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POPULATION AND PROSPERITY:

IOWA'S DEMOGRAPHIC TRENDS

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ABOUT COMMON SENSE INSTITUTE

Common Sense Institute is a non-partisan research organization dedicated to the protection and promotion of Iowa's economy. CSI is at the forefront of important discussions concerning the future of free enterprise and aims to have an impact on the issues that matter most to Iowans. CSI's mission is to examine the fiscal impacts of policies, initiatives, and proposed laws so that Iowans are educated and informed on issues impacting their lives. CSI employs rigorous research techniques and dynamic modeling to evaluate the potential impact of these measures on the economy and individual opportunity.

TEAMS & FELLOWS STATEMENT

CSI is committed to independent, in-depth research that examines the impacts of policies, initiatives, and proposed laws so that Iowans are educated and informed on issues impacting their lives. CSI's commitment to institutional independence is rooted in the individual independence of our researchers, economists, and fellows. At the core of CSI's mission is a belief in the power of the free enterprise system. Our work explores ideas that protect and promote jobs and the economy, and the CSI team and fellows take part in this pursuit with academic freedom. Our team's work is informed by data-driven research and evidence. The views and opinions of fellows do not reflect the institutional views of CSI. CSI operates independently of any political party and does not take positions.

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INTRODUCTION

New data from the U.S. Census Bureau shows Iowa's population grew less in 2025 than the last two years, though it grew more than in most recent years. This slowdown in population growth raises fresh questions about the demographic forces shaping Iowa's workforce and economy today. Demographic trends can have a large effect on economic growth over time. Population changes influence workforce availability and the size of the tax base that supports public services. Sustained population growth typically supports stronger labor force growth and economic output. Conversely, prolonged demographic stagnation can constrain workforce growth and slow long-term economic activity. In February 2025, Common Sense Institute published a report analyzing Iowa's demographic trends through 2024 and their economic implications.[1] The release of the U.S. Census Bureau's 2025 population estimates allows CSI to extend prior analysis through 2025, updating its evaluation of Iowa's demographic trajectory over the past three decades with the latest available data. This report examines three key demographic components—net births and replacement rates, net domestic migration, and net foreign migration—and what they all mean for Iowa's economy. It concludes with national and regional comparisons that place Iowa's demographic performance in context among Midwest states and the broader United States.

New data from the U.S. Census Bureau shows Iowa's population grew less in 2025 than the last two years, though it grew more than in most recent years.

KEY FINDINGS

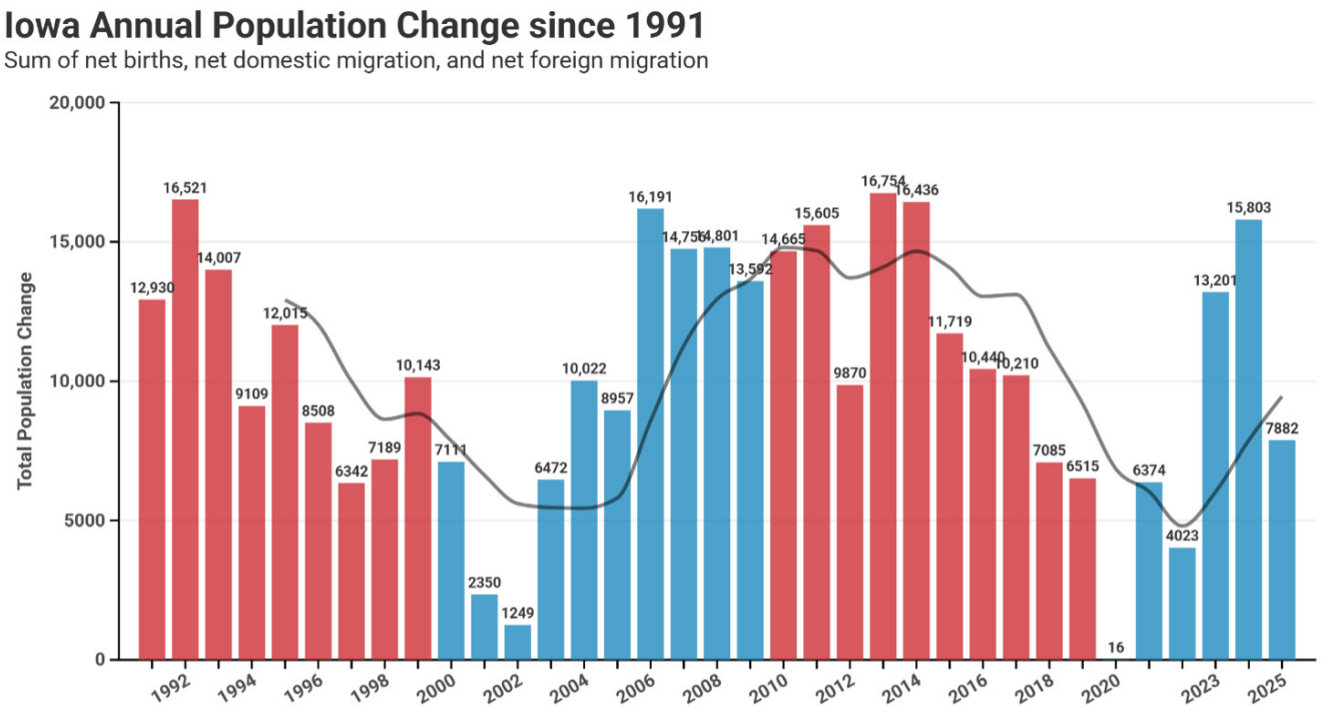
- **Total Population** grew by nearly 7,900 residents in 2025—the third highest annual gain since 2018—but growth slowed compared to the prior two years.
  - Iowa's population growth fell below both the 35-year average of about 10,250 and the five-year average of about 9,450 as foreign migration flows slowed.
- **Net Births** totaled just under 3,000 in 2025, down from about 3,500 in 2024 and 71% below the 1991-2019 average, as deaths continued their long-run upward trend while birth totals remained flat.
- **Fertility Rates** in Iowa were the fifth highest nationally in 2025.
  - Iowa's total fertility rate held at an estimated 1.79 in 2025—unchanged from the prior year. Its fertility rate has remained below the replacement rate of 2.1 for two decades.
- **Interstate Migration** remained negative for the second consecutive year, with Iowa losing a net 970 residents to other states in 2025, worsening from a loss of 427 in 2024.
- **Foreign Migration** fell sharply to 5,903 net migrants in 2025—a 53.5% decline from 12,701 in 2024.
- **Revised Estimates** – In its 2025 "Demographics are Destiny" report, CSI forecasted the economic impact of a 63% reduction in immigration into Iowa from 2024 to 2025. Actual foreign migration fell 75.9%, increasing the economic impact of federal immigration policy.
- **Economic Impact** – CSI's updated REMI modeling estimates the steeper-than-anticipated decline in foreign migration relative to the baseline resulted in significant economic losses. In 2025 alone, Iowa lost an estimated—
  - 15,463 fewer residents,
  - 8,546 fewer labor force participants,
  - $231 million less in GDP.
- **National and Regional Rankings** – Iowa's national and regional demographic rankings remain at or near historic lows across migration measures.
  - Nationally, Iowa ranked 35th in net domestic migration and 39th in overall net migration in 2025.
  - Within the Midwest, Iowa ranked 11th out of 12 states in both domestic and overall net migration—second to last in the region.

