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### WHO WE ARE

### ABOUT US

For Kansas City to maintain a fast-growing tech industry, it needs an ever-evolving coalition to advocate and serve as a catalyst for its success. That's where we come in. As an independent nonprofit membership organization, the KC Tech Council works with 180+ member companies and industry leaders to strengthen and promote the tech hub of the midwest.

#### WHAT WE DO

#### **Industry Access**

The tech industry employs one in every 10 workers in Kansas City. Through events such as The CEO Retreat, Access : Granted and our Executive Roundtable Series and conversations with industry leaders on our Byte by Byte podcast, we strive to create a unique space for these 100,000+ workers to connect, collaborate and achieve.

#### Workforce Development

Every successful tech hub has one thing in common: a strong tech talent pipeline. Throughout 2021, more than 25,000 tech jobs were posted in the Kansas City region. We employ short-term and long-term solutions to help bridge our region's tech talent gap. That's why at the start of 2021, we launched Apprenti KC, part of a nationally recognized apprenticeship program focused on diversity and equity in tech.

#### Policy Advocacy

Legislative policy has the ability to help or hinder the growth and success of the tech industry. It is vital for KC's industry to have a collective voice before our elected officials. Led by our Policy Committee of industry leaders, KCTC works to do just that. We actively monitor, champion or oppose emerging issues that impact the industry, and inform our members on the issues they should prioritize.



### **INDUSTRY LEADERSHIP COUNCIL**

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Chris Underwood General Manager, Business & Technology Solutions Burns & McDonnell

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Scott Woodward Partner MarksNelson LLC

# WELCOME & WHAT'S NEXT

We love to look at the tech industry in the form of headlines anointing the newest, hottest home for tech. Here are a few real ones from 2021 and 2022:

"From Dell to Oracle, How Nashville became a Tech Hub"

"Austin emerges as a city of unicorns and tech giants"

"How Miami Caught a Wave and became the Hot New Tech Hub"

"Austin vs. Pittsburgh: The Steel City climbing tech ladder right behind Live Music Capital"



To be sure, there is truth in all these headlines' accompanying stories. Tech growth is happening in cities across the United States. However, while reporting like this answers where tech growth is happening (spoiler: it's growing nearly everywhere), it may be more instructive to dig into how.

In KC Tech Specs v5, we'll get into the how. How quickly is the tech talent pool growing in Kansas City? In Kansas? In Missouri? How many tech companies are in our region? How do we compare to similarly-sized markets? How large is the talent pipeline coming out of regional universities' computer science (CS) programs? How successful have endeavors been to broaden CS education in the all-important K-12 space?

As you read and find out how, we invite you to ask another question: "What's next?"

In the Greater Kansas City region, there have been significant indications of what's next for tech, among them:

Panasonic's selection of DeSoto for its next EV battery plant represents the largest economic development project of any kind in the history of Kansas. It also represents a significant growth opportunity at the intersection of tech and manufacturing.

Meta's selection of Kansas City, Mo. as its next hyper-scale data center represents the largest single data center investment in our region's history to date. It also represents a significant growth opportunity at the intersection of tech and infrastructure.

In its report, Superstars, rising stars and the rest: Pandemic trends and shifts in the geography of tech, The Brookings Institution anoints Kansas City as one of nine "rising star" tech hubs across the country. But beyond answering where the next tech hubs may be built, the report offers specific insight on how these rising star tech hubs can create their own destiny:

- Building authentic, differentiated tech clusters
- · Developing a skilled, abundant, and diverse digital workforce
- Providing excellent broadband connectivity
- · Cultivating a vibrant tech community with plentiful networking opportunities and acceleration programs
- Crafting an excellent quality of place, complete with top-notch schools; parks and greenspace; bike lanes; and coworking spaces

-Superstars, rising stars and the rest: Pandemic trends and shifts in the geography of tech; Brookings Institution 2022

### WELCOME & WHAT'S NEXT

Through our work with 180+ of the region's top tech employers, KC Tech Council strives to carry out several of these strategies. From meaningfully building relationships within tech clusters like Cybersecurity, Data Centers/Mission Critical and Data Analytics through our "Exec Roundtable" programs, to building a skilled, diverse workforce through Apprenti, our growing tech apprenticeship program, to cultivating community by hosting events like our CEO Retreat, and sharing the stories of the people who make it grow.

But we know this work is never finished, nor is it ours to do alone. We need a coalition of broad support and collaboration from our community, companies and civic partners to fulfill Kansas City's ability to become a true tech hub of the future. So as our team addresses the how and progresses toward what's next, you're invited to join us for the journey.

