

AI and the Future of the Greater Des Moines Regional Economy

October 2026

Executive Summary

A. Where the Greater Des Moines economy stands today

- Employment is **6.3% above Jan 2020**, versus 4.5% for the US
- Job gains led by **education and food services**; wage gains led by **agriculture and finance**

B. How AI changes the nature of work

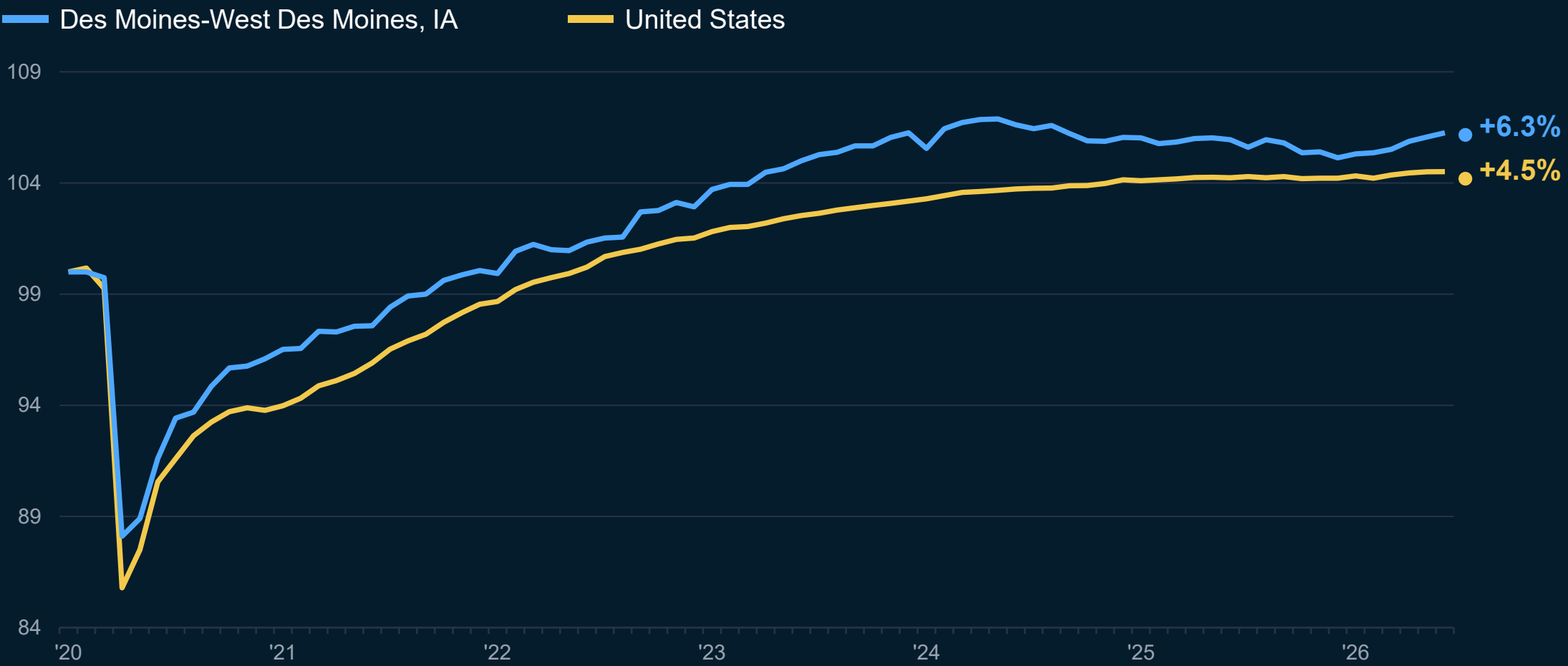
- **58% of regional work hours** are technically **automatable**, but **automation means job change, not necessarily job loss**; 42% still need people
- **Agent-centric roles** are 33.2% of employment, 2.8 points above the US share

C. What that means for the outlook

- Net job growth in every archetype to 2035: **+35.8k jobs**, led by people-first roles (+14.0k)
- **Disruption roles shift most**: office, admin and production lose 0.5k each; tech, business and transportation gain 1.6–1.8k
- **Talent gaps**: graduate supply trails annual hiring needs in business and finance (by 2.5k) and education (by 1.4k). Growth is forecast to keep outpacing the US, helped by insurance and agriculture

