

2024

IOWA COMPETITIVE
DASHBOARD



IBC'S RECOMMENDED ACTIONS

Economic Growth

A strong economic climate drives business decision-making such as hiring, capital investment, job creation and new initiatives. For businesses to locate, expand and thrive in Iowa, a vibrant economic ecosystem must be created and sustained to fuel growth.

Housing remains a vital catalyst for expanded economic growth and development. The availability of affordable workforce housing directly impacts the economic climate in Iowa's communities. Adequate housing stock is necessary to attract and retain workers to fill the jobs that growing businesses create.

The IBC further urges the Iowa General Assembly to adopt the Major Economic Growth Attraction (MEGA) Program in Iowa. This program allows Iowa to compete nationally to recruit new industries and jobs to the state. The program provides incentive opportunities for projects that invest more than \$1 billion in Iowa while concentrating on core Iowa industry competencies including advanced manufacturing, biosciences, and research.



Education & Workforce

In today's global, knowledge-based economy, states and local communities are increasingly differentiated based on the ability to educate, train, and recruit a qualified workforce that meets the needs of industry. Even as middle and high-skilled jobs grow in Iowa, the availability of a skilled workforce is a major area of concern to Iowa businesses. Identifying the job demands of the future, working with K-16 education systems to engage students and educators, and developing career pathways are essential areas of public/private partnerships for the IBC.

To address businesses' workforce needs, the IBC's Business Education Alliance (BEA) will work with K-12 educational institutions to develop and implement scalable, sustainable solutions to provide work-based learning opportunities for all students. The IBC is specifically working with community school districts across the state to bolster high quality career exploration through registered apprenticeship programs, quality pre-apprenticeship programs, and high school internship opportunities. These three main programs provide the structure, rigor, and scalability to feed Iowa's talent pipeline in a sustainable way.

From a workforce perspective, the state must continue to advance strategies that address child care availability in Iowa. This issue touches every segment of the population and costs Iowa close to \$1 billion dollars a year in lost tax revenue and employee absences. Stakeholders must address the holistic challenges of the child care industry including workforce challenges, wages, and infrastructure.



Governance

The IBC recognizes and applauds the significant bipartisan income tax reform legislation that was passed in 2022 and signed into law by Governor Kim Reynolds. Becoming more competitive from a tax perspective was long overdue in both the individual and corporate tax structures. The changes adopted in 2022 will lead to business expansion, population retention, and a more stable and equitable tax system.

In 2024, continued progress toward increasing Iowa's tax competitiveness will help Iowa attract and retain employers and employees that can increasingly do

business anywhere. Long-term, the IBC's goal is to achieve a top 15 ranking in both corporate and individual tax climate.

In total, a modernized tax system with competitive tax rates and rules will promote growth through greater investment, higher wages, and more jobs in Iowa. Understanding that talent migration into and out of Iowa has never been more transferrable, focusing on making Iowa's tax system as competitive as possible will set the foundation for future growth and opportunity.



Health & Wellness

The healthcare delivery system in Iowa continues to experience tremendous strain. This reality is compounded in rural parts of the state where workforce challenges are more acute. Smaller communities not only rely on crucial medical systems to stay healthy; they also depend on these clinics and hospitals to provide an economic impact throughout their region. Continued efforts to bolster healthcare workers, recruit more providers, and increasing public funding mechanisms are all areas the IBC will continue to engage in.

The IBC also recognizes the impact mental health has on the economy and workplace. Increasing the supply of mental health professionals in Iowa while also enhancing mental health investment mechanisms will directly benefit the state's business climate, communities, and schools thereby positively affecting Iowa's economy.

Demographics & Diversity

Population growth must be accelerated throughout the entire state of Iowa to ensure economic prosperity. The IBC is proud to partner with the state on the This is Iowa campaign in effort to highlight the many opportunities Iowans realize everyday including a low cost of living, safe communities and schools, short commute times, and thriving schools. Partnering on a robust market strategy to recruit new Iowans from high-cost states provides a significant opportunity to grow Iowa's population and increase innovation.

