

GREATER IOWA CITY, INC.

2024 DATA DIGEST

INSIGHTS FOR JOHNSON COUNTY

GREATERIOWACITY.COM

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GREATER IOWA CITY, INC.

FOREWORD 4

ABOUT THE REPORT 8
Introduction
Comparison Counties
Data and Measures

EXECUTIVE SUMMARY 10

BUSINESS CLIMATE 12
Business & Labor
Market Characteristics
Housing
Youth Profile

QUALITY OF LIFE 18
Income
Community Composition & Opportunity
Health & Transportation
Tourism & Civic Life

GREATER IOWA CITY, INC. 2024 BUSINESS RETENTION & EXPANSION SURVEY RESULTS 24

FINAL RANKINGS AND MEASURES 26

FOREWORD

We are proud to present Greater Iowa City, Inc.'s inaugural Data Digest, a significant initiative shaped by insights from civic and business leaders throughout Johnson County in 2024.

As a new organization, we understand that impactful programs require more than anecdotal information. This Data Digest establishes our first set of data-driven benchmarks to measure the baseline for business climate and quality of life metrics over time. With this information, we can evaluate the impact of our collective work and ensure that your investments are well utilized.

The following sections provide an overview of our current business landscape, highlight our ongoing initiatives supported by data, and outline our commitment to future progress in economic and community development and business support.

LOCAL BUSINESS LANDSCAPE

Our economy thrives on a diverse range of industries, bolstered by major employers such as the University of Iowa and Iowa Health Care Enterprises. Johnson County also hosts numerous other large public and private sector employers. We have 3,510 total businesses, ranking us 4th in business density across the report's comparison counties. But a key strength lies in our abundance of small businesses—3,329 (94.8%) of our county businesses have less than 50 employees.

Johnson County's robust mix of advanced manufacturing (e.g., Proctor & Gamble, CIVCO), cutting-edge biosciences (e.g., Integrated DNA Technologies, Perspective Therapeutics), EdTech companies (e.g., ACT, Pearson), and humanities and arts programs (e.g., Iowa Writers' Workshop, UNESCO City of Literature) has made it the second fastest-growing metro area in Iowa over the past 20 years.

We are committed to monitoring the rapidly changing business environment to support our community in remaining agile and responsive to evolving technologies, economic shifts, and demands. On the next page is a summary of the economic and community development data that has informed our current strategies.

LABOR FORCE

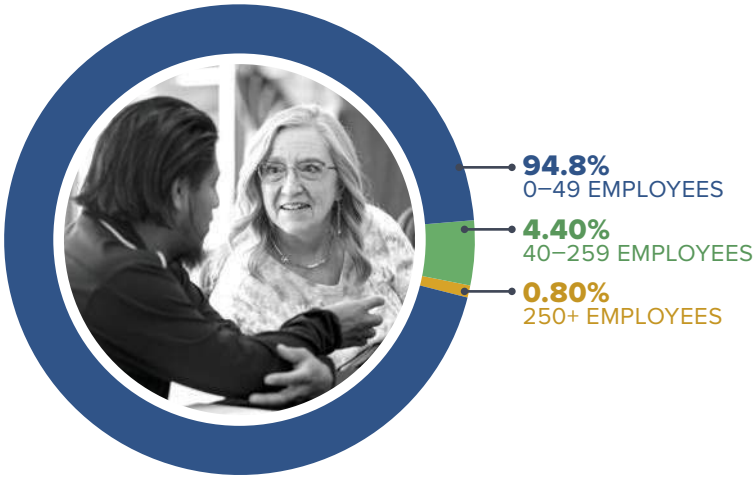
86,700

2.4%

UNEMPLOYMENT RATE

SOURCE: Iowa Workforce Development

SHARE OF BUSINESSES BY EMPLOYEE SIZE



TOP 6 INDUSTRY SECTORS WITH AVERAGE EMPLOYMENT AND WAGES

Sectors	Average Monthly Employment	Average Annual Wage
Health Care and Social Assistance	19,736	$58,812
Educational Services	18,009	$60,944
Retail Trade	9,270	$33,436
Accommodation and Food Services	8,293	$22,620
Manufacturing	4,942	$71,552
Public Administration	3,204	$58,656

Source: Iowa Workforce Development

HIGHLIGHTS

Supporting New Businesses and Entrepreneurs

To sustain growth, we are dedicated to supporting emerging businesses and entrepreneurs. Initiatives such as our Business Resource Center and the Underestimated Business Support Grant (in collaboration with the Community Foundation of Johnson County and South of 6 Business District) exemplify Greater Iowa City, Inc.'s commitment to fostering business growth. Through partnerships with University of Iowa John Pappajohn Entrepreneurial Center (JPEC) and a strong focus on startups, we aim to enhance economic output and ensure that Johnson County remains competitive.

Tracking Change in the Current Economic Climate

Respondents to Greater IC's Business Retention and Expansion (BRE) survey identified business growth as a top indicator of success. Johnson County excels in our region with high labor force participation and low unemployment. However, despite an increasing number of businesses, the businesses-per-capita rate is declining, and county GDP per capita is trending downward—making Johnson County the only area in our region experiencing this trend.

The working age population has declined for all counties in the report, by as much as 2%, reflecting a nationwide demographic shift. This may affect our previous levels of population and employee growth, indicating a pressing need for businesses to adjust their hiring models in light of a declining state and regional working age population.

Building Economic Resilience

To ensure a sustainable and resilient economy with financially secure residents, Johnson County leaders must consider initiatives that attract high-paying jobs, lower housing costs, raise wages, and grow the workforce. Greater Iowa City, Inc. is collaborating closely with business and government to address these needs and create an inclusive economy for all residents.

With rising living costs, wage growth must keep pace. Currently, the wage on an average job covers only 64% of the county's living wage ($21.41 per hour). Addressing income disparities is vital for economic stability and resident well-being.

- **24% of households are classified as ALICE (Asset Limited, Income Constrained, Employed).**
- **30% of households are housing cost-burdened, and despite Johnson County's fourth-lowest housing costs in the state, this cost burden ranks us eighth.**

Affordable and attainable housing remains a priority. By expanding housing options, we aim to alleviate financial pressures and foster a more inclusive community.

Family and Childcare Initiatives Supporting the Workforce

Johnson County's youth population is significant, making family support increasingly essential. Rising childcare costs and limited availability pose challenges. In response, Greater Iowa City, Inc. is enhancing childcare access through our leadership in the Childcare Solutions Coalition Wage Enhancement Program to support working families and attract talent to the region.

- **5% of the population is under age 5.**
- **76.5% of households with children under 6 have two parents in the workforce.**

BRE survey respondents emphasized childcare as a critical quality-of-life factor for regional competitiveness.

Fostering a Welcoming Community

As part of our mission to achieve certification as a Welcoming Community by 2026, Greater Iowa City, Inc. is supporting expansion of English Language Learning programs and supporting immigrant communities. Johnson County remains a safe and welcoming environment for diverse residents, with a higher percentage of foreign-born residents than both Polk and Story counties, and almost twice the state average.

