



Annual Iowa Competitiveness Index

INDICATORS

2012

Economic Growth



Education & Workforce Readiness



Governance & Fiscal Matters



Health & Well-Being



Workforce Demographics & Diversity



Overall Competitiveness Trend

Most Recent Year Over Previous Year

- Improving
- No Significant Changes
- 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 | \$36,548 (2010) | 31 ● | \$38,084 (2011) | 26 | ● |
| • Gross State Product (GSP) | \$93 bil (2000) | 29 | \$143 bil (2010) | 30 ● | \$143 bil (2010) | 30 | ● |
| • Mfg Value as a % of GSP | 23.4% (2001) | 8 | 20.8% (2009) | 2 ● | 17.8% (2010) | 6 | ● |
| • Total Employment | 1,555,200 (2000) | 2.6% | 1,565,233 (2009) | 6.1% IA Unempl. Rate ● | 1,573,675 (2011) | 6.0% IA Unempl. Rate | ● |
| • Knowledge Jobs | 18 (2007) | 18 | 29 (2010) | 29 ● | 29 (2010) | 29 | ● |
| Education & Workforce Readiness | | | | | | | |
| • Proficiency – 8 th Grade Reading | 36% (2003) | 11 | 32% (2009) | 26 ● | 33% (2011) | 27 | ● |
| • Proficiency – 8 th Grade Math | 33% (2003) | 12 | 34% (2009) | 29 ● | 34% (2011) | 25 | ● |
| • ACT Scores – 50% Participation | 22.0 (2004) | 3 | 22.2 (2010) | 2 ● | 22.3 (2011) | 2 | ● |
| • Ed. Attain. By Pop. > 25, H.S.+ | 86.1% (2000) | 9 | 89.6% (2009) | 7 ● | 90.6% (2010) | 7 | ● |
| • Ed. Attain. By Pop. > 25, Bach+ | 21.2% (2000) | 22 | 24.2% (2009) | 35 ● | 24.9% (2010) | 36 | ● |
| Governance & Fiscal Matters | | | | | | | |
| • State & Local Debt as % of GSP | 8.11% (2000) | 1 | 11.39% (2008) | 3 ● | 11.37% (2009) | 3 | ● |
| • State & Local Govt as % of GSP | 9.90% (2000) | 37 | 9.82% (2007) | 37 ● | 10.42% (2009) | 35 | ● |
| • State & Local Tax per Capita | \$2,593 (2000) | 29 | \$3,688 (2009) | 24 ● | \$3,688 (2009) | 24 | ● |
| • Govt FTEs per 10,000 | 601 (2000) | 41 | 506 (2009) | 28 ● | 492 (2010) | 27 | ● |
| • Units of Govt per 10,000 | 6.75 (2002) | 41 | 6.56 (2007) | 41 ● | 6.56 (2007) | 41 | ● |

Iowa Competitiveness Indicators



Iowa Business Council

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|---|--------------------------------|------------------|------------------------------------|------------------------------|-----------------------------------|-----------------------|-----------------------|
| Health & Well-Being | | | | | | | |
| • Primary Care Physicians/100,000 pop. | 71.3 (2000) | 46 | 82.0 (2010) | 34 ● | 82.0 (2010) | 34 | ● |
| • % Obese | 21.5% (2000) | 39 | 28.4% (2010) | 32 ● | 29.1% (2010) | 33 | ● |
| • % Smokers 18 Years and Older | 23.5% (2000) | 30 | 17.1% (2010) | 17 ● | 16.1% (2011) | 19 | ● |
| • Infant Mortality/1,000 Live Births | 6.4 (2000) | 9 | 5.3 (2010) | 5 ● | 5.6 (2011) | 10 | ● |
| • Gallup-Healthways Well-Being Index | 67.8 (2009) | 7 | 66.9 (2010) | 19 ● | 66.9 (2010) | 19 | ● |
| Workforce Demographics & Diversity | | | | | | | |
| • Total Population | 2,926,324 (2000) | 30 | 3,046,355 (2010) | 30 ● | 3,046,355 (2010) | 30 | ● |
| • Population 10-Year Change | 5.4% (2000) | 43 | 4.1% (2010) | 41 ● | 4.1% (2010) | 41 | ● |
| • Ethnic Diversity of Population | 6.1% (2000) | 45 | 11.3% (2010) | 44 ● | 11.3% (2010) | 44 | ● |
| • Median Age of Population, Iowa/USA | 36.6/35.3 (2000) | 40 | 38.1/37.2 (2010) | 32 ● | 38.1/37.2 (2010) | 32 | ● |
| • Net Overall Migration | 5,609 (1990-99) | 33 | -15,876 (2000-09) | 41 ● | -15,876 (2000-09) | 41 | ● |