IOWA'S POPULATION GREW IN 2025

Positive population growth can expand the labor force and broaden the tax base that supports public services and infrastructure.[2] Conversely, prolonged population stagnation or decline can constrain economic expansion, limit business investment, and increase fiscal pressures as aging populations rely more heavily on public services and programs with fewer working-age adults to support them.[3] Iowa has largely avoided the latter pressures by maintaining a pattern of consistent, positive population growth. In 2025, Iowa recorded yet another year of population growth, extending the state's gradual recovery from the pandemic period. Total year-over-year population growth reached approximately 7,882 residents when combining net births, net domestic migration, and net foreign migration. Last year marks the third highest annual population gain since 2018.

While Iowa's population continued to grow in 2025, it did so at a slower pace than the prior two years. When viewed across a 35-year timeframe, 2025 comes in at the bottom half of yearly growth—24th highest. Total growth fell below the 35-year average of 10,253 as well as the five-year average of 9,457. The latest print also follows strong five-digit gains observed in 2023 and 2024, which were driven largely by elevated levels of net foreign migration. As foreign migration flows moderated in 2025 mostly due to factors outside the state's control, overall population growth returned closer to norms seen in the late 90s and late 2010s. Figure 1 visualizes Iowa's annual population growth since 1991 according to the Census Bureau's population estimate data.

FIGURE 1.

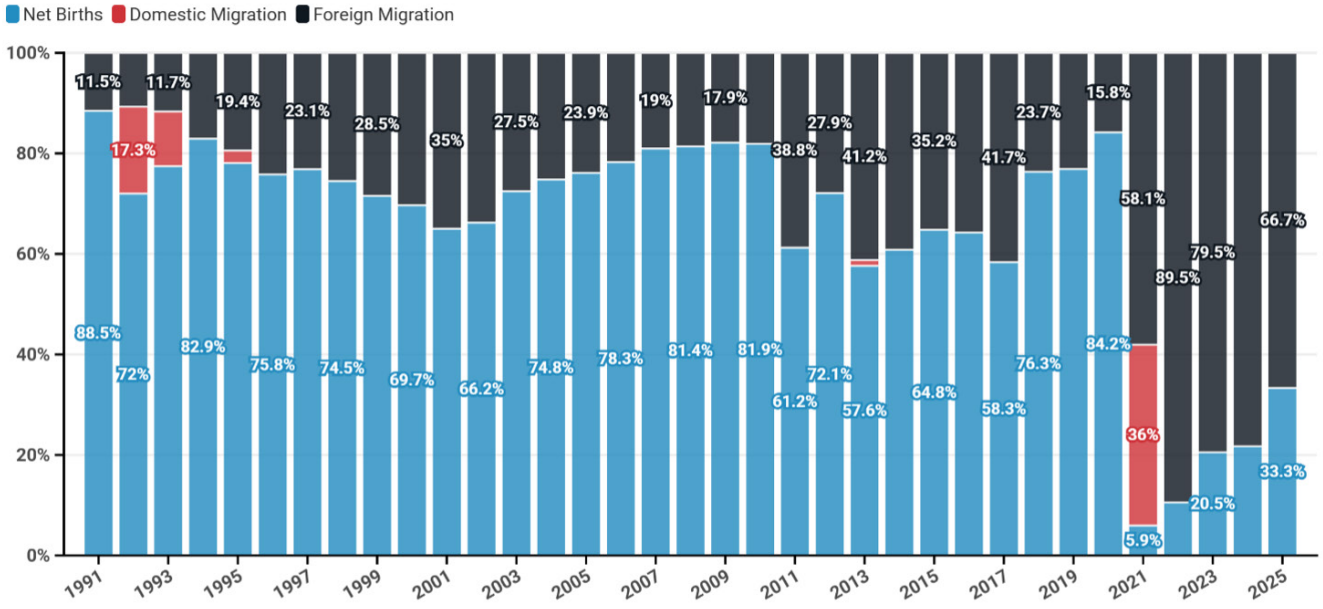


Note: Columns are colored by decade. The black line indicates the five-year average.
Source: U.S. Census Bureau

Growth has followed a clear cyclical pattern rather than a steady trend, with periods of expansion followed by slowdown. Population gains peaked in the early 1990s, weakened in the early 2000s, strengthened again through the mid-2000s and 2010s, and then fell to historic lows during the pandemic. Growth rebounded sharply during the post-pandemic recovery, reaching 15,803 in 2023. While Figure A captures the scale and timing of these swings, it does not explain their sources. Total population change reflects the combined effect of three distinct components that respond differently to economic conditions, policy changes, and long-term demographic trends. Figure 2 disaggregates the total growth into its core components: net births, net domestic migration, and net foreign migration. This clarifies which components have historically supported population growth and which are driving recent volatility.

FIGURE 2.