- **11% of residents are foreign-born.**
- **Nonwhite populations increased by 11% from 2018 to 2022, reaching 23.5% in 2022.**

In 2025, Greater Iowa City, Inc. will also launch Strategic Investment Districts to foster vibrant, self-sustaining neighborhoods where residents can live and work locally.

Economic Impact

The tourism sector in Johnson County is expanding rapidly. Visitor spending per capita has increased the second most of all counties in the analysis, increasing by 14% from 2018 to 2022. In 2022, we ranked third in the number of visitors per capita at 22 visitors for every 1 county resident. Key contributors to this growth include University of Iowa Athletics, Downtown Iowa City, Xtream Arena, brewery developments, cycling, and other successful initiatives. Additionally, the rise of agritourism—supported by Greater Iowa City, Inc. and initiatives like Agri-CULTURE Iowa—presents new opportunities for economic development and potential local tax revenue.

By introducing new programs in 2025, like our three new Strategic Investment Districts and a commuter train opportunity along the CRANDIC short line rail, we seek to further enhance economic development activity to promote an inclusive economy.

Commitment to the Community

This foreword underscores Greater Iowa City, Inc.'s dedication to data-driven, inclusive strategies for lasting community impact. Our organization's staff and partners will continually review and refine our programs against this baseline and publish our impact annually. Thank you all for your investment in our work and together, through our shared commitment, we can build a prosperous future in Johnson County for generations to come.



Nancy Bird, President & CEO

ABOUT THE REPORT

INTRODUCTION

Greater Iowa City, Inc. is dedicated to elevating business, investing in strategic initiatives and advocating for economic resiliency for the greater community. Our first annual Data Digest offers insights into the existing conditions of two focus areas: business climate and quality of life, providing a comprehensive snapshot of the greater Iowa City area in 2024. This report evaluates the county's strengths and challenges by analyzing various metrics related to both business performance and quality of life.

Monitoring key business and quality of life metrics helps us understand how the greater Iowa City area evolves over time and ensures we remain focused on addressing current challenges. This report uses benchmarks and comparisons to gauge progress and success. Fundamentally, it provides benchmark measures on key metrics for the greater Iowa City area to track our own progress over time. Additionally, it includes metric comparisons to show where greater Iowa City stands relative to areas with similar characteristics. Greater Iowa City, Inc. 2024 Data Digest serves as a resource for our organization, local businesses, and government leaders, highlighting issues that we can work on collectively. By using these insights to guide future data-driven decisions, we can work together to create a stronger, more vibrant region that truly is greater.

COMPARISON COUNTIES

For each metric included, we rank the greater Iowa City area against 8 comparable counties nationwide, providing a meaningful context for evaluating our performance. Counties are used as the primary unit of analysis because Greater Iowa City, Inc. represents all businesses and nonprofits throughout Johnson County.

A total of 9 counties, including Johnson County, are ranked in the report. The University of Iowa is a distinguishing feature of our county. To ensure fair comparisons, the report focuses on counties that also host major universities in a similar environment.

The first group includes counties with Big Ten universities:

- **Dane County, WI** (University of Wisconsin-Madison)
- **Washtenaw County, MI** (University of Michigan)
- **Champaign County, IL** (University of Illinois Urbana-Champaign)
- **Monroe County, IN** (Indiana University Bloomington)

These counties are in similar geographic regions to Johnson County, offering relevant regional comparisons.

The second group includes counties with universities outside the Big Ten:

- **Pima County, AZ** (University of Arizona)
- **Orange County, NC** (University of North Carolina at Chapel Hill)

These counties were selected because the University of Iowa frequently benchmarks itself against these institutions as peers.

Finally, the report includes:

- **Story County, IA** (Iowa State University)
- **Polk County, IA** (home to Iowa's state capital)

These two Iowa counties provide important in-state context for comparison.

Each measure ranks Johnson County from #1 (best) to #9 (worst) among all 9 counties. When applicable, state-level and national data are also included to offer additional context. These references help us understand how Johnson County compares to broader trends across Iowa and the United States.

DATA AND MEASURES

A strong business climate and high quality of life are essential for building prosperous communities. This report identifies standards and measures for business climate and quality of life to determine how our community ranks in these topics.

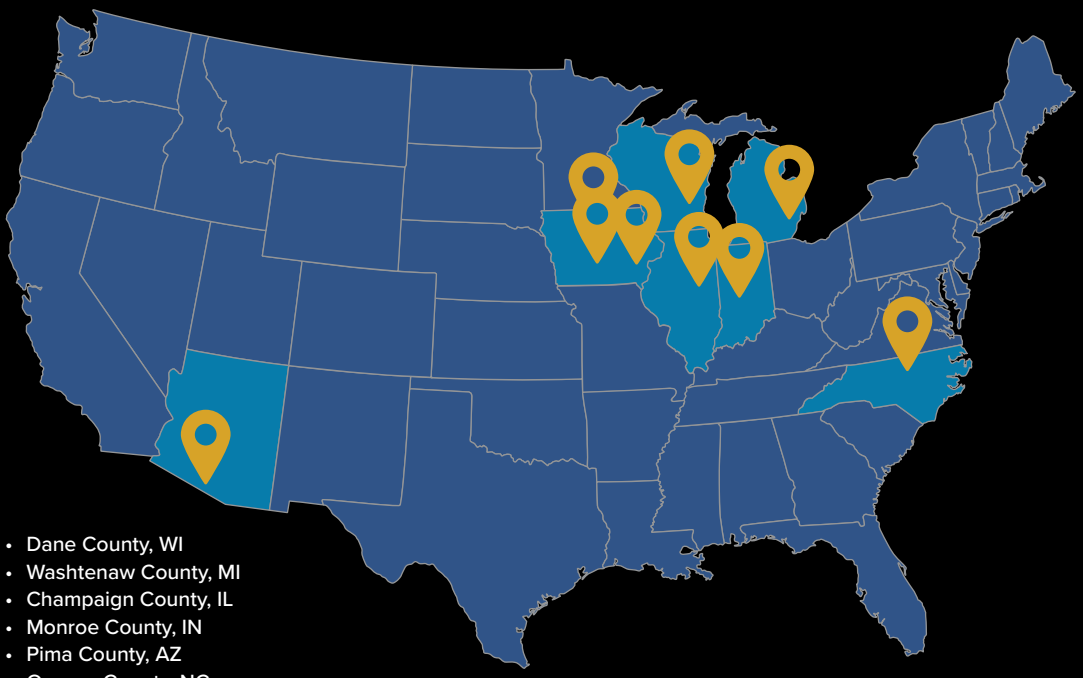
We disaggregate the broad topics of business climate and quality of life into multiple sub-topics, each containing specific attributes that we compare across the 9 comparison counties. While our report focuses on these topics, we recognize that each community may define business climate and quality of life differently, using a unique combination of metrics applicable to their community. The measures included in this report reflect what Greater Iowa City, Inc. and our community stakeholders identified as the most relevant for evaluating progress in the greater Iowa City area. For 2024, we identified 31 measures to assess our performance. These metrics rely on publicly available data sources and reflect the most current information available.