Greater Des Moines' diversified economy has grown faster than the US since the pandemic

Employment, Des Moines-West Des Moines MSA vs. US, indexed to Jan 2020 = 100, seasonally adjusted



Regional job growth led by education and food services; wage growth from agriculture and finance;

Top 3 sectors with most new jobs¹

+2.2k

new jobs in **Educational Services**

+8% job growth, 2023–2025



+1.9k

new jobs in **Accommodation & Food Services**

+6% job growth, 2023–2025



+878

new jobs in **Arts, Entertainment & Recreation**

+12% job growth, 2023–2025



Top 3 wage-growth sectors¹

+\$1.40/hr

real wage growth in **Agriculture, Forestry, Fishing**

+6% real wage growth, 2023–2025



+\$0.44/hr

real wage growth in **Arts, Entertainment & Recreation**

+3% real wage growth, 2023–2025



+\$1.03/hr

real wage growth in **Finance & Insurance**

+2% real wage growth, 2023–2025



What the region does

2.0×

workers in **Farming, Fishing & Forestry** occupations than U.S.

20.9k jobs in 2025



1.6×

workers in **Production** occupations than U.S.

143.4k jobs in 2025



1.2×

workers in **Education, Training & Library** occupations than U.S.

115.8k jobs in 2025



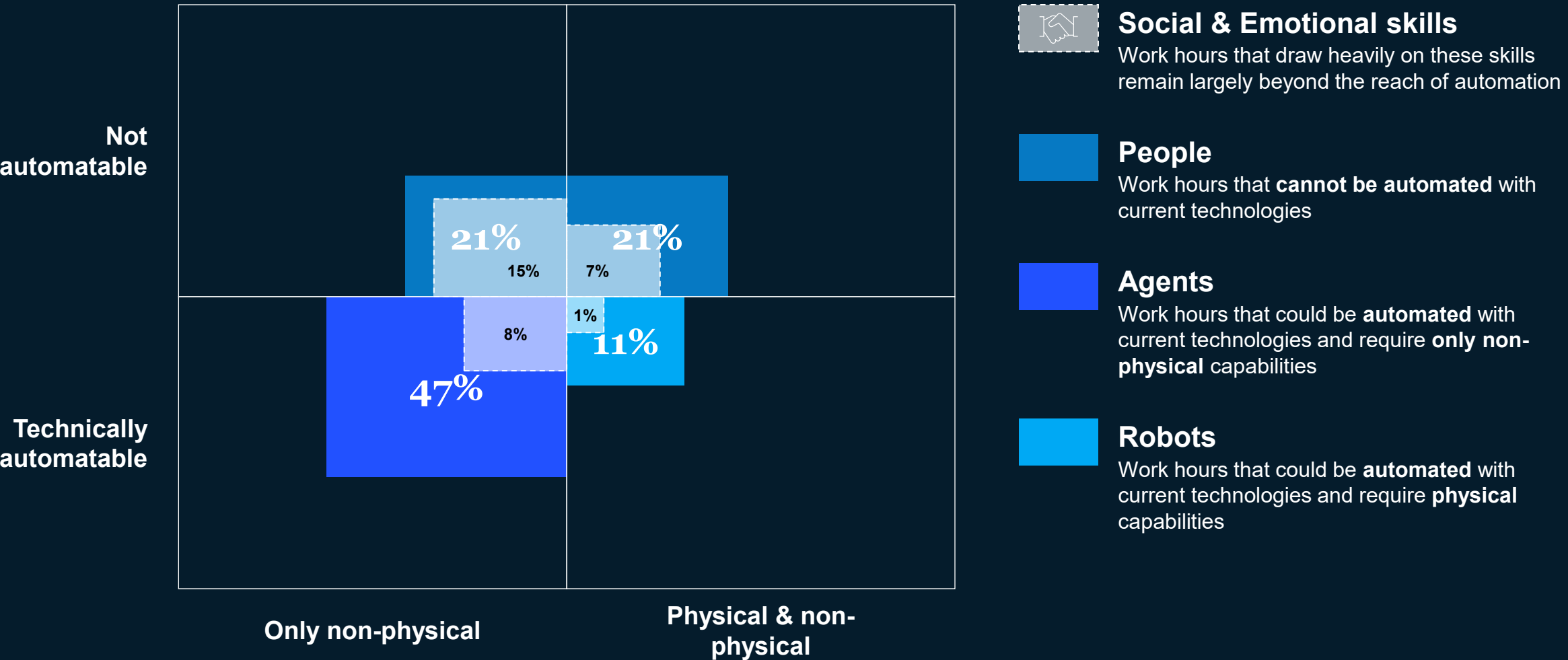
Note: Employment within industries is calculated using state employment matrices. Demographic job counts (Black, Hispanic, High School or less, Young) are modeled estimates and may not sum to regional totals.