Thank you,

Kandone

Kara Lowe President & CEO KC Tech Council

# ANALYSIS FROM RSM

Kansas City's growing technology ecosystem is a critical component of the region's overall vitality. Given the new possibilities of remote work, significant investment in the city's tech sector in recent years and the region's employment picture, Kansas City and its tech industry are poised to flourish as some workers decide to move inward from the coasts.

As of the first quarter of 2022, the Kansas City metro area had recovered 81% of the jobs it lost during 2020, according to Oxford Economics, and all lost jobs are expected to be recovered by the end of 2022. Throughout the pandemic, the region's recovery has outpaced the overall U.S. recovery rate, and that trend is expected to continue. In addition, the significant number of federal government jobs in the metro has helped to mitigate the volatility in the labor market.

The metro has a younger population and a higher employment rate in STEM occupations than the United States on average, and the area is expected to grow via migration. Kansas City also has an affordability factor; the metro's income distribution is more heavily weighted to the middle class than other metros, with households earning more than the national average in all income groups other than those making less than \$35,000 and over \$250,000 annually.

As the Kansas City technology sector works to expand its thriving tech ecosystem for a post-pandemic future, it will be critical for companies to embrace the technologies shaping the way we work, communicate, educate, care, and entertain. And investment trends show that ecosystem is already drawing attention; the region has recently experienced substantial venture capital and private equity investment in technology companies. Over \$22 billion of capital has been invested in regionally-based tech companies in over 1,200 deals in the trailing four and a half years, according to PitchBook Data Inc.

Small and large businesses alike will likely take advantage of this moment to increase discretionary spending. However, it would be wise to focus a large portion of that spending on technology implementation and upgrades to meet the demands of new hybrid work environments. Plenty of businesses—not just in the tech sector—are already upping their expenditures; 42% of respondents to the second-quarter RSM US Middle Market Business Index survey said in April that they had increased capital expenditures, and 51% expected to do so during the next six months.

Investment in talent will be just as important. The competition for—and cost of—highly skilled technology talent climbed significantly in 2021, and although wage pressure has subsided slightly, wage levels remain elevated in 2022. Moreover, in the same survey mentioned above, 62% of executives reported raising compensation in the last three months. The tech industry job market has experienced more competition than most other sectors as technology companies move to make some or all positions remote. That means the competition for top tech talent finds employers not only competing with regional rivals, but also at a national level. On one hand, this will likely benefit Kansas City as the talent pool expands and more top-tier candidates become available than in the past.

The drawback, however, is that top tech talent will continue to require more competitive compensation packages as have been historically offered by coastal tech employers, including those residing locally. As of this release, the median pay for tech occupations in Kansas City is \$81,500, which falls \$11,200 below the national median of \$92,700. The comparison of median tech salaries to median area salaries also shines Kansas City in a less competitive light. Nationally, the median tech salary is 120% higher than the median for all jobs. The same measure for Kansas City is 93%, which for a government job-heavy metro leaves plenty of opportunities for improvement.

The elevated labor costs will likely prompt tech companies to explore the use of artificial intelligence and automation to free their teams from repetitive manual processes, in turn allowing them to retrain and upskill their local workforce. Almost \$2.4 billion of capital has been invested in AI and automation companies over 278 deals in Kansas and Missouri since 2018, according to data compiled by PitchBook.

# ANALYSIS FROM RSM

The pace of technology adoption will continue as technology finds its way into every corner of our economy. If a company suspends its technology investments, it could disrupt its business model. Kansas City businesses are continually looking to enhance customer relationships, operational effectiveness, and their company's culture. With labor and competitive challenges in Kansas City and across the United States on the rise, there has never been a better time to invest in technology.

RSM US LLP is proud to be a Cornerstone Sponsor of the KC Tech Council and grateful for the opportunity to be a part of this year's KC Tech Specs report. RSM is the leading U.S. provider of audit, tax, and consulting services to the middle market. We understand the importance of communicating industry-specific trends to Kansas City and are grateful for the opportunity to promote the technology ecosystem in this great city.



Nate Farshchi Senior Analyst Technology, Media & Telecommunications Senior Analyst & Director Technical Accounting Consulting



### CURRENT STATE

Tech remains an integral component of the Kansas City region, with more than 3,800 existing tech businesses and more than one out of every 10 workers employed by the industry. However, with over 27,000 tech job postings in 2021 and not nearly enough talent to fill all positions, we must continue to build a pipeline that will support the growth of our sector.