Iowa Competitiveness Indicators



Iowa Business Council

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|--|--------------------------------|------------------|------------------------------------|-------------------------------|-----------------------------------|-----------------------|-----------------------|
| Economic Growth | | | | | | | |
| • Per Capita Income ₁ | \$27,348 (2000) | 23 | \$36,548 (2010) | 31 ● | \$38,084 (2011) | 26 | ● |
| • Gross State Product (GSP) ₂ | \$93 bil (2000) | 29 | \$143 bil (2010) | 30 ● | \$143 bil (2010) | 30 | ● |
| • Mfg Value as a % of GSP ₃ | 23.4% (2001) | 8 | 20.8% (2009) | 2 ● | 17.8% (2010) | 6 | ● |
| • Total Employment ₄ | 1,555,200 (2000) | 2.6% | 1,565,233 (2009) | 6.1% IA Unempl. Rate ● | 1,573,675 (2011) | 6.0% IA Unempl. Rate | ● |
| • Knowledge Jobs ₅ | 18 (2007) | 18 | 29 (2010) | 29 ● | 29 (2010) | 29 | ● |

What Do These Indicators Tell Us?

Iowa's economy expanded at a modest pace during 2011. **Per Capita Income** grew at a rate fast enough to improve Iowa's standing five spots relative to other states. This is significant progress, but the current ranking remains below the mid-point and still lags behind Iowa's standing in 2000. The update for **Gross State Product (GSP)** does not occur until June. In the first iteration of this Index, GSP increased – but growth was not fast enough to improve Iowa's ranking relative to other states. **Manufacturing** continues to play a key role in Iowa's diverse and resilient economy – due, in part, to many high-quality niche manufacturers. Slower sales activity during the recent economic downturn, combined with the current vigor and strength of Iowa's ag economy, may account for the lower GSP value related to manufacturing. This notwithstanding, the state's business sector must remain focused in pursuit and adoption of new innovations in practice and technology that will attract talent and provide Iowa with an advantage in the global marketplace. Iowa's goal should be to realize more dramatic improvement in **Total Employment** through creation of additional positions that offer greater wealth potential for Iowans. This has been achieved by other states and regions thru adding STEM-oriented **Knowledge Jobs**, e.g., those in high technology, advanced manufacturing, financial and information services.

Why Are The Indicators Important to Our Competitiveness?

Iowa has arrived at a critical juncture re: establishing government expenditure levels for infrastructure, education, public safety, and other services while weighing private sector needs for incenting R&D, prompting commercialization, and seeding new enterprises. A diverse portfolio of business sectors requires on-going investment to maintain a competitive posture. It is essential that Iowans can compete for and retain jobs through continuing education and skills development. Competitive advantages must be leveraged and identified weaknesses mitigated in striving to make Iowa the preferred location for corporate home offices, relocation, expansion, consolidation, R&D, and start-ups.

What Actions Are Necessary?

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 Iowa's strengths – utilizing regional organizations, institutions, and partnerships. The public/private partnership newly formed in 2011, the Iowa Partnership for Economic Progress, is an excellent start in this regard. 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. 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.

Iowa Competitiveness Indicators



Iowa Business Council

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| Education & Workforce Readiness | | | | | | | |
| • Proficiency – 8 th Grade Reading ₁ | 36% (2003) | 11 | 32% (2009) | 26 ● | 33% (2011) | 27 | ● |
| • Proficiency – 8 th Grade Math ₁ | 33% (2003) | 12 | 34% (2009) | 29 ● | 34% (2011) | 25 | ● |
| • ACT Scores – 50% Participation ₂ | 22.0 (2004) | 3 | 22.2 (2010) | 2 ● | 22.3 (2011) | 2 | ● |
| • Ed. Attain. By Pop. > 25, H.S.+ ₃ | 86.1% (2000) | 9 | 89.6% (2009) | 7 ● | 90.6% (2010) | 7 | ● |
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▪ **What Do These Indicators Tell Us?**

Iowa **Reading** and **Math** test scores have remained steady or risen slightly while other states have made substantial progress, pushing Iowa's **Proficiency** rankings substantially lower over time. Minimal changes have occurred in test scores between the 4th and 8th grades where most national experts suggest that strengthening the learning and understanding of math and science must occur – two important predictors of one's future wealth potential. Iowa has consistently ranked lower each year on the percentage of its population that has received a **Bachelor's Degree** or higher. Two data points are encouraging: the percentage of Iowans receiving their **High School Diplomas**, and Iowa's **ACT Test Score** ranking compared to states where at least 50% take the ACT test.