The IBC will continue to work with federal policy makers to modernize the current immigration system so legal immigration can be used as a viable tool to recruit and retain talent. The IBC urges state and local policy makers to actively voice their support in passing comprehensive immigration reform to federal officials. With local and statewide leaders boldly standing up on this issue, additional positive attention will be focused on the policy. Furthermore, the IBC supports the Afghan Adjustment Act which is currently being considered in Congress. The Afghan Adjustment Act is a bipartisan bill that would provide a path to permanent status to tens of thousands of Afghans who were evacuated to the U.S. following the fall of Kabul in August 2021. The legislation also includes provisions to ensure that eligible Afghan evacuees have been subject to rigorous vetting and screening procedures.

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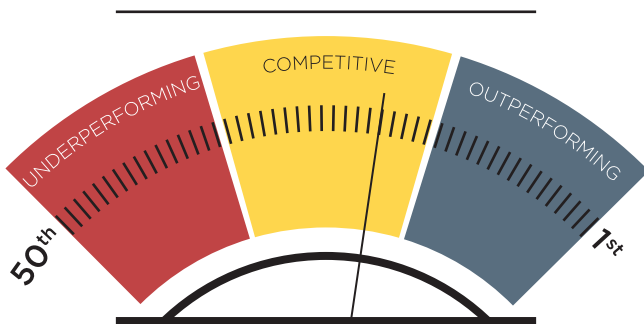
Mike Tousley

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ECONOMIC GROWTH



Iowa enters 2024 in a strong financial position. The state's employment has largely returned to pre-pandemic levels while state revenues continue to be robust. Iowa's gross state product (GSP) is now \$238.3 billion, an increase of more than 9.5% from the prior year. The report for median household income showed an increase of approximately \$4,000 to \$69,588, up 6% from last year's report. This wage growth goes even further when considering Iowa ranks 5th in cost of living and 6th in affordability according to the US News & World Report. Iowa remains a top tier hub for the country's manufacturing industry, solidifying a top 4 ranking once again.

Iowa continues to outperform most of the country with a 68.1% labor force participation rate and ranks 6th (using November 2023 data for consistency purposes) in the nation. Iowa's workforce constraints continue to be a top strategic concern for the IBC and statewide leaders considering a high labor force participation rate combined with a low 2.9% 12-month rolling average unemployment rate.

The State Technology & Science Index is released every two years, so it remains at a value of 44.5. This evaluation tracks five sub-indexes including research and development inputs, risk capital and entrepreneurial infrastructure, human capital investment, technology and science workforce, and technology concentration.

MEDIAN HOUSEHOLD INCOME

2022	2023
\$65,600	\$69,588
State Rank: 30	State Rank: 31



GROSS STATE PRODUCT

2022	2023
\$216.9 Billion	\$238.3 Billion
State Rank: 30	State Rank: 31



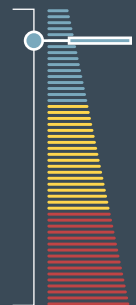
MANUFACTURING VALUE AS A % OF GSP

2022	2023
17.8 %	16.5 %
State Rank: 3	State Rank: 4



LABOR FORCE PARTICIPATION RATE

NOV. 2022	NOV. 2023
68.2%	68.1%
State Rank: 4	State Rank: 6
3.2%	2.9%
Unemployment Rate - 12 Month Rolling Average	

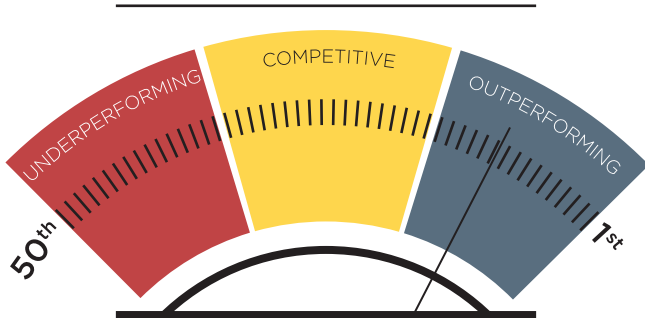


STATE TECHNOLOGY AND SCIENCE INDEX

2020	2022
41.6	44.5
(Highest Score 86.6)	(Highest Score 86.1)
State Rank: 34	State Rank: 33



EDUCATION & WORKFORCE

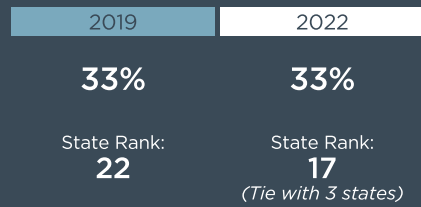


Iowa's educational system weathered the negative impacts of the pandemic much better compared to the rest of the country. In fact, data from the National Center for Educational Statistics show Iowa's proficiency rates in reading and math experiencing no statistical change over the course of the pandemic while most states realized declining proficiency rates in both categories. This metric is unchanged from the 2023 report as the data is released every two years from the National Center for Educational Statistics.