Population Components as a Share of Total Net Positive Growth in Iowa, 1991-2025



Source: U.S. Census Bureau

Over the early 1990s through the mid-2000s, Iowa's population gains were overwhelmingly supported by a surplus of net births—births minus deaths. Net births consistently accounted for roughly 66% to 88% of total population growth during this period. Domestic migration and foreign migration played secondary roles, typically filling the remaining share of growth. However, domestic migration has rarely contributed to positive population growth. In 2021, domestic migration temporarily surged and accounted for over one-third of total population gains. The expansion of remote work and Iowa's liberal handling of pandemic restrictions may have contributed to positive domestic migration.[4]

In the post-pandemic period, the weighting of foreign migration versus net births on total population growth has reversed. Beginning in 2021, the share of population growth attributed to net foreign migration began to represent a majority of total gains, peaking as high as 90% in 2022. That momentum has begun to fade but remains significant. As of 2025, foreign migration generated roughly two-thirds of total net positive population change. Meanwhile, net births contributed only about one-third of total growth—the highest share in the post-pandemic period but still well below the historical norm. Net

domestic migration does not appear in figure 2 for any year with negative flows, like 2025, as it does not contribute to population growth in those years.

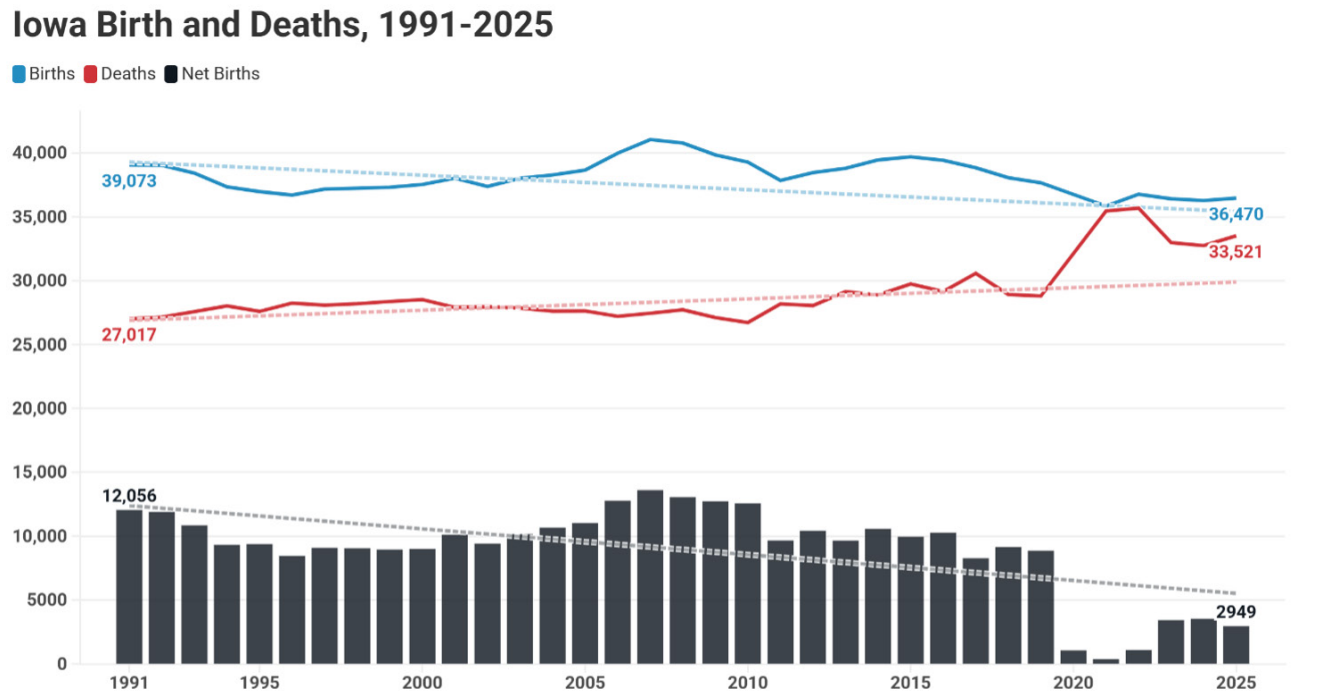
Understanding the evolving trends among these three population drivers is critical to evaluating Iowa's long-term economic outlook. Each component influences workforce growth and various other economic indicators differently. Population growth through new births reflects generational replacement and long-run demographic sustainability, whereas migration might signal Iowa's competitiveness relative to other states. The following sections examine each population component individually, beginning with net births, which historically served as Iowa's most stable source of population growth but has recently experienced decline.

Net birth levels struggle to recover

Natural population growth, otherwise known as net births, has historically provided the most sustainable source of economic expansion for Iowa. Unlike migration, which can fluctuate with policy or labor market conditions, natural increase reflects the state's underlying demographic growth via its native population. A steady surplus of births replenishes the future labor force, supports long-term labor supply growth, and broadens the base of future taxpayers.[5] Over time, larger birth cohorts translate into higher school enrollment, consumer demand, household formation, and productive capacity.[6]

Indeed, for much of the 1990s and early 2000s, Iowa's population growth was sustained by a consistent surplus of births over deaths. Birth totals routinely hovered between 38,000 and 41,000 per year, while deaths remained comparatively stable, near 27,000 to 28,000. This steady cushion produced annual net births commonly exceeding 9,000, reaching a peak of 13,600 in 2007. During this period, natural population growth served as a dependable contributor to the state's population stability. As seen earlier in figure 2, net births contributed at least 65% of the total positive population growth through the turn of the century. That foundation has weakened considerably over the past two decades. Figure 3 visualizes these trends in births, deaths, and net births since 1991.

FIGURE 3.



