

KC

TECH SPECS

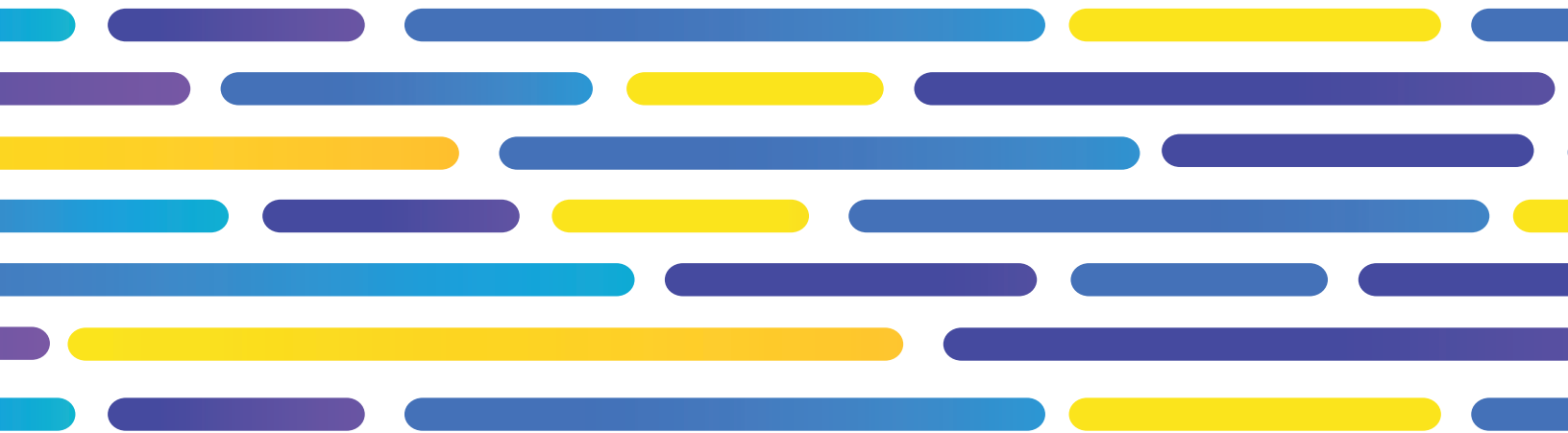
V.06

PRESENTED BY:



TABLE OF CONTENTS

WHO WE ARE	3
WELCOME & WHAT'S NEXT	6
ANALYSIS FROM RSM	8
CURRENT STATE	10
THE 2023 OUTLOOK	14
LOCAL VS. NATIONAL SALARY AVERAGES	15
ANALYSIS FROM TECH CHECKPOINT	16
THE STATE OF OUR STATES	18
TECH WORKFORCE DEMOGRAPHIC COMPARISON	20
TECH INDUSTRY COMPARISONS KC VS SELECT MARKETS	22
COMPUTER SCIENCE DEGREES ACROSS STATE LINES	25
TECH SALARIES ACROSS STATE LINES	26
COMPUTER SCIENCE EDUCATION POLICY	27



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 the KC Tech Council comes in. As an independent nonprofit membership organization, the KC Tech Council works with 200+ 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. It is imperative that we elevate the awareness of the tech industry. We do this by sharing data and insights on our Tech Checkpoint workforce dashboard and mobile app as well as this KC Tech Specs report.

Workforce Development

Every successful tech hub has one thing in common: a strong tech talent pipeline. Throughout 2022, more than 24,000 tech jobs were posted in the Kansas City region. KCTC employs short-term and long-term solutions to help bridge our region's tech talent gap. That's why we launched our own tech apprenticeship program, part of a nationally recognized apprenticeship program focused on growing 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

KC TECH COUNCIL BOARD OF DIRECTORS

Brian Anderson, Chairperson

Chief Technology Officer
NIC Division, Tyler Technologies

Bill Graff, Vice-Chairperson

Senior VP & Chief Information Officer
Clarivate Analytics (US) LLC

Karen Hornig, Immediate Past Chairperson

Chief Executive Officer
NIPR

Andrea Jones

Secretary & Nominations Chairperson

Director of Digital Orientation
Diode Ventures

Michael Graber, Treasurer

Partner
RSM US LLP

Josh Maxfield, Policy Committee Chair

Associate General Counsel-Corporate
Garmin International Inc.

George Brooks

Founder, Chief Executive Officer
Crema

Nickolette Cole

VP, Technology-Small Business &
Financial Services
H&R Block

Fred Ellermeier

VP, Connected Communities
Black & Veatch

Greg Elliott

VP, Business Development
1623 Farnam, LLC

Michael Hannan

Chief Security Officer
LightEdge Solutions

Gregory Kratofil

Shareholder
Polsinelli PC

Scott Morris

Chief Technology Officer
National Association of Insurance
Commissioners

Patricia Bergman

Director of Strategic Partnerships
University of Kansas Edwards Campus

Dr. Jeremy Bonnesen

Director/Principal
Summit Technology Academy

Dan Bower

Assistant Vice President
Federal Reserve Bank of Kansas City

Josh Brewster

Chief Marketing Officer
Trozzolo

John Chawana

Vice Chancellor | Institutional
Effectiveness, Research & Technology
Metropolitan Community College

Tom Collins

President & Chief Financial Officer
Dimensional Innovations

Chris Cooley

Account Manager
Fortinet

Steve Cosentino

Partner
Stinson LLP

Kanon Cozad

Director of CIO Advisory Services
Pomerol Partners

Daniel Cross

General Manager, Kansas City
Slalom

John Felton

Chief Technology Officer
UMB Bank

Kurt Hadermann

VP, Technology
BlueScope Buildings North America

Michael Hanska

SVP, Engineering
Oracle Cerner

Angela Hurt

Chief Executive Officer
Veracity Consulting, Inc

John Kmetz

Partner
FORVIS

Nathan Lagergren

Sr. Director Software Engineering
SS&C Technologies

Tim Lipscomb

Chief Technology Officer
Cboe Global Markets

Jill McCarthy

SVP, Corporate Attraction
Kansas City Area Development Council

Trish Merz

Regional Vice President
Tanium

David Mitchell

Chief Technology Officer
VMLY&R

Chris Newlin

Director of Strategic Accounts
Netrality Data Centers

Doug Oliveira

Chief Information Officer
Caliber Financial Services

Terry Owens

Chief Information Officer
Kansas City National Security Campus,
managed by Honeywell FM&T

Neelima Parasker

Chief Executive Officer
SnapIT Solutions

Ravi Peru

Chief Information Officer
CommunityAmerica Credit Union

Tonya Phillips

Enterprise Sales Director
Zerto, Inc.

