



Iowa Business Council

Annual Iowa Competitiveness Index

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as of January 27, 2014

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Iowa Business Council

Annual Iowa Competitiveness Index

Indicators

2014

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Workforce Demographics & Diversity	●

Overall Performance Trend

- **Improving**
- **Maintaining**
- **Worsening**

Iowa Competitiveness Indicators



Iowa Business Council

METRIC	Base Metric Measurement (Year)	Base Metric Rank	Previous Metric Measurement (Year)	Previous State Ranking/Trend	Current Metric Measurement (Year)	Current State Ranking	Competitiveness Trend
Economic Growth							
• Per Capita Income	\$27,348 (2000)	23	\$41,156 (2011)	23 ●	\$42,126 (2012)	22	●
• Gross State Product (GSP)	\$93 bil (2000)	29	\$146 bil (2011)	30 ●	\$152 bil (2012)	30	●
• Mfg Value as % of GSP	23.4% (2001)	8	16.2% (2011)	7 ●	16.7% (2012)	8	●
• Total Employment	1,555,200 (2000)	2.6%	1,569,617 (2012)	5.4% IA unempl. Rate (rolling av) ●	1,563,625 (2013)	4.9% IA unempl. rate (rolling aver.)	●
• Knowledge Jobs	18 (2007)	18	29 (2010)	29 ●	32 (2012)	32	●
Education & Workforce Readiness							
• Proficiency – 8 th Grade Reading	36% (2003)	11	33% (2011)	27 ●	37% (2013)	18	●
• Proficiency – 8 th Grade Math	33% (2003)	12	34% (2011)	25 ●	36% (2013)	22	●
• ACT Scores – 50% Participation	22.0 (2004)	3	22.1 (2012)	2 ●	22.1 (2013)	2	●
• Ed. Attain. By Pop. > 25, H.S.+	86.1% (2000)	9	90.6% (2011)	10 ●	91.6% (2012)	8	●
• Ed. Attain. By Pop. > 25, Bach+	21.2% (2000)	22	25.8% (2011)	33 ●	26.3% (2012)	33	●
Governance & Fiscal Matters							
• State Debt as % of GSP	2.53% (2000)	5	5.35% (2010)	12 ●	5.19% (2011)	13	●
• Local Debt as % of GSP	5.30% (2000)	10	7.10% (2010)	16 ●	7.36% (2011)	16	●
• State & Local Govt as % of GSP	9.90% (2000)	37	10.21% (2010)	36 ●	9.95% (2011)	37	●
• State & Local Tax as % of Income	9.1% (2000)	28	9.6% (2009)	27 ●	9.6% (2010)	24	●
• Govt FTEEs per 10,000	601 (2000)	41	573 (2010)	33 ●	565 (2011)	33	●



METRIC	Base Metric Measurement (Year)	Base Metric Rank	Previous Metric Measurement (Year)	Previous State Ranking/Trend	Current Metric Measurement (Year)	Current State Ranking	Competitiveness Trend
Health & Well-Being							
• Primary Care Physicians/100,000 pop.	71.3 (2000)	46	83.7 (2010)	34 ●	83.6 (2012)	33	●
• % Obese	21.5% (2000)	39	29.0% (2012)	33 ●	30.4% (2013)	39	●
• % Smokers 18 Years and Older	23.5% (2000)	30	20.4% (2012)	21 ●	18.1% (2013)	18	●
• Infant Mortality/1,000 Live Births	6.4 (2000)	9	5.1 (2012)	6 ●	4.7 (2013)	4	●
• Gallup-Healthways Well-Being Index	67.8 (2009)	7	67.4 (2011)	16 ●	68.1 (2012)	9	●
Workforce Demographics & Diversity							
• Total Population	2,926,324 (2000)	30	3,062,309 (2011)	30 ●	3,090,416 (2013)	30	●
• Population 10-Year Change	5.4% (2000)	43	4.4% (2011)	36 ●	5.6% (2013)	37	●
• Ethnic Diversity of Population	6.1% (2000)	45	11.6% (2011)	45 ●	12.0% (2012)	45	●
• Median Age of Population, Iowa/USA	36.6/35.3 (2000)	40	38.1/37.3 (2011)	29 ●	38.0/37.4 (2012)	26	●
• Net Overall Migration	5,609 (1990-99)	33	2,638 (2010-11)	31 ●	647 (2011-12)	35	●