Note: The dotted line denotes the 35-year trend.
Source: U.S. Census Bureau

Births have trended gradually downward, falling from more than 41,000 annually in the mid-2000s to 36,470 in 2025. At the same time, deaths have steadily increased, rising from roughly 27,000 in the early 1990s to 33,521 in 2025. The post-pandemic period sharply accelerated the decline in net births. In 2021, deaths surged while births declined, reducing net births to just 379. This marked the lowest level recorded in the dataset. Although natural growth partially rebounded in subsequent years, the recovery has been uneven and remains low compared to pre-pandemic norms. Net births rose to 3,529 in 2024 before declining again in 2025 as deaths increased and birth totals remained comparatively flat. The result has been a sustained narrowing between births and deaths, reducing net births to 2,949 in 2025—71% less than the average level observed between 1991 and 2019.

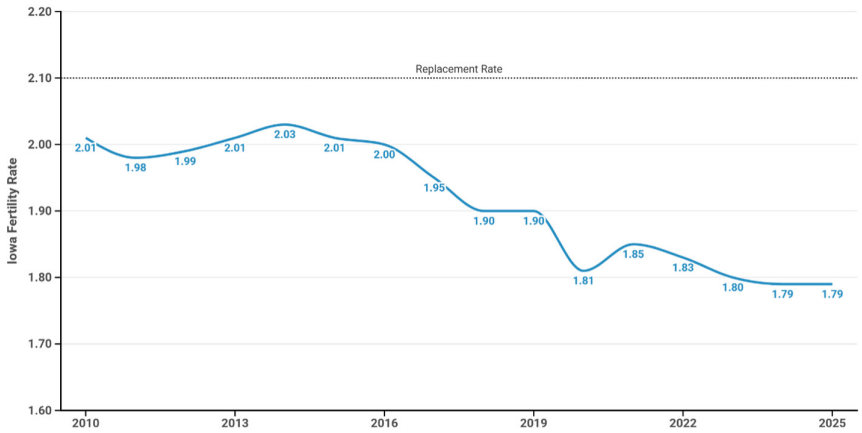
The persistence of elevated deaths since 2021 reflects more than the pandemic's immediate toll. Two forces are likely driving the ongoing decline in net births in Iowa: its increasingly aging population and its declining birth rates. As the youngest "Baby Boomers" are now in their early sixties and the oldest just reached 80-years-old, this cohort's mortality will push total deaths higher for years to come. This demographic shift will hit Iowa especially hard because it has a relatively large elderly population. As of 2023 the state ranked 2nd highest in the nation in the percentage of its population over the age of 65, at 24.4%.[7] CSI Iowa's December 2024 report, "Iowa's Future: The Impact of an Aging Workforce," documented this accelerating demographic shift in detail.[8] It estimates Iowans over 54 will compose 41.1% of the working-age population by 2030—nearly 12 percentage points higher than in 2000. As long as Iowa maintains a senior population share that exceeds the national average, its net birth statistics will likely continue to worsen.

Deaths account for much of the recent decline in net births, but a longer-term shift is also occurring on the births side of the equation. Figure 4 shows Iowa's total fertility rate from 2010 through 2025. Fertility rate measures the average number of children a woman is expected to have over her lifetime. The measure is based on current birth patterns of women aged 16-44. To achieve sustained population growth, a population should aim for "replacement rate," which is generally estimated at 2.1 births per woman in developed countries.[9] This represents the threshold required for a population to replace itself absent migration. When fertility falls below this level for a sustained period, populations age out and long-term labor force growth slows.

As shown in Figure 4, Iowa's fertility rate remained near replacement through the early 2010s, holding at or slightly above 2.0 births per woman. In 2016, the rate fell below 2.0 and has not recovered since, dropping under 1.90 in 2020 and below 1.80 by 2024. Iowa's fertility rate is estimated at 1.79 in 2025, unchanged from the prior year. Iowa has now spent nearly two decades

FIGURE 4.

Iowa's Fertility Rate, 2010-2025



Source: U.S. Census Bureau, U.S. Center for Disease Control, CSI Analysis

below replacement. The long-term erosion of natural population growth carries significant economic implications. Persistently low fertility means fewer people entering the workforce in the future and a faster-aging population. This can reduce Iowa's long-term competitiveness by limiting growth in the working-age population that supports employers, tax revenues, and economic expansion. States with relatively stronger fertility trends maintain a larger pipeline of future workers and face less pressure to rely on in-migration to sustain growth, making fertility an important component of demographic competitiveness.

Even with its recent decline, Iowa's fertility rate remains high relative to most states, preserving a measure of demographic competitiveness. Figure 9 in the appendix maps estimated fertility rates across the United States in 2025. Iowa ranks among the highest in the nation—tied for fifth alongside Alaska, Kansas, Kentucky and Utah. While Iowa faces clear headwinds on the births side, no state currently meets the replacement threshold, making below-replacement fertility a national issue rather than an Iowa-specific one. This gives Iowa a narrowing advantage in long-run workforce replenishment, but one that is insufficient on its own to sustain its population over the long term.