Jeff Portsche

Vice President Client Technology
American Century Investments

Jeanette Prenger

President & CEO
ECCO Select Corporation

Kevin Ruel

DVP, Infrastructure Cloud Computing
Blue Cross and Blue Shield of
Kansas City

Kevin Sears

Vice President, Mission Critical
JE Dunn Construction

Ash Siebecker

Chief Technology Officer
Ascend Learning

Matthew Simmons

Vice President of Enterprise Sales
North Region/Central Region
Unite Private Networks

Chris Underwood

General Manager, 1898 & Co.
Burns & McDonnell

Lana Veytia

Sales Manager
Wesco Anixter

Dale Werts

Partner
Lathrop GPM LLP

Richard Wilbanks

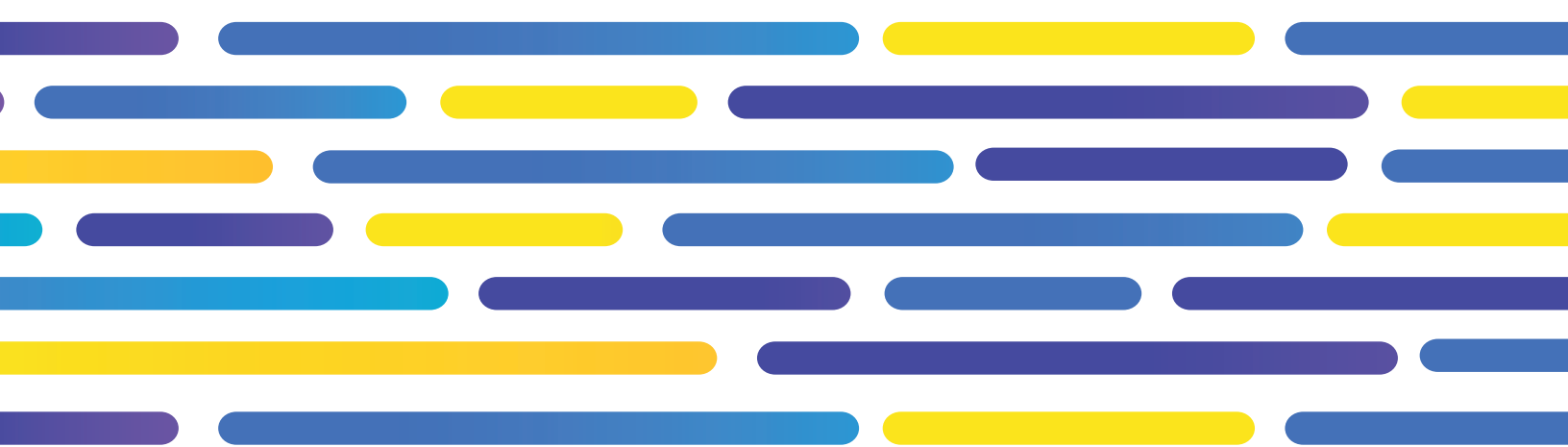
Director Business Development,
MMT-US North Central Region
Tata America International
Corporation

Scott Woodward

Partner
MarksNelson LLC

Mike Zimmerman

Chief Executive Officer
Viagio Technologies



WELCOME & WHAT'S NEXT

In KC Tech Specs v4, released some two years ago, a key word describing our tech industry was identified: resilience. As other markets churned and roiled in the months following the height of the pandemic, Kansas City's tech industry showed resilience, merely flattening headcount without taking a step backward.

In the past 18 months, broad tech layoffs have been evident, especially hitting coastal cities with large tech companies. You'll see in the data in KC Tech Specs v6 that once again, our market, our region, has shown resilience. Hiring is up, tech workforce has grown, and Kansas City is importing more college graduate-level talent than any time in the last couple decades.



So now, it's time to embrace a new key word. Let's talk about momentum.

In many ways, Kansas City is experiencing a surge in civic momentum. Since that v4 report some two years ago, the following has occurred:

- Our brand new, single terminal airport has opened, and garnered international attention.
- Panasonic announced plans to build an EV battery plant in DeSoto, representing the largest economic development project in Kansas history.
- The KC Current National Women's Soccer League team announced plans to build the first and only purpose built athletics stadium for women's sports along the KC riverfront.
- Meta announced plans for the largest data center build project in KC history.
- Kansas City was selected as a North American host city for the 2026 FIFA World Cup.
- Both Oracle and T-Mobile entered the KC market through merger and acquisition.
- The Kansas City Chiefs won their second Super Bowl in four years.

There is another type of momentum afoot, one that is surging through the tech industry. The geographic decoupling of worker and workplace is here to stay, evident in both the increased share of hybrid or fully-remote tech job postings, and the increased migratory patterns of college degree holders moving from the largest coastal tech hubs toward mid-sized cities across the United States.

So, the question becomes, what does Kansas City's tech industry do to maximize both types of momentum?

We think about that question every day at KC Tech Council, as we seek to build a more connected, more competitive, more representative tech workforce through programming, coalition-building, advocacy and opportunity.

These are opportunities KCTC is actively engaged with that can maximize our momentum, and increase the growth trajectory of our tech industry:

- Generate cluster-specific growth. Digital Health, Cybersecurity and Tech Infrastructure and Manufacturing are three areas with significant growth potential. KC Tech Council is proud to be one of many collaborators on efforts led by Digital Health KC, Enterprise KC, KCADC and other organizations to generate this growth.

WELCOME & WHAT'S NEXT

- Reimagine tech community building. With remote tech workers on the rise in cities like Kansas City, it's time to build the right engagement opportunities that exist outside of a company structure. With "micro-offices" in homes across the region, let's create a unifying tech culture, enriched by programming and connection, to attract and retain this new remote-only class.
- Audaciously tell our stories. Too often, this industry works with its head down. As we build products, hire great people and innovate, it's time to be bolder, more active storytellers. KCTC has built a pipeline for its members to pitch stories for inclusion in national media outlets, and built a "tech speakers bureau" to connect visiting groups with our own tech innovators for speaking opportunities.

Through our work with some 200 of the region's top tech employers, KC Tech Council is poised to lead efforts maximizing this momentum. But, we need your help. It requires a broad, influential coalition to realize our potential. Success will be measurable in job growth, a more skilled workforce, increased economic impact, a ripple effect toward other industries and a surge in corporate innovation and entrepreneurship.

The momentum is ours. The moment is now.

Thank you,



Kara Lowe
President & CEO
KC Tech Council



ANALYSIS FROM RSM

Kansas City's technology scene is the heartbeat of the greater region's technology ecosystem and a significant component of the city's overall vitality. As one of the 35 largest metros in the country, anchored by a strong technology labor force, large technology company presence, and increasing investment, Kansas City and its tech industry remain poised for growth.

As the Kansas City technology sector works to expand that growing ecosystem for the future, it will be critical for companies to embrace the technologies shaping the way we work, communicate, educate, care, and entertain. Investment trends show the tech ecosystem is already drawing attention; the region's businesses in this space continue to be a target for substantial venture capital and private equity investment. Technology, media, and telecommunications (TMT) investment in privately held organizations in Kansas and Missouri has been impressive over the past three and a half years, totaling \$19 billion. That exceeds the same figure for the preceding seven years by almost \$6 billion, according to PitchBook Data.

Total TMT investment—including public companies—for the region over the past three and a half years surpassed \$100 billion, which exceeds the same figure for the preceding seven years (2013-2019) by almost 10%, based on PitchBook Data. TMT deal activity in the region for the first six months of 2023 has been muffled, with \$1.5 billion invested across 105 deals according to PitchBook Data. This is consistent with national trends, considering current macroeconomic uncertainty. The message through the noise is that investment in the region's private tech companies is on the rise.

