

December 19, 2023



CYGNAL

# Survey of Iowa Working Age Residents Iowa Statewide

December 4-14, 2023 | n1210

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 **response:AI**

ICA-IA Working Age

# GOALS & METHODOLOGY



# PROJECT SPECIFICATION

- The Iowa Chamber Alliance (ICA) has moved talent attraction to the top of their agenda for the past few years and is interested in understanding any shifts in the issues that are important to Iowa's labor force. Iowa needs to find new people willing to move to the state by first understanding what working-age Iowans find attractive about living there and how that has changed in the last twelve months.



## Research Problem

- Last year's survey found that the cost of living, small town feel, and outdoor recreation were major selling points for the state and that many Iowans appreciate the state's friendliness and safety. Most Iowans view education in the state as at the same level or superior to education in other states. The primary reason for leaving Iowa was a perceived lack of job opportunities, and there was a noticeable downward shift in the perceived availability of childcare as well. Voters have continued to indicate that Iowa's entertainment options leave something to be desired.



## Target group

- Registered voters
- Residents of Iowa
- Age 18-65
- Weighted results to get sample structure representative



## Methodology

- Quantitative CAWI (Computer Administered Web Interviewing) survey
- Used online panel
- A total of **1210 respondents**
- Interviewed **4 – 14 December 2023**

ICA-IA

# DETAILED FINDINGS



## INSIGHTS & ANALYSIS

- Approximately 1-in-4 (22%) working aged people in Iowa have considered or are considering leaving the state permanently, down slightly from 2022 (24%). Of those Iowans, a quarter have **considered leaving for job opportunities** in other states, remaining down from nearly 1-in-3 in 2021.
  - Iowans with **college degrees are +13 more likely** to seek employment outside of Iowa compared to Iowans without college degrees.
- 42% of working age Iowans say **professional opportunities are inferior** compared to other states (+3 more than in 2022). Millennials and Gen Zs are slightly more optimistic or at least view Iowa's job market as about the same as other states, though overall their perceptions are largely in line with the overall sentiment. *See the Emotive Analysis on this topic on slide 25.*
- Those **who have considered leaving Iowa** are more likely than **non-leavers** to think taxes are higher compared to other states. **Overall Iowans think their taxes are the same or lower than other states** (28% higher – 30% same – 26% lower).
  - 52% say services are adequate or better for what they pay in **income taxes** (37% subpar or worse). Only 46% say the same for **property taxes** (40% subpar/worse).
- 36% say **access to childcare has decreased**, a **+10 increase from the 2022 survey**. There was also **significant 18-point decrease** from 2022 to 2023 in people saying **they're not in need of childcare**. 45% of working age Iowans rely on the public school system for childcare, especially middle-income earners.
- When respondents were asked to select their best and worst aspect of Iowa, **small town feel** and **cost of living** were most likely to be selected as the best, continuing the trend from previous years.
  - Career opportunities was more likely to be "best" and less likely to be "worst" than both sporting events and entertainment options. *More on the Max-Diff analysis beginning on slide 31.*
- A third of working age voters say their **top priority** is stopping inflation and the rising cost of living.
  - 37% say the **standard of living will be worse** for future residents (17% better).

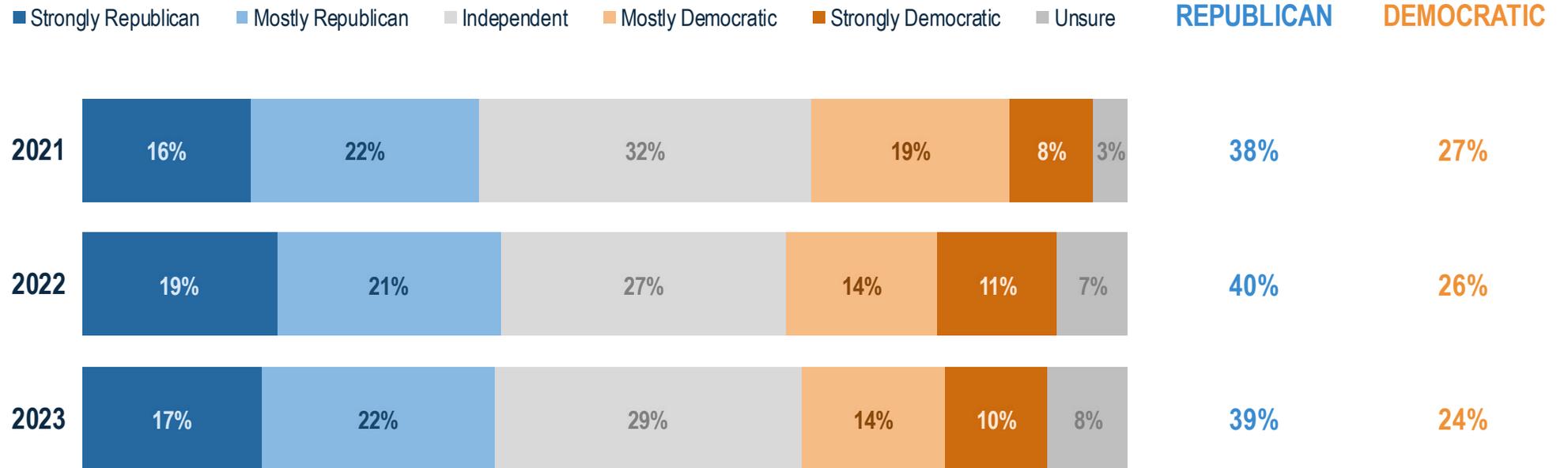


## INSIGHTS & ANALYSIS – CONT.

- The general perception of the **direction of the state is positive but continues to decline** (53% right direction – 35% wrong track) and working age lowans lean Republican overall (39% R – 29% I – 24% D).
- Iowa’s **safety** and **friendliness** continue to be the most widely accepted benefits of living in the state. Two-thirds also think **Iowa is at least somewhat more affordable than other states**. Slightly over half of working age lowans believe **they can achieve long-term life and career success** in the state. *See Emotive Analysis on this topic on slide 11.*
- **Outdoor recreation** continues to be a major appeal for Iowa, especially among Young Millennials (73% use) and those who have considered leaving the state (71% use). 33% of working aged lowans say outdoor recreation is superior to other states, down from 39% last year and 42% in 2021.
- lowans take pride in public education in the state. **76% believe higher education is at least the same as other states** and 65% say the same for Iowa’s public K-12 system.
- On **entertainment**, while overall negative perception has grown slightly (47% say inferior to other states), **Gen Z and younger Millennials** are more likely than older lowans to say entertainment in Iowa is superior or about the same.
- **Small businesses are the most trusted group** (53% trust – 7% distrust). Small businesses are especially trustworthy among voters who have considered leaving. There is also a generational split, Gen Z is more likely to trust small businesses than Younger Millennials.
  - Millennials have much less trust in their employer than Gen X and Boomers.
  - 1-in-4 working age lowans have “no trust at all” in the federal government, 1-in-5 have nearly no trust in their local government.
- 73% of working age lowans support rehabilitation and **job training programs for convicted felons** after they have served their time.

# PARTISANSHIP

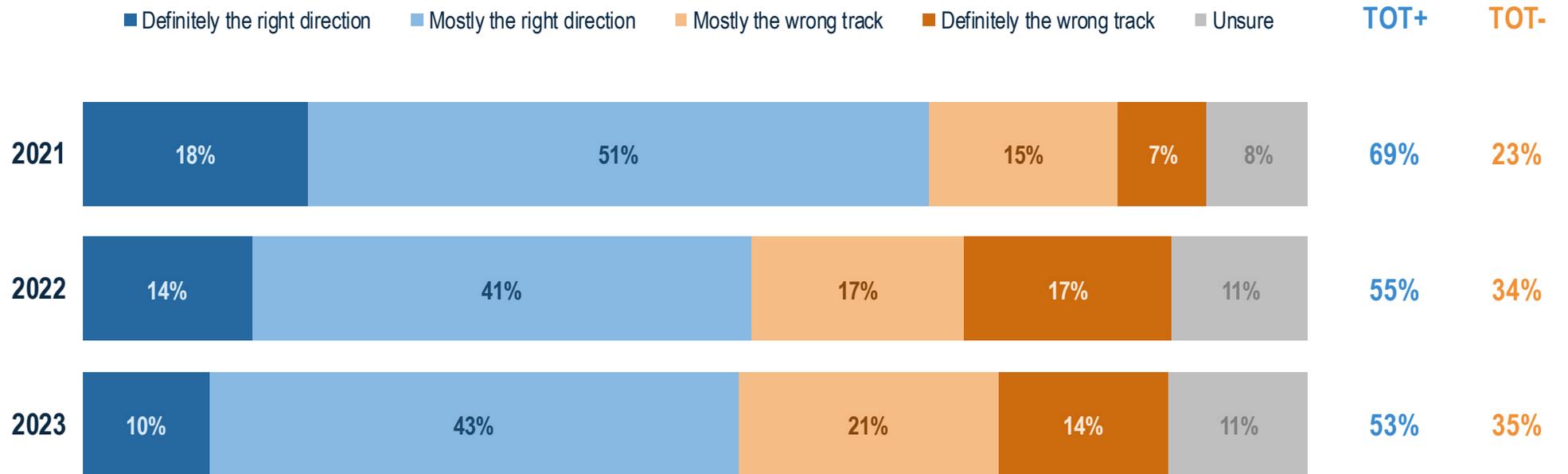
The environment remains favorable for Republicans who are **R+15** on partisan affiliation. A higher plurality of voters identify as Independent than they do Democrat.



2023	TOTAL	GENDER		AGE					EDUCATION		INCOME (\$)			URBANICITY			LEAVE vs NOT	
		Female	Male	Gen Z	Y Mill	O Mill	Gen X	Boomer	No degree	Degree	<50K	50K-100K	100K+	Rural	Suburban	Urban	Lv	NotLv
NUMBER OF RESPONDENTS	1210	622	588	210	171	252	397	180	805	405	488	412	310	514	410	286	583	583
REPUBLICAN	39%	38%	41%	36%	33%	40%	43%	44%	39%	41%	32%	42%	46%	46%	34%	34%	35%	45%
DEMOCRATIC	24%	26%	21%	25%	28%	23%	21%	24%	20%	31%	21%	25%	25%	16%	28%	31%	26%	22%

# RIGHT DIRECTION / WRONG TRACK

Working age lowans remain **optimistic** about the direction of the state, but fewer believe Iowa is heading in the right direction than did in 2021. Still, a majority of most groups are optimistic, except lower-income voters (47%) and urban voters (40%).