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• Knowledge Jobs ₅	18 (2007)	18	29 (2010)	29 ●	32 (2012)	32	●

What Do These Indicators Tell Us?

Economic growth in Iowa continued at a moderate pace in 2013. **Per Capita Income** grew at a rate fast enough to improve Iowa's ranking one spot, but the state still lurks closer to the middle than the top ten. Growth in **Gross State Product (GSP)** was not enough to improve Iowa's ranking. Manufacturing continues to play a key role in the state's diverse and resilient economy, and grows in light of a shrinking manufacturing sector nationally – with Iowa adding nearly 2,000 jobs over the past twelve months. Iowa's ag economy remains vigorous and strong, which may account for only modest improvement in **GSP value related to manufacturing**. **Total Employment** remained flat, but Iowa's **Unemployment Rate** ranks as one of the lowest in the nation – a notable achievement in tough economic times. Success in this metric, however, highlights the paradox of difficulty Iowa employers have finding enough qualified, skilled workers. **Knowledge Jobs**, e.g., those in high technology, advanced manufacturing, financial and information services as measured by the *State New Economy Index*, is a biannual measure that will not have new data until 2014 – so this metric remains unchanged.

Why Are The Indicators Important to Our Competitiveness?

Iowa policymakers continue to discuss appropriate spending levels for infrastructure, education, public safety, and other services while weighing private sector needs to incent R&D, prompt commercialization, and seed new enterprises. A diverse portfolio of business sectors requires on-going investment to maintain a competitive posture. It's essential that Iowans compete for and retain jobs through continuing education and skills development, and potential new Iowans find the state a desirable place to establish roots. Iowa's current low rank re: **Knowledge Jobs** suggests that additional emphasis on attracting new or expanding existing employers offering career opportunities to those qualified for such jobs will significantly impact measures like **Per Capita Income** and **GSP**. It's worth noting that awareness and enthusiasm for STEM-oriented school curriculums among educators and career options for students is increasing at a strong rate statewide, significant credit for which goes to the efforts of the **Governor's STEM Advisory Council**.

What Actions Are Necessary?

Iowa's business sector must remain focused in pursuit and adoption of new innovations in practice and technology that will attract talent and provide it with an advantage in the global marketplace. The goal should be to realize increased **Total Employment** by creating and attracting jobs offering greater wealth potential for Iowans. For Iowa commerce and industry to effectively compete in the 21st century, the existing delivery model for economic development must be transformed into a broader planning and programming strategy that plays to the state's strengths – utilizing regional organizations, institutions, and public-/private-sector partnerships such as that developed for the **Home Base Iowa** initiative, an effort to attract returning/retraining military veterans to the state. Iowa's future will depend on its ability to develop innovation capacity and recruit the skilled talent necessary to compete effectively in a global environment. Competitive advantages must be leveraged and identified weaknesses mitigated in the effort to make Iowa the preferred location for corporate home offices, relocation, expansion, consolidation, R&D, and start-ups. The presence of a diverse and vital economy enhances a quality lifestyle and offers meaningful career opportunities for our citizens, all to the promise of long-term economic growth and prosperity.

METRIC

Base Metric
Measurement
(Year)

Base
Metric
Rank

Previous Metric
Measurement
(Year)

Previous State
Ranking/
Trend

Current Metric
Measurement
(Year)

Current
State
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Competi-
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Education & Workforce Readiness

• Proficiency – 8 th Grade Reading ₁	36% (2003)	11	33% (2011)	27	●	37% (2013)	18	●
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What Do These Indicators Tell Us?

