the decade. This growth is clear evidence of the shift.

The barriers to work and to starting up a business are decreasing at the same time that freelancing is increasing.

According to a recent Freelancers' Union study, the top two barriers to starting a freelance career are the ability to find work and the ability to have a steady income<sup>xvii</sup>. These barriers to business are being broken down and the way we work is being disrupted by jobs marketplaces and work platforms that combine deep matching capabilities with project and mobile management technologies while also covering payments, reporting and training necessities. The barrier to finding work is being broken down by the platforms that provide matching and expertise location services. The barrier to steady work is also being broken down through these same technologies and complementary systems that are designed to bring together talent supply with talent demand in a relationship centric commerce graph.

The rise of on-demand expertise combined with the rise of match-making and collaboration management technologies in addition to the increasing focus of businesses on driving down costs while maintaining or elevating production and quality has created the ideal conditions where the growing talent supply plus increasing demand plus new technological capability disrupt traditional business models.

We're seeing the results across all segments of the economy. From travel to transportation, from the desktop to the datacenter, from project management to point-of-sale service, there is a new, highly engaged way of doing business.

## The New Engaged Workforce

As discussed previously, there is a very low level of engagement between companies and their full-time W2 employees. This engagement has material costs, as much as \$550 billion according to estimates<sup>xviii</sup>. But there is one segment of the workforce that has overcome these disengagement trends. This is the highly autonomous, competent and engaged freelance and independent contractor workforce. They are proven to be more engaged, more satisfied and more committed to the success of the organizations for which they contract than their W2 counterparts. In short, the best employee you have may not actually work for you. The best company to work for is, in all likelihood, your own.

The engagement factors like autonomy, competence and relatedness discussed previously are strongly evidenced in the freelance and contingent workforce.

In Fall of 2014, Field Nation conducted a study of the contractors who had registered for free on its platform<sup>xix</sup>. This study measured engagement and complementary factors such as how independent service providers view themselves.

The study revealed five key insights that each support the proposition that the freelance and independent workforce have the most autonomy, the most competence and a high degree of relatedness in their daily work, making them the most engaged workforce in America.

### Finding One: Freelancers Chose Freelancing

The first finding is that the freelance and contracting workforce has overwhelmingly opted into this independent lifestyle rather than feeling forced into it. 88% of respondents indicated that they selected the freelance and independent contracting lifestyle. Only 12% indicated that they felt forced into the role because of no other options at the time.

Furthermore, while moonlighting (i.e. supplementing their income through contracting while maintaining a traditional, full-time W2 job) is growing in popularity as discussed above, only 6% of respondents indicated that they were moonlighters. A surprising 94% of those who opted into the contracting lifestyle indicated that they did so because they wanted to better control their own future, better activate their own talents and capabilities or simply keep the choice and control of their career in their own court.

This first finding speaks directly to the autonomy requirement for engagement. The overwhelming majority of independent contractors started contracting and continue to do so not because of external forces but because of their own autonomy.

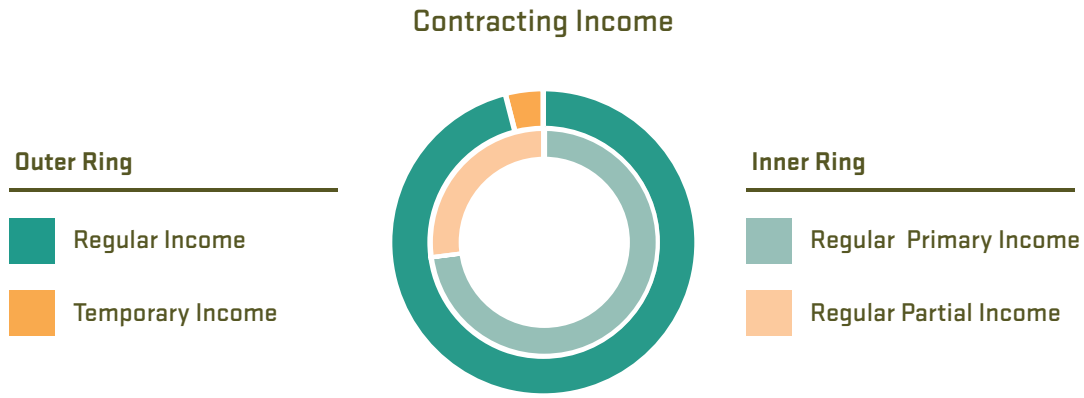
### Freelance Contractors Who Selected The Lifestyle vs Those Who Felt They Had No Other Option