Small and large businesses alike will likely take advantage of the recent investment boon to increase discretionary spending. However, it would be wise for companies to earmark spending in a way that sufficiently funds technology needs—whether implementations or upgrades—to meet the demands of an evolving industry. Plenty of businesses—not just in the tech sector—are upping their expenditures; 46% of respondents to the 2023 second-quarter RSM US Middle Market Business Index survey said in April that they had increased capital expenditures, and 60% expected to do so during the next six months. Those figures are up from 42% and 51%, respectively, from the same period last year. Companies should set aside talent and resources to evaluate how to leverage advancements in artificial intelligence to enhance customer-facing solutions or streamline back-office operations.

Technology companies are still working to find equilibrium with the labor market, given the workforce disruptions caused by the pandemic. At the national level there continue to be many more unfilled technology positions than there are unemployed technology workers, despite the narrative of tech layoffs reflected in many news outlets. More specifically, the national technology unemployment rate in May 2023 was 2.5% or 77,000 unemployed tech workers, up from the 10-year-low of 1.4% or 43,300 reported in April 2023, according to the Bureau of Labor Statistics (these figures refer to jobs in the information sector, the BLS category that most closely reflects technology). These unemployment levels are well below the reported 174,000-185,000 technology job openings for February – April 2023.

So, what does that mean for Kansas City? As you will see in the following report and based on the most recent data, 1 in 5 Kansas City workers were working from home in 2021, and therefore already demonstrate the skillset and resourcefulness to pursue remote positions. A Kansas City-based tech worker with the will to work will likely always have a job and as a result, Kansas City's technology ecosystem should continue to be a significant contributor to the growth of the region.

Given this labor landscape, investment in talent will continue to be critical for tech companies. The competition for—and cost of—highly skilled technology talent climbed significantly in recent years, and although wage pressure has fallen from its recent peaks, wage levels remain elevated in 2023 and are expected to continue rising. In the same RSM survey

ANALYSIS FROM RSM

mentioned above, 58% of executives reported increasing compensation in the last three months and 72% reported expecting to boost wages in the next six 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 for workers residing locally. As of this release, the median pay for tech occupations in Kansas City increased to \$89,500 in 2023 from \$81,500 in 2022, which for both years fall below the national median pay of \$99,200 and \$92,700, by \$9,700 and \$11,200, respectively. One encouraging sign is that the gap between the median pay for tech occupations in Kansas City compared to the nation is shrinking. The comparison of median tech salaries to median area salaries also paints Kansas City in a less competitive light. Nationally, the median tech salary is 115% higher than the median for all jobs. The same measure for Kansas City is 93.3%, which for a government job-heavy metro leaves plenty of opportunities for improvement.

The pace of technology adoption will continue as technology finds its way into every corner of our economy. Companies that suspend technology investments risk disrupting their 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 & Director, Technical Accounting Consulting
RSM US LLP



CURRENT STATE

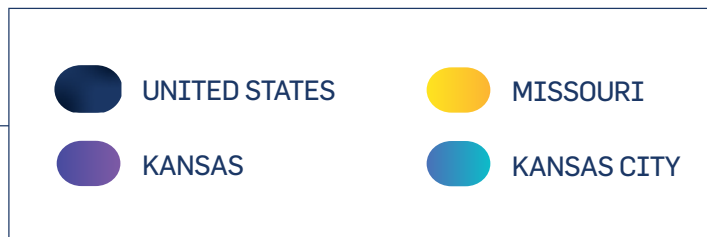
Tech remains an integral economic component of the Kansas City region, with more than 4,400 existing tech businesses and more than one out of every 10 workers employed by the industry. However, with over 24,000 tech job postings in 2022 and not nearly enough talent to fill all positions, we must continue to build a pipeline that will support the growth of our sector.

Following the pandemic, our region has undergone a unique transformation in the way we attract talent. Currently, one in five workers in Kansas City work from home which highlights the tremendous potential for attracting diverse professionals to our region. By embracing this evolving landscape, we can seize opportunities for growth and innovation, empowering both our businesses and our tech workforce.

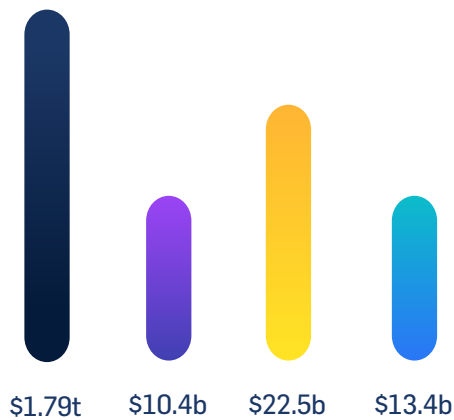
ECONOMIC IMPACT

Throughout KC Tech Specs v6, we utilize data from our partners at CompTIA. It's important to note that CompTIA revised the definition of "technology" along with NAICS and SOC codes used throughout its Cyberstates report. These changes prevent the ability to directly compare certain components of Tech Specs v6 from previous editions. When year over year comparisons can't be accurately made, we've instead offered comparison with peer tech markets, as shown below.

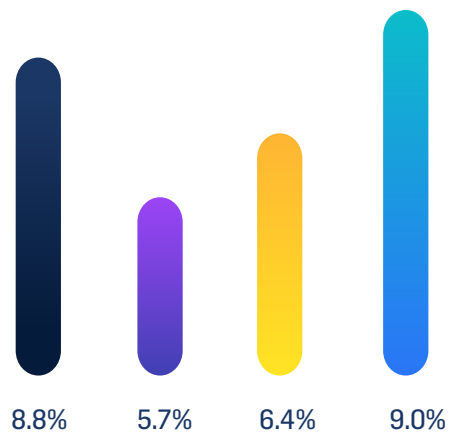
A complete list of NAICs and SOCs are provided at the end of the report.



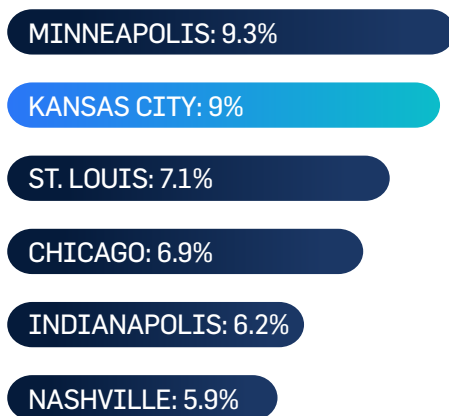
ECONOMIC IMPACT 2022:



TECH % SHARE OF ECONOMY:



PEER GROUP TECH ECONOMIC IMPACT AS A PERCENT OF LOCAL ECONOMY:



Source: CompTIA Cyberstates 2023

*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.

CURRENT STATE

KANSAS CITY TECH WORKFORCE AT A GLANCE

Job postings continue to tick upward in the post-pandemic landscape, through 2022 and into 2023. Cyberstates 2023 estimates that over the next ten years, employment in tech occupations will increase roughly twice as quickly as the national average for all occupations.