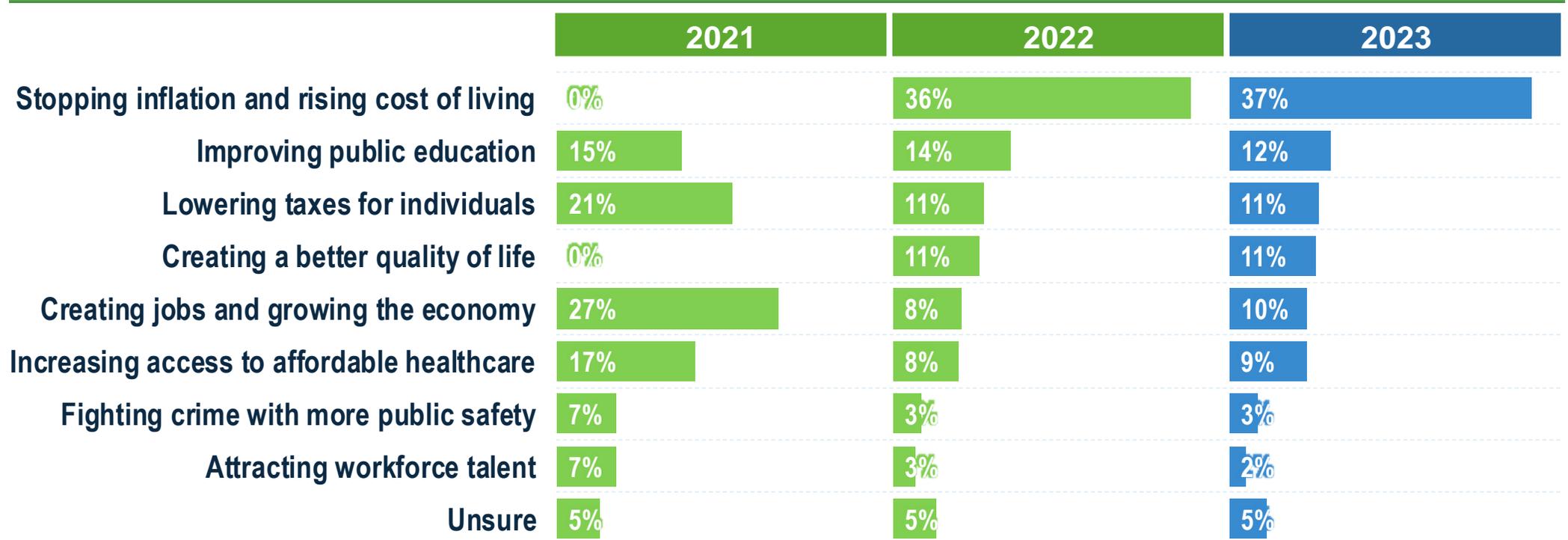
TOT+ = the sum of the two most positive values

TOT- = the sum of the two most negative values

2023	TOTAL	GENDER		AGE					EDUCATION		INCOME (\$)			URBANICITY			LEAVE vs NOT	
	TOTAL	Female	Male	Gen Z	Y Mill	O Mill	Gen X	Boomer	No degree	Degree	<50K	50K-100K	100K+	Rural	Suburban	Urban	Lv	NotLv
NUMBER OF RESPONDENTS	1210	622	588	210	171	252	397	180	805	405	488	412	310	514	410	286	583	583
TOT+	53%	50%	57%	52%	51%	51%	55%	59%	53%	54%	47%	59%	56%	61%	53%	40%	44%	63%
TOT-	35%	36%	34%	34%	35%	35%	38%	31%	34%	38%	36%	33%	37%	28%	37%	45%	47%	25%

# TOP PRIORITY

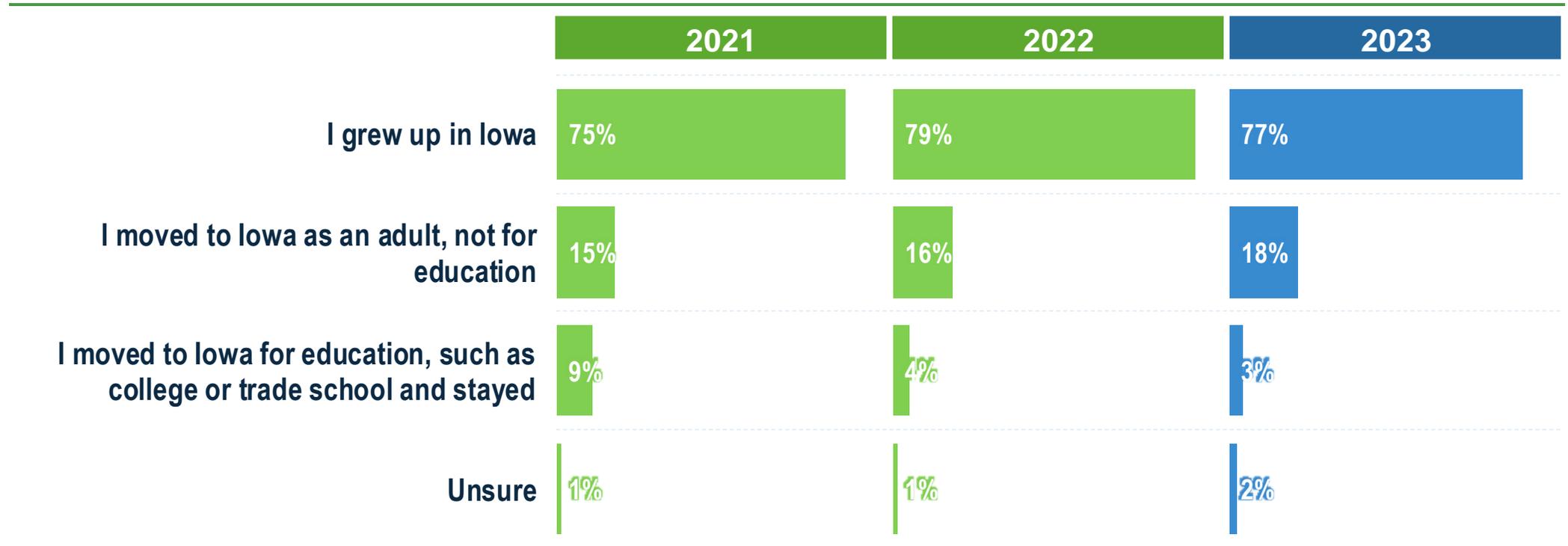
Inflation and the cost of living continues to be the preeminent issue among working age lowans. College voters care about public education while non-college voters are all inflation.



2023	TOTAL	GENDER		AGE					EDUCATION		INCOME (\$)			URBANICITY			LEAVE vs NOT	
		Female	Male	Gen Z	Y Mill	O Mill	Gen X	Boomer	No degree	Degree	<50K	50K-100K	100K+	Rural	Suburban	Urban	Lv	NotLv
NUMBER OF RESPONDENTS	1210	622	588	210	171	252	397	180	805	405	488	412	310	514	410	286	583	583
Stopping inflation and rising cost of living	37%	39%	35%	35%	38%	43%	35%	33%	40%	29%	40%	37%	33%	40%	32%	39%	32%	42%
Improving public education	12%	13%	12%	13%	11%	12%	12%	14%	7%	25%	6%	13%	19%	10%	16%	12%	15%	11%
Lowering taxes for individuals	11%	8%	13%	8%	7%	9%	16%	12%	11%	11%	11%	9%	14%	12%	12%	7%	11%	12%

# WHY IN IOWA

Most new movers who came for a reason other than education are **Millennials** and **Gen X's**. 3-in-4 Millennials in Iowa were born or grew up in the state.

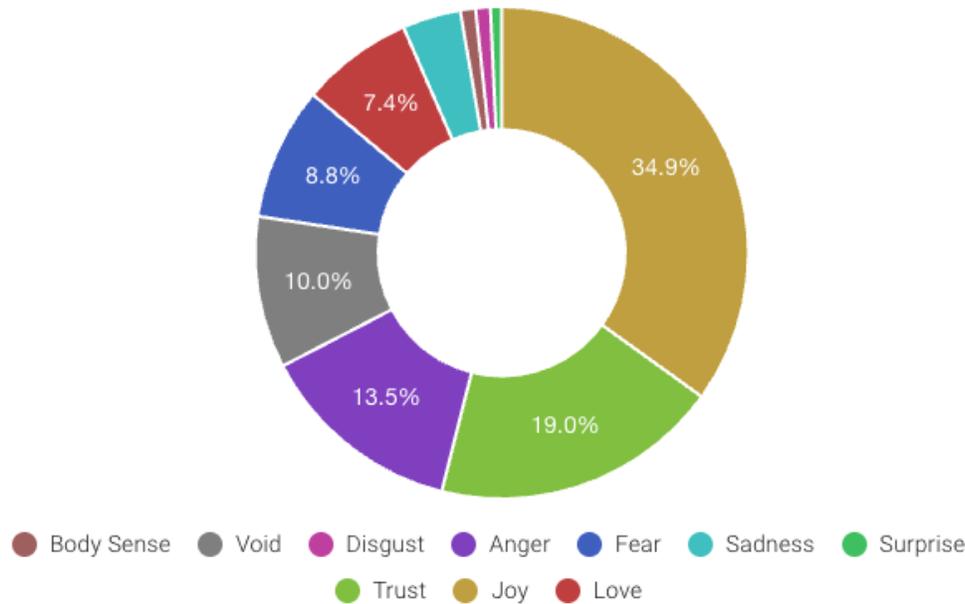


2023	TOTAL	GENDER		AGE					EDUCATION		INCOME (\$)			URBANICITY			LEAVE vs NOT	
		TOTAL	Female	Male	Gen Z	Y Mill	O Mill	Gen X	Boomer	No degree	Degree	<50K	50K-100K	100K+	Rural	Suburban	Urban	Lv
NUMBER OF RESPONDENTS	1210	622	588	210	171	252	397	180	805	405	488	412	310	514	410	286	583	583
I grew up in Iowa	77%	78%	75%	81%	75%	77%	73%	80%	78%	72%	80%	75%	74%	78%	73%	79%	76%	79%
I moved to Iowa as an adult, not for education	18%	17%	19%	9%	15%	17%	25%	19%	16%	22%	13%	22%	20%	18%	20%	16%	18%	17%
I moved to Iowa for education, such as college ...	3%	3%	4%	6%	6%	4%	1%	1%	3%	5%	4%	2%	4%	2%	6%	3%	4%	2%

# LIVING AND WORKING IN IOWA – EMOTIVE ANALYSIS

Working age Iowans **express mostly positive feelings** about the state, often highlighting the **friendliness, safety, and affordability** of the state. Most of the **negative** sentiment (anger & fear) comes from a perceived lack of good-paying jobs while some voters express concern over public education and crime.

Primary Emotions Breakdown  
Distribution



*“I feel like it is just about the same as anywhere else, really. Although, it is fairly cheaper, a lot less going on. Peaceful..”* – **Male 35-49, Independent**

*“I really enjoy Iowa and it is a friendly place to work and live.”* – **Male 25-34, Independent**

*“I like to live here; people are nice in the town I live and my husband a job with a good pay.”* – **Woman 25-34, Republican**

*“Lower cost of living at the expense of less opportunities. Friendly community but uneventful. Limited shopping choices. Boring.”* – **Man 25-34, Independent**

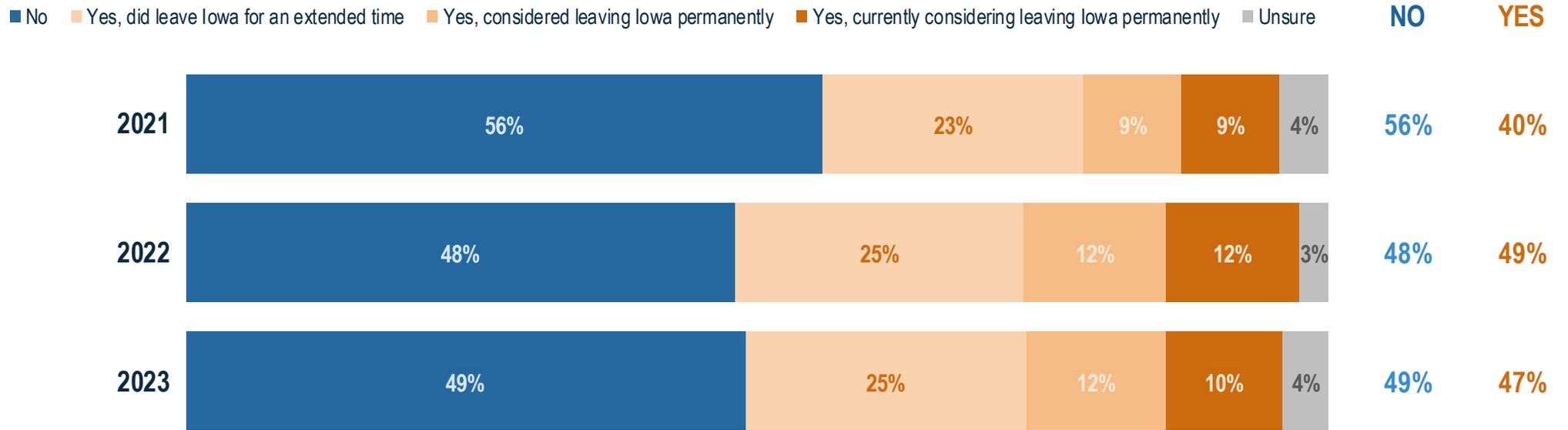
*“It is affordable living in Iowa, but our schools are in crisis and crime is getting out of control.”* – **Woman 35-49, Independent**

*“Iowa is ok. It is cold and is a very conservative state which does not apply to me. Wages in Iowa could be higher considering the cost of living and housing.”* – **Woman 50-65, Democrat**

*“Very bad. No job opportunities and the pay is terrible.”* – **Man 50-65, Republican**

# CONSIDERED LEAVING

About 1-in-4 Iowans have considered or are considering leaving the state permanently. Another quarter have left the state for an extended time but did not consider leaving permanently.