▪ **Why Are They Important to Our Competitiveness?**

The marginal "bumps" in test scores over the decade remain a challenge to be addressed with a more serious focus. A student who doesn't score well in math and science will not, generally, continue on to college to obtain the vital engineering, technological, and related scientific degree necessary to fill workforce demands – reducing the likelihood that he or she become the next new inventor or innovator for Iowa's intellectual capital. Reports such as *Rising Above the Gathering Storm* (The National Academies) and its update suggest that 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?**

Rekindling the commitment, resources, and CEO-leadership around a business-education consortium is critical to assuring federal, state, local, corporate, and philanthropic dollars are applied more effectively towards both student achievement and teacher training. Some states have substantially increased student participation in the ACT exam; though initial drops in scores can be expected, when "all" students participate a state can accurately assess the college and work readiness of its entire high school graduate population. 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 presented.

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| Governance & Fiscal Matters | | | | | | | |
| • State & Local Debt as % of GSP ₁ | 8.11% (2000) | 1 | 11.39% (2008) | 3 ● | 11.37% (2009) | 3 | ● |
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▪ **What Do These Indicators Tell Us?**

The cost of public sector services – e.g., primary & secondary education, social services, infrastructure, public safety – continues to increase throughout Iowa. In fact, at 10.42% in 2009, the size of **State and Local Government in Iowa as a percent of the Gross State Product (GSP)** is the largest of any year for which statistics are available. Areas in the state with declining populations are especially affected by this trend, as their local economies produce lower revenue and, consequently, lower tax receipts to fund services. While the State of Iowa has been able to maintain a AAA bond rating, **State and Local Debt as a percent of GSP** remains at elevated levels since the base measurement in 2000. **Government Full Time Employees per 10,000 Population** has seen improvement since 2000, with the trend continuing in 2010. In order to make improvements to this metric that are sustainable, the processes used to deliver government services must themselves be improved (see Lean discussion below). The next updates for **State & Local Tax per Capita** and **Units of Government per 10,000 Population** occur this Spring and in 2013, respectively.

▪ **Why Are These Indicators Important to Our Competitiveness?**

The national and state fiscal crisis is focused on the size and layers of government, the amount of public sector employment versus the private sector, and the lack of effective resource allocation policies that meet current and future demands. For instance, while it is of concern that the State and Local government portion of Iowa's GSP has increased in the latest 2009 measurement, of equal concern is that dollars allocated to Higher Education have decreased by 24% since 2001, while funding for all other areas of State government have increased by 28%. Alternative delivery of services and operations of facilities, along with reduction in public sector employment through new consolidation in governance, process improvement, or outsourcing, have been used successfully in other states and locations, resulting in improved customer satisfaction and lower tax consequences to individuals and industries. With 1,954 different government entities, Iowa ranks 41st in the U.S., which may impede efforts to drive continuing improvement into the delivery of 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 states reached the current fiscal situation that has forced attention on more efficient and effective processes. Early on, the Lean initiative was maintained at a level and scale that had some impact on Iowa's budget challenges. However, it still struggles to be broadly adopted across State agencies or utilized at the county and local government level – where the status of debt ratios and resource allocation gaps are just as critical. Therefore, it is essential that the Office of Lean Enterprise be revitalized within the Executive Branch and that an accountable organization be identified to address Lean in local government.