A limitation of our identified metrics is finding available county-level data that is collected uniformly across all counties in the analysis. There are several metrics we recognize as important contributors to both business climate and quality of life that are not included in the report due to data limitations. Examples of data that is not included due to limitations include childcare availability and costs, arts and culture, and local foods, among multiple others. These are all valuable topics identified by stakeholders; we are actively working on identifying measures to include these topics in future reports.

This report also incorporates findings from the 2024 Business Retention and Expansion (BRE) survey conducted by Greater Iowa City, Inc. This survey invited Johnson County businesses to share insights on their successes, challenges, and experiences within the local community. With 37 responses between May and August 2024 from employers of varying sizes, the survey offers valuable firsthand perspectives to supplement the broader data. The input from our local businesses can fill valuable gaps in missing community data, such as the need for childcare services or more workforce housing. We recognize that the number of responses is not fully representative of the county's business landscape. Greater Iowa City, Inc. is dependent upon area businesses for this input, and we all have a vested interest in increasing the number of BRE survey responses. We will make it a priority to increase the response rate in 2025. A summary of the 2024 BRE survey results is included at the end of the report, providing further insights into the strengths and challenges our business community faces.



9 COMPARISON COUNTIES



- Dane County, WI
- Washtenaw County, MI
- Champaign County, IL
- Monroe County, IN
- Pima County, AZ
- Orange County, NC
- Story County, IA
- Polk County, IA
- Johnson County, IA



EXECUTIVE SUMMARY

The 2024 Greater Iowa City, Inc. Data Digest evaluates key metrics identified by Greater Iowa City, Inc. alongside community and business stakeholders. As our first annual report, it establishes benchmarks to measure internal progress over time and compares our performance to counties with similar characteristics. These insights will guide our efforts and help us address challenges as we work to strengthen the region. The data show that the greater Iowa City area is competitive in both business climate and quality of life metrics.

Johnson County businesses are well-positioned for growth. Our area is home to 3,510 businesses, ranking fourth in businesses per capita at almost 44 residents for every 1 business. The 2024 BRE survey revealed that business growth—through expansion, new locations, and reaching wider audiences—was a top success for respondents. Although the number of businesses continues to grow, the county's GDP is the only county with a downward trend, shrinking by 6% from 2018 to 2022.

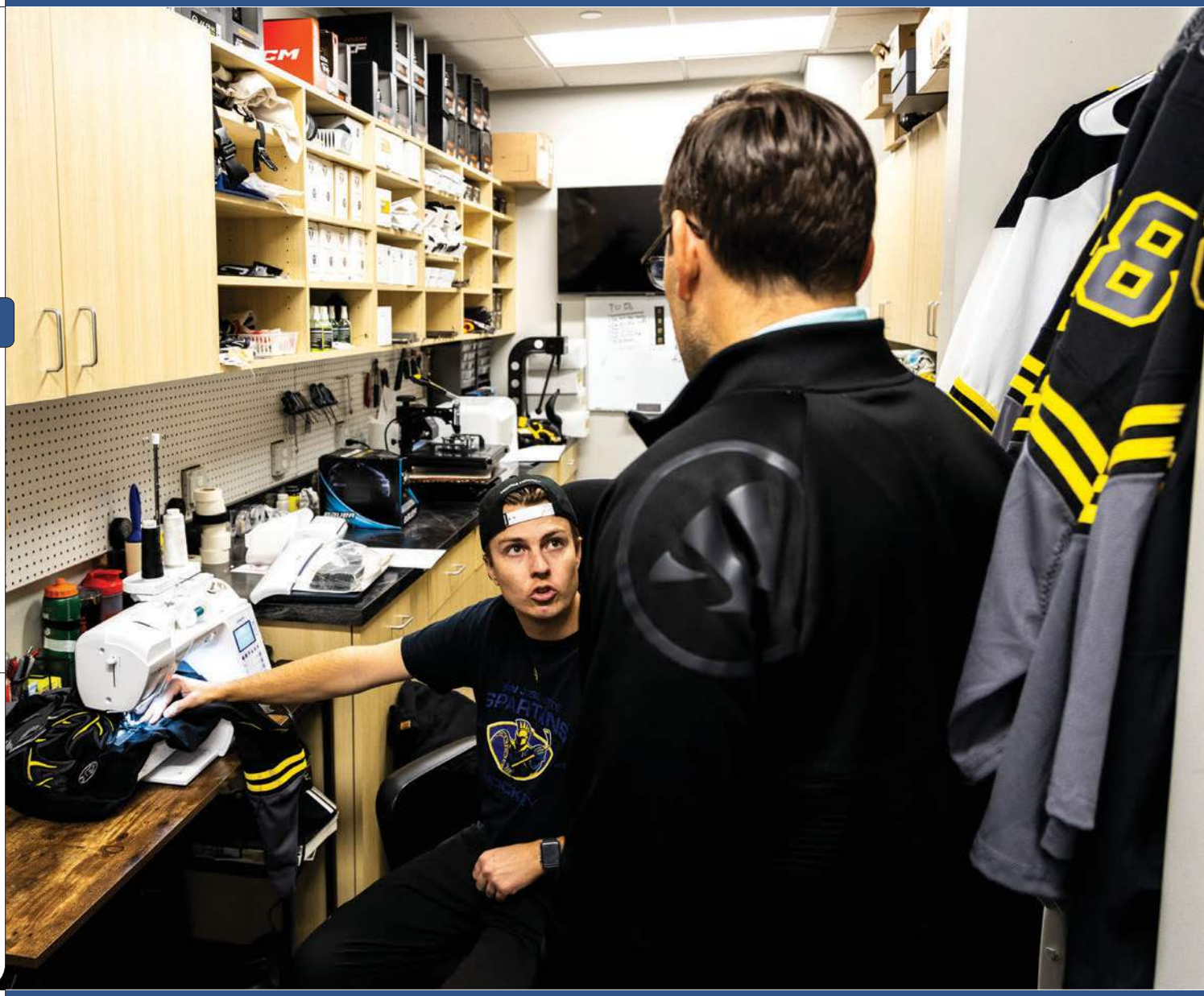
Businesses rely on a strong workforce. Over 71% of the population in Johnson County are considered working age residents and they are highly educated, providing a solid foundation for economic growth. However, as Baby Boomers retire and the number of working age adults shrinks, our region must attract new talent to remain competitive. The diminishing working age population is nationwide demographic shift as all counties in the analysis experienced a decrease in this share of the population by 0-2%.

