

2023

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. Additionally, continued improvement across the entire tax system will help Iowa attract and retain employers and employees that can increasingly do business anywhere.



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 offer registered apprenticeship programs and other programmatic opportunities to meet the needs of businesses and provide real-world career experiences for students.

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 a year in lost tax revenue and employee absences. Stakeholders must address the shortage of high-quality, affordable child care across Iowa, as well as the lack of workforce due to low wages.



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.

Continued efforts surrounding tax policy should include ensuring the recently enacted reforms extend to all types of Iowa businesses while additionally working to address property tax competitiveness in the long term.

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 for all.

Health & Wellness

The healthcare industry was one of the worst hit sectors during the pandemic. As the country rebuilds, a national race for healthcare talent has made efforts for the industry to rebound extremely challenging. The problem is compounded in rural parts of the state that were already experiencing continued recruitment challenges in all aspects of their healthcare delivery systems. Smaller communities not only rely on crucial medical services to stay healthy, they also depend on these clinics and hospitals to provide an economic ripple throughout their rural areas. With that in mind, the IBC supports efforts to attract and retain more primary care physicians, nurses, and support staff in addition to supporting tort reform efforts.

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. Specifically, supporting Iowa's entry into various national mental health consortiums, increasing Medicaid reimbursements in specific areas, supporting an efficient realignment of existing Mental Health and Disability Regions, and supporting tort reform efforts in Iowa are areas where the IBC will engage.



Demographics & Diversity

Population growth must be accelerated throughout the entire state of Iowa to ensure economic prosperity while increasing the percentage of Iowa's ethnic diversity. 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. Additionally, 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.

The IBC believes a commitment to advancing diversity, equity, and inclusion (DEI) is a fundamental element of corporate success and responsibility. The invaluable contributions in innovation, knowledge, and advancement that a welcoming and inclusive work environment cultivates is critical to the future of Iowa's economy. The IBC rejects racism and discrimination, systemic or otherwise, and will continue to engage, listen, and learn to advance opportunities for all Iowans. The IBC's focus on DEI will guide decision-making as policy initiatives are proposed that impact the state's population growth and overall diversity.

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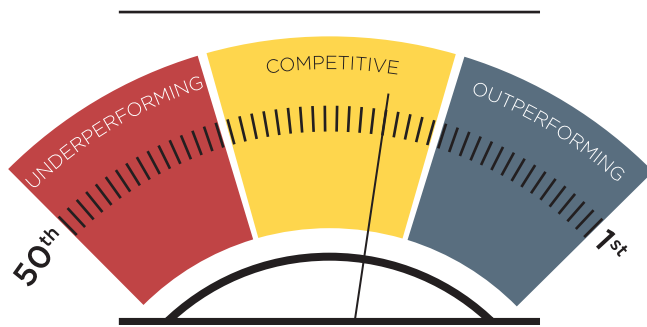
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ECONOMIC GROWTH



Despite concerns over a recession and persistent national and international economic strife, Iowa has emerged from the pandemic in a strong position. Iowa's gross state product (GSP) is now \$216.9 billion, an increase of more than 11% from the prior year. The report for median household income showed an increase of more than \$3,000 per year to \$65,600. Iowa remains a top tier hub for the country's manufacturing industry, increasing Iowa's rank in manufacturing value as a percentage GSP to 3rd in the nation.

The State Technology & Science Index increased slightly with a score of 44.5. This evaluation is recorded every two years and tracks five sub-indexes including research and development inputs, risk capital and entrepreneurial infrastructure, human capital investment, technology and science workforce, and technology concentration.

Iowa continues to outperform most of the country with respect to labor force participation rate and ranks 7th (using November 2022 data for consistency purposes). Iowa's reported labor force participation rate in November 2022 was 67.7% which is an increase of a full percentage point from the prior year but still below the 70% pre-pandemic level.