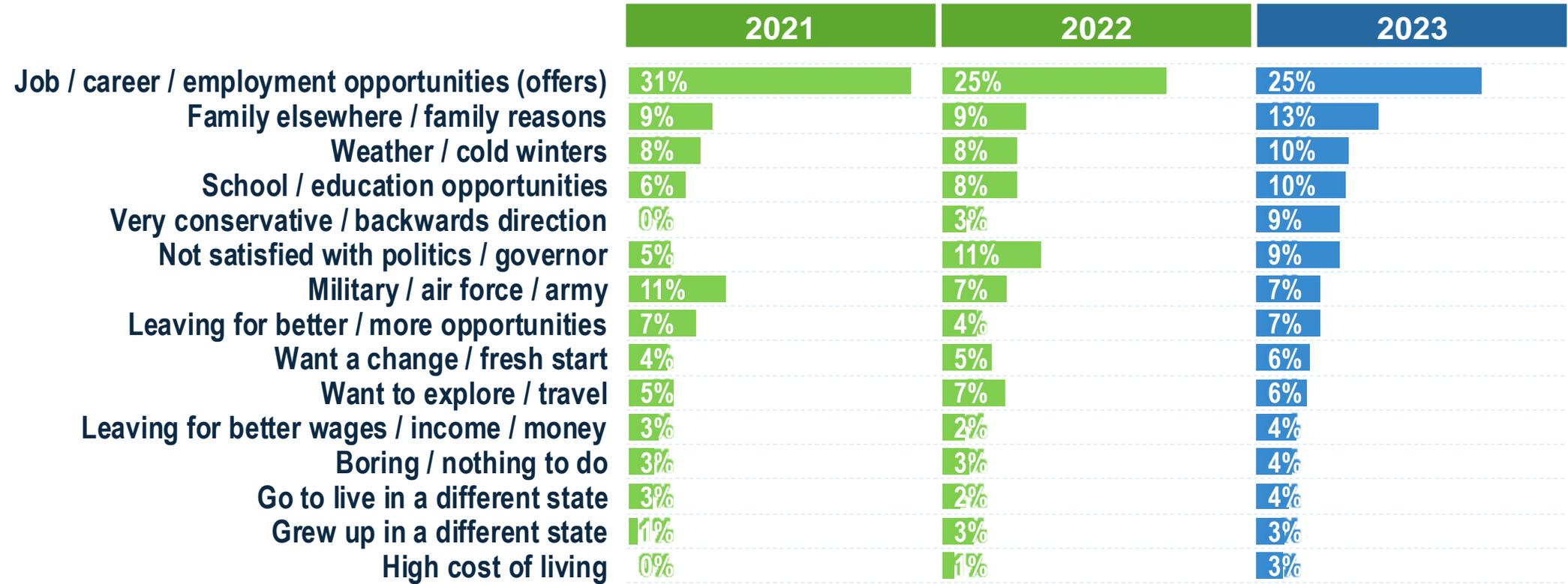
2023	TOTAL	GENDER		AGE					EDUCATION		INCOME (\$)			URBANICITY		
	TOTAL	Female	Male	Gen Z	Y Mill	O Mill	Gen X	Boomer	No degree	Degree	<50K	50K-100K	100K+	Rural	Suburban	Urban
NUMBER OF RESPONDENTS	1210	622	588	210	171	252	397	180	805	405	488	412	310	514	410	286
NO	49%	53%	45%	51%	52%	48%	45%	52%	50%	47%	49%	53%	46%	52%	48%	44%
YES	47%	44%	50%	44%	42%	48%	52%	45%	45%	51%	46%	45%	50%	43%	48%	54%

ConsideredLeaving: Other than for education such as college or trade school, have you ever left Iowa for an extended time or considered leaving Iowa permanently?

# WHY LEAVE

As in years past, most lowans who left for extended periods did so to look for employment opportunities outside the state, particularly college-educated lowans.

TOP 15

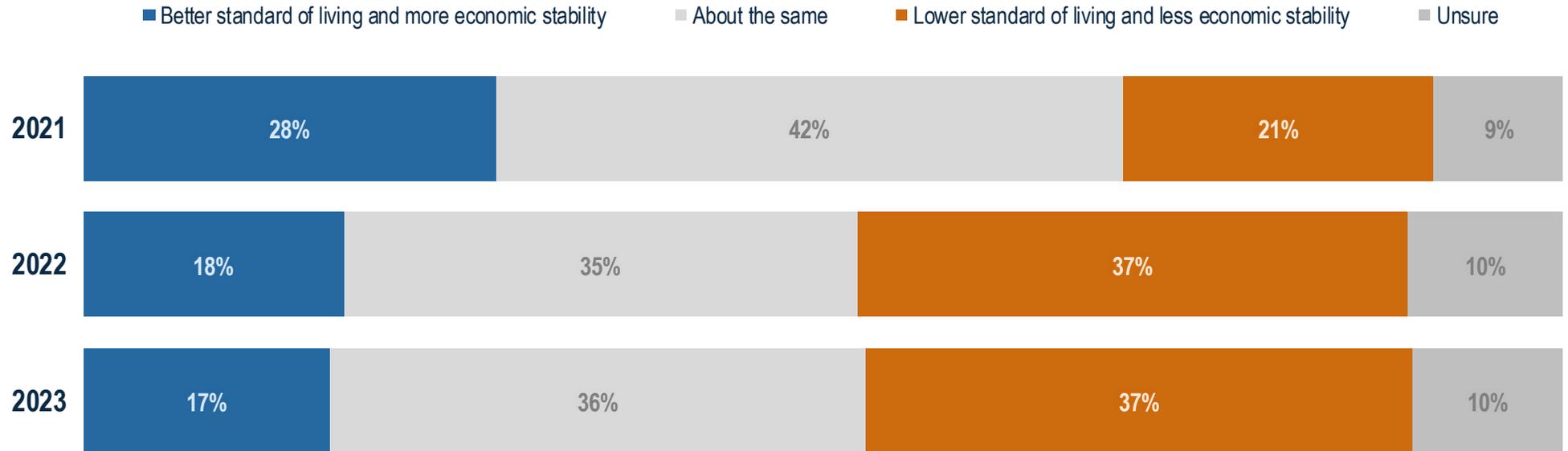


2023	TOTAL	GENDER		AGE					EDUCATION		INCOME (\$)			URBANICITY		
TOP 3	TOTAL	Female	Male	Gen Z	Y Mill	O Mill	Gen X	Boomer	No degree	Degree	<50K	50K-100K	100K+	Rural	Suburban	Urban
NUMBER OF RESPONDENTS	583	277	306	94	75	123	209	82	367	216	229	190	164	228	203	152
Job / career / employment opportunities (offers)	25%	24%	25%	10%	22%	25%	30%	34%	21%	34%	18%	23%	35%	26%	22%	27%
Family elsewhere / family reasons	13%	17%	10%	9%	10%	16%	15%	14%	14%	11%	16%	16%	7%	13%	14%	14%
Weather / cold winters	10%	12%	9%	13%	8%	11%	7%	15%	11%	9%	11%	11%	8%	10%	8%	13%

LEFT OR CONSIDERING LEAVING IOWA

# FUTURE ECONOMIC STABILITY

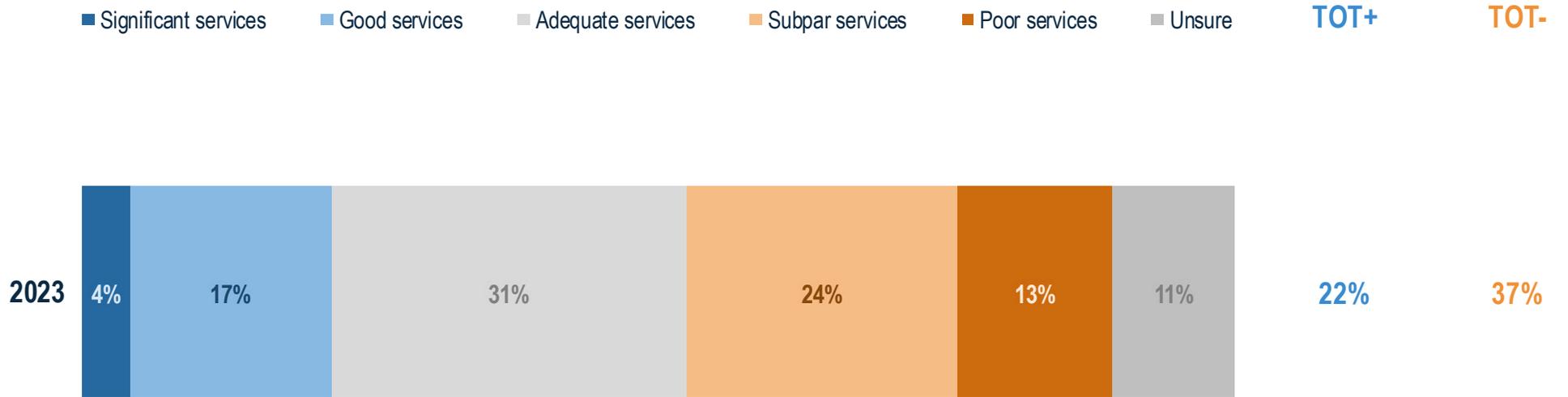
More than a third of Iowans think the **standard of living and stability will be worse** for future residents of the state.



2023	TOTAL	GENDER		AGE					EDUCATION		INCOME (\$)			URBANICITY			LEAVE vs NOT	
		Female	Male	Gen Z	Y Mill	O Mill	Gen X	Boomer	No degree	Degree	<50K	50K-100K	100K+	Rural	Suburban	Urban	Lv	NotLv
NUMBER OF RESPONDENTS	1210	622	588	210	171	252	397	180	805	405	488	412	310	514	410	286	583	583
Better standard of living and more econom ...	17%	16%	17%	20%	18%	16%	15%	14%	15%	20%	15%	14%	21%	13%	20%	19%	17%	17%
About the same	36%	38%	35%	38%	38%	36%	34%	38%	37%	34%	37%	38%	34%	40%	36%	30%	33%	39%
Low er standard of living and less economi ...	37%	33%	41%	28%	35%	37%	42%	39%	36%	40%	34%	39%	38%	37%	36%	38%	40%	35%

# INCOME TAXES

52% of voters think **public services** in Iowa are "adequate" or better for what they pay in **income taxes**, compared to 37% subpar or worse.