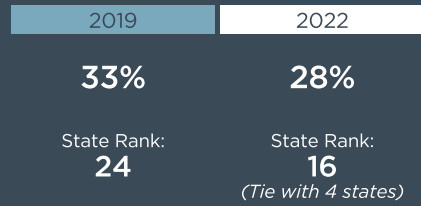
A core focus of the Iowa Business Council continues to be work-based learning initiatives. With the IBC playing a leading role in statewide efforts, participation opportunities continue to increase across all school districts with many private high schools participating as well. Work-based learning is a critical tool for Iowa's workforce. Work-based learning opportunities expose students to careers and companies they were not previously aware of and offer a first-time introduction to well-paying jobs in Iowa. Moving forward, the IBC will continue to work in areas promoting high-quality, experiential work-based learning around registered apprenticeships, quality pre apprenticeships, and high school internship opportunities. These main programs provide the structure, rigor, and scalability to feed Iowa's talent pipeline in a sustainable way.

According to Iowa Workforce Development, the Future Ready Iowa goal of having 70 percent of Iowans with some sort of education and training beyond high school by 2025 has been achieved two years early. Refocusing the state's efforts to work-based learning opportunities for the next generation of Iowan's should be a primary focus as the state continues meet the workforce demands of the future.

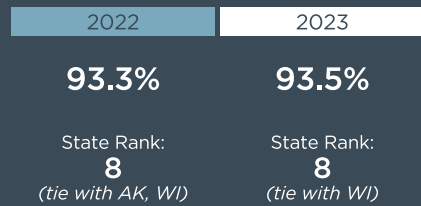
PROFICIENCY 4TH GRADE READING



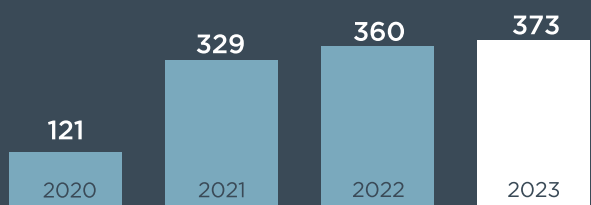
PROFICIENCY 8TH GRADE MATH



EDUCATIONAL ATTAINMENT HIGH SCHOOL +



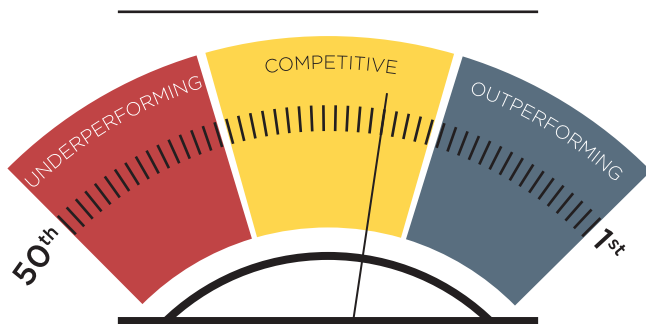
SECONDARY SCHOOL WORK-BASED LEARNING



WORKFORCE HAS TRAINING BEYOND HIGH SCHOOL



GOVERNANCE



The IBC recognizes and applauds the significant bipartisan income tax reform legislation that was passed in 2022 and signed into law by Governor Kim Reynolds. Becoming more competitive from a tax perspective was long overdue in both the individual and corporate tax structures. The changes adopted in 2022 will lead to business expansion, population retention, and a more stable and equitable tax system. Given the exceptional financial strength of the state, the opportunity exists for further action with respect to tax competitiveness.

As expected, the state's competitiveness in both tax categories continues to improve. Individual tax climate ranking increased 18 spots, going from 40th in the nation to 22nd. On the corporate tax climate side, Iowa increased its competitive ranking by 5, jumping from 34th in the nation to 29th. Achieving a top-15 rank in individual and corporate tax climate is the long-term goal of the IBC.

