






The 2025 PPI Tech/Info/ Ecommerce Job Index: Fighting Recession on the Local Level

DR. MICHAEL MANDEL
PROGRESSIVE POLICY INSTITUTE

JUNE 2025

 @ppi |  @progressivepolicyinstitute |  /progressive-policy-institute



The 2025 PPI Tech/Info/ Ecommerce Job Index: Fighting Recession on the Local Level

DR. MICHAEL MANDEL

JUNE 2025

INTRODUCTION

The evidence of the past two decades is clear. The tech/info/e-commerce (TIE) sector — which we will define below — and the closely related tech/info subsector, have consistently produced faster job gains, at higher pay, than the rest of the economy.

Focusing on the period since 2019, the tech/info/e-commerce sector has become essential as a source of good jobs. Propelled by massive investments in cloud computing, artificial intelligence and broadband, tech/info industries such as software, computer systems design, and computing infrastructure have generated hundreds of thousands of new jobs. In addition, ecommerce industries have added roughly 900,000 jobs over the same stretch.

All told, tech/info/e-commerce employment has risen by 18% since 2019, compared to a 4% gain in the rest of the private sector. Moreover, average weekly pay in the TIE sector is 47% higher than other private sector jobs.

That's on the national level — what about the impact of tech/info/e-commerce jobs on local economies? We'll show in this paper that counties with a strong TIE presence have stronger job growth in the rest of the private sector as well.

In particular, we will show that the top 25 counties, as ranked by the **PPI Tech/Info/Ecommerce Job Index**, reported a median non-TIE private sector job gain of 5.8% between 2019 and 2023. That's compared with a median 0.3% gain for the remaining large and medium counties. The somewhat narrower **PPI Tech/Info Job Index** showed a similar difference in job growth between high-ranking counties and everyone else.

The implication: With recession now a possibility, counties with a strong TIE presence are better positioned to weather an economic slowdown.

METHODOLOGY

To quantify the importance of tech/info/ecommerce jobs for local economies, we construct the PPI Tech/Info/Ecommerce Job Index, an updated version of the PPI Tech/Info Job Index first introduced in 2013.¹ For each of roughly 200 large and medium-size counties, the PPI Tech/Info/Ecommerce (TIE) Job Index reports the number of new TIE jobs created between 2019 and 2023, as a share of 2019 total private sector employment in that county, multiplied by 100. For example, an index of 1 means that new TIE jobs created between 2019 and 2023 equal 1% of total 2019 private employment (the list of tech/info/ecommerce industries is found in the appendix).

The PPI TIE Job Index is a combined measure of both the growth of the tech/info/ecommerce sector and its size relative to the local economy. The top-ranked five counties are San Joaquin County, California; Collin County, Texas; Somerset County, New Jersey; Will County, Illinois; and San Mateo County, California (Table 1).

We also constructed the PPI Tech/Info Job Index, which measures the number of new tech/info jobs between 2019 and 2023, as a share of 2019 total private sector employment in that county, multiplied by 100. The top-ranked five counties are Collin County, Texas; San Mateo County, California; Travis County, Texas; Williamson County, Texas; and Somerset County, New Jersey (Table 2).

IMPACT ON OVERALL JOB GROWTH

If we look at the counties at the top of the PPI TIE Job Index, we see that they tend to have faster TIE job growth than other counties. The median TIE job growth of the top 25 counties was 38% from 2019 to 2023. That's compared to 10% for all other medium and large counties (Table 3).

More important, top-ranked counties also tend to have faster non-TIE growth than other counties. The 25 counties at the top of the PPI TIE Job Index had a median job gain of 5.8% in the rest of the private sector from 2019 to 2023. By contrast, all other medium and large counties report a median job gain of only 0.3% across non-TIE jobs. An almost identical result holds for the PPI Tech/Info Job Index as well (Table 4).

IMPLICATIONS

This analysis does not show causality, of course. But it does suggest that counties with a strong tech/info or tech/info/ecommerce sector are better situated to withstand any economic slowdown.

That's important, in the context of the current economic and political climate. Cutbacks in the federal workforce, curbs on immigration, and higher tariffs are likely to lead to economic stresses, at least in the short term. Meanwhile, the vast amounts being spent on investment in artificial intelligence will be boosting the tech/info and TIE sectors.