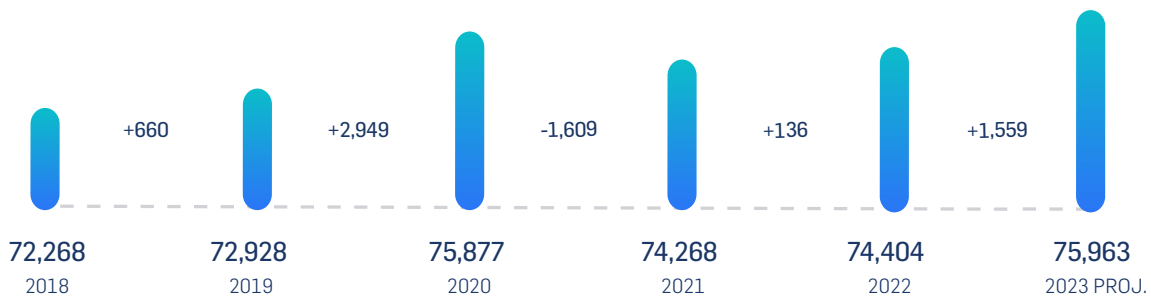
THREE CATEGORIES OF TECH WORKERS:

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

Non-tech workers at a tech company: a non-technical 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 digital healthcare company)

KANSAS CITY MSA NET TECH EMPLOYMENT



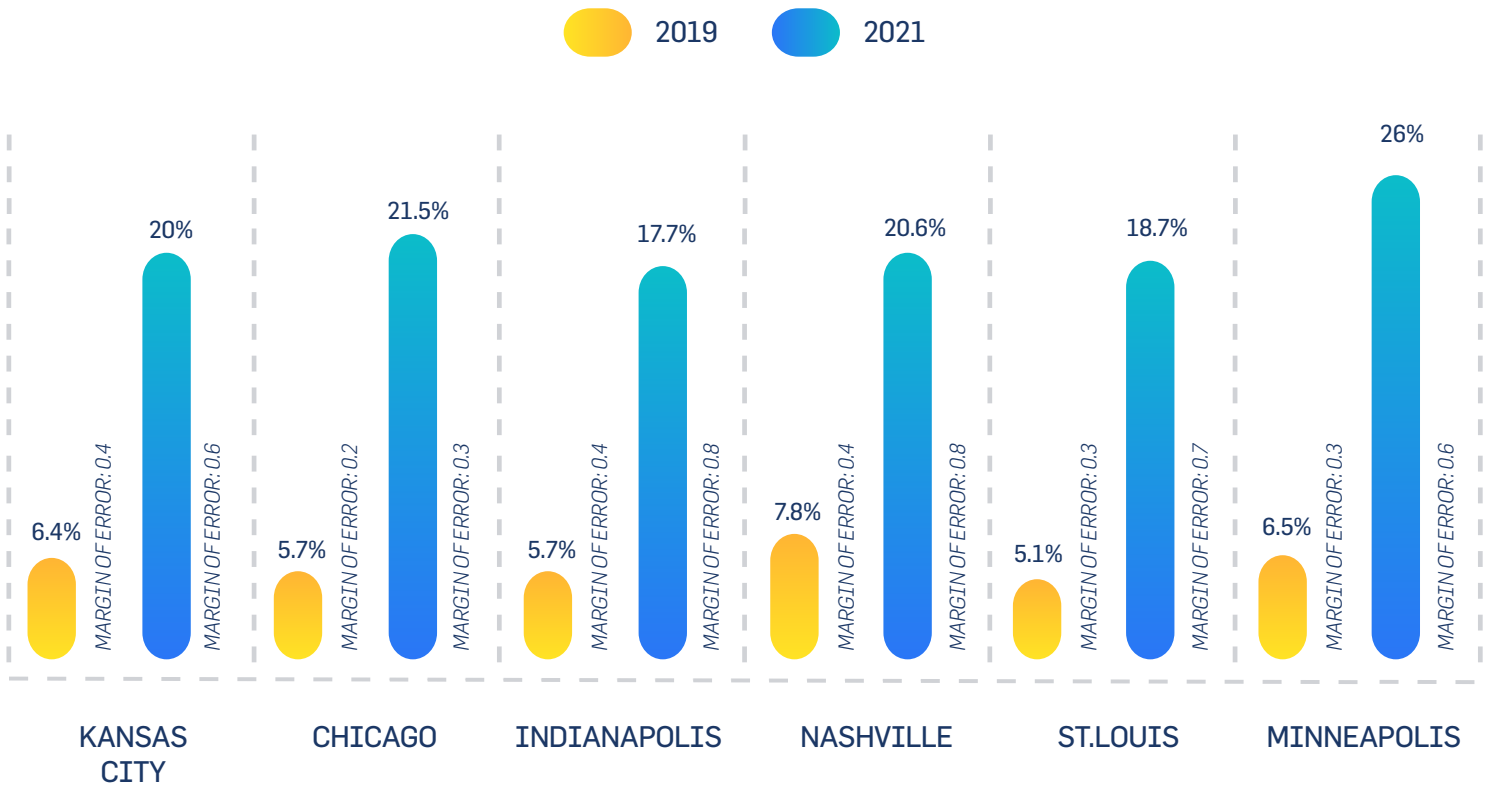
KANSAS CITY MSA OVERALL TECH JOB POSTINGS



REMOTE WORK

Notably, in 2021, Kansas City joined the ranks of cities where one in five workers embraced remote work, aligning with similar trends in peer cities. The city of Minneapolis stood out, with an impressive one in four workers opting to work remotely.

PERCENTAGE OF HOME-BASED WORKERS 2019 VS 2021:



THE 2023 OUTLOOK FOR TECH OCCUPATIONS

Tech isn't a monolith, and neither are tech jobs. Within the industry, where will jobs grow fastest? Let's explore this forecast in one and ten year increments.

TOP PROJECTED GROWTH TECH OCCUPATIONS FOR 2023 BY EMPLOYMENT:

- 5.5%** Data Scientists and Data Analysts
- 5.2%** Cybersecurity Analysts and Engineers
- 4.7%** Web Designers and UI/UX
- 4.7%** Software Developers and Engineers
- 4.1%** Software QA and Testers
- 3.4%** CIOs and IT Directors
- 2.6%** Systems Analysts and Engineers
- 2.4%** IT Support Specialists