While our area has maintained consistently low unemployment and high labor force participation rates, these indicators mask challenges in pay and affordability. A tight labor market, combined with high living costs, creates economic pressure for residents. Nearly a quarter of households are asset-limited, income-constrained, and employed (ALICE), and over 30% are housing cost-burdened. With average wages covering just 64% of Johnson County's $21.41 living wage, income inequality and housing affordability present significant barriers to financial security. 61% of BRE survey respondents emphasized the need for more attainable workforce housing to keep the region competitive.

The region's demographic composition highlights opportunities for growth. Johnson County has the second-highest share of residents under five years old, making up over 5% of the population. Further, 76.5% of households with young children have two parents in the labor force, the highest share in the analysis. These metrics underline the critical need for affordable childcare services. This need was verified by the BRE survey as respondents identified childcare as a major quality of life issue. Respondents also indicated more childcare services are needed for the region to stay competitive. Childcare availability is both a workforce attraction tool and a driver of economic development.

Supporting all people to plant their roots and grow here is foundational to growing our workforce. Since 2018, the county has seen the second-fastest growth in its nonwhite population, growing from 21.2% in 2018 to 23.5% in 2022, and 11% of residents are foreign-born. Johnson County has significant job opportunities, economic integration, and upward mobility for all residents.

Business Climate



Business & Labor

In 2023, Johnson County maintained a low **unemployment rate of 2.4%**, while its 2022 **labor force participation rate averaged 69.7%**. Both metrics rank third among comparable counties and have remained steady over the past five years. Although labor force participation dipped below 70% for the first time in a decade, this decline aligns with trends seen across all comparable counties. Only Monroe County, IN, experienced an increase in labor force participation between 2013 and 2022. The drop reflects the shrinking share of working age residents, a pattern that mirrors national demographic trends. Despite this, low unemployment and steady participation demonstrate that Johnson County workers remain active and ready to meet labor demands.

Johnson County businesses are performing well, sometimes exceeding expectations compared to larger counties. In 2022, the county reported **3,510 businesses**—fewer than only five counties with larger populations (Pima, Dane, Polk, Washtenaw, and Champaign). When adjusted for population, only two counties with larger populations—Dane and Polk—have more businesses per capita. These counties are also home to state capitals, adding to their competitive advantage.

Our businesses are significant drivers of economic activity, generating approximately **$61,900 in GDP per capita**. However, Johnson County is the only comparable county where GDP per capita has declined since 2018. This decrease likely reflects both slower economic output and rapid population growth. Despite this, our GDP per capita remains in the middle of the pack among peer counties, leaving room for improvement.

DEFINITIONS

Unemployment rate: The percentage of people in the labor force who are unemployed and actively seeking work. Data is not seasonally adjusted.

Sources: Iowa Workforce Development; Job Center of Wisconsin; Michigan Department of Technology, Management, and Budget; Hoosiers by the Numbers; Illinois Department of Employment Security; North Carolina Department of Commerce Labor and Economic Analysis; Arizona Office of Economic Opportunity

Labor force participation rate: The percentage of the civilian, noninstitutionalized population aged 16 and older who are employed or actively looking for work. This group excludes those in institutional settings or on active military duty.

Source: U.S. Census Bureau, American Community Survey 5-year estimates, Table S2301

Population / businesses: The ratio of total population to total number of businesses, where a lower ratio indicates more businesses per capita.

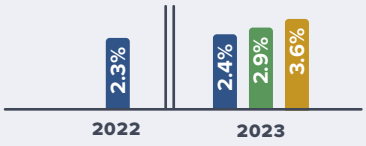
Sources: U.S. Census Bureau, American Community Survey 5-year estimates, Table DP05; U.S. Census Bureau, County Business Patterns

GDP per capita: The county's total gross domestic product (in chained 2017 dollars) divided by the total population.

Sources: United States Bureau of Economic Analysis; U.S. Census Bureau, American Community Survey 5-year estimates, Table DP05

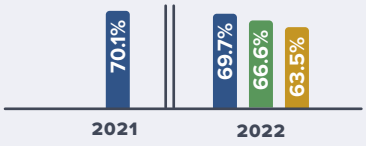
JOHNSON COUNTY
IOWA
UNITED STATES

Unemployment rate



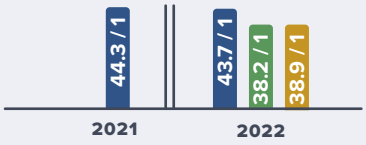
9-COUNTY RANK 2022 ▼ 9 3 1 2023 ▲

Labor force participation rate



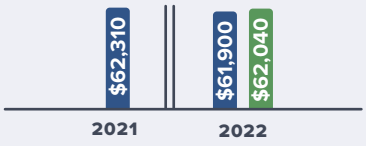
9-COUNTY RANK 2021 ▼ 9 3 1 2022 ▲

Population / businesses



9-COUNTY RANK ▼ 2021 9 4 1 ▲ 2022

GDP per capita



9-COUNTY RANK ▼ 2021 9 5 1 ▲ 2022

9 COMPARISON COUNTIES

- Dane County, WI
- Washtenaw County, MI
- Champaign County, IL
- Monroe County, IN
- Pima County, AZ
- Orange County, NC
- Story County, IA
- Polk County, IA
- Johnson County, IA

Market Characteristics

Johnson County's population is predominantly working age, with 71.2% of its 153,360 residents between the ages of 15 and 64, ranking third among comparable counties. While the county's population is growing the fastest in this analysis, increasing by 14% from 2013 to 2022, the share of working age residents has slightly declined over time. This shift reflects an increase in both older adults (65+) and children under 15.

A significant portion of the workforce commutes from outside the county, a trend common among peer counties. Currently, 44.7% of people employed in Johnson County live elsewhere, while **67.0% of county residents also work within the county**.

The University of Iowa plays a critical role in shaping our highly educated workforce. More than half of Johnson County's residents hold a bachelor's degree or higher, ranking the county third among our university-focused peers. This share of highly educated adults has largely stayed the same since 2018 with little fluctuations.

However, education does not always translate directly to income—Johnson County ranks fifth in household income at $73,708. While our residents are well-educated, several peer counties offer higher wages. On a positive note, household income in Johnson County has increased by almost $12,000 (19%) in the past five years, demonstrating progress.

DEFINITIONS

Working age population: The percentage of the population aged 15-64.

Source: U.S. Census Bureau, American Community Survey 5-year estimates, Table DP05

Educational attainment: The percentage of the population with a bachelor's degree or higher.

Source: U.S. Census Bureau, American Community Survey 5-year estimates, Table S1501

Living and employed in county: The percentage of residents who both live and work within the county.

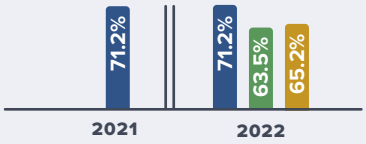
Source: U.S. Census Bureau, Center for Economic Studies, LEHD

Household income: The mean household income of the third income quintile; comparable to median household income.