MEDIAN HOUSEHOLD INCOME

2021	2022
\$62,209	\$65,600
State Rank: 30	State Rank: 30



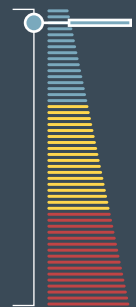
GROSS STATE PRODUCT

2021	2022
\$194.3 Billion	\$216.9 Billion
State Rank: 30	State Rank: 30



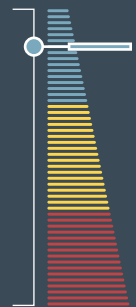
MANUFACTURING VALUE AS A % OF GSP

2021	2022
17.3 %	17.8 %
State Rank: 4 (Tie with KY)	State Rank: 3



LABOR FORCE PARTICIPATION RATE

NOV. 2021	NOV. 2022
66.8%	67.7%
State Rank: 8	State Rank: 7
3.9%	3.2%
Unemployment Rate - 12 Month Rolling Average	

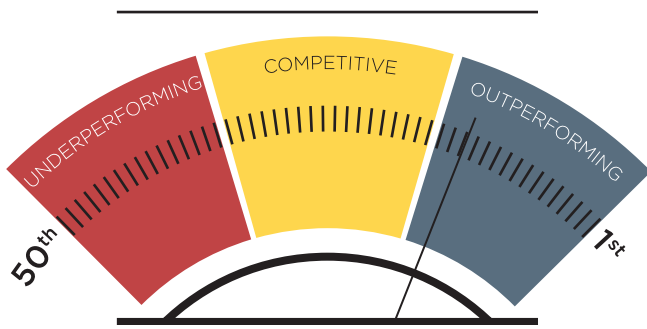


STATE TECHNOLOGY AND SCIENCE INDEX

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



EDUCATION & WORKFORCE

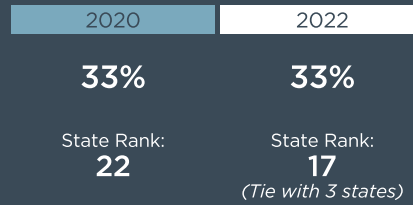


Iowa's educational system weathered the negative impacts of the pandemic much better compared to the rest of the country. In fact, data from the National Center for Educational Statistics shows Iowa's proficiency rates in reading and math experiencing no statistical change over the course of the pandemic while most states realized declining proficiency rates in both categories.

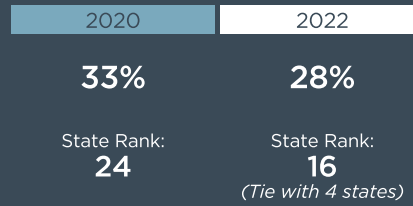
Work-based learning programming throughout Iowa continues to surge with the Iowa Business Council serving a catalyst across the state. Participation opportunities at Iowa high schools have increased more than 9% with 360 Iowa high schools offering at least one work-based learning opportunity. Work-based learning is a critical tool for Iowa's workforce. Such 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.

Future Ready Iowa (FRI) connects individuals to the education and training required for good-paying jobs and careers in Iowa. The state's goal is to have 70 percent of Iowans with education and training beyond high school by 2025. Iowa continues to make steady progress with 62.1% of the population with some level of training beyond high school as of the end of 2021.