Source: Bureau Labor Statistics CES and SAE, U.S. Census Bureau QWI; Lightcast, U.S. Census Bureau ACS Subject Table S2301 and DP05 (1-year estimates)

GenAI could automate many work activities performed today; we characterize these by automation potential and physical nature

Full Region – Greater Des Moines Region

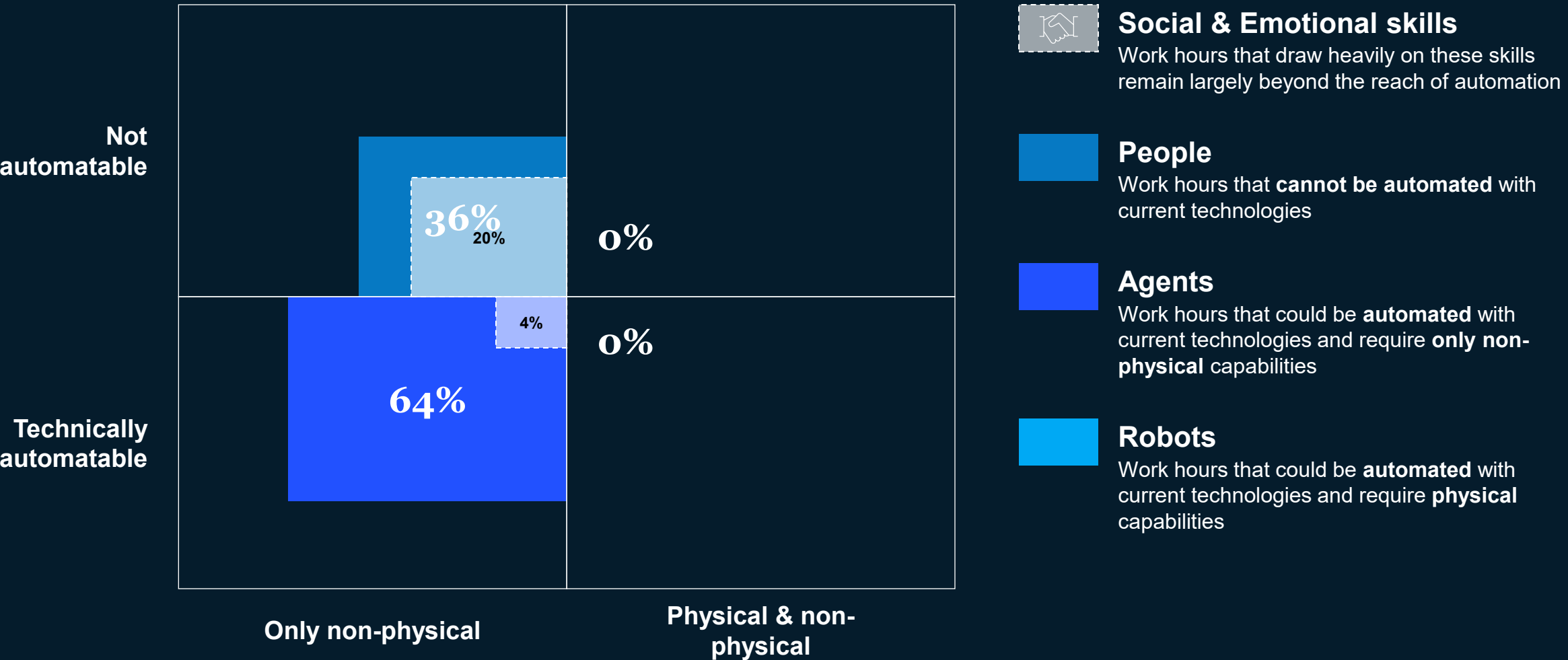
Hours worked in Des Moines-West Des Moines, IA MSA, by technical automation potential, 2024, %



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Software developer – Greater Des Moines Region