** Growth indicates net new jobs being added and does not include jobs being replaced.*

10 YEAR TOP PROJECTED GROWTH TECH OCCUPATIONS BY EMPLOYMENT:

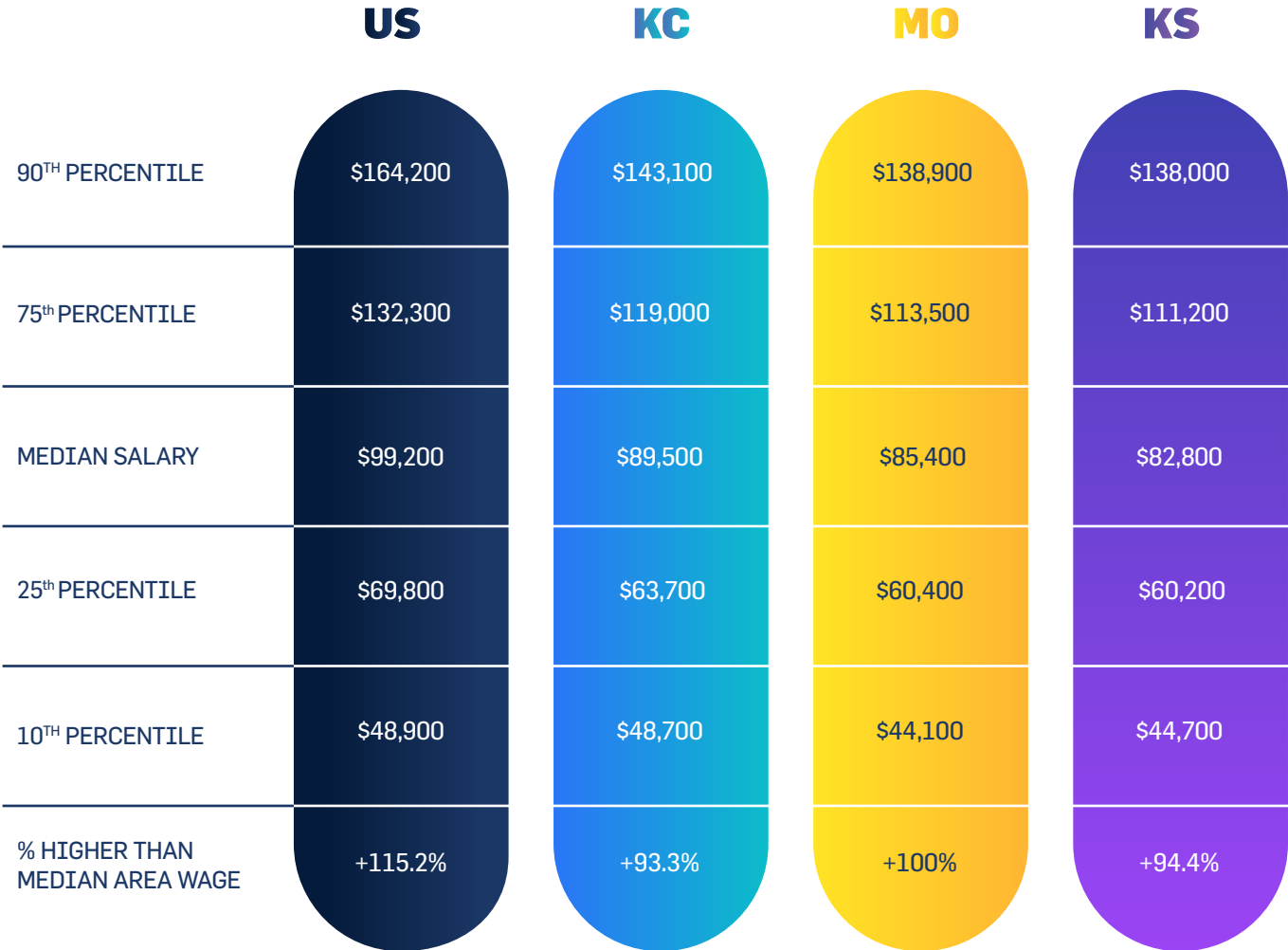
- 266%** Data Scientists and Data Analysts
- 242%** Cybersecurity Analysts and Engineers
- 180%** Software Developers and Engineers
- 164%** Web Designers and UI/UX
- 159%** Web Developers
- 132%** Software QA and Testers
- 99%** CIOs and IT Directors
- 49%** Database Architects
- 39%** Systems Analysts and Engineers
- 22%** Network Support Specialists
- 21%** IT Support Specialists

** Growth indicates net new jobs being added and does not include jobs being replaced.*

LOCAL VS. NATIONAL SALARY AVERAGES

With remote work options becoming accessible to almost all tech workers throughout the U.S., our focus shifts to comparing the average salaries of our city and states with the national average. This comparison holds significant value as it reflects the changing dynamics of competition. Rather than solely competing with St. Louis or Wichita for talent, we now compete with everyone. Consequently, our region must enhance its competitiveness in terms of tech salaries to meet the industry's evolving demands.

TECH OCCUPATION SALARIES



ANALYSIS FROM KC TECH CHECKPOINT

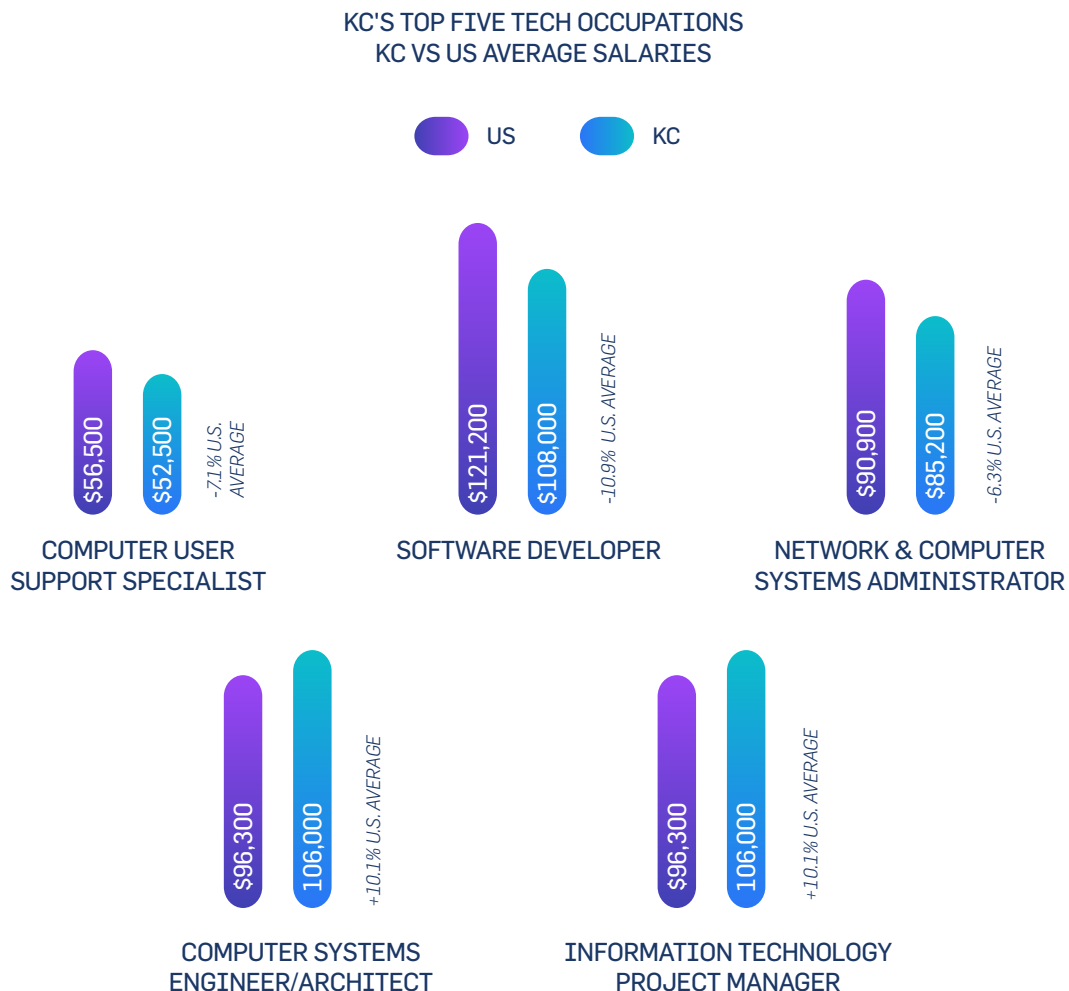


Scan this QR code to download the KC Tech Checkpoint app!