The state public pension funded ratio is greater than 100% resulting in a top 10 ranking. A public pension funded ratio can be greater than 100% by achieving more assets than liabilities.

AMERICA'S TOP STATES FOR BUSINESS

2022	2023
State Rank: 12	State Rank: 23



STATE PUBLIC-PENSION FUNDED RATIO

2022	2023
82.9%	101.0%
State Rank: 11	State Rank: 9



MEDICAID EXPENDITURES AS % OF TOTAL EXPENDITURES

2022	2023
24.0%	25.0%
State Rank: 21	State Rank: 23
27.6%	All States 29.6%



CORPORATE TAX INDEX

2022	2023
4.85	5.09
State Rank: 34	State Rank: 29

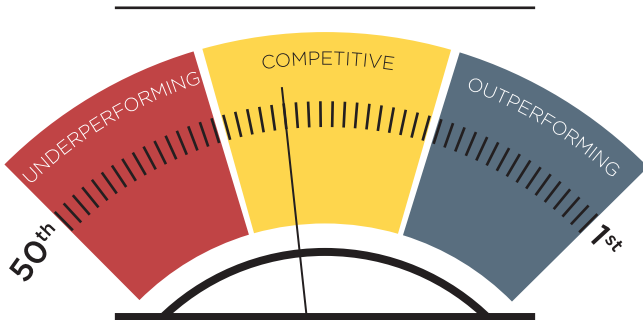


INDIVIDUAL INCOME TAX INDEX

2022	2023
4.26	5.11
State Rank: 40	State Rank: 22



HEALTH & WELLNESS



A new metric this year, active primary care providers, provides a more realistic viewpoint of Iowa's primary care scene. With the inclusion of the whole spectrum of primary care providers, including nurse practitioners, Iowa is firmly at the midpoint of competitiveness ranking 26th in the country. However, key aspects of Iowa's health and wellness metrics need improvement. The state's percentage of obese people has remained flat, with the state ranking increasing by one spot to be 38th in the country. Additionally, the state's mental health providers continue to rank low. Iowa Business Council efforts in recent years have highlighted this reality and the organization continues to seek partnerships while advocating the need for increased public investment and opportunities to increase mental health providers in the state. Increasing the supply of mental health professionals in Iowa while also enhancing public mental health investment mechanisms will directly benefit the state's business climate, communities, and schools thereby positively affecting Iowa's economy.

Iowa's ranking in the Gallup National Health and Well-Being Index decreased three spots and now ranks 33rd in the nation. The index measures surveyed individuals' overall well-being as it pertains to career, social, financial, community and physical well-being.

ACTIVE PRIMARY CARE PROVIDERS (PER 100,000)

2022	2023
266.5	239.6
State Rank: 31	State Rank: 26



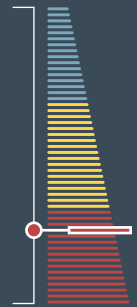
MENTAL HEALTH PROVIDERS (PER 100,000)

2022	2023
193.8	207.4
State Rank: 44	State Rank: 43



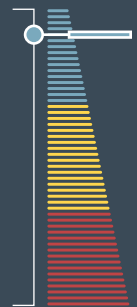
PERCENT OBESE

2022	2023
36.4%	37.4%
State Rank: 39	State Rank: 38



PERCENT LACKING HEALTH INSURANCE

2022	2023
4.8%	4.5%
State Rank: 6	State Rank: 5

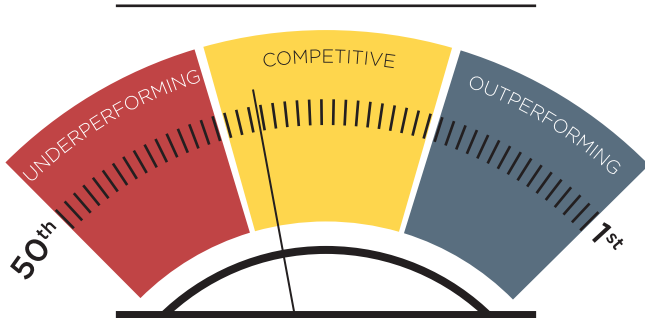


GALLUP HEALTHWAYS WELL-BEING INDEX

2022	2023
State Rank: 30	State Rank: 33



DEMOGRAPHICS & DIVERSITY



Iowa's population growth has consistently trailed the national average. Long-term prosperity will continue to be constrained by a lack of people to fill jobs. Growing Iowa's overall population will be critical to building a talent pipeline and expanding state revenues. This year, it is encouraging to report that Iowa's net overall migration for 2022-23 increased by almost 1,500 individuals.