## Finding Two: Freelancing Provides An Important & Regular Income Stream

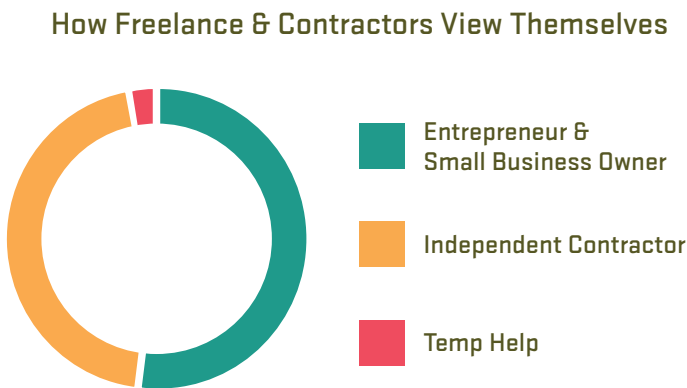
The second finding shows that the independent freelance community has built a lasting and successful model on the foundation of their competence. This is revealed by the overwhelming percent who have made contract work a regular means for income. Over 96% of respondents stated that contracting was a regular means of income with 73% indicating that it was their primary income. Only 4% stated that contracting was temporary income while they looked for another job.



The inference of competence from the vast majority of contractors whose livelihood depends on their ability to consistently execute is strong. In the expertise marketplace, competence is rewarded with repeat business. Those who are able to not just make ends meet but also thrive in such an environment have a clear foundation of competence in their specific areas of expertise.

## Finding Three: Independents Are Entrepreneurs & Small Business Owners

The third finding is related to the first showcasing the fact that independent and freelance workers in the U.S. see themselves in ways that blend autonomy and competence.



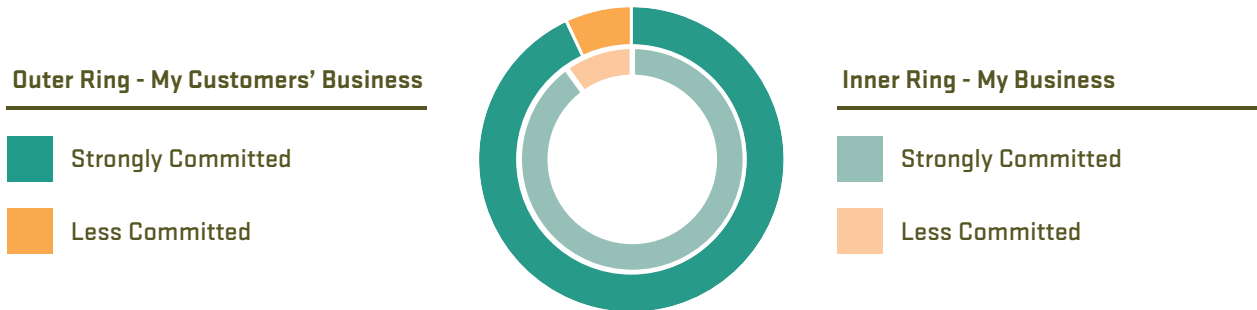
A majority - 52% - of independent contractors view themselves as entrepreneurs and small business owners while 45% view themselves as independent contractors. The remaining 3% of respondents see themselves as temporary help and people who fill the gaps.

The clear results demonstrate that independent contractors view themselves as capable and competent to blaze their own trail in the new economy of self-determinism. Furthermore, the large minority of freelancers responding who self-identify as independent contractors demonstrate the acceptance of contractors and freelance contracting in the on-premises, B2B world. This results sits on the engagement foundation of both autonomy and competence.

## Finding Four: Independent Contractors Are Committed To Their Clients' & Their Own Success

The fourth finding demonstrates the incredibly high degree of relatedness that the independent contracting community has. This is found in the dual commitments they hold to both their own business and to their customer's businesses. Respondents to the Field Nation study indicated that they were committed to the success of their own business by a factor of 9 to 1. When compared against the percentage of independents who chose the lifestyle vs. those who were forced into it due to circumstance, we find that even those who did not opt for the freelance career path, some nonetheless develop an appetite and commitment to their own success. This suggests that, regardless of how they start contracting, once they experience it, they desire and work towards excellence.

### Committed To The Success Of Business



When asked about their commitment to their customers' success the results were even stronger. Over 93% indicated an abiding commitment to the success of their customer. This means that they are able to both relate to the needs of their customers and clients while doing what it takes to achieve success. In the world of on-site contracting work that Field Nation specializes in, success requires engaging with other people. From greeting the customer at their front

desk when the contractor shows up, to communicating in person with the customer's on-site staff to engaging electronically through the Field Nation platform, the ability to communicate, understand and relate project details, customer expectations and on-site peculiarities demands a level of relatedness not seen in other remote-workforce applications.