Reading and Math test scores, as measured by proficiency percentages, increased our state ranking notably according to the National Report Card released by the National Center for Educational Statistics (NCES), the only national assessment of student achievement. Iowa jumped 9 spots for 8th grade reading proficiency while 8th grade math proficiency improved 3 spots. Some of this increase can be attributed to Iowa schools teaching toward common state standards. While not tracked by IBC, 4th grade math proficiency scores increased substantially and have climbed into the top ten nationally. It should be noted, however, that 8th grade scores on the recent Iowa Assessments declined, which conflicts with the NCES national assessment. Trend dots for both metrics changed from **RED** to **YELLOW**. Iowa showed slight improvement for both **Education Attainment by Population Age 25 or Greater - High School** and **Education Attainment by Population Age 25 or Greater – Bachelor Degree +**. Both are encouraging developments. However, while the High School educational attainment trend dot will remain **GREEN**, that for Bachelor's degree + remains **RED** due to Iowa's bottom-half ranking. Iowa's **ACT Test Score** ranking compared to states where at least 50% take the ACT test is essentially unchanged, with scores staying steady for the 2013 graduating class and solidly in the top three nationally.

Why Are They Important to Our Competitiveness?

The improved outcome in test scores and state ranking indicates positive movement at the 4th and 8th grade levels - though a one-year increase in rankings is not yet a trend. **Iowa should strive to be ranked in the top ten in all educational rankings by the end of the decade.** Student scores in math and science are an indicator of future success in obtaining the vital engineering, technological, and related scientific degrees necessary to fill workforce demands. It also increases the likelihood that he or she becomes Iowa's next new inventor or innovator. A two-year associate or four-year university degree correlates to higher personal income, increased Gross State Product and, eventually, a more competitive and robust workforce from which industry selects its vital talent.

What Actions Are Necessary?

Commitment, resources, and CEO-leadership around a business-education consortium are critical to assuring that federal, state, local, corporate, and philanthropic dollars are applied most effectively towards both student achievement and teacher training. **IBC commends the Iowa General Assembly for its commitment to education reform and enhancement in our state.** Progress is already evident. In addition, the **Governor's STEM Advisory Council** is raising awareness and generating momentum in our schools for science and math education and careers. Iowa needs to encourage more participation in the ACT exam and other skills assessments to monitor progress and identify gaps in education and workforce readiness. Finally, a parent-student awareness campaign should be developed that promotes the benefits of completing college or technical training, the future employment opportunities such an achievement affords, and the innovative entrepreneurial scenarios created.



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What Do These Indicators Tell Us?












State Debt as a % of GSP improved modestly in 2011, though not as fast as other states – with Iowa’s rank dropping one spot. **Local Debt as a % of GSP** rose slightly and the ranking remained unchanged. **Concern persists that** local debt obligations related to Tax Increment Financing (TIF) are still not fully reflected in this metric – a looming pressure that may challenge local government finances. **State & Local Government as a % of GSP** is in retreat from its historical high in 2009, a positive trend that’s resulted from the private-sector economy growing at a rate faster than government as a whole. Iowa’s ranking worsened slightly, though, attributed to higher economic growth rates in other states. The cost to deliver services like primary & secondary education, social services, infrastructure, and public safety account for a larger portion of Iowa’s economic activity (its Gross State Product) than most other states, making our governing bodies more dependent for funding from a relatively smaller state economy. The metric presentation for **State & Local Tax as a % of Income** changed for 2014, moving from a pure dollar data point to a percentage measure for more accurate guidance. Figures more recent than 2010 are not yet available, however. **Government Full-Time Equivalent Employment (FTEEs) per 10,000 population** is also a new metric presentation, offering a computed statistic representing the number of full-time government employees that would have been employed if the reported number of hours worked by part-time government employees had been worked by full-time employees. With this change, the data point now reflects higher numbers re: government employees. Though Iowa continues to steadily improve in this area, its rank did not move from the previous year. Improvements to this metric will be sustained only when the processes used to deliver government services themselves are improved (see Lean discussion below).