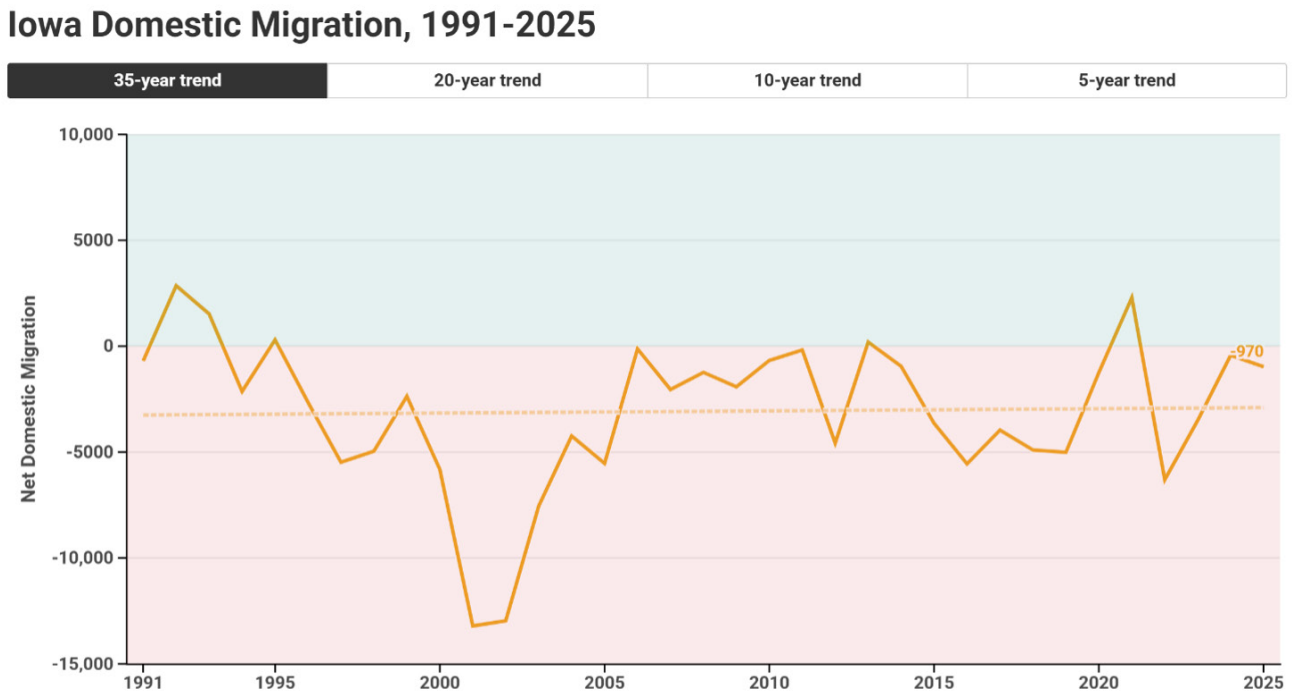
That distinction matters because an advantage in fertility rates only translates into economic strength if a state also remains competitive in attracting and retaining residents. A state with weak replacement rates can still grow its workforce and economy by attracting large inflows of migrants, while a state with relatively stronger fertility can still fall behind if it consistently loses working-age residents. Conversely, strong migration inflows could compensate for low fertility, but strong fertility alone may not offset sustained migration losses. For decades, strong net births provided Iowa with a stable source of workforce continuity. As that margin erodes, Iowa's population trajectory becomes more dependent on migration to offset aging and sustain labor force growth. Unlike net births, domestic migration has remained persistently negative for much of the past three decades, and the most recent data show no sustained reversal. The following section examines Iowa's domestic migration trends in detail.

Net domestic migration remained negative

Domestic migration reflects the movement of residents between states and serves as a barometer of relative economic competitiveness. Natural population growth changes slowly as age structure and birth-death patterns evolve, whereas domestic migration adjusts more quickly as residents move between states. Persistent outflows may signal that residents perceive greater economic opportunity elsewhere. Over time, sustained domestic losses can erode economic growth. Indeed, CSI Iowa has published numerous studies that confirm this trend of domestic outmigration, especially among young adults.[10]

In Iowa, domestic migration has remained a persistently lagging feature of Iowa's population trends over the past three decades. While year-to-year movements fluctuate with economic cycles and regional labor market conditions, the long-term pattern shows more residents leaving Iowa for other states than relocating into Iowa. Figure 5 visualizes net domestic migration flows since 1991 alongside various trendlines depending on the selected period. The 35-year trend line indicates an average annual net domestic outflow of roughly 2,900 residents, suggesting this migration dynamic is structurally constant.

FIGURE 5.



Note: The dotted line denotes the trendline for the selected timeframe.
Source: U.S. Census Bureau

In 2025, Iowa recorded a net domestic migration loss of 970 residents. This is an increase from 427 lost residents in 2024. While still negative, net outmigration for 2025 came in significantly lower than the long-term trend. The data represents an improvement compared to larger outflows observed during parts of the 2010s and early 2020s. The largest losses occurred in the early 2000s, when net domestic outmigration exceeded 13,000 residents in both 2001 and 2002. These losses gradually moderated in subsequent years but continued to trend negatively overall.

When domestic outflows occur alongside declining natural population growth, maintaining overall population stability increasingly depends on foreign migration. Foreign migration has historically provided an offset to domestic outflows and net births, often serving as the secondary contributor to population growth. In the post-pandemic period, however, foreign migration has become the leading contributor to population growth. The following section examines long-term trends in net foreign migration and the economic impacts of a migration slowdown.

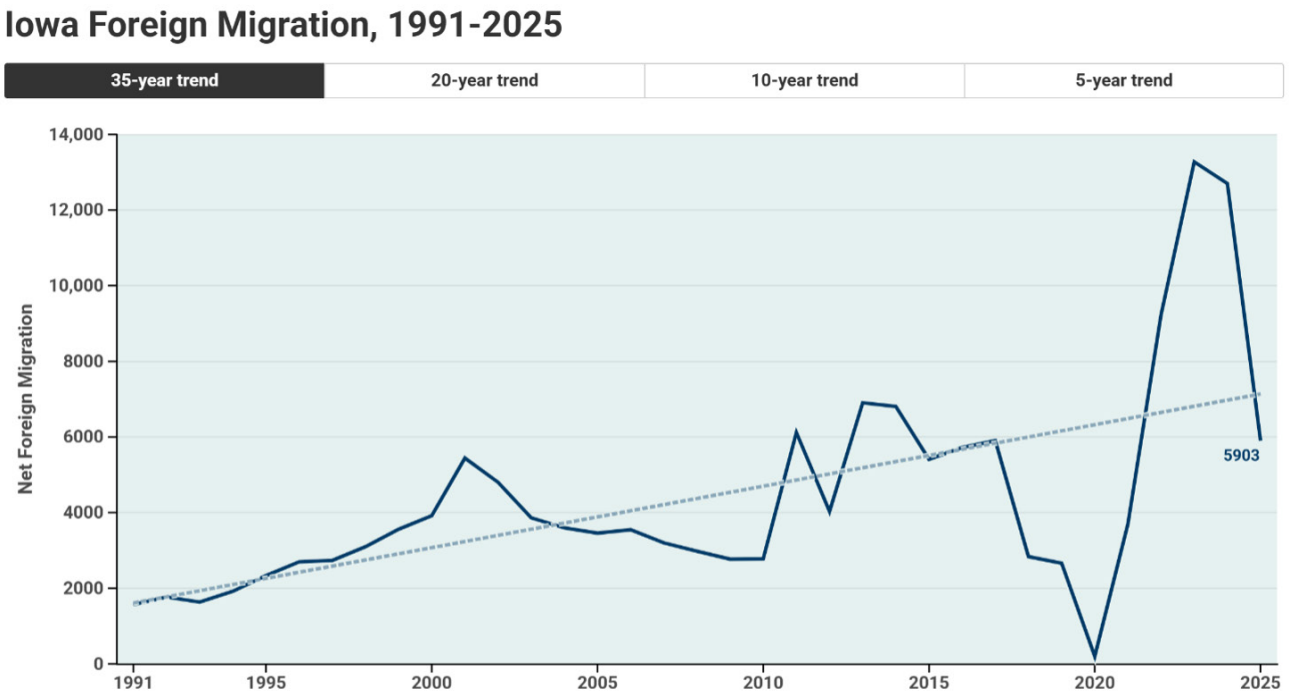
Foreign migration experienced major slowdown