We are currently in the unique position to attract talent that we previously were unable to attract by offering opportunities to work from home. As the pandemic persists and we settle into a "new normal," it's evident we're amidst a historic shift towards remote employment. In 2021, nearly 16,000 Missouri tech job postings, or 28% of all job postings, included a work-from-home or hybrid work option, representing a 75% increase from the 2019 pre-pandemic rate. Kansas experienced an even greater 147% increase over the last three years accounting for over 8,400 WFH or hybrid postings in 2021, representing 33% of the state's total tech job listings.

# CURRENT STATE ECONOMIC IMPACT

Throughout Tech Specs v5, we utilize data from our partners at CompTIA. It's important to note that CompTIA revised the definition of "technology" along with North American Industry Classification System (NAICS) and Standard Occupatoinal Classification (SOC) codes used throughout its Cyberstates 2022 report. These changes prevent the ability to directly compare certain components of Tech Specs v5 from previous editions. However, throughout Tech Specs v5, you'll find it's beneficial to benchmark to our peer tech industries.

To find the complete list of NAICs and SOCs used throughout Tech Specs v5, please navigate to the end of the report.



#### PEER GROUP: TECH ECONOMIC IMPACT AS A % OF LOCAL ECONOMY\*

INDIANAPOLIS:	6.3%	NASHVILLE:	5.8%	ST. LOUIS:	7.6%	
MINNEAPOLIS:	9.8%	CHICAGO:	7.4%	KANSAS CITY:	9.3%	

### CURRENT STATE

# KANSAS CITY TECH WORKFORCE AT A GLANCE

Due to the pandemic, tech job postings among U.S. employers dipped in 2020 and continue to bounce back throughout 2021 and 2022. However, Cyberstates 2022 estimates that over the next ten years, employment in tech occupations will increase roughly twice as quickly as the national average across all occupations.

#### THREE CATEGORIES OF TECH WORKERS:

**Tech workers in other industries:** a skilled tech worker who works in an industry outside of technology (Ex. a software developer working at a small retail business)

**Non-tech workers at a tech company:** A worker who does not have technical skills working in the tech industry (Ex. a marketing director at a tech startup)

**Tech workers at a tech company:** a skilled tech worker who works in the tech industry (*Ex. a computer engineer working at a tech company*)



#### KANSAS CITY TECH JOB TRENDLINE

Though the pandemic, and its related hiring freezes caused a bit of a "coasting effect" on tech job growth, projected numbers in 2022 already show a full rebound.

## THE 2032 OUTLOOK FOR TECH OCCUPATIONS

There are several factors that contribute to the ebb and flow of the demand for tech workers: growth through expansion, retirement, those leaving the workforce as well as those transitioning into new roles within an organization.

#### TOP PROJECTED GROWTH TECH OCCUPATIONS FOR 2022 BY EMPLOYMENT:

4.3% Data Scientists
4.0% Cybersecurity
3.9% Software Developers and Software QA
3.5% Computer and Information Research Scientists
2.6% Web Developers and Digital Interface Designers
2.1% Emerging Tech, IT Project Mgt. and Other
1.7% IT Support Specialists

 $^{st}$  Growth indicates net new jobs being added and does not include jobs being replaced.

According to our partners at CompTIA, here's how growth and replacement will play out in terms of tech talent demands over the next 10 years:

The current number of tech occupations in Kansas City is predicted to grow by **9%** over the next **10 years**. In the interim, we will also need to backfill some of our current jobs. In the same 10-year period, upwards of **36%** of tech occupations, or approximately **3,733** tech jobs a year, will need to be replaced due to retirement, workers transitioning into new roles, those leaving the industry, etc.



View the charts below to see these figures for Kansas City, Missouri, Kansas and the United States.

# HIGHEST AND LOWEST COMBINED TECH JOB GROWTH & REPLACEMENT RATES ACROSS THE UNITED STATES



### PEER GROUP PROJECTED COMBINED TECH JOB GROWTH & REPLACEMENT PERCENT CHANGE



## LOCAL VS. NATIONAL SALARY AVERAGES

As remote work becomes available for nearly all U.S.-based tech workers, comparing city and state salary averages to the national average proves to be the most valuable. In other words, Kansas City no longer directly competes with St. Louis or Wichita for talent. We are competing with everyone.