Why Are These Indicators Important to Our Competitiveness?

The national and state fiscal challenges that confront our country are significantly impacted by the size and layers of government, the amount of public- versus private-sector employment, and the lack of effective resource allocation policies to meet current and future demands. Utilizing alternative methods to deliver services and operate facilities – along with reduction in public sector employment through consolidation in governance, process improvement, or outsourcing – has been successful in other locales, with improved customer satisfaction and lower tax consequences to citizens and industries. **Iowa ranks 41st in the U.S. with 1,939 different government entities**, a statistic that should drive policymakers to demand the use of continuous process improvement in the delivery of public services.

What Actions Are Necessary?

Nearly a decade ago, Iowa was one of the first states to adopt the philosophy of continuous process improvement – or Lean Enterprise – in the public-sector, well before many other states began to focus on more efficient and effective processes. Early on, the Lean initiative was maintained at a level and scale that had limited impact on Iowa’s budget challenges. It’s now beginning to realize broad adoption into the culture of State agencies, though still struggles to be utilized regularly at county and local government levels – where debt ratios and resource allocation gaps are just as critical. Therefore, **it is essential that government at all levels focus on Lean Enterprise.**

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• % Obese ₂	21.5% (2000)	39	29.0% (2012)	33 	30.4% (2013)	39	
• % Smokers 18 Years and Older ₃	23.5% (2000)	30	20.4% (2012)	21 	18.1% (2013)	18	
• Infant Mortality/1,000 Live Births ₄	6.4 (2000)	9	5.1 (2012)	6 	4.7 (2013)	4	
• Gallup-Healthways Well-Being Index ₅	67.8 (2009)	7	67.4 (2011)	16 	68.1 (2012)	9	

What Do These Indicators Tell Us?

The data point for **Primary Care Physicians per 100,000 Population** fell slightly, but Iowa's rank improved one spot – so the metric remains, essentially, unchanged. The **Percentage of Iowans considered to be Obese** worsened significantly from the previous Index, with the data point and ranking dropping. Most startling is that the percentage of Iowans considered to be obese has increased over 40% since the benchmark year of 2000 – a disconcerting trend that reinforces the need for statewide, broadly based health & wellness efforts, e.g., the **Healthiest State Initiative**, **Blue Zone Communities**. The **Percentage of Adults Who Smoke** decreased by over 10% and Iowa's rank improved three spots – a promising development that reinforces the need to sustain and bolster smoking cessation initiatives. Iowa's **Infant Mortality Rate** and state ranking continue to show strong improvement, and remains well under the base metric measurement. The **Gallup-Healthways Well-Being Index** metric improved seven ranking spots. Iowa's areas of strength include the physical energy and daily health of its citizens, the environment in which they work, and access to basic healthcare, while the biggest area of concern is our level of healthy behavior (lifestyle habits) – which may account for, in part at least, Iowa's poor obesity standing. Given that Iowa's health ranking – relative to other states – has improved in four metric areas and worsened in one, the overall trend indicator for this issue area has been changed from **YELLOW** to **GREEN**.

Why Are These Indicators Important to Our Competitiveness?

A healthy, able, and available workforce is the engine that drives Iowa's economy and its prospects for competing on a global level. Responsible fiscal planning is advanced through strategic investment in the health and productivity of Iowans in the workforce, their families, and retirees. Iowans cannot reasonably expect to be competitive in attracting business and industry if we are unable to promise a healthy workforce and a work environment focused on wellness.

What Actions Are Necessary?