Foreign migration plays a significant role in population and economic growth for Iowa. Unlike natural population growth, which requires decades to translate births into workforce participants, international migration provides immediate additions to labor supply. This makes foreign migration particularly influential during periods when domestic migration remains negative, and fertility rates fall below replacement. In this environment, international inflows can function as the primary means of demographic growth.

Nationally, foreign migration surged in the years immediately following the pandemic as visa processing resumed and border flows increased. This surge contributed to record levels of international inflows into many states from 2022 through 2024. Though immigration flows remains above pre-pandemic levels, the most recent Census population estimates indicate immigration slowed considerably in 2025. Figure 10 in the appendix visualizes these trends at the national level.

Iowa followed a similar trajectory but with greater volatility than the broader U.S. Foreign migration into the state reached historic highs in recent years, peaking at 13,275 residents in 2023. It remained elevated at 12,701 in 2024. These gains temporarily helped offset persistent domestic migration losses and weakening natural population growth. In 2025, however, foreign migration fell sharply to 5,903 residents, representing a 53.5% decline from the prior year. This drop reversed much of the short-term migration recovery observed following the pandemic. Figure 6 visualizes these trends in foreign migration since 1991.

FIGURE 6.



Note: The dotted line denotes the trendline for the selected timeframe.
Source: U.S. Census Bureau

Despite long-term upward trends in foreign migration since the early 1990s, recent data highlights the volatility of international inflows. The 35-year trend indicates foreign migration into Iowa has generally expanded over time, rising from fewer than 2,000 residents annually in the early 1990s to sustained inflows exceeding 5,000 in many recent years. However, the abrupt decline in 2025 demonstrates that foreign migration, while increasingly important to Iowa's demographic stability, remains subject to sudden fluctuations based on federal immigration policy.

The reduction in foreign migration carries measurable economic consequences because international migrants disproportionately contribute to workforce growth, population expansion, and consumer demand. Table 1 estimates the economic activity associated with the 2025 foreign migration slowdown. In its February 2025 report, CSI modeled the hypothetical economic impact of a reduction in immigration from 2025 through 2028. To demonstrate the full economic impact of foreign migration, the first scenario assumed a 100% reduction in immigration from 2025 through 2028 relative to the REMI baseline.[11] The second assumed a 63% reduction based findings from the CATO Institute about the impact of federal immigration policies.[12] The latest Census Bureau estimate of 5,903 net migrants reflects an actual 75.9% decline in immigration for 2025 relative to the REMI baseline—exceeding the 63% reduction assumed in last year's report. To determine the most up-to-date economic impact based on the latest actual data and best current assumptions, the following table assumes a 75.9% decline in foreign migration relative to the baseline each year from 2025 through 2028.

TABLE 1. ECONOMIC IMPACT OF THE SHARP DECLINE IN FOREIGN MIGRATION IN IOWA, 2025-2028

CSI New Estimate - Latest Data – 75.9% Decline				
Outputs	2025	2026	2027	2028
Total Employment	-2,355	-3,257	-3,243	-3,165
Population	-15,463	-22,874	-24,722	-26,273
Labor Force	-8,546	-12,553	-13,343	-13,882
GDP (millions)	-$231	-$329	-$321	-$299
CSI Initial Estimate - Feb. 2025 – 63.0% Decline				
Outputs	2025	2026	2027	2028
Total Employment	-1,929	-2,635	-2,599	-2,523
Population	-12,688	-18,605	-19,908	-21,001
Labor Force	-6,999	-10,201	-10,754	-11,114
GDP (millions)	-$202	-$280	-$281	-$278
Difference – New Estimate Less Initial Estimate				
Outputs	2025	2026	2027	2028
Total Employment	-426	-622	-644	-642
Population	-2,775	-4,269	-4,814	-5,272
Labor Force	-1,547	-2,352	-2,589	-2,768
GDP (millions)	-$29	-$49	-$40	-$21

Note: CSI's New Estimate assumes a 75.9% decline in foreign migration. Outputs reflect the difference between the simulation and REMI's baseline.
Source: REMI, CSI Analysis

The projected population figures illustrate the scale of Iowa's dependence on foreign migration. Under the initial February 2025 estimate, which assumed a 63.0% decline in foreign migration, Iowa was projected to see 12,688 fewer residents added in 2025 than the REMI baseline, growing to a cumulative gap of 21,001 by 2028. The latest estimate, reflecting a steeper 75.9% decline, revises those figures upward. Iowa added 15,463 fewer residents in 2025 than expected, with that gap widening to 26,273 by 2028. These population shortfalls translate directly into a smaller labor force and reduced economic output.

The initial estimate projected 6,999 fewer workers entering the labor force in 2025 than the baseline, reaching 11,114 fewer by 2028. The updated estimate worsens that outlook, with 8,546 fewer workers in 2025 and 13,882 fewer by 2028.

The downstream effect on gross domestic product follows the same pattern. Where the February 2025 estimate implied GDP falling approximately $192 million short of baseline in 2025, the updated estimate places that figure at $231 million, growing to $299 million by 2028. Foreign migration flows shape not only population totals but the scale of Iowa's labor market and long-run economic capacity. The widening gap between the two estimates across the forecast horizon reflects a migration slowdown more severe than anticipated and highlights how heavily Iowa's economic trajectory has come to rest on the continued flow of foreign migrants.