Source: U.S. Census Bureau, American Community Survey 5-year estimates, Table B19081

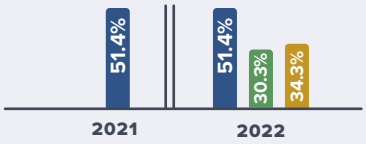
JOHNSON COUNTY
IOWA
UNITED STATES

Working age population



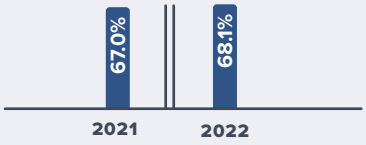
9-COUNTY RANK 2021 ▼ 9 3 1 2022 ▲

Educational attainment



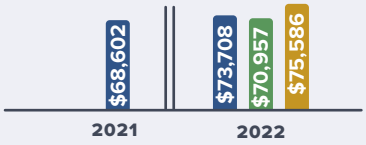
9-COUNTY RANK 2021 ▼ 9 3 1 2022 ▲

Living and employed in county



9-COUNTY RANK ▼ 2021 9 5 1 ▲ 2022

Household income



9-COUNTY RANK ▼ 2021 9 5 1 ▲ 2022

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- Johnson County, IA

Housing

Housing costs in Johnson County place a burden on many residents. Currently, **33.5% of households are housing cost-burdened**. Cost-burdened households are those that spend more than 30% of their gross income on housing-related expenses, including rent or mortgage payments, property taxes, utilities, and insurance. This ranks the county eighth among comparable regions and has remained steady since 2013. Additionally, **16% of households are extremely cost-burdened**. When a household is extremely cost-burdened, it allocates more than 50% of its income to housing. Cost-burdened thresholds are significant because spending such a high percentage of income on housing leaves limited resources for other essential needs, like food, healthcare, transportation, and savings, increasing financial stress and instability. The housing wage—the hourly wage required to afford a two-bedroom unit at fair market rent—is **$20.81**. While this ranks as the fourth lowest among peer counties, the high percentage of cost-burdened households suggests that wages, especially for lower-income and hourly workers, are not keeping pace with rising housing costs.

Despite these challenges, homeownership rates have remained stable. Johnson County's homeownership rate stands at 63.6%, fluctuating by no more than one percentage point over the past decade. The median value of owner-occupied homes in 2022 was $277,800, ranking fourth among comparable counties and slightly below the national median of $281,900.

Johnson County has responded proactively to the demand for affordable and diverse housing. In 2022, the county built one new housing structure for every 112 residents, ranking second in new housing units per capita among comparable counties.

DEFINITIONS

Homeownership rate: Calculated by dividing the estimated population in owner-occupied units by the total estimated population.

Source: U.S. Census Bureau, Homeownership Rate (5-year estimate), retrieved from FRED, Federal Reserve Bank of St. Louis

Cost-burdened households: The percentage of households spending more than 30% of their income on housing.

Source: U.S. Census Bureau, Burdened Households (5-year estimate), retrieved from FRED, Federal Reserve Bank of St. Louis

Housing wage: The hourly wage required to afford a two-bedroom unit at fair market rent, with lower wages indicating cheaper housing.

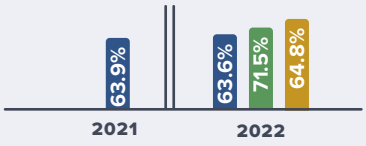
Source: National Low Income Housing Coalition, 2024 Out of Reach

Population / building permits: The ratio of total population to the number of newly permitted housing structures, where a lower ratio indicates more permits per capita.

Sources: U.S. Census Bureau, American Community Survey 5-year estimates, Table DP05; U.S. Census Bureau, New Private Housing Structures Authorized by Building Permits, retrieved from FRED

JOHNSON COUNTY
IOWA
UNITED STATES

Homeownership rate

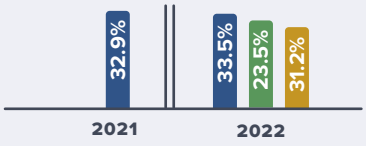


9-COUNTY RANK ▼ 2021

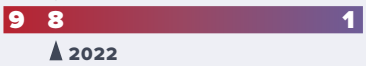


▲ 2022

Cost-burdened households

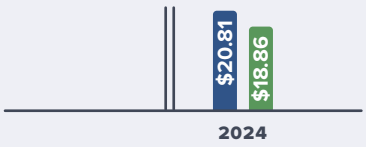


▼ 2021 9-COUNTY RANK

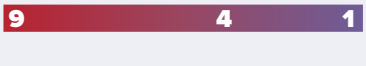


▲ 2022

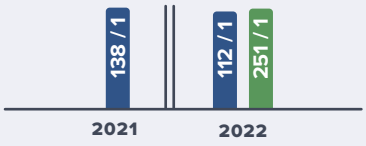
Housing wage



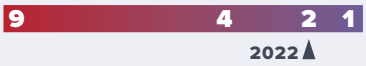
9-COUNTY RANK ▼ 2024



Population / building permits



9-COUNTY RANK ▼ 2021



2022 ▲

9 COMPARISON COUNTIES

- Dane County, WI
- Washtenaw County, MI
- Champaign County, IL
- Monroe County, IN
- Pima County, AZ
- Orange County, NC
- Story County, IA
- Polk County, IA
- Johnson County, IA

Youth Profile

Johnson County has the second-highest share of children under five years old, with 5.44% of the population in this age group. Although this percentage has slightly declined since 2018, the trend mirrors decreases in other counties in the analysis. A large proportion of young children is not unique to Johnson County but reflects a broader trend across Iowa. Counties outside of Iowa in the comparison group report smaller shares than Polk County, Johnson County, and the state overall, indicating that Iowa is generally seen as a desirable place to raise children.

The greater Iowa City area leads in the percentage of households with children under six years old where two parents are in the workforce. While the region is home to many young families, housing costs and wages require both parents to work. This also points to the need for addressing childcare costs for working families.

Access to childcare, healthcare, and early education services is critical for young children to thrive. However, only **43.2% of 3- to 4-year-olds are enrolled in preschool**, a significant drop since 2017, consistent with declines in other counties such as Polk County, IA, and Orange County, NC. Additionally, **over 3% of residents aged 0-18 lack access to healthcare**, highlighting an area for improvement.

DEFINITIONS

Access to preschool: The percentage of children aged 3-4 enrolled in preschool.

Source: U.S. Census Bureau, American Community Survey 5-year estimates, Table S1401

Under 5 years old: The percentage of the population under age 5.

Source: U.S. Census Bureau, American Community Survey 5-year estimates, Table DP05

Two parents working: The percentage of households with children under age 6 where both parents are in the labor force.

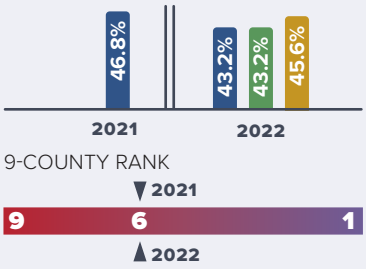
Source: U.S. Census Bureau, American Community Survey 5-year estimates, Table DP03

0-18 year olds with health insurance: The percentage of children aged 0-18 with health insurance coverage.