- Iowans of all ages must actively engage in efforts to improve wellness, engage in healthy lifestyles, promote better nutrition, exercise regularly, etc.. Collaboration is essential between local public health departments, legislatively-directed and ad hoc health-related committees, State agencies, the business sector, schools, and other organizations working to affect the health of Iowans.
- Engage with the **Healthiest State Initiative**, the statewide effort addressing health needs and issues over the next five years, and **Healthy People 2020**, the U.S.'s health plan for 2011-2020.
- Encourage medical school graduates to stay in Iowa for their graduate medical education (GME) and attract those who enter out-of-state GME programs back to Iowa once their training is complete.
- Develop incentives for medical graduates in primary care specialties and other health care providers in short supply to stay in or come to Iowa, like the **Rural Iowa Primary Care Loan Repayment Program**.

METRIC *updated 11.9.12*

Base Metric
Measurement
(Year)

Base
Metric
Rank

Previous Metric
Measurement
(Year)

Previous
State Trend/
Ranking











Current Metric
Measurement
(Year)

Current
State
Ranking

Competi-
tiveness
Trend



Workforce Demographics & Diversity

• Total Population	2,926,324 (2000)	30	3,062,309 (2011)	30		3,090,416 (2013)	30	
• Population 10-Year Change	5.4% (2000)	43	4.4% (2011)	36		5.6% (2013)	37	
• Ethnic Diversity of Population	6.1% (2000)	45	11.6% (2011)	45		12.0% (2012)	45	
• Median Age of Population, Iowa/USA	36.6/35.3 (2000)	40	38.1/37.3 (2011)	29		38.0/37.4 (2012)	26	
• Net Overall Migration	5,609 (1990-99)	33	2,638 (2010-11)	31		647 (2011-12)	35	

What Do These Indicators Tell Us?

Significant positive change in Iowa's population and demographic profile since 2000 remains evasive, with only subtle improvement in two metrics. **Total Population** increased modestly between 2000 - 2013, and **Population 10-Year Change** maintains its slow ascent back to the base year level. Iowa's **Ethnic Diversity of Population** is increasing at a steady rate, though ranks ahead of only five states. **Median Age of Population**, though showing slight improvement recently, continues to be higher than the country as a whole. The most noticeable metric movement occurred in **Net Overall Migration**, with Iowa reversing the previous positive trend by dropping four spots in rank – a development that earned a Competitiveness Trend color change from **YELLOW** to **RED**.

Why Are These Indicators Important to Our Competitiveness?

All tolled, Iowa's demographics and diversity are not advancing swiftly enough to address the needs of a growth-oriented economy. Of concern are two facts: that **Iowa is the only state in the U.S. whose total population did not grow at least 50% from 1900-2010 (36.5%)**, and **57% of Iowa children ages 0-5 live in only 13 counties**. The state still lacks in attracting populations with diverse skill sets, nor does it do well in retaining the talented students, American and international, graduating from Iowa's colleges and universities – the next generation of business owners, inventors, and employees of key industry clusters. A growing, dynamic population drives vibrant economic activity, thriving school districts, and healthy government coffers. A diverse population provides the skills and 'global perspective' that increase the competitiveness of academic institutions, industries, and the innovation process. Foreign born residents choosing Iowa as their home increased by **4,265** during 2011-12, while domestic migration out of Iowa totaled **3,618** – providing a thin **Net Overall Migration** positive balance. Low graduate retention rates at Iowa universities and colleges reduce our competitiveness related to educational attainment, cost of public services, and competencies needed for industrial productivity. Iowa businesses succeed in the world marketplace when they have educated, culturally varied, globally aware, and motivated employees – drawn to the state for its reputation of dynamic companies operating in a welcoming business climate with an attractive quality of life. High-skill, knowledge-intensive jobs drive innovative, market-leading enterprises. It's no secret that a qualified workforce follows wealth-creating opportunity wherever it may exist. That opportunity can be, and should be, in Iowa.

What Actions Are Necessary?

