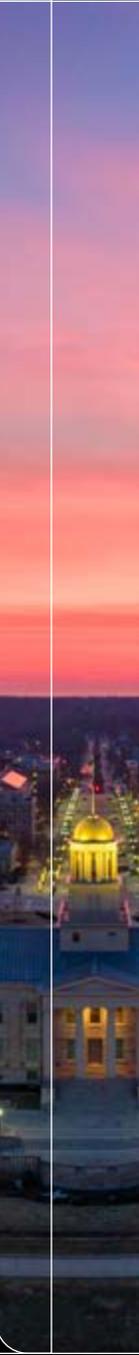




GREATER IOWA CITY, INC.

2025 DATA DIGEST

INSIGHTS FOR JOHNSON COUNTY



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GREATER IOWA CITY, INC.

FOREWORD 3

BUSINESS CLIMATE 4

Business & Labor
Market Characteristics
Housing
Youth Profile

QUALITY OF LIFE 5

Income
Community Composition & Opportunity
Health & Transportation
Tourism & Civic Life

FINAL RANKINGS AND MEASURES 6

DEFINITIONS AND SOURCES 8



Greater Iowa City, Inc. presents our second annual Data Digest, an ongoing data initiative formed through valuable input from civic and business leaders across Johnson County. In 2024, Greater IC released the organization’s first Data Digest benchmark report for Johnson County. After aligning stakeholder input with our organization’s mission, more than 30 business climate and quality of life metrics were selected to be included in the report and tracked for future annual data collection efforts. The report also featured identical comparison data for eight counties across the nation that are similar to Johnson County and also host major universities.

For the 2025 release of our annually tracked metrics, we are taking on two new delivery modes to improve the community’s access to and usage of our data. First, we are excited to have launched an online, interactive Community Data Dashboard that showcases all data included in our Data Digest benchmark reports, including the data for our comparison counties, the state of Iowa, and the United States. As a supplement, 2025’s newly unveiled data dashboard also includes those same data metrics for the nearby 7-county region to provide important local context as well.

The Community Data Dashboard format provides several benefits over the static annual report. The engaging, interactive dashboard allows users to visualize the data through different formats, download the data directly from our website, filter data by year, county, or data metric, and compare Johnson County to benchmarked counties using graphs, tables, or charts. Explore our new Community Data Dashboard to find the data that matters most to you.

With the data dashboard now available, the annual Data Digest has a new format and presents an overview of the current state of all metrics within our business climate and quality of life sections for Johnson County relative to the selected comparison counties. The final pages of this report include a group of tables that display the final rankings and measures for all 30+ metrics.

The Greater Iowa City, Inc. 2025 Data Digest provides valuable insights for our organization, local businesses, nonprofits, and government leaders. Together, we can use this information to make informed decisions that strengthen and energize our region.

8 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

8 DATA TOPICS

- Business & Labor
- Market Characteristics
- Housing
- Youth Profile
- Income
- Community Composition & Opportunity
- Health & Transportation
- Tourism & Civic Life



Business Climate

Johnson County's residents, workforce, and businesses have built a strong foundation for economic success over the past decade. In 2023, the county was home to 3,490 businesses. While this reflects a slight decline of 20 businesses from the previous year, Johnson County still achieved the third-largest growth in business establishments over the past five years. On a businesses per capita basis, the county ranks fifth among comparison counties with one business for every 44 residents.

Johnson County businesses generated **\$9.6 billion in GDP in 2023**, equating to **\$62,500 per resident**. However, GDP per capita remains an area for improvement. Johnson County is the only comparison county in the analysis with a lower GDP per capita today than in 2017, a trend driven by a modest GDP decrease (\$17 million) and rapid population growth (up more than 10,000 people since 2017).

LABOR MARKET STRENGTHS

Residents and workers are the backbone of Johnson County's economy. In 2023, household income reached \$75,662, reflecting a nationwide trend of steady income growth over the past decade. The county has continually maintained both low unemployment and high labor force participation rates, creating a tight labor market for area employers.

- **Unemployment rate:** 2.4% in 2023 and 2024 (3.6% and 4% nationwide). In the past decade, the unemployment rate has exceeded 2.6% only twice (during COVID-19), peaking at 4.7% in 2020.
- **Labor force participation rate:** 69.8% in 2023 (63.5% nationwide), slightly below 70% for the first time since 2013 but still a top three highest participation rate amongst comparison counties.

This strong participation impacts families and childcare. **79% of households with children under 6 have two working parents (67.7% nationwide)**, creating significant demand for childcare services. Childcare is now both a workforce necessity and a quality-of-life pillar.

EMERGING WORKFORCE CHALLENGES

Labor force participation declined across all counties in the dashboard (and the state and country) from 2014 to 2023. Over that same time, the share of working-age adults fell yet the share of households with young children and two working parents increased. These trends signal a growing challenge: fewer young workers are entering the workforce and more older workers are retiring, creating a mismatch between labor supply and demand that is being filled by middle-aged households with children.