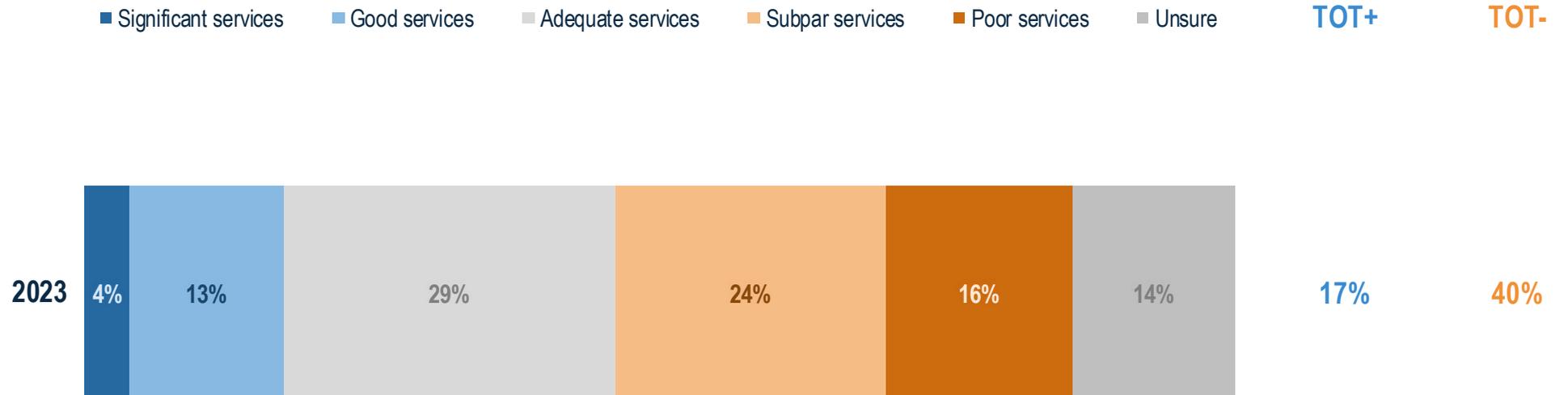
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2023	TOTAL	GENDER		AGE					EDUCATION		INCOME (\$)			URBANICITY			LEAVE vs NOT	
		Female	Male	Gen Z	Y Mill	O Mill	Gen X	Boomer	No degree	Degree	<50K	50K-100K	100K+	Rural	Suburban	Urban	Lv	NotLv
NUMBER OF RESPONDENTS	1210	622	588	210	171	252	397	180	805	405	488	412	310	514	410	286	583	583
TOT+	22%	20%	23%	25%	20%	18%	23%	21%	21%	24%	20%	21%	25%	23%	20%	21%	20%	24%
TOT-	37%	35%	39%	35%	39%	41%	36%	32%	39%	33%	39%	38%	34%	33%	36%	46%	44%	31%

# PROPERTY TAXES

Iowans are less forgiving on their property taxes. **Only 46% of voters say services are at least adequate** for what they pay in **property taxes**, whereas 40% say subpar or worse.



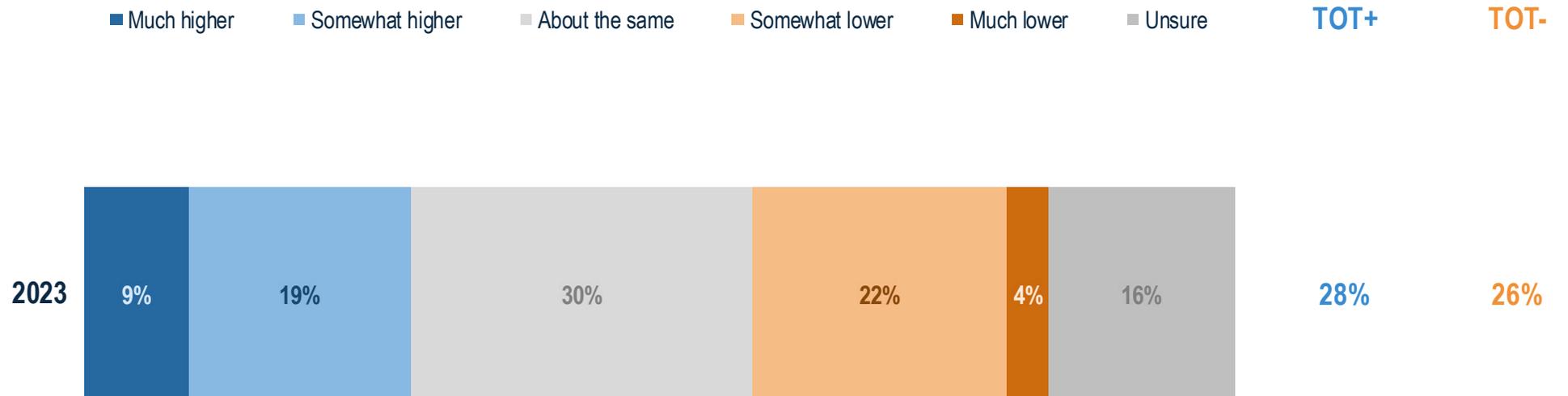
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2023	TOTAL	GENDER		AGE					EDUCATION		INCOME (\$)			URBANICITY			LEAVE vs NOT	
		Female	Male	Gen Z	Y Mill	O Mill	Gen X	Boomer	No degree	Degree	<50K	50K-100K	100K+	Rural	Suburban	Urban	Lv	NotLv
NUMBER OF RESPONDENTS	1210	622	588	210	171	252	397	180	805	405	488	412	310	514	410	286	583	583
TOT+	17%	16%	19%	22%	19%	16%	15%	15%	17%	17%	17%	17%	19%	16%	18%	18%	16%	19%
TOT-	40%	37%	42%	36%	38%	38%	43%	43%	41%	36%	41%	41%	37%	39%	39%	43%	47%	34%

# OTHER TAXES

Those who have considered leaving Iowa are more likely than non-leavers to think taxes are higher in Iowa compared to surrounding states.



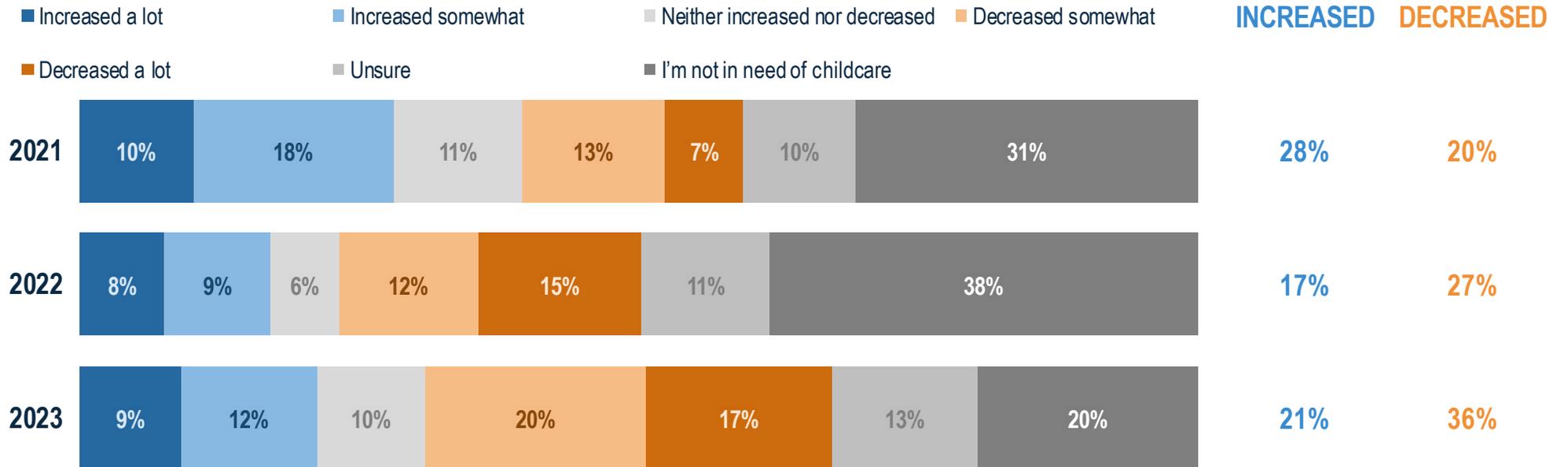
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2023	TOTAL	GENDER		AGE					EDUCATION		INCOME (\$)			URBANICITY			LEAVE vs NOT	
		Female	Male	Gen Z	Y Mill	O Mill	Gen X	Boomer	No degree	Degree	<50K	50K-100K	100K+	Rural	Suburban	Urban	Lv	NotLv
NUMBER OF RESPONDENTS	1210	622	588	210	171	252	397	180	805	405	488	412	310	514	410	286	583	583
TOT+	28%	26%	31%	23%	27%	27%	32%	32%	29%	28%	25%	29%	32%	28%	29%	28%	32%	26%
TOT-	26%	23%	28%	24%	25%	30%	24%	27%	24%	29%	23%	29%	26%	26%	25%	26%	26%	26%

# ACCESS TO CHILDCARE

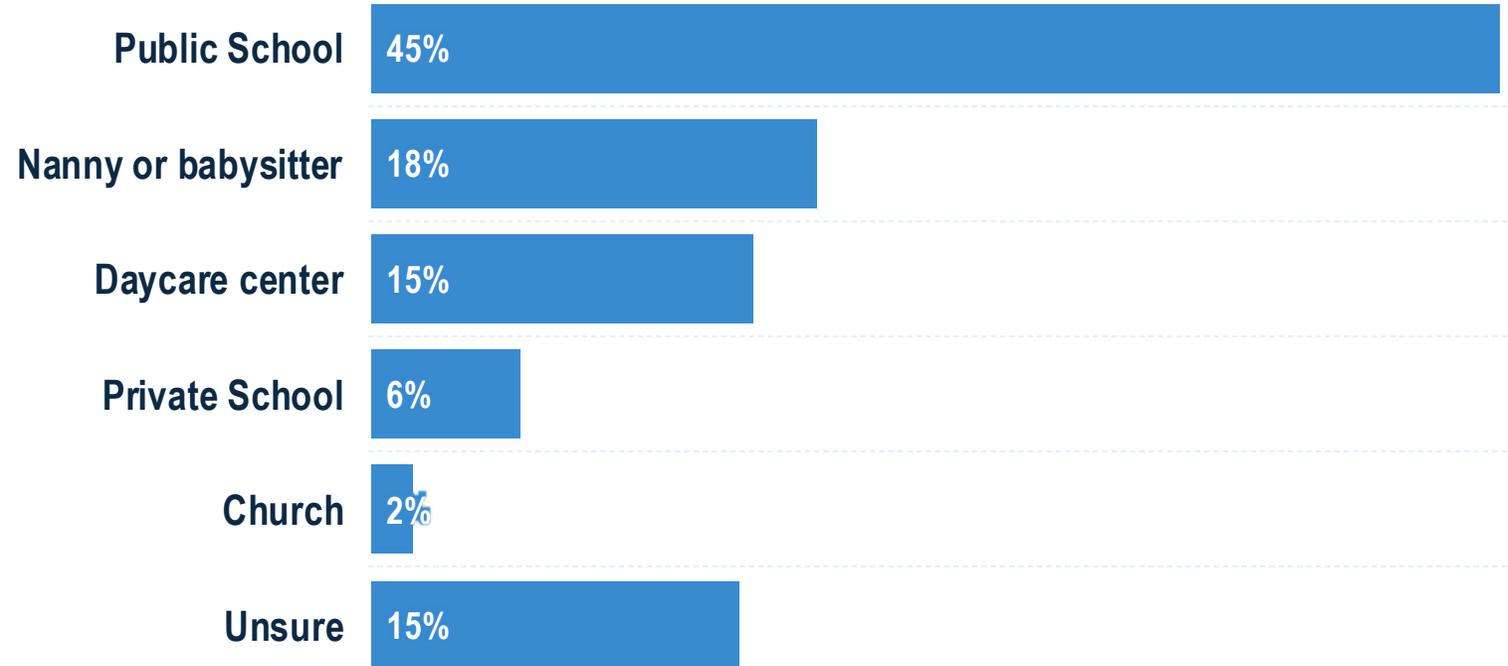
36% of working age lowans say **access to childcare has decreased**, a +10 increase from last year.