The growth of Iowa's population must be accelerated in both urban and rural communities to ensure continued economic vitality for the state. Recruitment and retention efforts could be bolstered by changes in federal immigration policy, as well as highlighting the significant advantages Iowa provides its citizens over other states including safe communities, high quality K-12 educational systems, low cost of living, and affordable housing.

Population growth has the potential to be the main economic driver for the next decade. Policy decisions must be made with the perspective of increasing Iowa's population to sustain and enhance economic opportunity for future generations.

TOTAL POPULATION

2022	2023
3,193,079	3,200,517
State Rank: 31	State Rank: 31



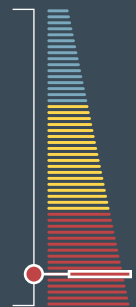
POPULATION 5-YEAR CHANGE

2022	2023
1.6%	1.4%
State Rank: 31	State Rank: 30



ETHNIC DIVERSITY OF POPULATION

2022	2023
17.0%	17.2%
State Rank: 45	State Rank: 45



MEDIAN AGE OF POPULATION

2022	2023
38.5	38.9
State Rank: 16 (Tie with AK)	State Rank: 17 (Tie with AK, MS)
38.8 All States	39.0



NET OVERALL MIGRATION

2022	2023
2,056	3,509
State Rank: 31	State Rank: 34



GLOSSARY

Active Primary Care Providers: A physician (M.D. – Medical Doctor or D.O. – Doctor of Osteopathic Medicine), nurse practitioner, clinical nurse specialist or physician assistant, as allowed under state law, who provides, coordinates or helps a patient access a range of health care services.

America's Top States for Business: CNBC scores each state on unprecedented 88 metrics of economic competitiveness. The ten categories have been used since 2007 and are weighted based on how frequently states use them as a selling point in economic development marketing materials. Those categories are workforce; infrastructure; cost of doing business; economy; life, health and inclusion; technology and innovation; business friendliness; education; access to capital; and cost of living. Data is gathered on the state's performance in each metric using the most recent figures publicly available.

Corporate Tax Index: A sub-index used by the Tax Foundation to gauge how a state's corporate income tax top marginal rate, bracket structure, and gross receipts rate affect its competitiveness compared to other states.

Education Attainment: Refers to the highest level of education completed in terms of the highest degree or the highest level of schooling achieved.

Ethnic Diversity of Population: Calculated by the difference between 100% population and Census registered "White alone, not Hispanic or Latino"

Future Ready Iowa (FRI): Future Ready Iowa connects Iowans to the education and training required for good-paying jobs and careers to improve people's lives. This figure includes both the Iowans who received a certificate and those adults who attended training and education programs that they stated helped them acquire skills that have added value to their career path (despite not officially completing a program). The Future Ready Iowa goal is to have 70 percent of Iowans with education and training beyond high school by 2025.

Gross State Product (GSP): A measurement of a state's output; it is the sum of value added from all industries in the state. GSP by state is the state counterpart to the Nation's Gross Domestic Product (GDP).

Individual Income Tax index: A sub-index used by the Tax Foundation to measure the impact of tax rates on the marginal dollar of individual income using three criteria: the top tax rate, the graduated rate structure, and the standard deductions and exemptions which are treated as a zero percent tax bracket. The rates and brackets used are for a single taxpayer, not a couple filing a joint return.

Labor Force Participation Rate: The labor force participation rate represents the number of people in the labor force as a percentage of the civilian noninstitutional population. In other words, the participation rate is the percentage of the population that is either working or actively looking for work. The labor force participation rate is calculated as: $(\text{Labor Force} \div \text{Civilian Noninstitutional Population}) \times 100$.

Manufacturing Value as a % of GSP: A breakdown of gross domestic product by manufacturing value. In addition to showing the manufacturing contribution to the state, known as its value added, these statistics include industries' compensation of employees, gross operating surplus, and taxes.