Iowa has several potential pathways to promote the quality of life, affordability, and employment opportunities it offers. Leveraging public-private sector partnerships to promote this as a place willing to welcome and embrace a new generation of talented citizens is critical, e.g., the **Home Base Iowa** initiative recruiting returning/retiring military veterans to the state; **alumni networks** within academic institutions; existing **corporate and industry global connections**; and, **targeted economic development strategies** that recruit "talent" to the state. Efforts currently underway to emphasize and promote Iowa's innovation capacity can strengthen the recruitment and attraction of talented, experienced professionals as well as recent graduates from around the country. A statewide recruiting and 'diversity' network could assist in promoting Iowa as a preferred employment location.



■ Sources/Notes

ECONOMIC GROWTH

- 1: Bureau of Economic Analysis – www.bea.gov; Iowa State Data Center – www.iowadatacenter.org; US Census Bureau – www.census.gov
- 2: US Dept. of Commerce Bureau of Economic Analysis – www.bea.gov/regional/gsp
- 3: US Bureau of Economic Analysis, Regional Economic Information System – www.bea.gov/regional
- 4: Iowa Workforce Development “Iowa Trends,” September 2012 – www.iowaworkforce.org/trends/emp.html - 12 month rolling average for both Total Employment and Iowa Unemployment Rate
- 5: Information Technology & Innovation Foundation – www.kauffman.org/uploadedfiles/snei_2012_report.pdf. *“Knowledge jobs” measures seven aspects of knowledge-based employment:*
 - 1) employment in IT occupations in non-IT sectors; 2) share of workforce in managerial, professional, & technical occupations; 3) education level of the workforce; 4) average educational attainment of recent immigrants; 5) average education attainment of recent U.S. inter-state migrants; 6) employment in high-value added manufacturing sectors; & 7) employment in high-wage traded services.

EDUCATION & WORKFORCE READINESS

- 1: National Center for Educational Statistics – www.nces.ed.gov/nationsreportcard/states; Iowa Department of Education – educateiowa.gov
- 2: ACT – www.act.org/newsroom/data/2012/states
- 3: American Community Survey – <http://factfinder2.census.gov/faces/tableservices/jsf/productview.xhtml>

GOVERNANCE & FISCAL MATTERS

- 1: State Gross Domestic Product: <http://www.bea.gov/>. Debt: <http://www.census.gov/govs/estimate>
- 2: <http://www.bea.gov/>. Statistics available for years 1963 to 2011 at the time of publication.
- 3: State and Local Taxes as a % of Income: <http://www.taxfoundation.org/taxdata/topic/86.html>
- 4: Government Full-Time Equivalent Employment: <http://www.census.gov/govs/go/>. Population: <http://www.census.gov/>.

HEALTH & WELL-BEING

- 1: Univ. of Iowa Office of Statewide Clinical Education Programs, Iowa Physician Information System, call Roger Tracy (319)335-8603 for data; includes general practice, family practice, pediatrics, & internal medicine; reflects availability of physicians to assist citizens w/ preventative & regular care. Also, AAMC State Physician Workforce Data Book.
- 2: America’s Health Rankings (AHR) – www.americashealthrankings.org; % of population estimated to be obese, w/ a body mass index (BMI) of 30.0 or higher; obesity is known to contribute to a variety of diseases, including heart disease, diabetes, & general poor health.
- 3: AHR – www.americashealthrankings.org; % of population over age 18 that smokes on a regular basis; indicative of known, addictive, health-adverse behaviors.
- 4: AHR – www.americashealthrankings.org; number of infant deaths (before age 1) per 1,000 live births; indicative of the prenatal care, access, & birth process for child & mother.
- 5: Gallup-Healthways Well-Being Index – www.well-beingindex.com/default.asp

WORKFORCE DEMOGRAPHICS & DIVERSITY

- US Census Data – www.census.gov and State of Iowa Data Center – www.iowadatacenter.org/