2023	TOTAL	GENDER		AGE					EDUCATION		INCOME (\$)			URBANICITY			LEAVE vs NOT	
	TOTAL	Female	Male	Gen Z	Y Mill	O Mill	Gen X	Boomer	No degree	Degree	<50K	50K-100K	100K+	Rural	Suburban	Urban	Lv	NotLv
NUMBER OF RESPONDENTS	1210	622	588	210	171	252	397	180	805	405	488	412	310	514	410	286	583	583
INCREASED	21%	22%	21%	27%	26%	22%	18%	13%	22%	19%	24%	20%	19%	21%	22%	21%	20%	23%
DECREASED	36%	38%	35%	32%	35%	40%	38%	37%	33%	44%	30%	38%	43%	37%	35%	36%	40%	33%

# CHILDCARE TYPE

Nearly half of working age lowans **rely on the public school system** for childcare, especially middle-income lowans.



2023	TOTAL	GENDER		AGE					EDUCATION		INCOME (\$)			URBANICITY			LEAVE vs NOT	
TOP 3	TOTAL	Female	Male	Gen Z	Y Mill	O Mill	Gen X	Boomer	No degree	Degree	<50K	50K-100K	100K+	Rural	Suburban	Urban	Lv	NotLv
NUMBER OF RESPONDENTS	490	283	207	60	90	177	145	18	325	165	141	194	155	209	181	100	228	243
Public School	45%	48%	41%	38%	47%	48%	44%	28%	46%	42%	40%	51%	42%	41%	48%	48%	44%	44%
Nanny or babysitter	18%	18%	18%	23%	26%	17%	12%	0%	18%	17%	19%	18%	17%	21%	15%	16%	20%	16%
Day care center	15%	14%	17%	18%	19%	15%	13%	10%	15%	17%	13%	13%	19%	19%	12%	13%	13%	17%

ChildcareType: What type of childcare do you use most often use?

# SERVICE USAGE

Iowa's public parks and open spaces are the most-used public service, **especially among younger millennials** and those who have considered leaving the state. Women are more likely to care about public education than men.

Public parks and other open spaces

68%

Public education

34%

Public transit

11%

Other

14%

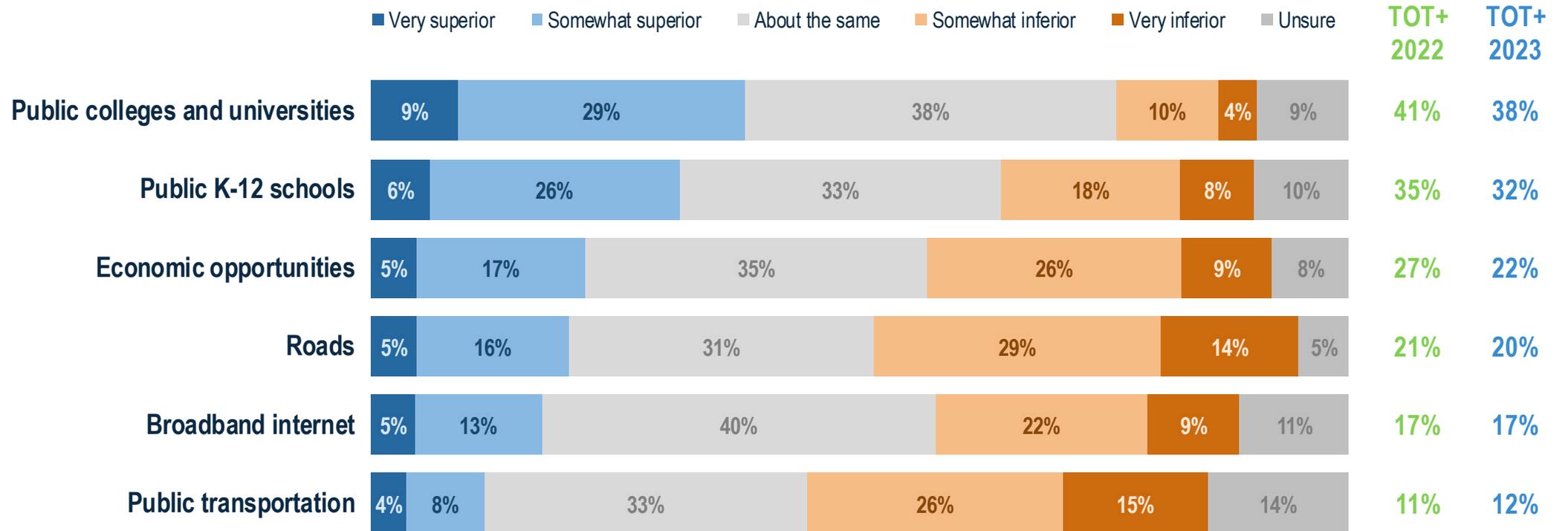
Unsure

10%

2023	TOTAL	GENDER		AGE					EDUCATION		INCOME (\$)			URBANICITY			LEAVE vs NOT	
TOP 3	TOTAL	Female	Male	Gen Z	Y Mill	O Mill	Gen X	Boomer	No degree	Degree	<50K	50K-100K	100K+	Rural	Suburban	Urban	Lv	NotLv
NUMBER OF RESPONDENTS	1210	622	588	210	171	252	397	180	805	405	488	412	310	514	410	286	583	583
Public parks and other open spaces	68%	70%	67%	61%	73%	69%	68%	76%	64%	79%	63%	68%	75%	65%	70%	72%	71%	68%
Public education	34%	41%	28%	38%	42%	47%	30%	12%	31%	42%	27%	37%	42%	35%	38%	28%	35%	35%
Public transit	11%	10%	12%	17%	13%	12%	9%	4%	12%	8%	18%	7%	7%	7%	12%	19%	13%	9%

# GOVERNMENT PRIORITIES

More than a third of working age Iowans believe public higher education in Iowa is better than to other states. **76% believe higher education is at least the same as other states** and 65% say the same for Iowa's public K-12 system. 35% say the economic environment is inferior to other states.

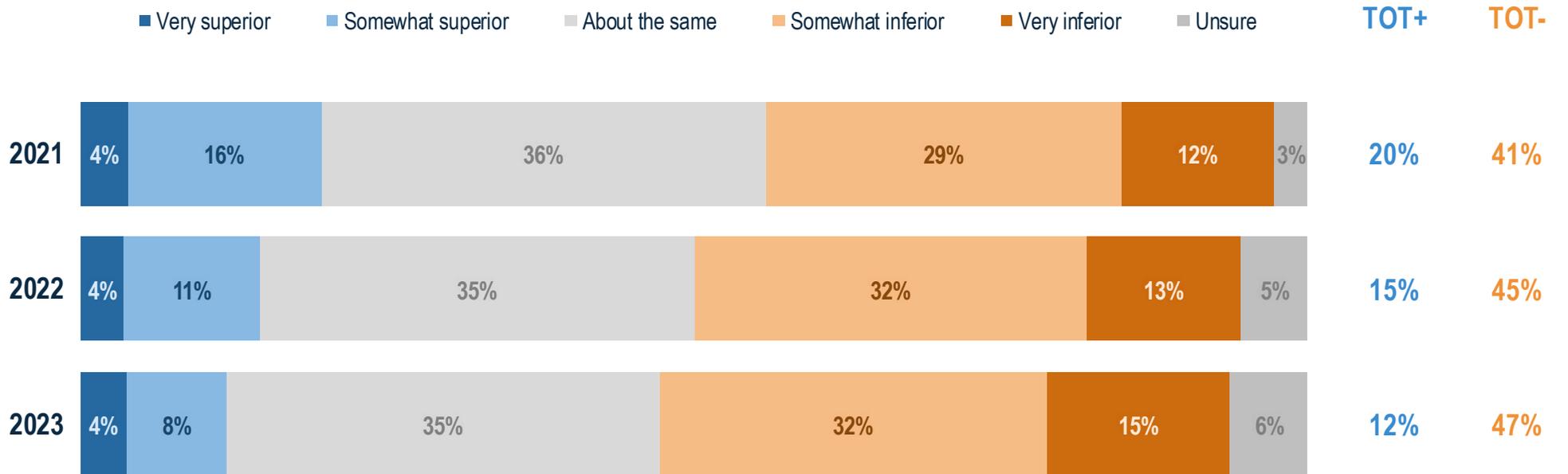


TOT+ = the sum of the two most positive values

2023 - TOT+	TOTAL	GENDER		AGE					EDUCATION		INCOME (\$)			URBANICITY			LEAVE vs NOT		
		Female	Male	Gen Z	Y Mill	O Mill	Gen X	Boomer	No degree	Degree	<50K	50K-100K	100K+	Rural	Suburban	Urban	Lv	NotLv	
TOP3																			
NUMBER OF RESPONDENTS	1210	622	588	210	171	252	397	180	805	405	488	412	310	514	410	286	583	583	
Public colleges and universities	38%	39%	38%	36%	33%	39%	40%	43%	35%	45%	34%	38%	43%	39%	41%	32%	36%	42%	
Public K-12 schools	32%	31%	32%	35%	25%	29%	33%	36%	28%	40%	26%	32%	38%	36%	30%	25%	29%	36%	
Economic opportunities	22%	18%	26%	23%	18%	26%	20%	23%	20%	28%	17%	21%	29%	21%	25%	18%	18%	27%	

# ENTERTAINMENT

Perceptions of entertainment opportunities in Iowa have continued a downward trend overall, and **Gen Z and Younger Millennials** are more likely than older Iowans to say entertainment in Iowa is superior.