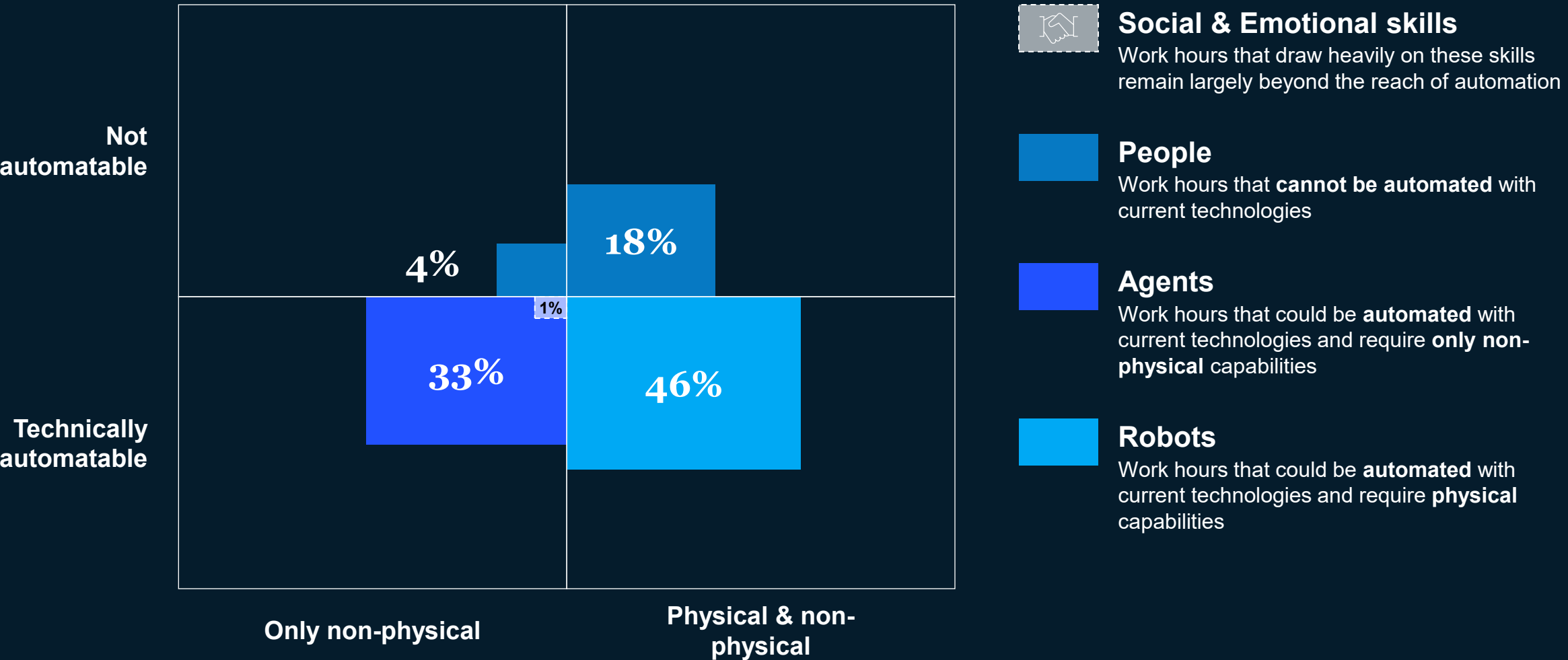
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