We understand the importance of up-to-date data year-round. That's why we recently collaborated with Kansas City-based global consulting firm Pomerol Partners to create a dynamic, interactive dashboard to explore the latest workforce data and trends in Kansas City's tech industry. And now, with our free mobile app, it's accessible anytime, anywhere and on the go by visiting the KC Tech Council website.

Our dedication to delivering accurate and timely information extends to highlighting the salary landscape in Kansas City's tech sector. Currently, the highest-paying tech occupation on average is the Database Architect, boasting an impressive median salary of \$129,800. On the other end of the spectrum, the lowest-paying tech occupation is the Computer User Support Specialist, with a median salary of \$52,500.

For the second year in a row, whether it's because of increased competition to hire at a national level or the results of rising wages everywhere, tech companies in Kansas City are paying more than the national median wage for two of the most critical roles.



ACCORDING TO THE KC TECH CHECKPOINT, THE FOLLOWING
ARE OCCUPATIONS, CERTIFICATIONS AND SKILLS IN
HIGHEST DEMAND IN OUR REGION.

TOP 10

OCCUPATIONS

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. Information Security Analyst
7. Computer Systems Analyst
8. Software Quality Assurance Analyst and Tester
9. Web Developer
10. Database Administrator

TOP 5

CERTIFICATIONS

1. Secret Clearance
2. CISSP
3. PMP
4. CCNA
5. CISA

TOP 5

SKILLS

1. Computer Programming/Coding
2. SQL
3. Agile
4. JavaScript
5. Java

THE STATE OF OUR STATES



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

2022 EST.
NET TECH EMPLOYMENT JOBS ADDED STATE RANK*

27TH

2022 EST.
NET TECH EMPLOYMENT STATE RANK*

19TH

2022 TECH JOB POSTINGS*

73,150

2022 TECH BUSINESSES*

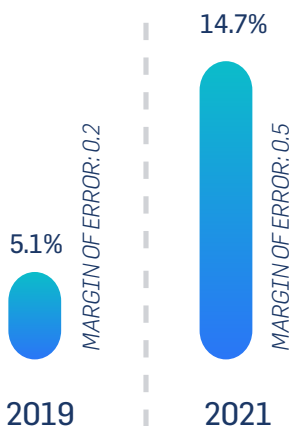
11,028

NET TECH
EMPLOYMENT:



2022 NET TECH EMPLOYMENT AS A % OF OVERALL WORKFORCE*: **5.1%**

PERCENTAGE OF HOME-BASED
WORKERS 2019 VS 2021:



Source: CompTIA Cyberstates 2019, CompTIA Cyberstates 2020, CompTIA Cyberstates 2021, CompTIA Cyberstates 2022, CompTIA Cyberstates 2023

*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.

LOSS	GAIN
TECH INDUSTRY SECTORS	
	2023
TECH MANUFACTURING	12,981 (+6.33% FROM 2022)
TELECOM, DATA AND INTERNET SERVICES:	30,344 (+1.54% FROM 2022)
SOFTWARE PRODUCTS:	5,275 (+33.81% FROM 2022)
IT SERVICES & CUSTOM SOFTWARE SERVICES:	54,747 (+0.63% FROM 2022)
TOTAL:	103,349 (+2.9% FROM 2022)

THE STATE OF OUR STATES



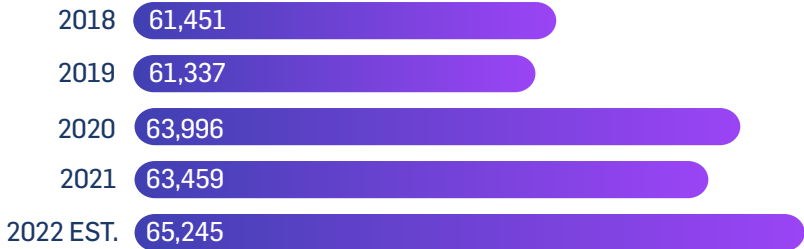
2022 EST.
NET TECH EMPLOYMENT JOBS ADDED STATE RANK* **31ST**

2022 EST.
NET TECH EMPLOYMENT STATE RANK* **30TH**

2022 TECH JOB POSTINGS*
42,621

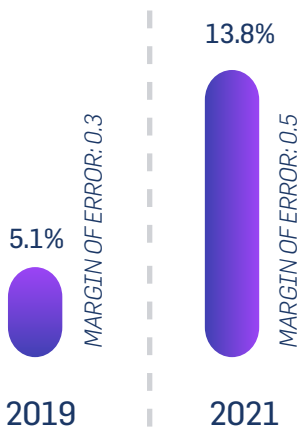
2022 TECH BUSINESSES*
5,543

NET TECH
EMPLOYMENT:



2022 NET TECH EMPLOYMENT AS A % OF OVERALL WORKFORCE*: **4.4%**

PERCENTAGE OF HOME-BASED WORKERS 2019 VS 2021:



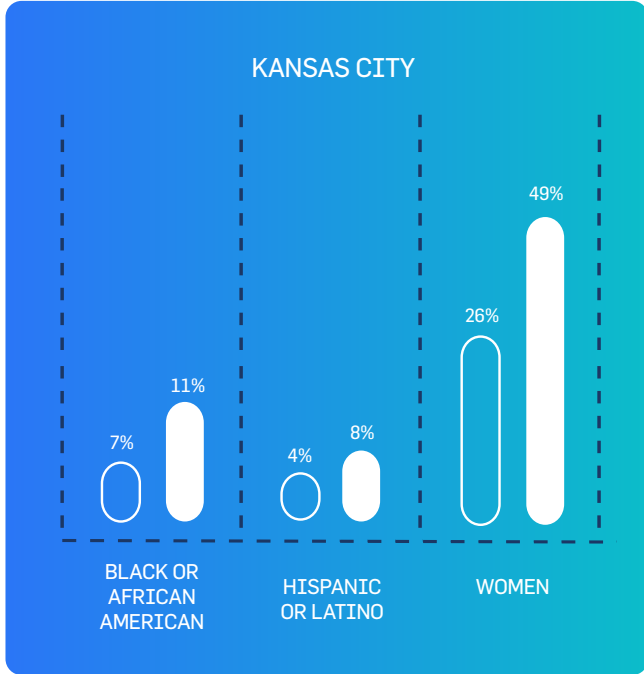
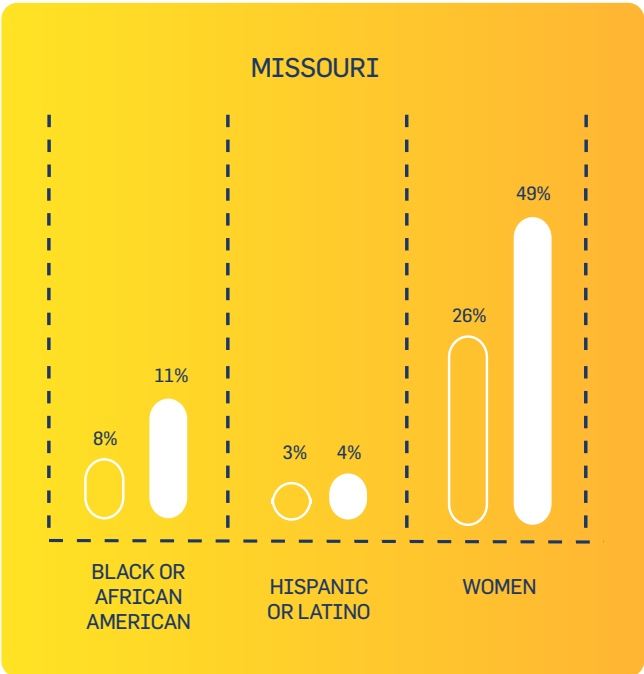
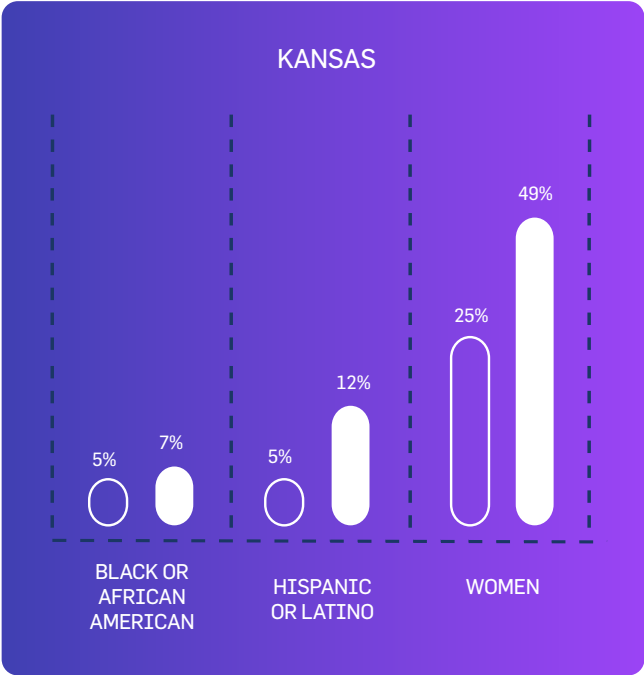
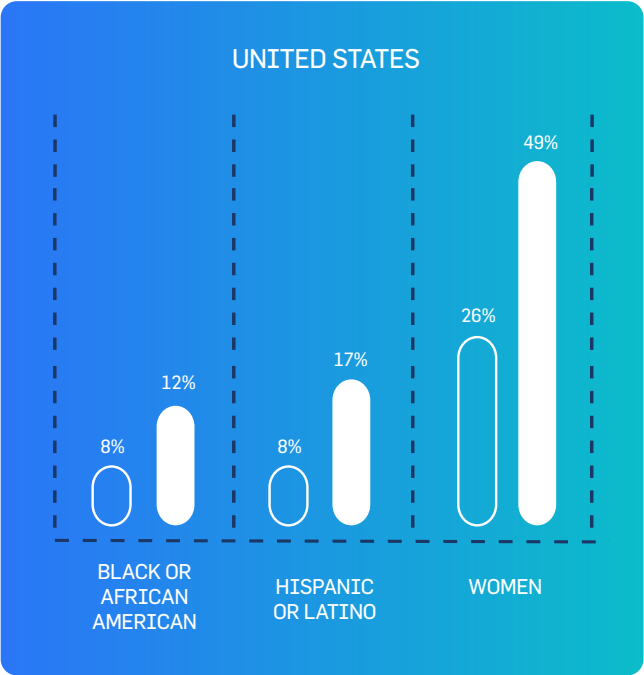
Source: CompTIA Cyberstates 2019, CompTIA Cyberstates 2020, CompTIA Cyberstates 2021, CompTIA Cyberstates 2022, CompTIA Cyberstates 2023

*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.

TECH INDUSTRY SECTORS	2023
TECH MANUFACTURING	7,703 (+4.33% FROM 2022)
TELECOM, DATA AND INTERNET SERVICES:	10,749 (+5.41% FROM 2022)
SOFTWARE PRODUCTS:	2,521 (+58.16% FROM 2022)
IT SERVICES & CUSTOM SOFTWARE SERVICES:	18,733 (-2.53% FROM 2022)
TOTAL:	39,706 (+3.42% FROM 2022)

TECH WORKFORCE DEMOGRAPHIC COMPARISON

With fewer tech workers than jobs available, it's imperative to open pathways to tech careers for those underrepresented in the industry. Outlined here is a comparison of the percentage of underrepresented demographic populations in technology vs. the overall workforce.



CITY & STATE COMPARISONS

In this section, we explore Greater 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.

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 cities, how significantly tech has grown, and its share of economic impact within the market.

	MSA POPULATION	ECONOMIC IMPACT AS A % OF OVERALL	NET TECH EMPLOYMENT AS A % OF OVERALL WORKFORCE*	NET TECH EMPLOYMENT 2021 EST.
KANSAS CITY	2,209,494	9%	6.6%	74,404
INDIANAPOLIS	2,141,779	6.2%	5%	57,055
NASHVILLE	2,046,828	5.9%	4.7%	52,768
MINNEAPOLIS	3,693,729	9.3%	7.4%	150,516
AUSTIN	2,421,115	23.8%	14.1%	173,629
DENVER	2,985,871	13.1%	9.2%	154,948

MIGRATION OF COLLEGE GRADUATES - A SHIFT IS UNDERWAY

In the past, college graduates often moved to major coastal cities like New York, San Francisco, and Boston in search of high-paying jobs and a vibrant cultural scene. However, there is a noticeable shift happening. For much of this century, large metropolitan areas with populations of one million or more have consistently gained educated workers at the expense of smaller cities. While they saw net gains from college graduates, they lost many workers without degrees. Now, we're seeing a reversal of this pattern as the most costly metropolitan areas are losing both types of workers.

	2010-14	2015-19	2020-21
BALTIMORE	-0.3K	-3K	+4K
BOSTON	+12K	+16K	+11K
CHICAGO	+1K	-11K	-19K
HONOLULU	+1K	+0.2K	-2K
LOS ANGELES	+0.1K	-4K	-37K
MIAMI	+5K	-5K	+0.2K
NEW YORK CITY	-18K	-39K	-103K
SAN DIEGO	+1K	-0.5K	+4K
SAN FRANCISCO	+13K	+8K	-25K
SAN JOSE	+2K	+2K	-23K
SEATTLE	+15K	+16K	+1K
WASHINGTON	+14K	+2K	-15K

College-educated workers who've turned away from the above major coastal cities are increasingly migrating toward metros that are still prosperous but not quite so expensive, such as Kansas City. Since 2020, the workers moving in and out of the Kansas City area have been roughly evenly divided between those with and without a college degree. Our region is now gaining workers with a college degree and breaking even with those without a degree.