Source: U.S. Census Bureau, American Community Survey 5-year estimates, Table DP03

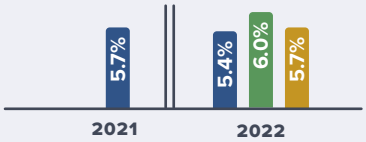
JOHNSON COUNTY
IOWA
UNITED STATES

Access to preschool

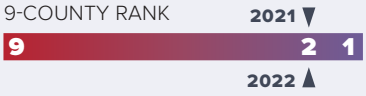


9-COUNTY RANK

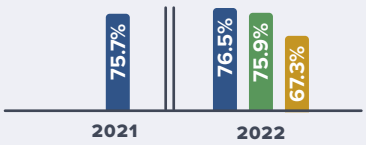
Under 5 years old



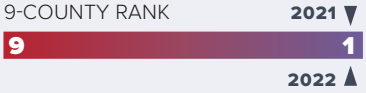
9-COUNTY RANK



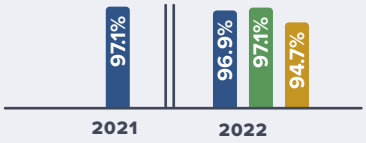
Two parents working



9-COUNTY RANK



0-18 year olds with health insurance



9-COUNTY RANK



9 COMPARISON COUNTIES

- Dane County, WI
- Washtenaw County, MI
- Champaign County, IL
- Monroe County, IN
- Pima County, AZ
- Orange County, NC
- Story County, IA
- Polk County, IA
- Johnson County, IA



Quality of Life



Income

Income levels in the greater Iowa City area are not sufficient for all residents to live comfortably, without financial stress. This reality is reflected in the high number of cost-burdened households and limited access to living-wage jobs.

In Johnson County, a household with two adults and one child needs to earn **$21.41 per hour** to cover basic expenses. Only three counties in the analysis are more expensive to live in. The gap between wages and the cost of living becomes even clearer when comparing the average wage to the required living wage. The average wage in the county covers just **64% of what is needed** to meet essential expenses, ranking the county eighth in this category. This stark gap highlights that many residents earn far less than what is required for financial stability. Additionally, **24% of households** in the county fall into the ALICE (Asset Limited, Income Constrained, Employed) category—working families with insufficient income or savings to cover basic needs, even though they are essential to the economy and community.

Household income levels in Johnson County rank in the middle of comparable counties. Johnson County's income inequality ratio is **5.3**, placing it fifth in the rankings. In this analysis, inequality is measured by the ratio of income between the 80th and 20th percentiles. Notably, counties with larger populations tend to show less disparity. Much of this inequality in the Iowa City area results from the contrast between well-paid university, tech, and industry jobs and the prevalence of lower-wage positions in food service, retail, and hospitality sectors.

DEFINITIONS

Living wage: The hourly rate needed for a full-time worker to support themselves or their family, based on a 2080-hour work year. Lower wages indicate a lower cost of living. This value is for two working adults with one child.

Source: Amy K. Glasmeier, "Living Wage Calculator," MIT, 2024

Access to living wage jobs: The ratio of average job pay to the cost of living.

Source: Upward Mobility Data Dashboard, Urban Institute, 2024

Income inequality: The ratio of household income at the 80th percentile to that at the 20th percentile.

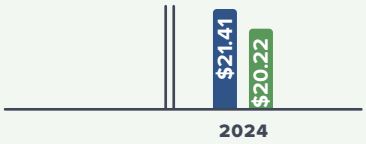
Source: U.S. Census Bureau, American Community Survey 5-year estimates, 2024 County Health Rankings

ALICE households: The percentage of households that are asset-limited, income-constrained, and employed.

Source: 2024 United for ALICE

JOHNSON COUNTY
IOWA
UNITED STATES

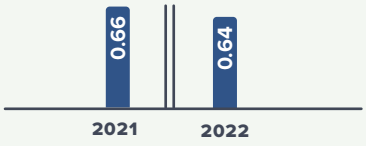
Living wage

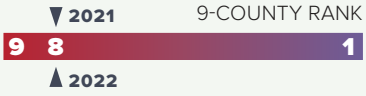


9-COUNTY RANK

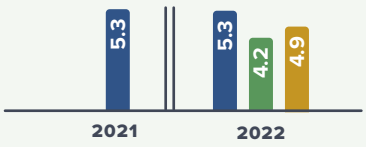


Access to living wage jobs



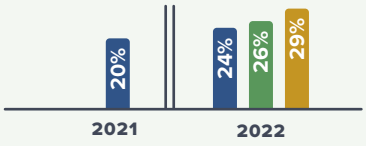


Income inequality





ALICE households





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Community Composition & Opportunity

Johnson County's population is 76.5% white and 23.5% nonwhite, reflecting an increase in racial diversity, up five percentage points since 2014. This rise aligns with a nationwide trend of growing racial diversity across counties, with only Polk County in Iowa showing a higher increase. Additionally, 11% of Johnson County's residents are foreign-born, giving the county the fifth-highest share of foreign-born residents among comparable counties—exceeding both Polk and Story counties and more than doubling the state average.

Johnson County also boasts strong educational opportunities, with four of Iowa's top ten high schools located in the area, according to U.S. News Rankings. Although some residents face challenges with internet access, local public libraries play a vital role in bridging this gap by providing free Wi-Fi services, including take-home hotspots and extended access in library parking lots.

Despite high income inequality, Johnson County excels in economic connectedness. Opportunities for social mobility increase when households of different income levels engage with each other. According to a 2022 study by Opportunity Insights, **54.8% of above-median-income residents in Johnson County** have friendships with lower-income individuals, placing the county in the **93rd percentile** nationwide for this measure. This high level of integration enhances opportunities for lower-income residents to improve their economic standing.

DEFINITIONS

Nonwhite residents: The percentage of the population identifying as nonwhite.

Source: U.S. Census Bureau, American Community Survey 5-year estimates, Table DP05

Internet access: The percentage of the population with internet access.

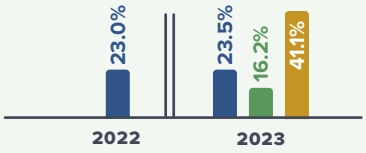
Source: U.S. Census Bureau, American Community Survey 5-year estimates, Table S2801

Immigrant population: The percentage of residents who are foreign-born.

Source: U.S. Census Bureau, American Community Survey 5-year estimates, Table DP02

JOHNSON COUNTY
IOWA
UNITED STATES

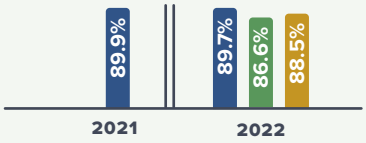
Nonwhite residents



9-COUNTY RANK



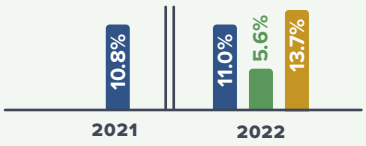
Internet access



9-COUNTY RANK



Immigrant population



9-COUNTY RANK



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Health & Transportation

The presence of University of Iowa Health Care gives greater Iowa City the highest number of primary care providers per capita. Despite easy access to healthcare facilities, only **94.8% of residents have health insurance coverage**, ranking Johnson County sixth among comparable counties and below the state average. Once a top-ranked county for health coverage in 2013, Johnson County's coverage growth has not kept pace with other counties.