	10 <sup>™</sup> PERCENTILE	25 <sup>th</sup>	MEDIAN SALARY	75 <sup>th</sup>	90 <sup>™</sup> PERCENTILE	% HIGHER THAN MEDIAN AREA WAGE
US	\$46,300	\$65,800	\$92,700	\$124,400	\$156,000	120%
KC	\$44,700	\$59,700	\$81,500	\$106,000	\$129,000	93%
MO	\$40,900	\$57,700	\$80,600	\$105,500	\$130,000	105%
KS	\$41,200	\$55,100	\$74,800	\$99,800	\$124,500	94%

### TECH OCCUPATION SALARIES

### HIGHEST AND LOWEST MEDIAN SALARY BY TECH OCCUPATION



# ANALYSIS FROM TECH CHECKPOINT



The Tech Checkpoint is a monthly workforce report produced by the KC Tech Council. Each month, we collect data from our partners at JobsEQ and compile it into one report delivered straight to the inboxes of KCTC subscribers. In addition to current statistics, Tech Checkpoint offers thought leadership from local talent acquisition company, ECCO Select.

In the five years the KC Tech Council has produced KC Tech Specs, we have never exceeded the U.S salary average for any of our top tech occupations. This year, that has changed. Whether it's because of increased competition to hire at a national level or the results of increasing wages everywhere, tech companies in Kansas City are now paying more for two of the most critical roles.



#### KC VS US SALARIES FOR KC'S TOP FIVE TECH OCCUPATIONS

### ACCORDING TO THE MONTHLY TECH CHECKPOINT IN 2021, THE FOLLOWING ARE OCCUPATIONS, CERTIFICATIONS AND SKILLS IN HIGHEST DEMAND IN KC.



- 1. Computer User Support Specialist
- 2. Software Developer
- 3. Network and Computer Systems Administrator
- 4. Computer Systems Engineer/Architect
- 5. Information Technology Project Manager
- 6. Computer Systems Analyst
- 7. Information Security Analyst
- 8. Software Quality Assurance Analyst and Tester
- 9. Database Administrator
- 10. Web Developer

# TOP 5 CERTIFICATIONS

- 1. Secret Clearance
- 2. PMP
- 3. CISSP
- 4. CCNA
- 5. CCNP



- 1. Agile
- 2. Computer Programming/Coding
- 3. SQL
- 4. Java
- 5. Amazon Web Services

### REPRESENTATION IN TECH ACROSS RACE AND GENDER

From recruiting and retaining talent to fostering innovation and delivering strong financial performances, cultivating a representative work environment leads to a myriad of benefits.

When it comes to diversifying the Kansas City tech workforce, we unfortunately have not seen much measurable progress in the last year. There has also been little change at both the state and national levels. Though progress is slow, it's essential we focus on opportunities today that can directly lead to the inclusive workforce of tomorrow. That's why at the start of 2021, KC Tech Council launched Apprenti KC, part of a nationally recognized apprenticeship program focused on diversity and equity in tech.



### DEMOGRAPHIC BREAKDOWN IN TECH INDUSTRY

The Diversity Index weighs two key facets of race and ethnicity within the workforce: quantity and distribution, and reflects it in a single metric.

Source: CompTIA Cyberstates 2022 & CompTIA Cyberstates 2021







The Diversity Index weighs two key facets of race and ethnicity within the workforce: quantity and distribution, and reflects it in a single metric.

# THE STATE OF OUR STATES

To fully grasp our capabilities as a region, we must objectively assess the present state of Kansas and Missouri's tech industries.











#### Source: CompTIA Cyberstates 2022 \*Please note: The year-over-year comparability of this number has been affected by a narrowed definition of tech occupations by CompTIA, the source for this data.

### CITY & STATE COMPARISONS

In this section, we explore Kansas City's tech talent supply in addition to those of its two home states and similar markets. With a continuously increasing demand for tech workers, it is important to examine our tech talent pipeline and how it stacks up against others.

### COMPUTER SCIENCE DEGREES ACROSS STATE LINES

Even if Kansas City's tech industry was able to capture every graduating computer science student in the top six states from which we recruit them, we would still fall short of filling all available tech positions in our region. It is worthwhile to rethink how you source talent beyond the traditional four-year path.

### WHO'S GRADUATING WITH COMPUTER SCIENCE DEGREES ACROSS THE REGION?

	KANSAS	MISSOURI	IOWA	NEBRASKA	ARKANSAS*	INDIANA*
BACHELORS	668	1,781	954	679	480	2,654
MASTER'S	141	1,223	495	304	263	571
ASSOCIATE'S	265	439	320	195	242	663
DOCTORATE	6	23	15	7	7	71
TOTAL TECH	1,279	3,891	2,177	1,415	4,484	4,958
DEGREES	2.3% OF TOTAL DEGREES	4.1% OF TOTAL DEGREES	3.9% OF TOTAL DEGREES	4.6% OF TOTAL DEGREES	3% OF TOTAL DEGREES	4% OF TOTAL DEGREES
TOTAL DEGREES	55,158	95,881	55,943	30,838	50,290	121,847

Awards and enrollment are for the academic year of 2020. The academic year ends in the spring semester of the displayed year.