TABLE 1: PPI TECH/INFO/ECOMMERCE (TIE) INDEX

COUNTY	TECH/INFO/ ECOMMERCE (TIE) INDEX	TIE JOB GROWTH, 2019-23	NON-TIE PRIVATE JOB GROWTH, 2019-23	LOCATION
SAN JOAQUIN COUNTY, CALIFORNIA	5.8	53.7%	7.0%	Stockton
COLLIN COUNTY, TEXAS	5.4	50.8%	21.8%	Dallas MSA
SOMERSET COUNTY, NEW JERSEY	4.9	45.3%	-4.3%	NYC MSA
WILL COUNTY, ILLINOIS	4.8	49.9%	2.1%	Chicago MSA
SAN MATEO COUNTY, CALIFORNIA	4.7	20.3%	-3.9%	SF MSA
FORT BEND COUNTY, TEXAS	4.6	113.5%	12.9%	Houston MSA
TRAVIS COUNTY, TEXAS	4.4	37.1%	16.0%	Austin
SAN BERNARDINO COUNTY, CALIFORNIA	4.3	40.8%	5.4%	San Bernardino
POLK COUNTY, FLORIDA	4.2	55.6%	11.8%	Lakeland
RIVERSIDE COUNTY, CALIFORNIA	3.7	53.9%	5.8%	Riverside
WILLIAMSON COUNTY, TEXAS	3.6	72.5%	23.1%	Austin MSA
ADAMS COUNTY, COLORADO	3.4	38.2%	4.1%	Denver MSA
KING COUNTY, WASHINGTON	3.0	20.1%	-1.5%	Seattle
WAKE COUNTY, NORTH CAROLINA	2.9	29.0%	10.8%	Raleigh
WASHOE COUNTY, NEVADA	2.8	39.7%	3.3%	Reno
DENTON COUNTY, TEXAS	2.8	36.1%	18.6%	Dallas MSA
DURHAM COUNTY, NORTH CAROLINA	2.8	24.4%	9.4%	Durham
BOULDER COUNTY, COLORADO	2.7	16.4%	2.0%	Boulder
DENVER COUNTY, COLORADO	2.6	34.9%	5.8%	Denver
NEW HAVEN COUNTY, CONNECTICUT	2.6	60.5%	-0.6%	New Haven
CLARK COUNTY, NEVADA	2.6	65.1%	4.6%	Las Vegas
DALLAS COUNTY, TEXAS	2.6	30.6%	3.3%	Dallas
MECKLENBURG COUNTY, NORTH CAROLINA	2.5	37.9%	7.9%	Charlotte
BURLINGTON COUNTY, NEW JERSEY	2.5	34.0%	1.9%	Philadelphia MSA
SALT LAKE COUNTY, UTAH	2.4	28.4%	8.3%	Salt Lake City

Source: BLS QCEW data, PPI calculations

TABLE 2: PPI TECH/INFO JOB INDEX

COUNTY	TECH/INFO JOB INDEX	TECH/INFO JOB GROWTH, 2019-2023	NON-TIE PRIVATE JOB GROWTH, 2019-23	LOCATION
COLLIN COUNTY, TEXAS	4.9	47.5%	21.8%	Dallas MSA
SAN MATEO COUNTY, CALIFORNIA	4.8	21.6%	-3.9%	SF MSA
TRAVIS COUNTY, TEXAS	3.7	34.2%	16.0%	Austin
WILLIAMSON COUNTY, TEXAS	3.0	70.7%	23.1%	Austin MSA
SOMERSET COUNTY, NEW JERSEY	2.9	29.3%	-4.3%	NYC MSA
DURHAM COUNTY, NORTH CAROLINA	2.7	25.2%	9.4%	Durham
BOULDER COUNTY, COLORADO	2.6	16.3%	2.0%	Boulder
DENVER COUNTY, COLORADO	2.5	37.5%	5.8%	Denver
SAN FRANCISCO COUNTY, CALIFORNIA	2.4	13.0%	-10.8%	SF MSA
KING COUNTY, WASHINGTON	2.2	15.7%	-1.5%	Seattle
DANE COUNTY, WISCONSIN	1.7	17.7%	-0.3%	Madison
SALT LAKE COUNTY, UTAH	1.6	25.3%	8.3%	Salt Lake City
WAKE COUNTY, NORTH CAROLINA	1.5	16.3%	10.8%	Raleigh
SUFFOLK COUNTY, MASSACHUSETTS	1.3	15.0%	-0.1%	Boston
EL PASO COUNTY, COLORADO	1.2	18.4%	7.7%	Colorado Springs
DALLAS COUNTY, TEXAS	1.1	18.9%	3.3%	Dallas
JOHNSON COUNTY, KANSAS	1.1	23.2%	3.6%	Kansas City MSA
MADISON COUNTY, ALABAMA	1.1	9.8%	8.8%	Huntsville
MONTGOMERY COUNTY, TEXAS	1.1	59.5%	15.3%	Houston MSA
FORT BEND COUNTY, TEXAS	1.1	41.4%	12.9%	Houston MSA
ESSEX COUNTY, NEW JERSEY	1.0	35.8%	-3.0%	NYC MSA
CLARK COUNTY, WASHINGTON	1.0	23.7%	11.1%	Vancouver, WA
DENTON COUNTY, TEXAS	1.0	22.0%	18.6%	Dallas MSA
EL PASO COUNTY, TEXAS	0.9	41.9%	4.4%	El Paso
HOWARD COUNTY, MARYLAND	0.9	6.2%	-5.8%	Baltimore MSA