While population change is shaped by both the direction and magnitude of each component, it also matters how Iowa performs relative to other states competing for residents and workforce growth. Iowa may experience low net births and negative net domestic migration while still ranking comparatively well if peer states perform worse. Conversely, modest or stable year-over-year changes in Iowa's population may appear favorable in isolation but still reflect underperformance if other states are growing more rapidly. The following section evaluates Iowa's population trends across natural growth and migration within both national and regional competitive contexts.

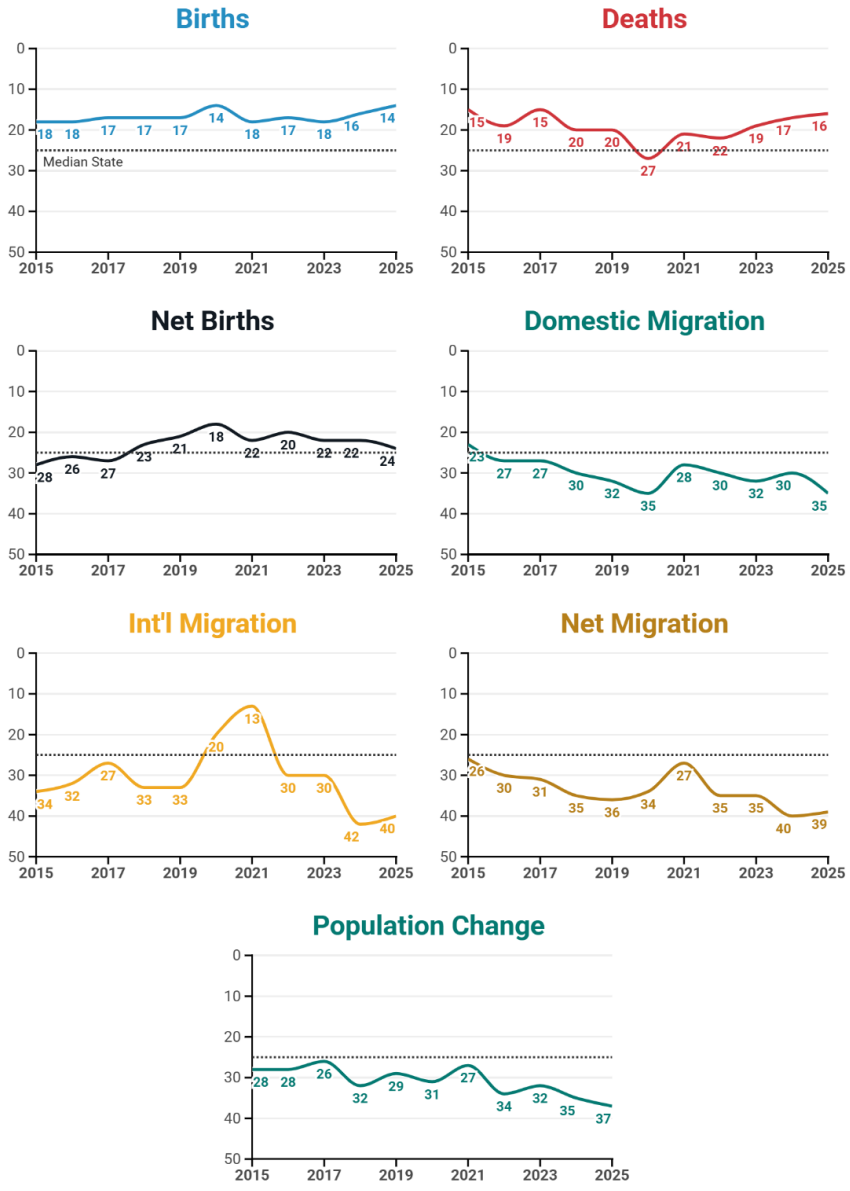
IOWA POPULATION COMPONENT RANKINGS REMAIN AT HISTORIC LOWS

In absolute terms, Iowa's population increased in 2025, but the underlying components of that growth showed broad-based weakening. Net births continued to slow, domestic migration remained negative, and overall gains relied disproportionately on migration flows that have proven volatile in recent years. These trends signal that the nominal population growth metric could overstate Iowa's demographic momentum. When viewed in a national context, Iowa's competitive position becomes more clear-cut, though performance varies by measure.

Iowa ranks comparatively well on fertility and births, but poorly on mortality and indicators tied to labor mobility and migration. States with weaker natural replacement rates can offset those disadvantages by attracting residents from elsewhere, while states with stronger birth dynamics can still fall behind if they fail to compete for mobile workers. Figure 7 shows that, despite modest short-term improvements in select indicators,

FIGURE 7.

Per-Capita Population Components, Iowa's Rank in the United States, 2015-2025



Source: U.S. Census Bureau, CSI Analysis

Iowa's relative demographic competitiveness remains constrained when benchmarked against other states.

In 2025, Iowa's birth rate per capita improved modestly, rising to 14th nationally after hovering in the high teens for much of the past decade. This places Iowa among the stronger-performing states on fertility relative to peers and suggests declining natural population growth is driven less by weak birth trends and more by other demographic pressures, like mortality. Iowa's death rate ranked 16th highest nationally in 2025—a modest weakening from pandemic-era lows of 27th highest. While deaths rose in nominal terms during the pandemic, Iowa's ranking temporarily improved as mortality per capita rose more sharply elsewhere. That relative advantage faded in 2025 as deaths per capita increased again, pulling Iowa's net births per capita ranking down to 24th nationally—near the national median and well below its pre-pandemic peak of 18th best.

Migration rankings highlight Iowa's most persistent demographic weakness. Net domestic migration has remained below the national median since at least 2016, falling to 35th nationally in 2025—the lowest rank in the series, tied with 2020. Although nominal domestic outflows have eased, Iowa continues to lose residents at a larger per capita rate than most states, constraining population momentum and workforce growth. International migration deteriorated more sharply. After briefly improving to 13th nationally during the post-pandemic surge in 2021, Iowa fell to 40th in 2025 as immigration flows normalized nationwide. As a result, Iowa's overall net migration ranking declined to 39th in 2025.