Median Age: The median age is the age at the midpoint of the population. Half of the population is older than the median age and half of the population is younger. The median age is often used to describe the "age" of a population.

Median Household Income: Household income is a measure of the combined incomes of all people sharing a particular household or place of residence. It includes every form of income, e.g., salaries and wages, retirement income, near cash government transfers like food stamps, and investment gains. Median income is the amount that divides the income distribution into two equal groups, half having income above that amount, and half having income below that amount.

Medicaid Expenditures: The total amount spent by state government on Medicaid entitlement programs. Amounts exclude administrative costs but include spending from state funds, federal matching funds and other funds and revenue sources used as a match such as provider taxes, fees, assessments, donations and local funds. Medicaid Part D clawback payments are included in a state's overall Medicaid expenditures.

Mental Health Providers: Number of psychiatrists, psychologists, licensed clinical social workers, counselors, marriage and family therapists and advanced practice nurses specializing in mental health care per 100,000 population.

Net Migration: The difference between immigration into and emigration from the area during the year (net migration is therefore negative when the number of emigrants exceeds the number of immigrants).

Obesity: Percentage of adults with a body mass index of 30.0 or higher based on reported height and weight.

Population Change: The difference between the size of the population at the end and the beginning of a period. It is equal to the algebraic sum of natural increase and net migration (including corrections). There is negative change when both of these components are negative or when one is negative and has a higher absolute value than the other.

Proficiency: One of the three National Assessment of Educational Progress achievement levels, representing solid academic performance for each grade assessed. Students reaching this level have demonstrated competency over challenging subject matter, including subject-matter knowledge, application of such knowledge to real-world situations, and analytical skills appropriate to the subject matter.

Sharecare Community Well-Being Index: This report examines well-being across the nation as determined by five elements. The five elements include: purpose (liking what you do each day and being motivated to achieve your goals); social (having supportive relationships and love in your life); financial (managing your economic life to reduce stress and increase security); community (liking where you live, feeling safe and having pride in your community); and physical (having good health and enough energy to get things done daily).

State Public-Pension Funded Ratio: The funded ratio measures the level of assets in proportion to accrued liability.

State Technology and Science Index: Benchmark that measures states' science and technology capabilities and broader commercialization ecosystems that contribute to company growth, high-value-added job creation, and overall economic growth. It is a measure of a state's innovation pipeline. The STSI's 107 individual indicators are sorted into five composites: Research and Development Inputs, Risk Capital and Entrepreneurial Infrastructure, Human Capital Investment, Technology and Science Workforce, and Technology Concentration and Dynamism.

Total Population: The total population of a state consists of all persons falling within the scope of the census.

Uninsured: Percentage of the population that does not have health insurance privately, through their employer or through the government.

Work-Based Learning (WBL): The purpose of WBL is to merge theory with practice by providing students with opportunities to connect real-world work experience with classroom learning as they explore potential career paths of interest.

Appendix

Economic Growth

Median Household Income: U.S. Census Bureau, Table ID: B19013, "[Median household income in the past 12 months \(in 2022 inflation-adjusted dollars\)](#)"

Gross State Product: Bureau of Economic Analysis, "[Gross Domestic Product by State and Personal Income by State, 3rd Quarter 2023](#)"

Labor Force Participation Rate: U.S. Bureau of Labor Statistics, "[Employment Status of the Civilian Noninstitutional Population](#)"

Unemployment Rate: Iowa Workforce Development, "[Local Area Unemployment Statistics](#)" (12 month rolling average to avoid seasonal variations)

State Technology and Science Index: Milken Institute Center for Jobs and Human Capital, "[State Technology and Science Index 2022](#)"

Education & Workforce

Proficiency in 4th Grade Reading: National Center for Educational Statistics, National Assessment of Educational Progress, "[The Nation's Report Card](#)"

Proficiency in 8th Grade Math: National Center for Educational Statistics, National Assessment of Educational Progress, "[The Nation's Report Card](#)"

Education Attainment High School Plus: U.S. Census Bureau, Table C15002 "[Educational Attainment for the Population 25 Years and Over](#)"

Secondary School Work-Based Learning: www.iowain.org

Future Ready Iowa: [Iowa's Readiness Level](#)

Governance

America's Top States for Business: CNBC, "[America's Top States for Business 2023: The full rankings](#)"