Source: BLS QCEW data, PPI calculations

TABLE 3: PPI TECH/INFO/ECOMMERCE JOB INDEX AND JOB GROWTH

	MEDIAN TIE JOB GROWTH, 2019-2023	MEDIAN NON-TIE PRIVATE JOB GROWTH, 2019-2023
TOP 25 COUNTIES, RANKED BY TECH/INFO INDEX	38.2%	5.8%
REMAINING LARGE AND MEDIUM COUNTIES	10.4%	0.3%

Source: BLS QCEW data, PPI calculations

TABLE 4: PPI TECH/INFO JOB INDEX AND JOB GROWTH

	MEDIAN TECH/INFO JOB GROWTH, 2019-2023	MEDIAN NON-TIE PRIVATE JOB GROWTH, 2019-2023
TOP 25 COUNTIES, RANKED BY TECH/INFO INDEX	23.2%	5.8%
REMAINING LARGE AND MEDIUM COUNTIES	-1.1%	0.5%

Source: BLS QCEW data, PPI calculations

Appendix

The PPI TIE Job Index and PPI Tech/info Job Index are based on the QCEW data from the Bureau of Labor Statistics. Counties in our sample have 150,000 or more private sector jobs as of 2023, the latest annual data available at the local level when the analysis was done.

For the purposes of this ranking, the tech/info sector consists of the following industries spanning NAICS 51, NAICS 5415, and NAICS 5417:

- Software development and support (including enterprise and consumer software);
- Custom computer programming (including app developers and web developers) and other computer-related services.;
- Computing infrastructure, data processing and hosting (including cloud computing and artificial intelligence);

- Wired and wireless telecom;
- Broadcasting (internet, cable, and over-the-air);
- Film, video, and sound recording (conventional and digital distribution);
- Publishing (print and digital);
- Web search portals and social media;
- Scientific research and development services.

The tech/info/ecommerce (TIE) sector includes these industries plus NAICS 492 (couriers and messengers) and NAICS 493 (warehousing and storage). These industries cover ecommerce-related activities such as local delivery and ecommerce fulfillment. The tech/info/ecommerce (TIE) sector includes these industries plus NAICS 492 (couriers and messengers) and NAICS 493 (warehousing and storage). These industries cover ecommerce-related activities such as local delivery and ecommerce fulfillment.

ABOUT THE AUTHOR

Dr. Michael Mandel is Chief Economist and Vice President at PPI.



The Progressive Policy Institute is a catalyst for policy innovation and political reform based in Washington, D.C. Its mission is to create radically pragmatic ideas for moving America beyond ideological and partisan deadlock.

Founded in 1989, PPI started as the intellectual home of the New Democrats and earned a reputation as President Bill Clinton's "idea mill." Many of its mold-breaking ideas have been translated into public policy and law and have influenced international efforts to modernize progressive politics.

Today, PPI is developing fresh proposals for stimulating U.S. economic innovation and growth; equipping all Americans with the skills and assets that social mobility in the knowledge economy requires; modernizing an overly bureaucratic and centralized public sector; and defending liberal democracy in a dangerous world.

© 2025
PROGRESSIVE POLICY INSTITUTE
ALL RIGHTS RESERVED.

PROGRESSIVE POLICY INSTITUTE
1919 M Street NW,
Suite 300,
Washington, DC 20036

Tel 202.525.3926
Fax 202.525.3941

info@ppionline.org
progressivepolicy.org