Health extends beyond healthcare access; it also requires reliable food sources and opportunities for active living. Compared to other counties, Johnson County residents generally experience food security, with **89.9% of the population considered food secure**—exceeding both the state and national averages and ranking second only to Dane County, WI. However, a nearly 3-percentage point rise in food insecurity from 2021 to 2022 across all counties raises concerns locally. Although Johnson County holds a strong rank, this sharp increase in food insecurity is significant and requires attention.

Johnson County supports active lifestyles with its incredible trail system. There are **18 miles of on-street bike lanes, 70 miles of paved multi-use paths, and 45 miles of roadside paths** suitable for biking and walking throughout the county. This extensive trail and bike network is highly utilized, promoting healthy, outdoor activity among residents.

For workplace commuters, **51.8% of residents** travel less than 10 miles to work, and the average commute time is just **19.7 minutes**, both ranking third among peer counties. Short commute distances foster opportunities for alternative transportation and encourage healthier lifestyles.

DEFINITIONS

Access to health services: The ratio of residents to primary care physicians.

Sources: Area Health Resources Files (AHRF) 2022-2023; American Medical Association; 2024 County Health Rankings

Health insurance coverage: The percentage of the civilian noninstitutionalized population with health insurance.

Source: U.S. Census Bureau, American Community Survey 5-year estimates, Table DP03

Food secure: The percentage of the population that is not food insecure, based on United States Department of Agriculture standards. Food insecurity is defined by the USDA as the lack of access, at times, to enough food for an active, healthy life.

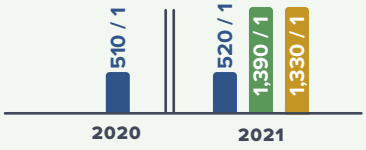
Source: 2024 Feeding America, Map the Meal Gap

Commute time: The average travel time from a worker's residence to their workplace.

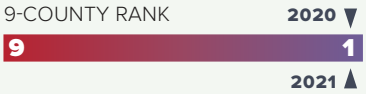
Source: U.S. Census Bureau, American Community Survey 5-year estimates, Table S0801

JOHNSON COUNTY
IOWA
UNITED STATES

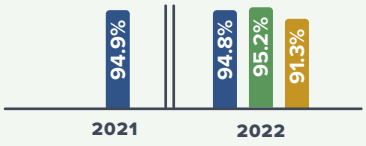
Access to health services



9-COUNTY RANK



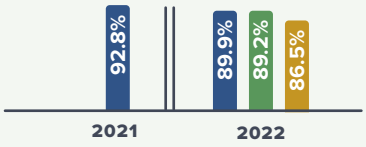
Health insurance coverage



9-COUNTY RANK



Food secure



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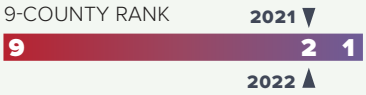
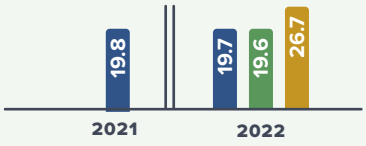


Commute time (minutes)



9-COUNTY RANK



9 COMPARISON COUNTIES

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Tourism & Civic Life

The greater Iowa City area attracted over **3,700,000 visitors in 2023**, and our visitors per capita ranks third with 22 visitors for every one county resident. Johnson County **visitors spent over $433 million**, equating to $2,829 spent for every 1 county resident. For all counties, visitor spending in 2022 is finally creeping above the pandemic levels, outpacing spending pre-2020. Our area's wide and diverse array of events and activities give visitors endless reasons to make the trip to our area - from The Hawkeye Wave at Kinnick Stadium to Iowa City's UNESCO City of Literature status, just one of two cities to hold this designation in the entire country.

In 2022, 10% of residents were members of volunteer organizations, ranking #3 among comparable counties and in the 77th percentile among all counties in the country. Our volunteer rate pairs well with the number of nonprofit organizations throughout our community.

While we rank #5 in violent crimes committed per 100,000 residents, our violent crime has slightly decreased from 2021 to 2022 and local crime analysis data shows this continues to decrease, especially in terms of gun-related crimes.

DEFINITIONS

Visitors per capita: The ratio of visitors to the county population, with higher values indicating more visitors per capita.

Source: 2024 Placer.ai Labs, Inc

Visitor spending per capita: The ratio of total visitor spending to the population, with higher values indicating more spending per capita.

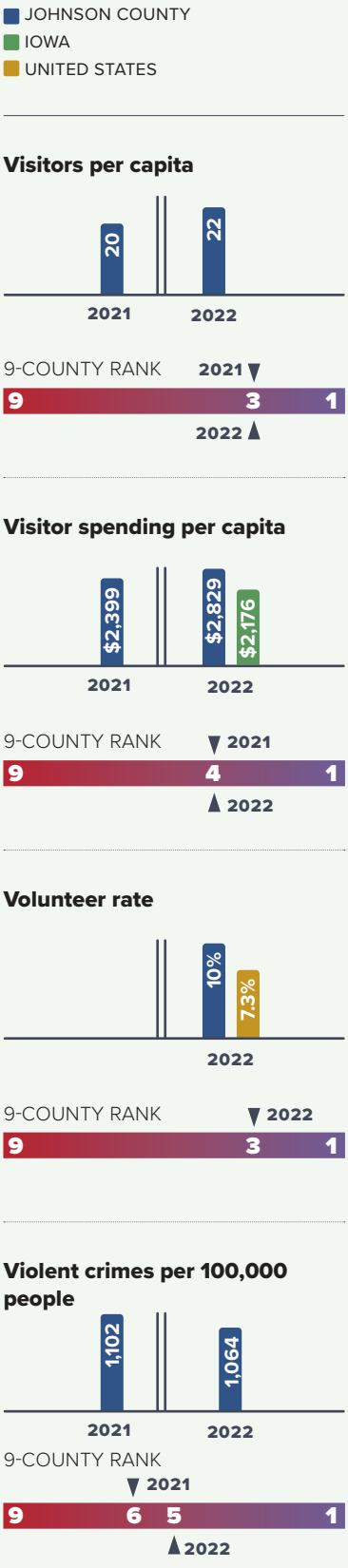
Sources: Think Iowa City; Chapel Hill/Orange County Visitors Bureau; Visit Bloomington; Travel Wisconsin; Visit Tucson; Arizona Office of Tourism; Enjoy Illinois; Pure Michigan

Volunteer rate: The percentage of people participating in volunteer organizations, based on Facebook friendship data.