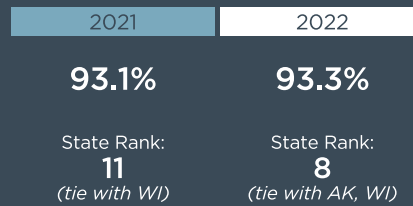
PROFICIENCY 4TH GRADE READING



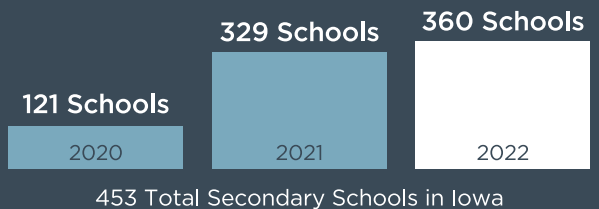
PROFICIENCY 8TH GRADE MATH



EDUCATIONAL ATTAINMENT HIGH SCHOOL +



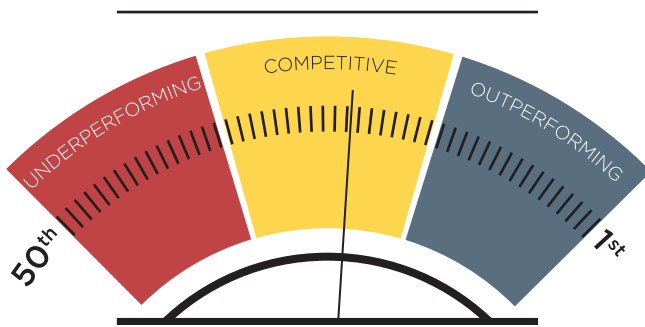
SECONDARY SCHOOL WORK-BASED LEARNING



WORKFORCE HAS TRAINING BEYOND HIGH SCHOOL



GOVERNANCE



Iowa's ranking as one of America's top states for business increased from 20th to 12th in 2022. With continued efficiencies, regulatory reform, and the implementation of a more competitive tax system in future years, the state's standing will likely continue to improve in this metric category.

The state public pension funded ratio is greater than 82% resulting in a top 11 ranking which is consistent with previous years' reporting. Iowa's Medicaid expenditures as percentage of total expenditures decreased slightly to 24% improving the state's ranking to 21st.

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. While the state rankings for both corporate and individual tax climate are essentially flat, the IBC expects rankings in both categories to significantly improve over the next five years as the reforms to the income tax system are phased in.

AMERICA'S TOP STATES FOR BUSINESS

2021	2022
State Rank: 20	State Rank: 12



STATE PUBLIC-PENSION FUNDED RATIO

2021	2022
85.4%	82.9%
State Rank: 10	State Rank: 11



MEDICAID EXPENDITURES AS % OF TOTAL EXPENDITURES

2021	2022
23.2%	24.0%
State Rank: 22	State Rank: 21
27.2%	All States 27.6%



CORPORATE TAX INDEX

2021	2022
4.53	4.85
State Rank: 38	State Rank: 34

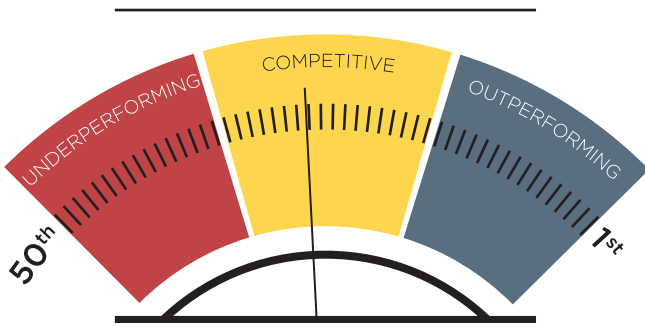


INDIVIDUAL INCOME TAX INDEX

2021	2022
4.32	4.26
State Rank: 38	State Rank: 40



HEALTH & WELLNESS



Key aspects of Iowa's health and wellness metrics need improvement. The state's percentage of obese people has remained flat, although our ranking has improved to 39th. Additionally, Iowa's ranking has not changed for active primary care physicians per 100,000. Iowa remains 35th in the country with only a slight increase in total primary care physicians per capita. Furthermore, according to America's Health Rankings, Iowa has one of the highest instances of excessive drinking in the state which has not improved in many years. Despite this reality, Iowa remains relatively competitive in overall wellness. If individual rankings could be improved over time - prevalence of excessive drinking, low supply of mental health providers, obesity - Iowa's overall competitiveness would improve.