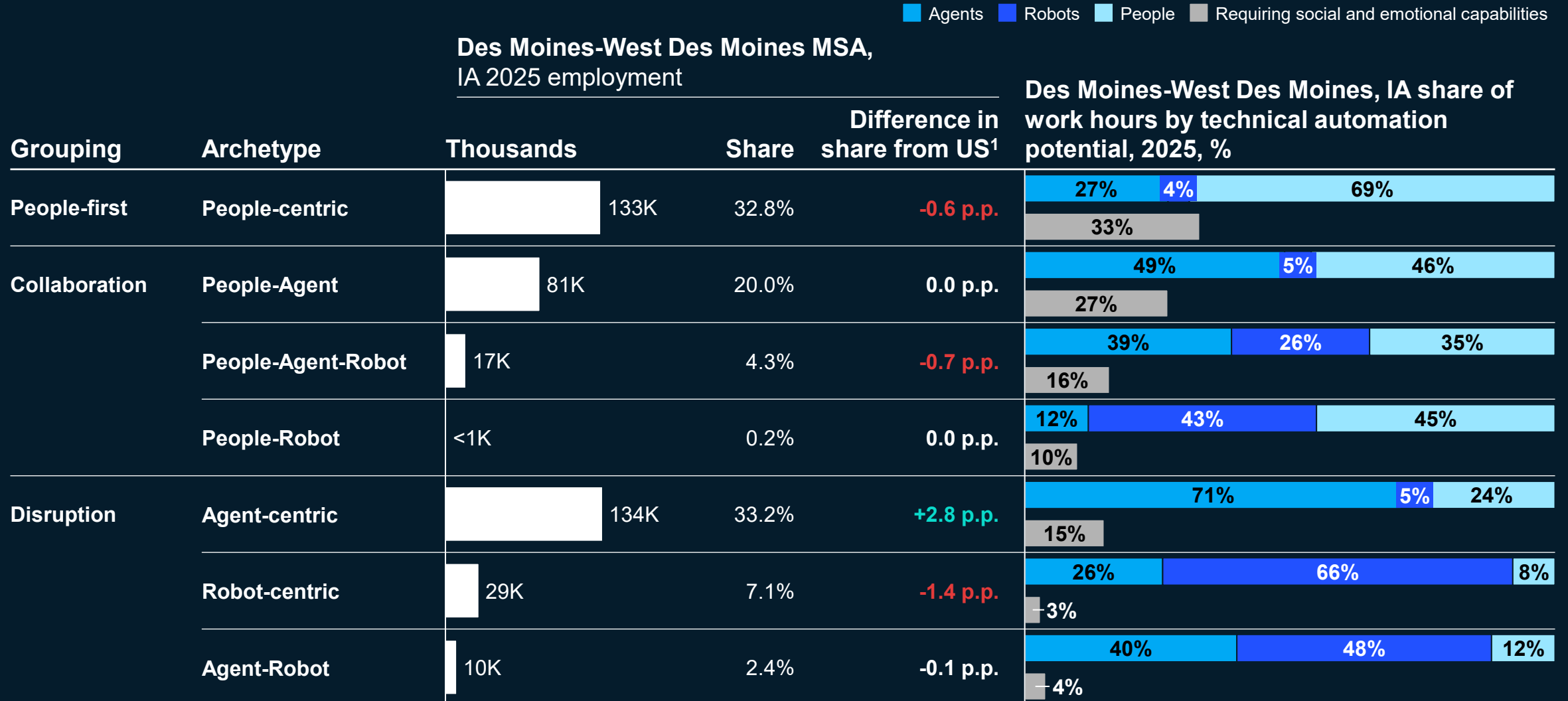
Assembler / Fabricator - Greater Des Moines Region