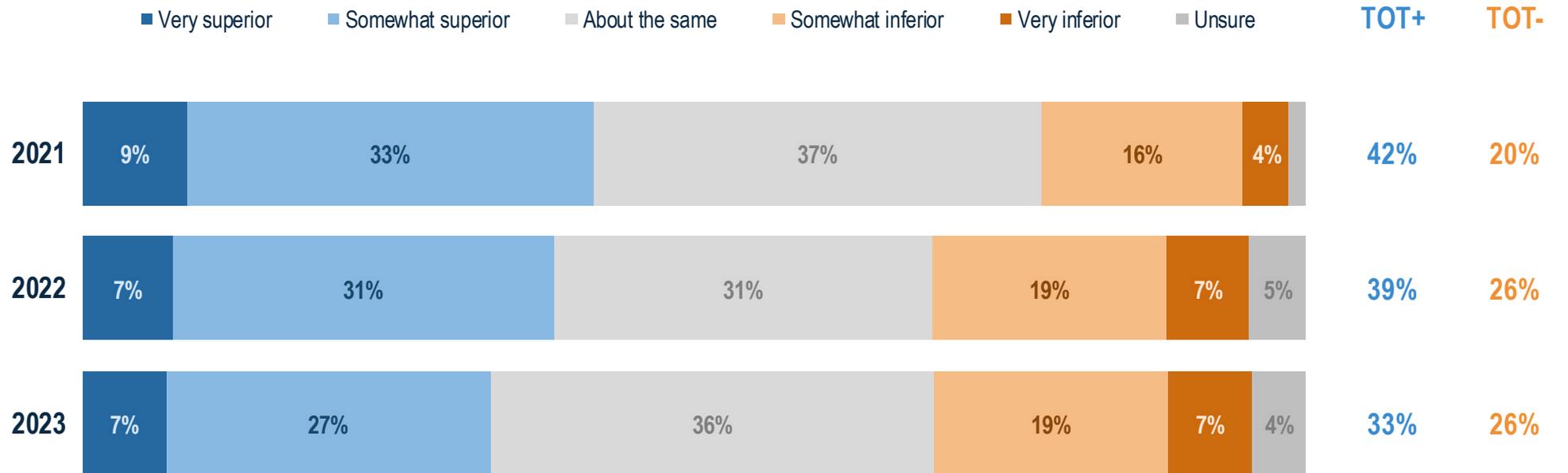
TOT+ = the sum of the two most positive values

TOT- = the sum of the two most negative values

2023	TOTAL	GENDER		AGE					EDUCATION		INCOME (\$)			URBANICITY			LEAVE vs NOT	
		Female	Male	Gen Z	Y Mill	O Mill	Gen X	Boomer	No degree	Degree	<50K	50K-100K	100K+	Rural	Suburban	Urban	Lv	NotLv
NUMBER OF RESPONDENTS	1210	622	588	210	171	252	397	180	805	405	488	412	310	514	410	286	583	583
TOT+	12%	12%	11%	18%	17%	10%	9%	7%	12%	11%	12%	11%	12%	10%	12%	16%	10%	14%
TOT-	47%	47%	47%	45%	47%	50%	47%	42%	44%	54%	43%	46%	51%	47%	48%	44%	53%	41%

# OUTDOOR RECREATION

Attitudes about outdoor recreation are largely positive and remain consistent with 2022. Younger millennials especially appreciate outdoor recreation compared to other age groups.



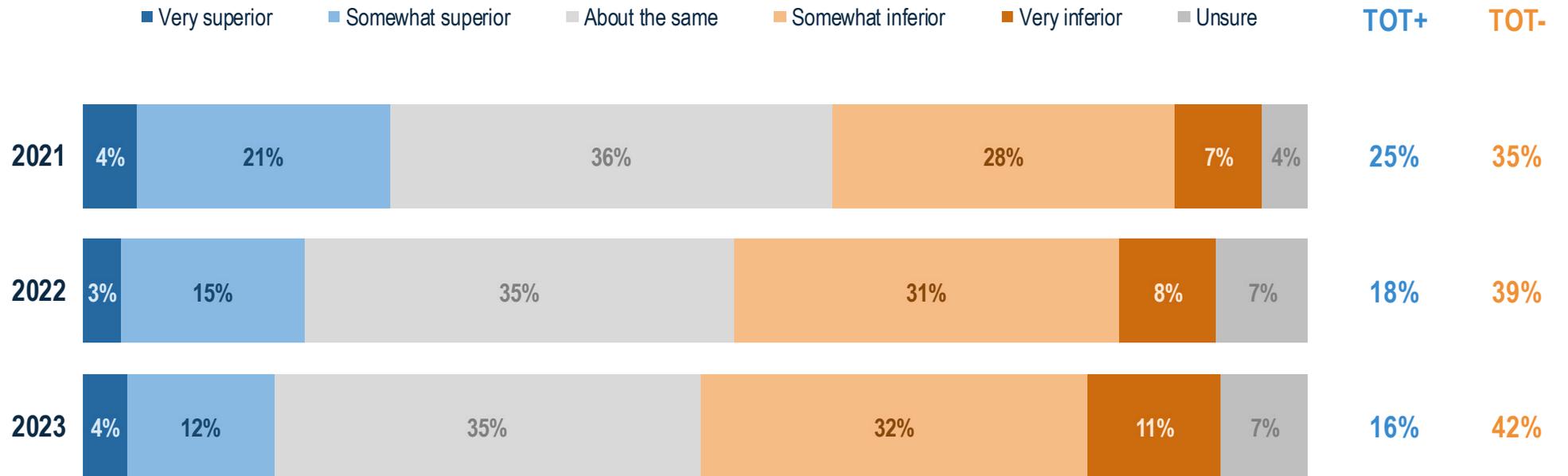
TOT+ = the sum of the two most positive values

TOT- = the sum of the two most negative values

2023	TOTAL	GENDER		AGE					EDUCATION		INCOME (\$)			URBANICITY			LEAVE vs NOT	
		Female	Male	Gen Z	Y Mill	O Mill	Gen X	Boomer	No degree	Degree	<50K	50K-100K	100K+	Rural	Suburban	Urban	Lv	NotLv
NUMBER OF RESPONDENTS	1210	622	588	210	171	252	397	180	805	405	488	412	310	514	410	286	583	583
TOT+	33%	34%	33%	33%	38%	34%	31%	33%	32%	36%	30%	35%	37%	33%	34%	33%	30%	39%
TOT-	26%	25%	27%	30%	27%	26%	26%	17%	27%	24%	26%	24%	28%	23%	29%	28%	31%	21%

# PROFESSIONAL OPPORTUNITIES

Negative attitudes about professional opportunities in Iowa have increased since last year. Millennials and Gen Z's are slightly more optimistic or at least view Iowa's job market as about the same as other states.



TOT+ = the sum of the two most positive values

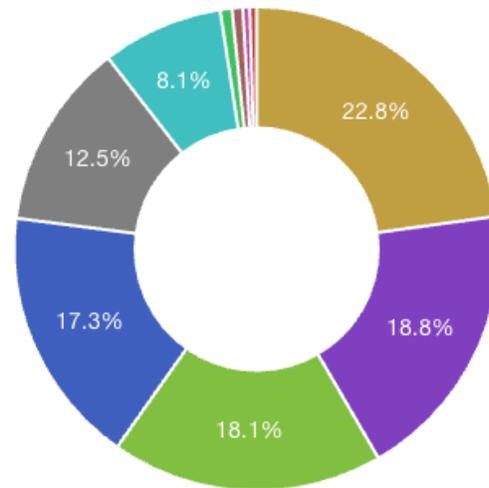
TOT- = the sum of the two most negative values

2023	TOTAL	GENDER		AGE					EDUCATION		INCOME (\$)			URBANICITY			LEAVE vs NOT	
		Female	Male	Gen Z	Y Mill	O Mill	Gen X	Boomer	No degree	Degree	<50K	50K-100K	100K+	Rural	Suburban	Urban	Lv	NotLv
NUMBER OF RESPONDENTS	1210	622	588	210	171	252	397	180	805	405	488	412	310	514	410	286	583	583
TOT+	16%	14%	17%	18%	17%	17%	14%	12%	16%	16%	15%	18%	15%	16%	17%	13%	12%	20%
TOT-	42%	43%	42%	42%	41%	42%	45%	39%	41%	47%	43%	37%	47%	42%	42%	44%	51%	34%

# CAREER OPPORTUNITIES – EMOTIVE ANALYSIS

Working age Iowans **have mixed feelings about career opportunities** in the state. Many express Joy and Trust, often stemming from optimism about an improving job market and current opportunities. A roughly **equal share of voters express Fear and Anger**, coming largely from **dissatisfaction with the wages and benefits** in Iowa. A few felt very limited by their lack of a college degree.

Primary Emotions Breakdown  
Distribution



- Body Sense
- Void
- Disgust
- Anger
- Fear
- Sadness
- Surprise
- Trust
- Joy
- Love

*“Most good businesses do not want to come to Iowa.” – Man 35-49, Independent*

*“Because we do not have some of the bigger corporations in Iowa, some opportunities are limited for some of the better paying jobs, like in the tech industry.” – Woman 50-65, Independent*

*“Without college education my opportunities are very limited.” – Male 35-49, Republican*

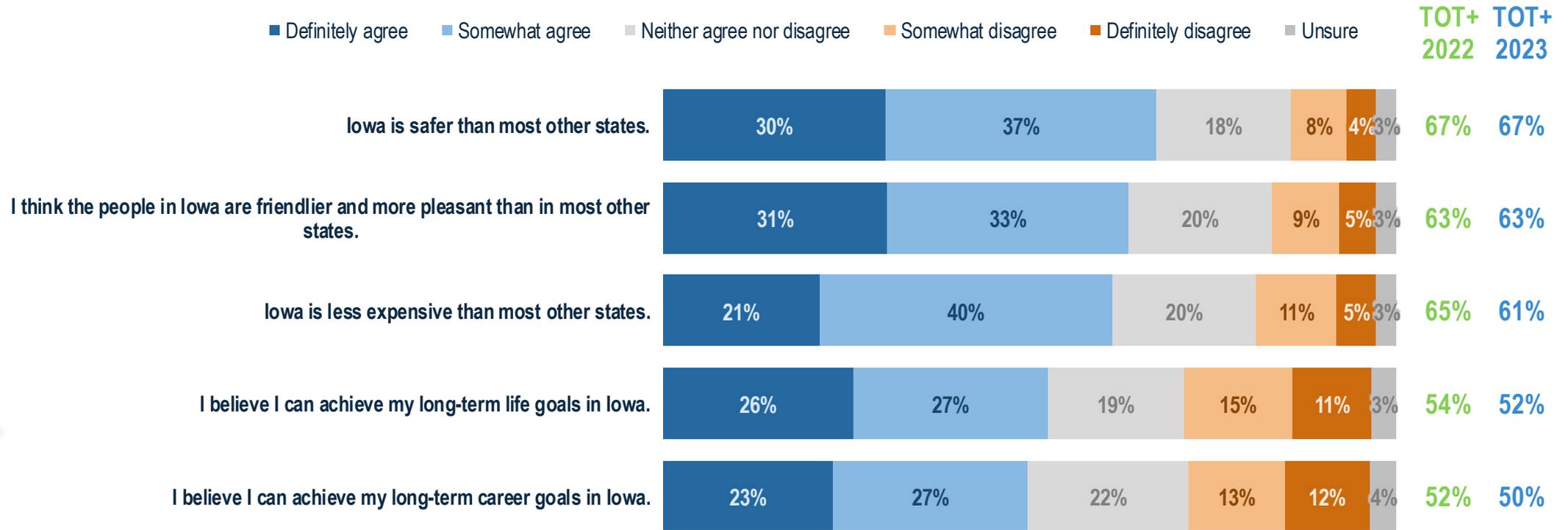
*“There are plenty of jobs available **but wages and benefits can be low** due to employers hiring part time to avoid giving benefits and the state minimum wage is too low.” – Woman 50-64, Republican*

*“Need more opportunities for students and higher pay to stay in Iowa.” – Woman 50-64, Democratic*

*“I will leave the state after I finish nursing school because Iowa is among the lowest paid states for nurses.” – Woman 25-34, Democratic*

# LIVING IN IOWA

Iowa's **safety** and **friendliness** are the most widely-accepted benefits of living in the state. Two-thirds also think Iowa is **somewhat more affordable** than other states. Half of working age Iowans believe they can achieve long term life and career success in the state.