Iowa's ranking in the Sharecare Community Well-Being Index has improved to 30th in the nation, increasing six spots from the previous report. The index measures surveyed individuals' overall well-being as it pertains to career, social, financial, community and physical well-being. Iowa made further, albeit minimal, improvement on the percentage of Iowan's lacking health insurance remaining a top six state nationally with less than 5% lacking health insurance.

While no specific data relating to mental health is captured in the IBC's Competitive Dashboard, the IBC recognizes the impact mental health has on the economy and workplace. 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.

ACTIVE PRIMARY CARE PHYSICIANS (PER 100,000)

2019	2021
84.8	86.3
State Rank: 35	State Rank: 35



PERCENT OBESE

2021	2022
36.5%	36.4%
State Rank: 42	State Rank: 39



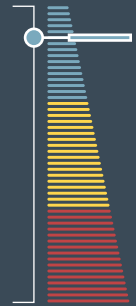
PERCENT SMOKERS 18 YEARS AND OLDER

2021	2022
15.8%	14.6%
State Rank: 26	State Rank: 27



PERCENT LACKING HEALTH INSURANCE

2021	2022
5.0%	4.8%
State Rank: 6	State Rank: 6

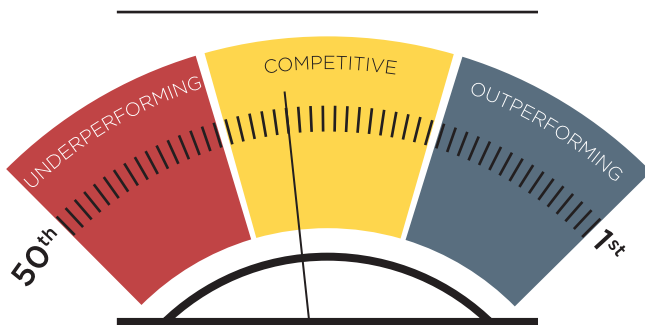


SHARECARE COMMUNITY WELL-BEING INDEX

2021	2022
State Rank: 36	State Rank: 30



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. Iowa's population growth continues to be outpaced by other states and still does not meet businesses' growth needs. Most concerning, it is estimated that Iowa's net migration dropped by nearly 1900 people compared to the previous report.

The growth and diversification 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 in order to sustain and enhance economic opportunity for future generations.

TOTAL POPULATION

2021	2022
3,190,369	3,193,079
State Rank: 31	State Rank: 31



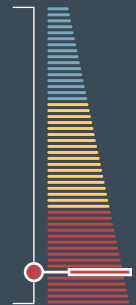
POPULATION 5-YEAR CHANGE

2021	2022
1.0%	1.6%
State Rank: 28 (Tie with MA)	State Rank: 31



ETHNIC DIVERSITY OF POPULATION

2021	2022
17.3%	17.0%
State Rank: 45	State Rank: 45



MEDIAN AGE OF POPULATION

2021	2022
38.7	38.5
State Rank: 20 (Tie with MN, WY)	State Rank: 16 (Tie with AK)
38.7	All States 38.8



NET OVERALL MIGRATION

2021	2022
3,911	2,056
State Rank: 30	State Rank: 31



GLOSSARY

Active Primary Care Physicians: Physicians are counted as primary care physicians if their self-designated primary specialty is one of the following: adolescent medicine (pediatrics), family medicine, general practice, geriatric medicine (family practice), geriatric medicine (internal medicine), internal medicine, internal medicine/pediatrics, or pediatrics. Residents and fellows are counted as primary care residents and fellows if they are in one of the following programs: adolescent medicine (pediatrics), family medicine, family practice, geriatric medicine (family practice), geriatric medicine (internal medicine), geriatric medicine/family practice, geriatric medicine/internal medicine, internal medicine, internal medicine/family practice, internal medicine/pediatrics, or pediatrics.

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. 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.

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).

Smoking: Percentage of adults who are smokers (reported smoking at least 100 cigarettes in their lifetime and currently smoke every or some days).