## Finding Five: Freelancers Are Overwhelmingly Satisfied With Their Work

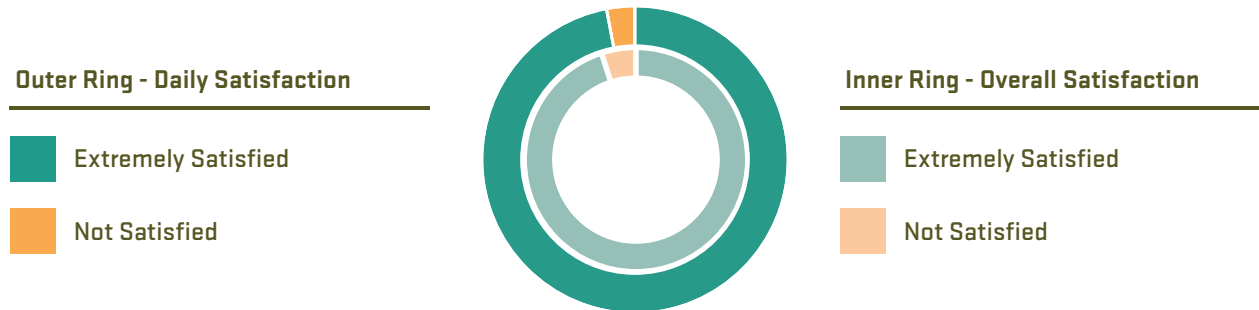
The fifth and final finding from the Field Nation study on independent contractor engagement is that they are far more satisfied with their daily work than their traditionally employed counterparts. When asked about their satisfaction with both their daily work and overall career, the results were overwhelmingly satisfied.

On a day to day basis, 97% reported that they were satisfied with what they do. Of those who indicated they were satisfied, over 63% stated, *'I love what I do'*.

When looking at the big picture, 95% reported that they were either satisfied or very satisfied with their career as an independent contractor. When compared to the percentage who originally chose the freelance path, this finding suggests that, even when people start freelancing out of economic necessity, they grow to value and embrace the career choice.

This stands in sharp contrast with the mere 30% of traditional, full-time employees who Gallup finds are engaged and satisfied with their jobs in the U.S.<sup>xx</sup>.

### Satisfaction As An Independent Contract Worker



The incomparably high satisfaction and engagement scores of the independent contracting workforce evident in the Field Nation study provide strong justification for the claim that the best employee in your organization may not work for you; he or she may work for him or herself. Similarly, the best business to work for may actually be your own.

The autonomy inherent to a freelance career, the deep expertise (i.e. competence) and the relatedness that continued success as an independent requires create the strongest pillars of the newly engaged workforce. Modern organizations, both large and small, must recognize that their continued success depends on connecting and building relationships with this highly skilled, engaged workforce in order to get work done.

When you put it all together, it means that the freelance workforce, and specifically the independent contracting workforce present on Field Nation, is arguably the most engaged workforce in the world.



# Conclusion: The New Face Of The American Workforce

The new face of the American workforce is independent, online and committed to controlling their own future. This workforce understands that success requires more than showing up. It requires activated expertise that delivers on time, on budget and on site. It requires insight and availability that is local and able to access needed materials immediately as they are needed. The future of this newly engaged workforce is empowered by cloud platforms like Field Nation which connect expertise supply with expertise demand in an ecosystem of exchange and management.

In this paper we have covered the five reasons for the shift from full time to freelance. These reasons are:

1. The appetite for on-demand expertise outside of the organization that started with global outsourcing.
2. The inversion of the traditional organization – individual hierarchy wherein organizations are no longer proxies for expertise; rather individuals are now primary.
3. The evolution and emergence of communication and collaboration technology that facilitate engagement with expertise anywhere it is needed and management of projects without cumbersome infrastructure and headcount.
4. The Great Recession of the late 2000s that drove many individuals to seek out freelancing opportunities.
5. The emerging culture of passion which encourages and rewards working in ways which delight you and thereby drive individual productivity and engagement.

We then examined the two disruptions that have profoundly affected employment topology. These are:

1. The Disengagement Dilemma wherein traditionally employed full-time workers are strikingly disengaged, disappointed and disinterested in their jobs, costing the U.S. economy as much as \$550 Billion in lost productivity each year.
2. The Freelance Disruption which finds businesses increasingly turning to a contingent and independent workforce to meet their needs and solve their problems.

The paper then discussed the five research revelations that show how this freelance workforce is overwhelmingly more engaged, more satisfied and more committed to success than their traditional counterparts. These five research revelations are:

1. Independent contract workers overwhelmingly chose the freelance lifestyle.
2. Independent contracting provides a non-trivial and regular income stream for most, rather than occasional or supplemental earnings.
3. Independent contractors consider themselves to be entrepreneurs and small business owners, demonstrating a clear focus on growth and opportunity.
4. Independent contractors are overwhelmingly committed to success: both theirs and their customers'.
5. Independent contractors are overwhelmingly satisfied with their work.

Together, these five revelations support the scientific basis for an engaged workforce: autonomy, connectedness and competence. Together these show that the best employee may not actually work for you. Together these show that the best company to work for may be your own.

This is the new face of the American workforce.

This is Field Nation.

Get work. Done.

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