\*Please Note: Awards data for Arkansas and Indiana are based upon degrees conferred for the 2019 academic year and are provided by the National Center for Education Statistics. Statistics were pulled using Computer and Information Sciences and Support Services (11).

Source: JobsEQ

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# TAKING A LOOK ACROSS STATE LINES

As noted in the previous section, Kansas and Missouri produced fewer graduates than some of our competing states. On top of that, the increase of remote work and the race to attract graduates continues. Salary has become a crucial component of graduates' post-degree job hunt and has the potential to draw talent across state lines.



TECH MEAN: \$83,300 STATE MEAN OF ALL OCCUPATIONS: \$50,900



TECH MEAN: \$79,100 STATE MEAN OF ALL OCCUPATIONS: \$49,000



TECH MEAN: \$82,400 STATE MEAN OF ALL OCCUPATIONS \$49,900



TECH MEAN: \$81,400 STATE MEAN OF ALL OCCUPATIONS \$50,400



TECH MEAN: \$73,300 STATE MEAN OF ALL OCCUPATIONS: \$45,100



TECH MEAN: \$79,400 STATE MEAN OF ALL OCCUPATIONS: \$48,900

# COMPUTER SCIENCE EDUCATION POLICY FOR K-12

Believe it or not, the tech talent pipeline can be influenced as early as kindergarten. Meaningful computer science (CS) education experience can play a predictive and significant role in determining a student's likelihood of electing to pursue a career in tech.

The nine policies outlined below were created by our advocacy partners at Code.org, a leading non-profit advocating for CS education expansion in the United States, as tactics that could help states bolster computer science education in their K-12 public schools.

Below, we've tracked each of the nine proposals, indicated how many states have already passed similar statewide legislation, and noted whether Missouri and Kansas have passed legislation as well. Additionally, we've indicated how many states had passed legislation the last time these metrics were tracked by KCTC, which was in summer 2022.



### TECH INDUSTRY COMPARISONS KC VS SELECT MARKETS

The matrix below outlines various metrics to measure how large the tech industry's employment base is in peer metros, how significantly tech has grown, and its share of economic impact within the market.

	2020 CENSUS MSA POPULATION	NET TECH EMPLOYMENT JOBS ADDED RANK*	NET TECH EMPLOYMENT RANK*	TECH ECONOMIC IMPACT AS A % OF OVERALL*	NET TECH EMPLOYMENT AS A % OF OVERALL WORKFORCE*	NET TECH EMPLOYMENT 2021 EST.
KANSAS CITY	2,192,035	41ST	24TH	9.3%	7.3%	104,397
INDIANAPOLIS	2,111,040	20TH	30TH	6.3%	5.2%	75,284
NASHVILLE	1,989,519	14TH	34TH	5.8%	4.8%	68,603
MINNEAPOLIS	3,690,261	45TH	14TH	9.8%	7.9%	194,287
CHICAGO	9,618,502	50TH	9ТН	7.4%	5.5%	245,798
ST. LOUIS	2,820,253	34TH	25TH	7.6%	5.6%	74,602

# **REPORT'S NAICS AND SOC CODES**

### INDUSTRY CLASSIFICATION BY NAICS (NORTH AMERICAN INDUSTRY CLASSIFICATION SYSTEM)

#### **IT/Tech Services**

423430, 541511, 541512, 541513, 541519, 611420, 811211, 811212, 811213, 811219

Telecommunications, Internet Services and Data Hosting

517311, 517312, 517410, 517911, 517919, 518210, 519130 Software 511210

#### Manufacturing: Computer, Peripheral and Communications Equipment,

#### **Semiconductors and Electronic Components**

333242, 334111, 334112, 334118, 334210, 334220, 334290, 334310, 334412, 334413, 334416, 334417, 334418, 334419, 334510, 334511, 334512, 334513, 334514, 334515, 334516, 334517, 334519, 334613, 334614

### OCCUPATION CLASSIFICATION BY SOC (STANDARD OCCUPATIONAL CLASSIFICATION)

#### Information Technology (IT) Occupations

11-3021, 15-1211, 15-1212, 15-1221, 15-1231, 15-1232, 15-1241, 15-1242, 15-1243, 15-1244, 15-1245, 15-1251, 15-1252, 15-1253, 15-1255, 15-1256, 15-1257, 15-1299, 15-2098, 17-2061, 49-2011



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