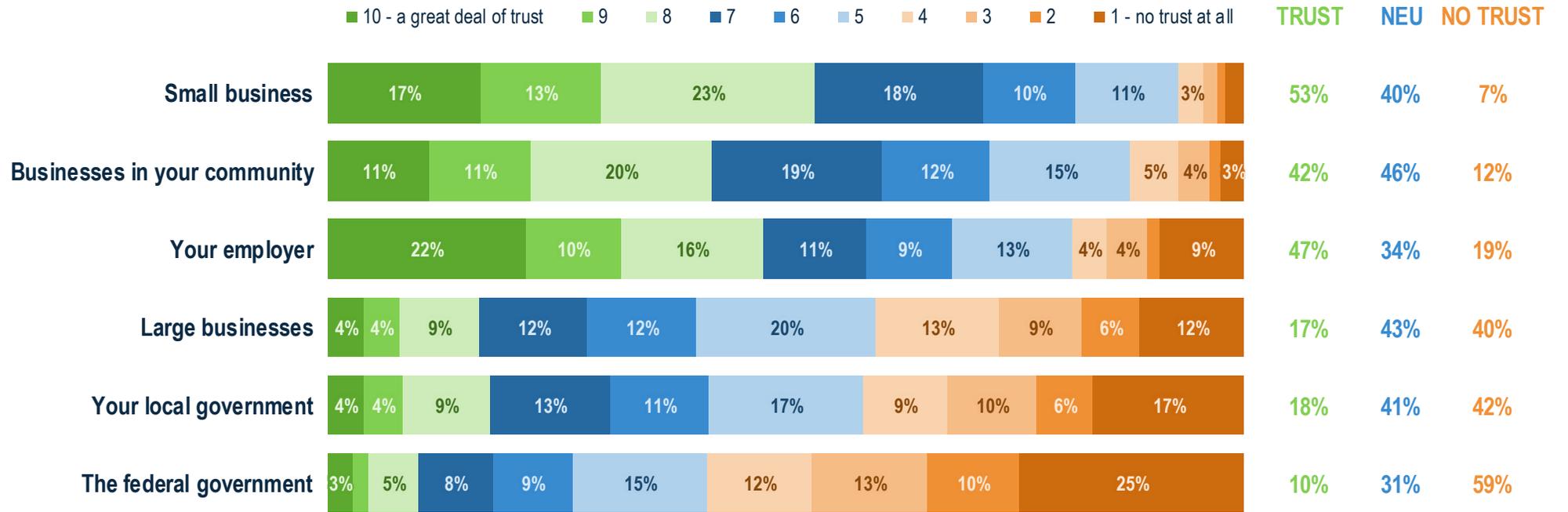
TOT+ = the sum of the two most positive values

2023 - TOT+	TOTAL	GENDER		AGE					EDUCATION		INCOME (\$)			URBANICITY			LEAVE vs NOT	
TOP3	TOTAL	Female	Male	Gen Z	Y Mill	O Mill	Gen X	Boomer	No degree	Degree	<50K	50K-100K	100K+	Rural	Suburban	Urban	Lv	NotLv
NUMBER OF RESPONDENTS	1210	622	588	210	171	252	397	180	805	405	488	412	310	514	410	286	583	583
Iowa is safer than most other states.	67%	65%	69%	60%	67%	67%	72%	68%	63%	78%	59%	67%	78%	73%	68%	55%	62%	72%
I think the people in Iowa are friendlier ...	63%	64%	63%	53%	69%	60%	67%	70%	59%	76%	54%	66%	72%	67%	65%	54%	56%	72%
Iowa is less expensive than most other st ...	61%	61%	61%	61%	64%	64%	57%	65%	58%	71%	55%	61%	69%	65%	63%	52%	56%	67%

LivingStatements: The following is a list of statements about living in Iowa. Please indicate how much you agree or disagree with each statement.

# INSTITUTION'S TRUST

- Small businesses are significantly more trustworthy among lowans earning \$50k+ and voters who have considered leaving. There is also a generational split, Gen Z is more likely to trust small businesses than Younger Millennials.
- Millennials have much less trust in their employer than Gen X and Boomers.
- 1-in-4 working age lowans have "no trust at all" in the federal government, 1-in-5 have nearly no trust in their local government.



TRUST = 10+9+8  
 NEUTRAL = 7+6+5  
 NO TRUST = 4+3+2+1+0

2023 - TOT+	TOTAL	GENDER		AGE					EDUCATION		INCOME (\$)			URBANICITY			LEAVE vs NOT	
		Female	Male	Gen Z	Y Mill	O Mill	Gen X	Boomer	No degree	Degree	<50K	50K-100K	100K+	Rural	Suburban	Urban	Lv	NotLv
TOP3	1210	622	588	210	171	252	397	180	805	405	488	412	310	514	410	286	583	583
NUMBER OF RESPONDENTS	1210	622	588	210	171	252	397	180	805	405	488	412	310	514	410	286	583	583
Small business	53%	56%	51%	55%	46%	51%	56%	56%	52%	57%	46%	57%	58%	56%	54%	48%	49%	57%
Your employer	47%	48%	47%	48%	47%	46%	50%	42%	44%	56%	40%	48%	57%	48%	49%	44%	43%	52%
Businesses in your community	42%	41%	43%	42%	39%	38%	46%	42%	39%	50%	37%	42%	48%	46%	41%	35%	39%	46%

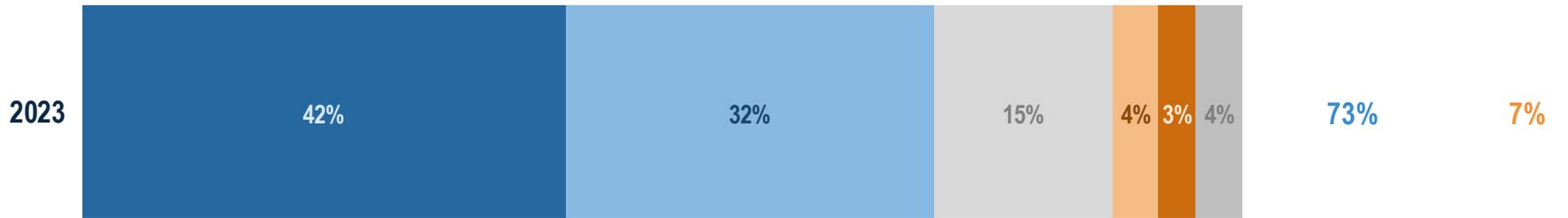
ALL RESPONDENTS

InstitutionsTrust: The following is a list of institutions and groups. Please indicate how much trust you have each in institution or group on a scale from 1-10 with 1 meaning "no trust at all" and 10 meaning "a great deal of trust."

# EX-CONVICT JOB

Nearly three quarters of lowans support rehabilitation and job training programs for convicted felons after they have served their time.

■ Strongly support
■ Somewhat support
■ Neither support nor oppose
■ Somewhat oppose
■ Strongly oppose
■ Unsure
TOT+
TOT-



TOT+ = the sum of the two most positive values

TOT- = the sum of the two most negative values

2023	TOTAL	GENDER		AGE					EDUCATION		INCOME (\$)			URBANICITY			LEAVE vs NOT	
		Female	Male	Gen Z	Y Mill	O Mill	Gen X	Boomer	No degree	Degree	<50K	50K-100K	100K+	Rural	Suburban	Urban	Lv	NotLv
NUMBER OF RESPONDENTS	1210	622	588	210	171	252	397	180	805	405	488	412	310	514	410	286	583	583
TOT+	73%	73%	73%	71%	76%	72%	74%	75%	71%	79%	71%	75%	75%	70%	75%	78%	77%	71%
TOT-	7%	7%	7%	8%	6%	6%	7%	9%	7%	7%	7%	6%	8%	9%	6%	6%	7%	8%

ICA-IA Working Age

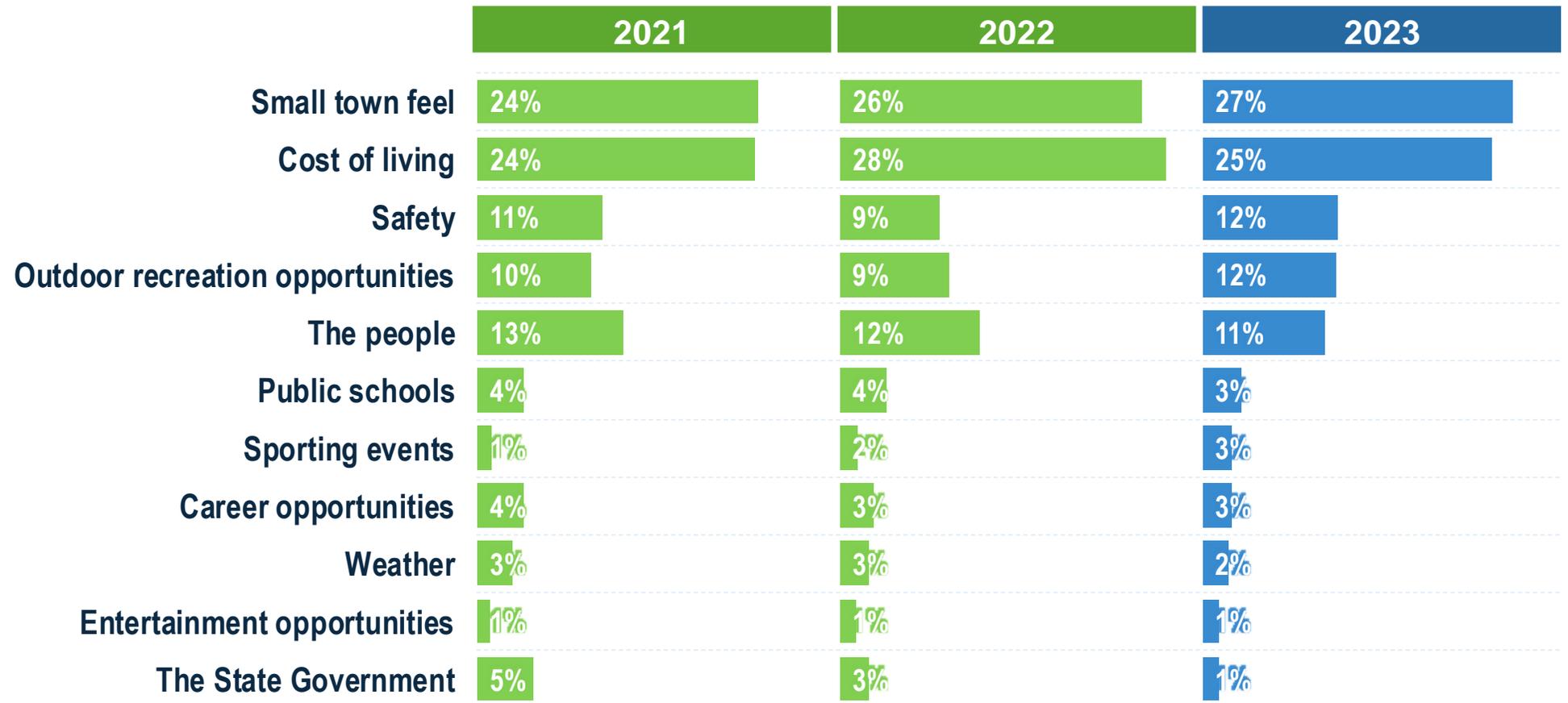
# MAX-DIFF



# THE MOST PREFERRED CLAIM

Small town feel and the cost of living remain the most appealing aspects of the state among working age lowans. **Safety appeal has also increased.**

THE MOST PREFERRED simulates a situation in which the respondents choose from all items the one with the highest preference