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 2021 inflation-adjusted dollars)"

Gross State Product: Bureau of Economic Analysis, "Gross Domestic Product by State and Personal Income by State, 3rd Quarter 2022"

Labor Force Participation Rate: U.S. Bureau of Labor Statistics, "Civilian Noninstitutional Population & Associated Rate and Ratio Measures for Model-Based Areas"

Unemployment Rate: Iowa Workforce Development, Labor Market Information Division (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: www.futurereadyiowa.gov

Governance

America's Top States for Business: CNBC, "America's Top States for Business 2022: The full rankings"

State Public-Pension Funded Ratio: State Pension Contributions Hit Important Benchmark" Pew Research Center, Washington, D.C.

Medicaid Expenditures as a Percentage of Total Expenditures: National Association of State Budget Officers, "State Expenditure Report: Fiscal 2020-2022" (Table 29)

Corporate Tax Climate Index: Tax Foundation, "State Business Tax Climate Index" (Table 1)

Individual Income Tax Climate Index: Tax Foundation, "Individual Income Tax Component of the State Business Tax Climate Index" (Table 4)

Health & Wellness

Active Primary Care Physicians per 100,000 Population: Association of American Medical Colleges, "State Physician Workforce Data Report."

Percent Obese: America's Health Rankings, "America's Health Rankings 2022 Annual Report"

Percent of Smokers 18 years+: America's Health Rankings, "America's Health Rankings 2022 Annual Report"

Percent Lacking Health Insurance: America's Health Rankings, "America's Health Rankings 2022 Annual Report"

Sharecare Community Well-Being Index: Well-Being Index Score, 2021

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: 2020-2022"

BASELINE DATA

		Baseline Year	Baseline Rank	2021 Rank	2022 Rank	Baseline Metric	2021 Metric	2022 Metric
Economic Growth	Median Household Income	2000	25	30	30	\$42,993	\$62,209	\$65,600
	Gross State Product (GSP)	2000	29	30	30	\$93 billion	\$194.3 billion	\$216.9 billion
	Manufacturing Value (as a % of GSP)	2001	8	4	3	23.4%	17.3%	17.8%
	Labor Force Participation Rate	2000	9	8	7	71.3%	66.8%	67.7%
	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	11	8	86.1%	93.1%	93.3%
	Secondary School Work-Based Learning	-	-	-	-	-	329 Schools	360 Schools
	70% of Workforce has Training Beyond High School	2017	-	-	-	58.4%	60.2%	62.1%

Governance	America's Top States for Business	2010	3	20	12	3	20	12
	State Public-Pension Funded Ratio	2000	29	10	11	97.7%	85.4%	82.9%
	Medicaid Expenditures (as a % of Total Expenditures)	2000	9	22	21	13%	23.2%	24.0%
	Corporate Tax Index	2010	46	38	34	4.23	4.53	4.85
	Individual Income Tax Index	2010	41	38	40	3.89	4.32	4.26

Health & Wellness	Active Primary Care Physicians per 100,000 Population	2000	46	35	35	71.3	84.8	86.3
	Percent Obese	2000	39	42	39	21.5%	36.5%	36.4%
	Percent of Smokers 18 years+	2000	30	26	27	23.5%	15.8%	14.6%
	Percent Lacking Health Insurance	2000	4	6	6	6.9%	5.0%	4.8%
	Sharecare Community Well-Being Index	2009	7	36	30	7	36	30

Demographics & Diversity	Total Population	2000	30	31	31	2,926,324	3,190,369	3,193,079
	Population 5 Year Change	2000	34	28	31	4.5%	1.0%	1.6%
	Ethnic Diversity of Population	2000	45	45	45	6.1%	17.3%	17.0%
	Median Age of Population	2000	40	20	16	36.6	38.7	38.5
	Net Overall Migration	1990-1999	33	30	31	5,609	3,911	2,056



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