HOUSING AS WORKFORCE STRATEGY

Housing plays a critical role in attracting and retaining talent. Johnson County has a relatively high renter share, which in turn influences the share of cost-burdened households. To expand housing supply and homeownership opportunities, the county approved over 2,500 building permits for authorized housing structures in 2022 and 2023 combined, ranking second among comparison counties for building permits per capita. Despite strong employment, demographic shifts and tight labor conditions underscore the need for strategies that increase Johnson County's overall housing supply.



Quality of Life

Economic strengths pair well with exceptional quality-of-life amenities across Johnson County's rural and metropolitan areas. This is a place where people want to live, work, and visit.

A WELCOMING COUNTY

Johnson County's population has grown to be more diverse over the past decade:

- **Nonwhite population:** Increased from 18% in 2014 to 25% in 2023. One in every four Johnson County residents are nonwhite.
- **Immigrant population:** Steady at 9–11% of the population from 2014-2023, with over 15,000 foreign-born residents in 2023.

Events like Welcoming Week, the Coralville Asian Festival, and the Iowa City Latino Festival, along with many more, celebrate and strengthen our growing community.

HOUSEHOLD PURCHASING POWER

Disposable income drives both quality of life and local economic vitality. Using United Way's ALICE metric, about one in every four households are ALICE (Asset Limited, Income Constrained, Employed). Compared to peer counties, Johnson County ranks #1 for lowest ALICE share, improving from the #4 position last year. However, access to living-wage jobs remains a challenge. In 2023, the average wage covered only 60% of the living wage for a family of three, ranking Johnson County #8 among comparison counties.

HEALTH AND WELL-BEING

Food insecurity is rising nationwide, including in Johnson County. From 2021 to 2023, Johnson County's food insecurity rate climbed from 7.2% to 11.5%, an increase of over 4 percentage points in two years. Healthcare access is strong but still lags in scheduling and access due to the strains on consolidating healthcare systems. Insurance coverage also lags:

- **Overall coverage:** 94.9% (#6 among comparison counties)
- **Children (0–18):** 96.4% (#8 among comparison counties)

TOURISM AND COMMUNITY APPEAL

Johnson County attracts millions of annual visitors and their spending. In 2023, 5 million visitors generated over \$458 million in spending throughout our county's businesses and establishments. This equates to \$2,957 in visitor spending per resident, ranking the county at #4 for visitor spending per capita and #3 for visitors per capita. With new developments and national sporting events, tourism is poised for continued growth.

FINAL TAKEAWAYS

Johnson County offers a dynamic economy, strong workforce participation, and a high quality of life. Yet challenges like labor supply, housing, and living-wage access require strategic focus. Greater Iowa City, Inc. remains committed to **advocating for solutions that strengthen our business climate, workforce, and community well-being.**



Final Rankings and Measures

BUSINESS CLIMATE

BUSINESS & LABOR	Prior year measure	Current year measure	Percent change	Prior rank	Current rank
Unemployment rate	2.4%	2.4%	-	3	3
Labor force participation rate	69.7%	69.8%	+0.1%	3	3
Population / businesses	43.7 / 1	44.4 / 1	-1.6%	4	5
GDP per capita	\$61,900	\$62,500	+1.0%	5	5

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- Polk County, IA
- Johnson County, IA

MARKET CHARACTERISTICS	Prior year measure	Current year measure	Percent change	Prior rank	Current rank
Working age population	71.2%	70.8%	-0.6%	3	3
Educational attainment	54.1%	54.6%	+0.9%	3	3
Living and employed in county	67.0%	66.0%	-1.5%	5	5
Household income	\$73,708	\$75,662	+2.7%	5	5

HOUSING	Prior year measure	Current year measure	Percent change	Prior rank	Current rank
Homeownership rate	63.6%	63.8%	+0.2%	5	5
Cost-burdened households	33.46%	33.48%	+0.1%	8	8
Housing wage	\$20.81	\$21.25	-	4	3
Population / building permits	112 / 1	125 / 1	-11.6%	2	2

YOUTH PROFILE	Prior year measure	Current year measure	Percent change	Prior rank	Current rank
Access to preschool	43.2%	48.5%	+12.3%	6	6
Under 5 years old	5.44%	5.40%	-0.7%	2	2
Two parents working	76.5%	79.0%	+3.3%	1	1
0-18 year olds with health insurance	96.9%	96.4%	-0.5%	7	8



Final Rankings and Measures

QUALITY OF LIFE

INCOME	Prior year measure	Current year measure	Percent change	Prior rank	Current rank
Living wage	\$21.41	\$20.26	-	6	2
Access to living wage jobs	0.64	0.60	-6.3%	8	8
Income inequality	5.3	5.1	+3.8%	5	6
ALICE households	24%	24%	-	4	T-1