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▪ **What Do These Indicators Tell Us?**

Three of the five metric data points for this area have changed since the first Competitiveness Index. The **Percentage of Iowans considered to be Obese** worsened nearly 10% in just over a decade – a disconcerting trend that indicates the need for statewide, broadly based health & wellness initiatives, e.g., the Healthiest State Initiative, Blue Zone Communities, Live Healthy Iowa Corporate Cup Challenge, PE4life. The **Percentage of Adults Who Smoke** continues to drop, but Iowa’s rank has worsened, indicating that other states are doing a better job with their smoking cessation initiatives. The state’s **Infant Mortality Rate** has worsened since July, but remains improved versus measures recorded back in 2000; Iowa’s ranking dropped five spots which, again, indicates other states are seeing greater success with their initiatives. The next updates related to **Primary Care Physicians** and the **Gallup-Healthways Well-Being Index** occur in the Spring. Given that Iowa’s health ranking – relative to other states – has fallen in the three metrics with new data, this necessitates a change in the overall trend indicator for the Health & Well-Being section from green to yellow.

▪ **Why Are These Indicators Important to Our Competitiveness?**

A healthy, able, and available workforce is the engine that drives Iowa’s economy and its ability to compete globally. Fiscal soundness is advanced through a strategic investment in the health and productivity of Iowans and our continued ability to take care of the state’s workforce, 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 healthful work environment.

▪ **What Actions Are Necessary?**

All Iowans must actively engage in efforts to improve wellness, healthy lifestyles, nutrition, exercise, etc., that address obesity problems in our children and adults. 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 Healthy Iowans, the statewide plan addressing health needs and issues over the next five years, and Healthy People 2020, the U.S.’s health plan for 2011-2020.

Encourage med school grads 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 so that medical graduates choosing careers in primary care specialties and other health care providers in short supply stay in or come to Iowa.

Reduce the out-migration of not only Iowa’s young physicians, but also our dentists and other health care providers.

Iowa Competitiveness Indicators



Iowa Business Council

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|  Workforce Demographics & Diversity | | | | | | | |
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| • Net Overall Migration | 5,609 (1990-99) | 33 | -15,876 (2000-09) | 41 ● | -15,876 (2000-09) | 41 | ● |

▪ **What Do These Indicators Tell Us?**

There has been little movement of Iowa's population and demographic profile over the past decade. While **Total Population** increased modestly between 2000 and 2010, the **Population 10-Year Change** rate is lower than the prior decade. Though Iowa's **Ethnic Diversity of Population** rate increased noticeably, the state's **Net Overall Migration** has been negative for the past decade. As a result, Iowa's demographics and diversity, while slightly improved, have not advanced significantly towards addressing the needs of a growth-oriented economic engine. The state still lacks in attracting populations with diverse skill sets as well as retaining the talent graduating from Iowa's colleges and universities – the next generation of business owners, inventors, or employees of key industry clusters. Iowa's **Median Age of Population** continues to be higher than the country as a whole. In addition, the dependency ratio, i.e., sectors of the population below the age of 18 and over 64, is projected to grow over the next 20 years. These age groups normally are less productive and draw upon more social services.

▪ **Why Are These Indicators Important to Our Competitiveness?**

A diverse population provides the skills and a 'global perspective' that increase the competitiveness of academic institutions, industries, and the innovation process. With the exception of immigrants from Latin America and Asia, foreign born residents choosing Iowa as their home has not grown over the past decade. Domestic migration out of Iowa totaled 52,205 between 2000-09. 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. Recruiting talented and skilled workers to Iowa is an expensive proposition, one that adds to the cost of a company's products and services. Iowa businesses will compete and succeed in the world marketplace only when they have an educated, culturally varied, and globally aware workforce. The goal is to build our reputation as a destination for highly skilled and motivated employees that work for dynamic companies in a welcoming business climate. High-quality, knowledge-intensive jobs drive innovative, market-leading enterprises. It's no secret that a skilled and diverse 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 the state as a place willing to welcome and embrace a new generation of talented citizens is critical. These include utilizing 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.iowadatecenter.org; US Census Bureau – www.census.gov
- 2: US Dept. of Commerce Bureau of Economic Analysis – www.bea.gov/regional/gsp
- 3: Iowa State University, CIRAS, Manufacturing in Iowa Report 2010 – www.ciras.iastate.edu; US Bureau of Economic Analysis, Regional Economic Information System – www.bea.gov/regional
- 4: Iowa Workforce Development “Iowa Trends,” September 2011 – 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_2010_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/2011/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 2009 at the time of publication.
- 3: State and Local Taxes per Capita: <http://www.taxfoundation.org/taxdata/topic/86.html>
- 4: Government Full-Time Employees: <http://www.census.gov/govs/go/>. Population: <http://www.census.gov/>.
- 5: Units of Government: <http://www.census.gov/govs/go/>

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.
- 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.iowadatecenter.org/