Hours worked in Des Moines-West Des Moines, IA MSA, by technical automation potential, 2024, %



Greater Des Moines Region is more exposed to job types facing disruption from generative and agentic AI

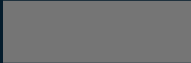
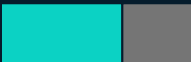
%, Share of regional employment by archetype. 2025



1. Shading denotes those percentage point differences above 0.5 p.p. or below -0.5 p.p.

Employment will shift as GenAI and other factors reshape the economy; jobs across each archetype are forecast to grow

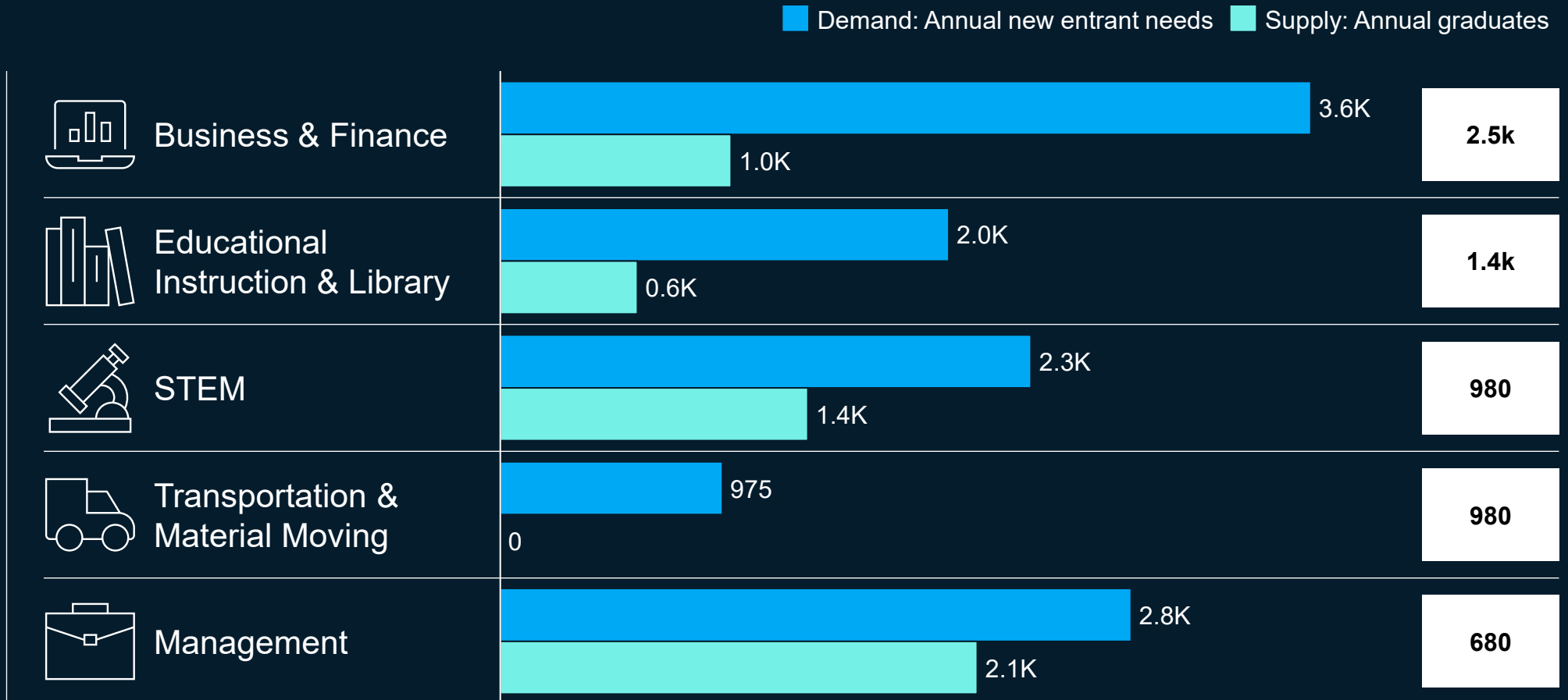
Lightcast forecasts of net employment change by AI archetype tied to McKinsey Global Institution analysis

Forecasted net job change, 2025–2035							
Grouping	Level	% change	Forecast declining roles			Forecast growing roles	
People-first		14.0K	+10.6%	Management	 -0.0k	Management	 +2.7k
				Arts & Media	 -0.0k	Transportation	 +2.1k
				Business & Finance	 -0.0k	Healthcare	 +1.6k
Collaboration		10.3K	+10.4%	Maintenance & Repair	 -0.1k	Construction	 +1.5k
				Protective Services	 -0.0k	Management	 +1.4k
				Sales	 -0.0k	Sales	 +1.4k
Disruption		11.5K	+6.7%	Office & Admin	 -0.5k	Tech	 +1.8k
				Production	 -0.5k	Business & Finance	 +1.7k
				Sales	 -0.1k	Transportation	 +1.6k

Key occupations that typically require postsecondary training that may see the largest potential talent shortages from now to 2035

POTENTIAL SHORTAGE

Top occupation groups with potential shortage of talent



Note: Graduates from Title IV institutions are mapped to occupations using a many-to-many mapping of fields of study to occupations. Because the same field of study for a graduate can map to multiple occupations, to avoid double-counting graduates, this analysis assigns shares of total graduates by field of study to occupations considering (i) the typical level of education an occupation requires versus the award level attained; and (ii) the relative employment of that occupation in the region. Supply is limited to Title-IV postsecondary institutions in the United States, and therefore does not include sources of supply including many private training providers, and/or apprenticeship programs.

Closing thoughts as we enter conversation:

- How is the evolving AI landscape changing the nature of your **work** and **market**?
- How are those changes reshaping your **talent needs** and **talent approach**?
- Within Greater Des Moines, which **regional assets** best help you navigate the shifting market and **attract and retain** the talent you need?