	2010-14	2015-19	2020-21
KANSAS CITY	+4K	+2K	+7K
AUSTIN	+9K	+7K	+21K
DENVER	+13K	+19K	+17K
INDIANAPOLIS	+2K	+2K	+2K
MILWAUKEE	-1K	-3K	-0.4K
MINN./ST. PAUL	+5K	+7K	-1K
ST. LOUIS	+1K	-1K	+2K



COMPUTER SCIENCE DEGREES ACROSS STATE LINES

Even if we were able to capture every graduating computer science student in Kansas City, we would still fall short of filling all available tech positions in our region. This outlines the importance of sourcing talent in addition to this more traditional four-year path.

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

	KANSAS	MISSOURI	IOWA	NEBRASKA
BACHELORS	799	1,784	842	833
MASTER'S	159	1,267	508	282
ASSOCIATE'S	234	421	329	248
DOCTORATE	13	20	19	9
TOTAL TECH DEGREES	1,456	3,968	2,027	1,613
	2.65% OF TOTAL DEGREES	4.18% OF TOTAL DEGREES	3.68% OF TOTAL DEGREES	4.82% OF TOTAL DEGREES
TOTAL DEGREES	54,840	94,918	55,067	33,467

TECH SALARIES ACROSS STATE LINES

As noted in the previous section, Missouri and Kansas 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.

Keep an eye on our peer cities as other states such as Iowa have increased tech salaries over the past year. If peer economies can do it, Kansas and Missouri can as well.



TECH MEAN: \$90,500
STATE MEAN OF ALL OCCUPATIONS: \$55,600



TECH MEAN: \$89,600
STATE MEAN OF ALL OCCUPATIONS: \$54,200



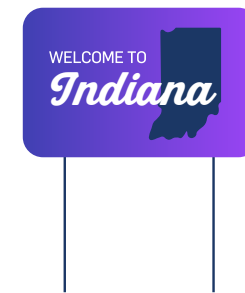
TECH MEAN: \$92,500
STATE MEAN OF ALL OCCUPATIONS: \$55,300



TECH MEAN: \$86,900
STATE MEAN OF ALL OCCUPATIONS: \$55,200



TECH MEAN: \$78,300
STATE MEAN OF ALL OCCUPATIONS: \$49,300



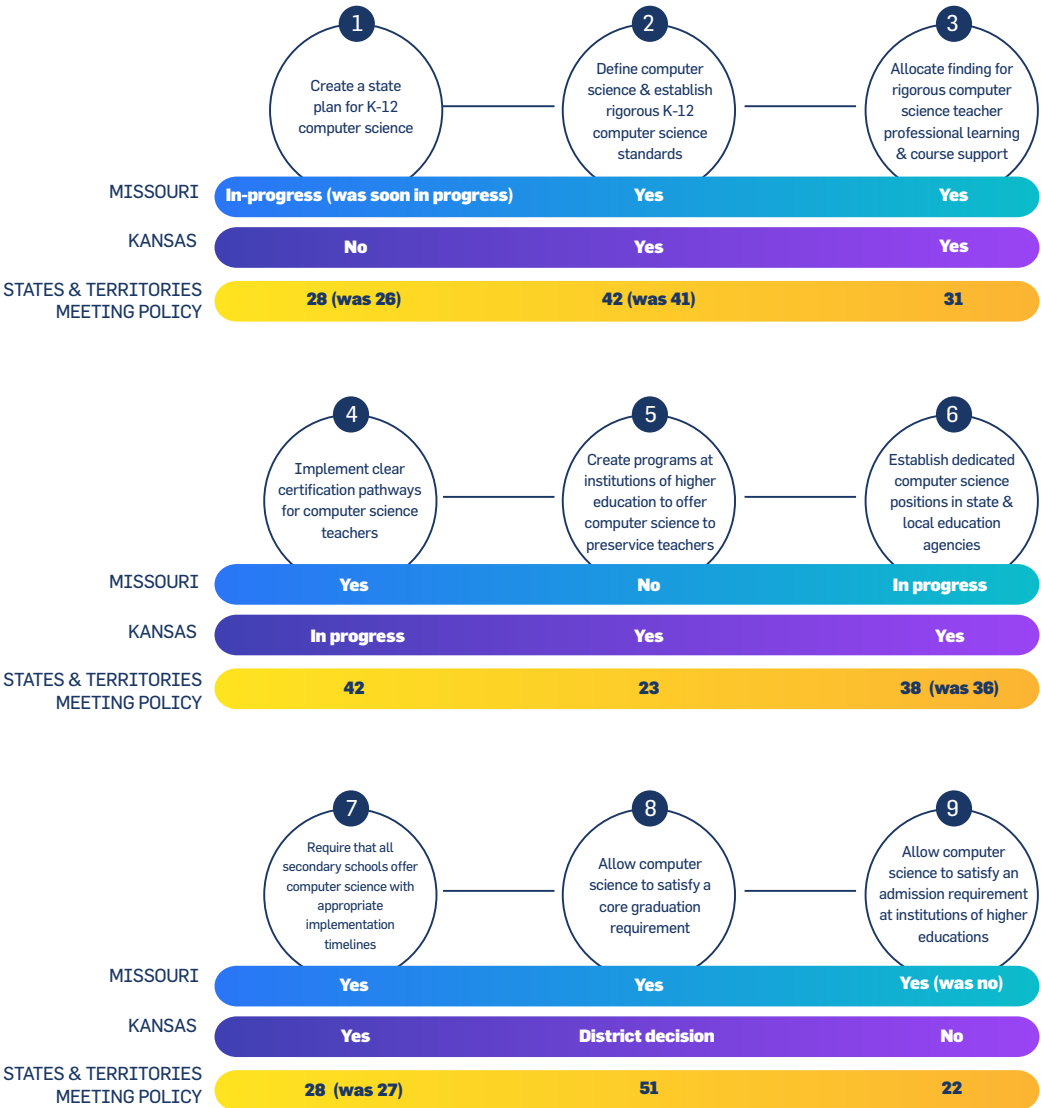
TECH MEAN: \$85,800
STATE MEAN OF ALL OCCUPATIONS: \$54,100

COMPUTER SCIENCE EDUCATION POLICY FOR K-12

To begin assessing the performance of our region's tech talent pipeline, it's important to start at the very beginning. In this case, 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.

These nine policies 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 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 since the last time these metrics were tracked by KCTC, which was in 2022.



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, 15-1251, 15-1252, 15-1253, 15-1254, 15-1255, 15-1299, 15-2051, 17-2061, 49-2011



WANT MORE?

Connect with us:
kctechcouncil.com

Request a presentation:
kctechspecs.com