State Public-Pension Funded Ratio: Pew Research Center, Washington, D.C., "[Public Sector Retirement Systems](#)"

Medicaid Expenditures as a Percentage of Total Expenditures: National Association of State Budget Officers, "[State Expenditure Report: Fiscal 2021-2023](#)" (Table 29)

Corporate Tax Climate Index: Tax Foundation, "[State Business Tax Climate Index](#)"

Individual Income Tax Climate Index: Tax Foundation, "[Individual Income Tax Component of the State Business Tax Climate Index](#)"

Health & Wellness

Active Primary Care Providers per 100,000 Population: America's Health Rankings, United Health Foundation, "[America's Health Rankings 2023 Annual Report](#)"

Mental Health Providers per 100,000 Population: America's Health Rankings, United Health Foundation, "[America's Health Rankings 2023 Annual Report](#)"

Percent Obese: America's Health Rankings, United Health Foundation, "[America's Health Rankings 2023 Annual Report](#)"

Percent Lacking Health Insurance: America's Health Rankings, United Health Foundation, "[America's Health Rankings 2023 Annual Report](#)"

Gallup-Healthways Well-Being Index: [Well-Being Index Score, 2023](#)

Demographics & Diversity

Total Population: U.S. Census Bureau, Table ID: B01003, "[Total Population](#)"

Population 5-Year Change: U.S. Census Bureau, Table ID: XK200101, "[2020 ACS 1-Year Experimental Data Tables](#)"

Ethnic Diversity of Population: U.S. Census Bureau, Table ID: DP05, "[ACS Demographic and Housing Estimates](#)"

Median Age of Population: U.S. Census Bureau, Table ID: XK200103, "[2020 ACS 1-Year Experimental Data Tables](#)"

Net Overall Migration: U.S. Census Bureau, "[National Population Totals and Components of Change: 2020-2023](#)"

BASELINE DATA

		Baseline Year	Baseline Rank	2022 Rank	2023 Rank	Baseline Metric	2022 Metric	2023 Metric
Economic Growth	Median Household Income	2000	25	30	31	\$42,993	\$62,209	\$69,558
	Gross State Product (GSP)	2000	29	30	31	\$93 billion	\$216.9 billion	\$238.3 billion
	Manufacturing Value (as a % of GSP)	2001	8	3	4	23.4%	17.8%	16.5%
	Labor Force Participation Rate	2000	9	4	6	71.3%	68.2%	68.1%
	State Technology & Science Index	2002	31	34	33	42.5	41.6	44.5

Education & Workforce	4th Grade Reading Proficiency	2003	9	22	17	35%	33%	33%
	8th Grade Math Proficiency	2003	9	24	16	33%	33%	28%
	Education Attainment High School+	2000	9	8	8	86.1%	93.3%	93.5%
	Secondary School Work-Based Learning	2020	-	-	-	121 Schools	360 Schools	373 Schools
	Workforce has Training Beyond High School	2017	-	-	-	58.4%	71.4%	71.8%

Governance	America's Top States for Business	2007	11	12	23	11	12	23
	State Public-Pension Funded Ratio	2000	29	11	9	97.7%	82.9%	101.0%
	Medicaid Expenditures (as a % of Total Expenditures)	2000	9	21	23	13%	24.0%	25.0%
	Corporate Tax Index	2010	46	34	29	4.23	4.85	5.09
	Individual Income Tax Index	2010	41	40	22	3.89	4.26	5.11

Health & Wellness	Active Primary Care Providers per 100,000 Population	2020	31	31	26	245.2	266.5	239.6
	Mental Health Providers per 100,000 population	2017	44	44	43	134.7	193.8	207.4
	Percent Obese	2000	39	39	38	21.5%	36.4%	37.4%
	Percent Lacking Health Insurance	2000	4	6	5	6.9%	4.8%	4.5%
	Gallup Healthways Well-Being Index	2009	7	30	33	7	30	33

Demographics & Diversity	Total Population	2000	30	31	31	2,926,324	3,193,079	3,200,517
	Population 5 Year Change	2000	34	31	30	4.5%	1.6%	1.4%
	Ethnic Diversity of Population	2000	45	45	45	6.1%	17.0%	17.2%
	Median Age of Population	2000	40	16	17	36.6	38.5	38.9
	Net Overall Migration	1990-1999	33	31	34	5,609	2,056	3,509



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