Source: 2022 Opportunity Insights, Social Capital Atlas

Violent crimes per 100,000 people: The number of violent crimes per 100,000 residents.

Sources: Urban Institute Upward Mobility Data Dashboard; FBI National Incident-Based Reporting System (ICPSR); U.S. Census Bureau 5-Year American Community Survey



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GREATER IOWA CITY, INC. 2024 BUSINESS RETENTION & EXPANSION SURVEY RESULTS

SUCCESSES/ACCOMPLISHMENTS (TOP 3 COMMON THEMES)

- **Growth and expansion of services:** Respondents often indicated they are either expanding their services via new physical locations or expanding their services via further audience outreach. New services or products because of previous business success were also cited.
- **Community involvement:** Responding businesses cited their involvement within the local community as a success for themselves throughout the year. This includes things like landing local community projects, providing shareholder value, employees volunteering for local organizations, and even more support services for their staff.
- **Technological integration and innovation:** Multiple respondents stated their new technological advancements were a success. These include advancements such as launching new e-commerce sites, different workflow programs, integrating AI in their services or models, and successfully transitioning to a different software program.

CHALLENGES (TOP 3 COMMON THEMES)

1. **Recruitment: 43%** of respondents cited employee recruitment as a challenge.
2. **Government Policy: 30%** of respondents cited government policy as a challenge.
3. **Employee Retention: 27%** of respondents cited employee retention as a challenge.

Domestic regulatory barriers affecting business (share of businesses **not** facing regulatory issues)

80% of responding businesses are not facing any regulatory issues that are inhibiting growth or causing the community to not be considered for future expansion.

Competitiveness prioritization (top 3 efforts prioritized in the survey to increase competitiveness of city, region, or state)

1. **Increase housing opportunities for workforce** (61% of respondents)
2. **Talent attraction initiatives** (50% of respondents)
3. **Childcare initiatives** (44% of respondents)

WORKFORCE NEEDS (TOP 3 COMMON THEMES OF CURRENT WORKFORCE NEEDS)

1. **Skilled/technical labor:** Surveyed businesses cited the need for more workers with skilled and technical labor expertise. Dependent on the industry, examples of these jobs include software development, machinists, or engineers, among others.
2. **Management skills:** Leadership skills are a growing need for many of our businesses. Experience with project management, leadership programs, or leading a team of workers are highly desired skills.
3. **Support roles:** Support includes tasks and duties such as customer service, soft skills, hourly or part-time positions, and office assistants.

Workforce attraction innovation (share of companies employing new workforce attraction methods)

67% of respondents have employed new workforce attraction methods in the past 1-3 years, showing these businesses are finding creative ways to address the common recruitment and retention challenges indicated by survey responses.

Business sustainability (share of companies with some type of a sustainability goal for themselves, such as environmental, social, or governance)

61% of responding businesses have sustainability goals for themselves. Of the businesses who have identified goals for themselves: 85% have environmental goals; 60% have social goals; and 45% have governance goals.

Experiencing common community issues (share of responding businesses experiencing issues with local quality of life, local infrastructure, local public safety, Eastern Iowa Airport)

24% of respondents are experiencing issues with local quality of life (housing costs, placemaking, childcare)

22% of respondents are experiencing issues with local infrastructure (temporary road construction, internet costs and speed)

8% of respondents are experiencing issues with local public safety (vandalism)

11% of respondents are experiencing issues with the Eastern Iowa Airport (high expense compared to Moline, flight schedules and frequency)

Average ratings on a scale from 1–7, with 1 low and 7 high

FUTURE INVESTMENT OR DEVELOPMENT

Only 1 business scored the community less than a 5/7 rating.



FUTURE BUSINESS ESTABLISHMENT

22% of respondents scored the community less than a 5/7 rating.



LOCAL QUALITY OF LIFE

24% of respondents scored the community less than a 5/7 rating.



FINAL RANKINGS AND MEASURES

BUSINESS CLIMATE

BUSINESS & LABOR	Previous year measure	Current year measure	Percent change	Previous year ranking	Current year ranking
Unemployment rate	2.3%	2.4%	+4.3%	3	3
Labor force participation rate	70.1%	69.7%	-0.6%	3	3
Population / Businesses	44.3 / 1	43.7 / 1	+1.5%	4	4
GDP per capita	$62,310	$61,900	-0.7%	5	5

MARKET CHARACTERISTICS	Previous year measure	Current year measure	Percent change	Previous year ranking	Current year ranking
Working age population	71.2%	71.2%	-0.03%	3	3
Educational attainment	54.1%	54.1%	0%	3	3
Living and employed in county	68.1%	67.0%	-1.6%	5	5
Household income	$68,602	$73,708	+7.4%	5	5

HOUSING	Previous year measure	Current year measure	Percent change	Previous year ranking	Current year ranking
Homeownership rate	63.9%	63.6%	-0.5%	5	5
Cost-burdened households	32.9%	33.5%	+1.8%	8	8
Housing wage	-	$20.81	-	-	4
Population / building permits	138:1	112:1	+18.8%	4	2

YOUTH PROFILE	Previous year measure	Current year measure	Percent change	Previous year ranking	Current year ranking
Access to preschool	46.8%	43.2%	-7.7%	6	6
Under 5 years old	5.7%	5.4%	-4.7%	2	2
Two parents working	75.7%	76.5%	+1.1%	1	1
0-18 year olds with health insurance	97.1%	96.9%	-0.2%	6	7

QUALITY OF LIFE

INCOME	Previous year measure	Current year measure	Percent change	Previous year ranking	Current year ranking
Living wage	-	$21.41	-	-	6
Access to living wage jobs	0.66	0.64	-3.0%	8	8
Income inequality	5.3	5.3	0%	5	5
ALICE households	20%	24%	+20%	4	3 (T)

COMMUNITY COMPOSITION & OPPORTUNITY	Previous year measure	Current year measure	Percent change	Previous year ranking	Current year ranking
Nonwhite residents	23.0%	23.5%	+2.2%	6	6
Internet access	89.9%	89.7%	-0.2%	5	6
Immigrant population	10.8%	11.0%	+1.9%	5	5

HEALTH & TRANSPORTATION	Previous year measure	Current year measure	Percent change	Previous year ranking	Current year ranking
Access to health services	510 / 1	520 / 1	-2.0%	1	1
Health insurance coverage	94.9%	94.8%	-0.1%	5	6
Food secure	92.8%	89.9%	-3.1%	2	2
Commute time (minutes)	19.8	19.7	-0.5%	4	3

TOURISM & CIVIC LIFE	Previous year measure	Current year measure	Percent change	Previous year ranking	Current year ranking
Visitors per capita	20	22	+10%	3	3
Visitor spending per capita	$2,399	$2,829	+17.9%	4	4
Volunteer rate	-	10%	-	-	3
Violent crimes per 100,000 people	1,102	1,064	-3.4%	6	5



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