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COMMUNITY COMPOSITION & OPPORTUNITY	Prior year measure	Current year measure	Percent change	Prior rank	Current rank
Nonwhite residents	23.5%	25.0%	+6.4%	6	6
Immigrant population	11.0%	10.2%	-7.3%	5	5
Internet access	89.7%	89.5%	-0.2%	6	7

HEALTH & TRANSPORTATION	Prior year measure	Current year measure	Percent change	Prior rank	Current rank
Access to mental health services	220 / 1	210 / 1	+4.5%	4	4
Health insurance coverage	94.8%	94.9%	+0.1%	6	6
Food secure	89.9%	88.5%	-1.6%	2	T-2
Commute time	19.7	19.7	-	3	3

TOURISM & CIVIC LIFE	Prior year measure	Current year measure	Percent change	Prior rank	Current rank
Visitors per capita	32.0	32.9	+3.1%	3	3
Visitor spending per capita	\$2,829	\$2,957	+4.5%	4	4
Violent crimes per 100,000 people	1,048	1,147	+9.4%	6	6



Definitions and Sources

BUSINESS CLIMATE

Business & Labor

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 Division; Arizona Office of Economic Opportunity; United States Bureau of Labor Statistics. 2024.

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, 2023 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, County Business Patterns; U.S. Census Bureau, 2023 American Community Survey 5-year estimates, Table DP05.

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

Sources: U.S. Bureau of Economic Analysis; U.S. Census Bureau, 2023 American Community Survey 5-year estimates, Table DP05.

Market Characteristics

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

Source: U.S. Census Bureau, 2023 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, 2023 American Community Survey 5-year estimates, Table S1501.

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

Source: U.S. Census Bureau, Center for Economic Studies, 2022 LEHD.

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

Source: U.S. Census Bureau, 2023 American Community Survey 5-year estimates, Table B19081.

Housing

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

Source: U.S. Census Bureau, Homeownership Rate (2023 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 (2023 5-year estimate), retrieved from FRED, Federal Reserve Bank of St. Louis.

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

Source: National Low Income Housing Coalition, 2025 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, 2023 American Community Survey 5-year estimates, Table DP05; U.S. Census Bureau, 2023 New Private Housing Structures Authorized by Building Permits, retrieved from FRED, Federal Reserve Bank of St. Louis.

Youth Profile

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

Source: U.S. Census Bureau, 2023 American Community Survey 5-year estimates, Table S1401.

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

Source: U.S. Census Bureau, 2023 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, 2023 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, 2023 American Community Survey, 5-year estimates, Table DP03.



Definitions and Sources

QUALITY OF LIFE

Income

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," Massachusetts Institute of Technology, 2025. Accessed on 1 August 2025.

Access to living wage jobs: The ratio of the average wage paid by jobs to the cost of basic expenses for a family of three (one adult and two children). The higher the ratio the better.

Source: Upward Mobility Data Dashboard, Urban Institute, 2025.

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

Sources: U.S. Census Bureau, 2023 American Community Survey 5-year estimates; 2025 County Health Rankings.

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

Source: 2025 United For ALICE.

Community Composition & Opportunity

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

Source: U.S. Census Bureau, 2023 American Community Survey 5-year estimates, Table DP05.

Immigrant population: The percentage of residents who are foreign-born (immigrant status).

Source: U.S. Census Bureau, 2023 American Community Survey 5-year estimates, Table DP02.

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

Source: U.S. Census Bureau, 2023 American Community Survey 5-year estimates, Table S2801.

Health & Transportation

Access to mental health services: The ratio of mental health service providers to number of residents, with a lower number representing more mental health service providers per capita.

Sources: Centers for Medicare & Medicaid Services, 2024 National Provider Identification; County Health Rankings 2025.

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

Source: U.S. Census Bureau, 2023 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: 2025 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, 2023 American Community Survey 5-year estimates, Table S0801.

Tourism & Civic Life

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

Sources: U.S. Census Bureau, 2023 American Community Survey 5-year estimates, Table DP05; Placer.ai.

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

Sources: U.S. Census Bureau, 2023 American Community Survey 5-year estimates, Table DP05; Think Iowa City; Chapel Hill/Orange County Visitors Bureau; Visit Bloomington; Travel Wisconsin; Visit Tucson; Arizona Office of Tourism; Enjoy Illinois & Experience Champaign-Urbana; Pure Michigan.

Violent crimes per 100,000 people: The number of violent crimes per 100,000 residents. Property crimes and total crimes are also reported.

Sources: Urban Institute Upward Mobility Data Dashboard; Federal Bureau of Investigations (FBI) National Incident-Based Reporting System (ICPSR); U.S. Census Bureau, 2023 American Community Survey 5-year estimates.





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