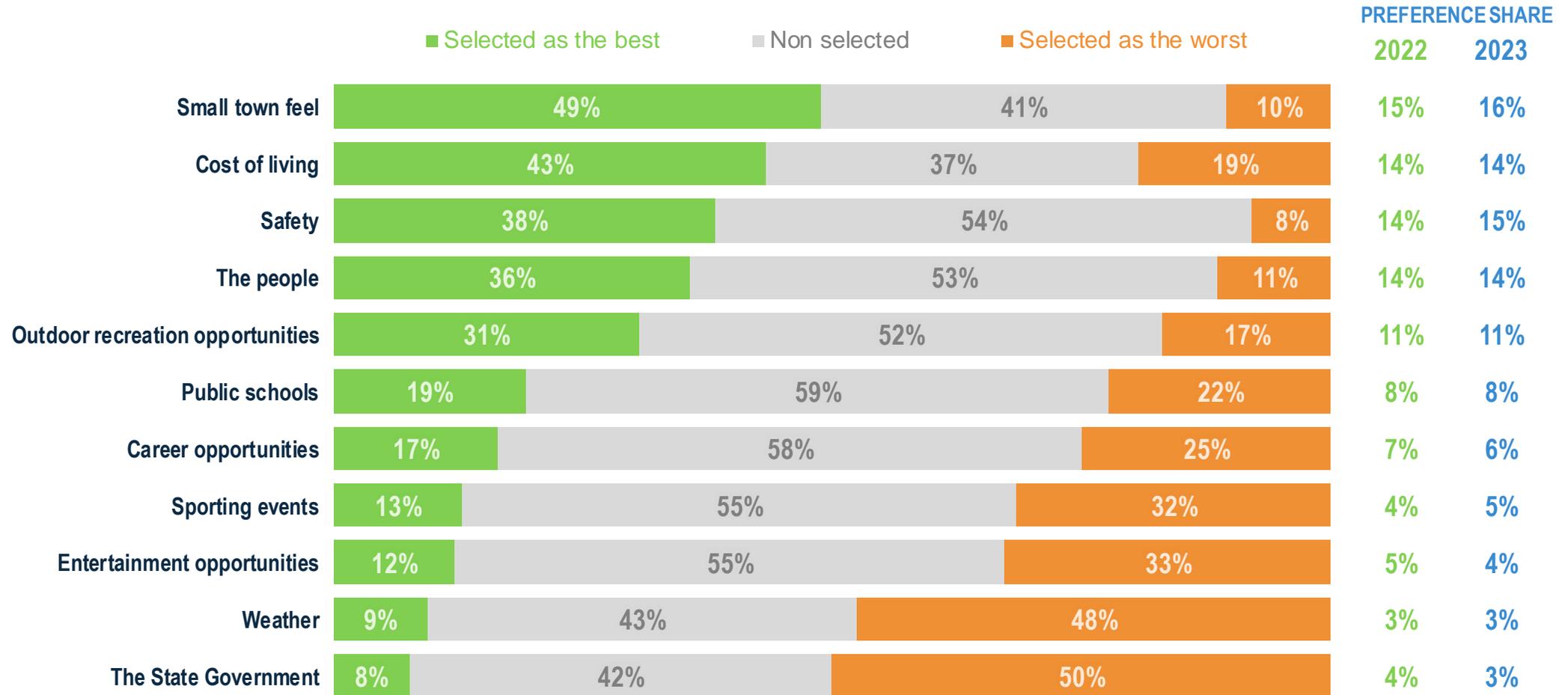




# PREFERENCE SHARE

State Government and weather were most likely to be selected as the worst. Career opportunities was more likely to be "best" and less likely to be "worst" than both sporting events and entertainment options.

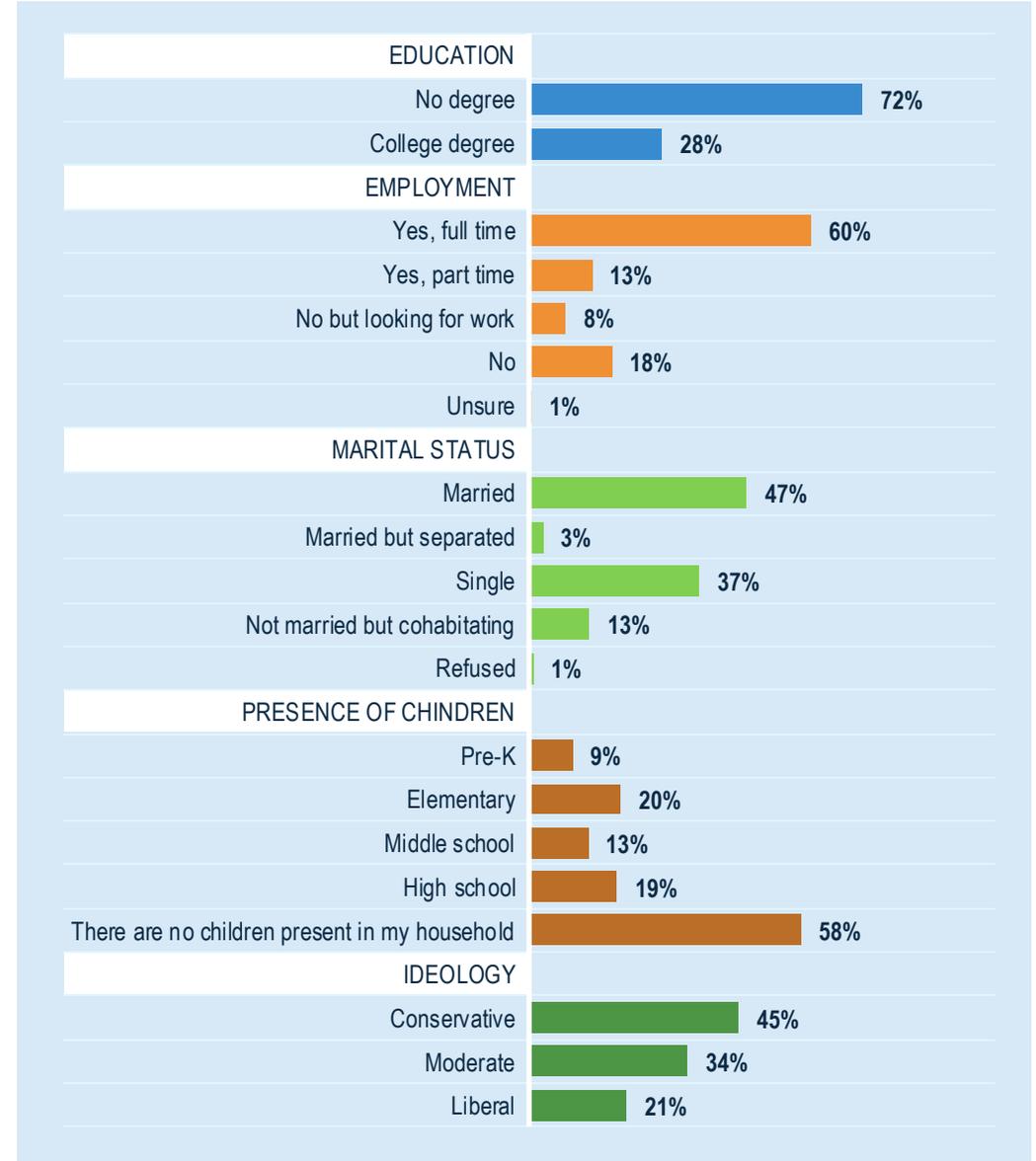
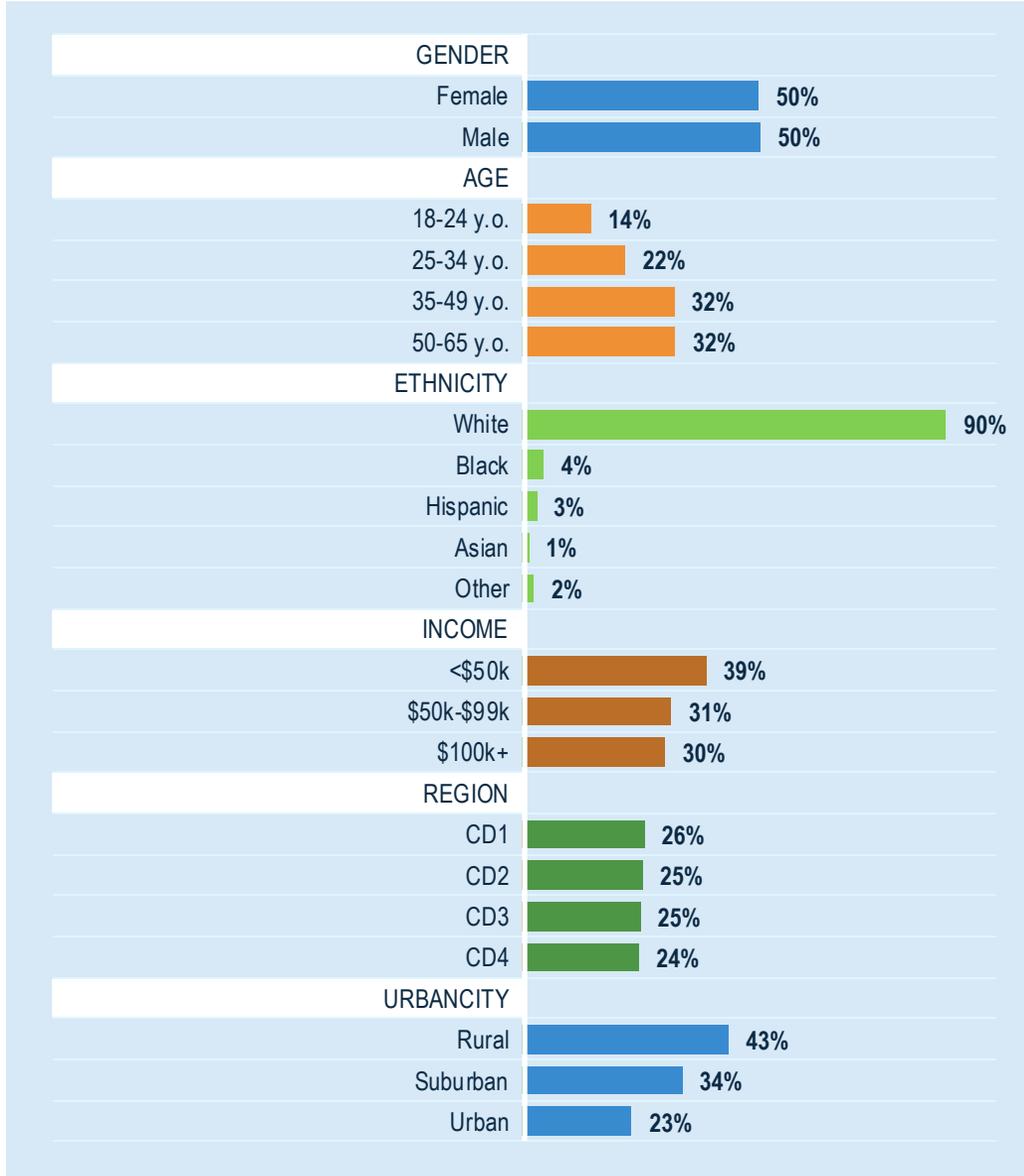
**PREFERENCE SHARE**  
simulates a situation in which respondents distribute 100% among all items according to their preferences



ICA-IA Working Age

# SAMPLE STRUCTURE

# SAMPLE STRUCTURE 2023





CYGNAL

THANK YOU

powered by

 **response:AI**