Iowa continues to perform comparatively well in birth rates, but its weak migration flows and elevated mortality limit overall population growth potential. As natural population growth weakens nationwide, migration has become the primary driver of workforce and population expansion across most states. Iowa's consistently low rankings in per-capita migration suggest long-term population growth could remain a hinderance to the state's ability to attract and retain residents relative to national competitors. However, national rankings can mask how Iowa performs relative to the states it most directly competes with for residents, workers, and economic investment.

Examining Iowa's demographic performance within a regional context provides additional insight into the state's competitive position. States in the Midwest often share similar economic structures, labor markets, industrial compositions, and demographic aging patterns. As a result, regional comparisons offer a more direct benchmark for evaluating whether Iowa's population trends reflect broader regional pressures or state-specific challenges. If Iowa's demographic performance lags neighboring states facing similar structural conditions, it may signal relative weaknesses in workforce attraction, economic opportunity, or migration competitiveness. The following section evaluates how Iowa's population components compare across Midwestern states.

Iowa's rank changes within the Midwest were less favorable

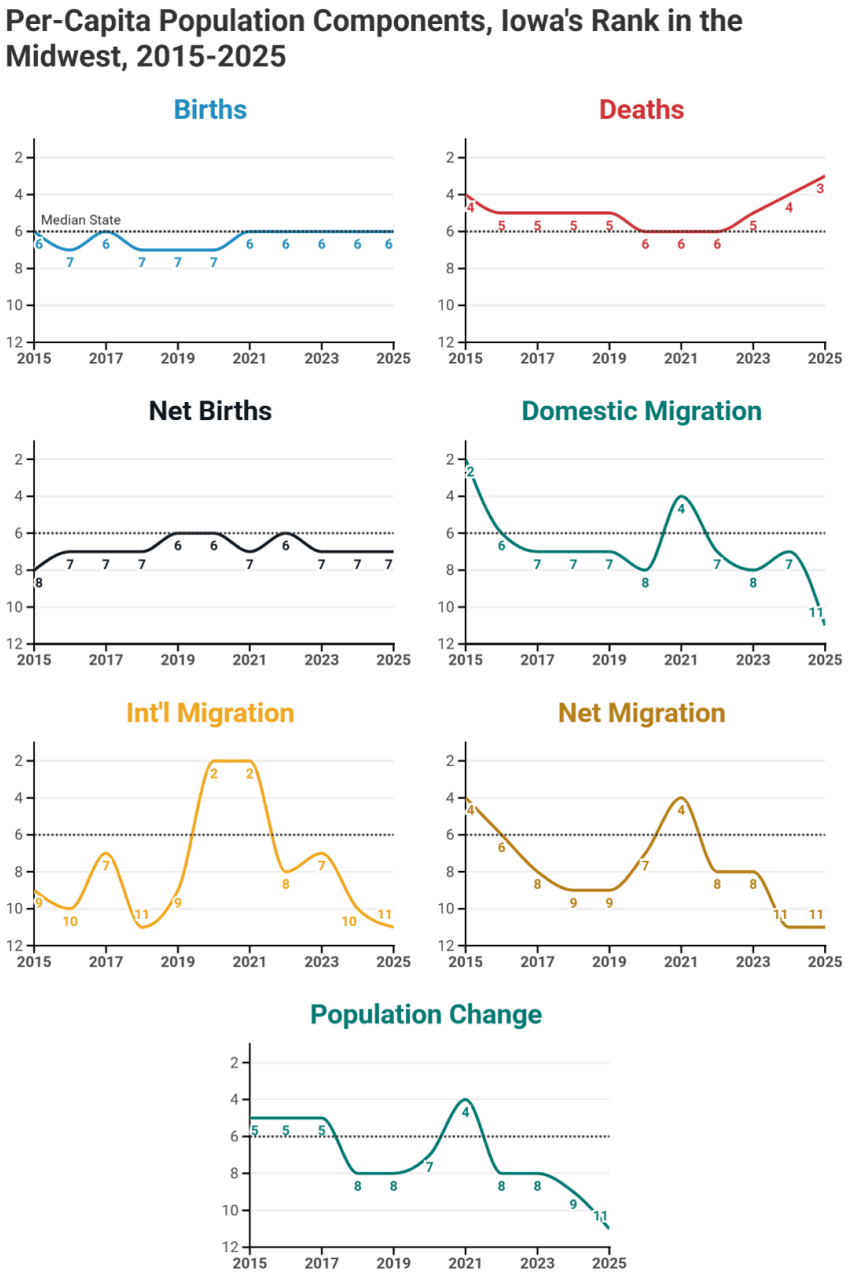
Within the Midwest, Iowa's demographic position has weakened more clearly than national rankings alone suggest. While some population components have remained relatively stable, Iowa's relative standing across the region has deteriorated across several key measures tied to population momentum and labor force growth. Figure 8 places Iowa's demographic performance in direct comparison with neighboring states that share similar environments.[13]

Iowa's birth rate rankings within the Midwest have remained largely stable over the past decade. The state has consistently placed near the regional median, ranking sixth out of 12 midwestern states in 2025. This indicates that Iowa's fertility trends are broadly aligned with neighboring states rather than representing a distinct competitive advantage or disadvantage. Figure 9 reinforces this pattern, showing the Midwest as a region with relatively high fertility rates overall. Mortality trends diverge more clearly. Iowa's death rate ranked third highest in the Midwest in 2025, reflecting persistently higher mortality pressures than most neighboring states. Since 2022, Iowa's ranking has gradually worsened, moving upward from the regional median. As a result, Iowa's net births ranking remained slightly below the Midwest median, placing seventh in 2025.

Migration metrics again represent Iowa's most pronounced regional weakness. Domestic migration has generally tracked slightly below the Midwest median over the past decade, but its relative position deteriorated sharply in the most recent year. Iowa's ranking fell from seventh lowest in 2024 to 11th in 2025, placing second-to-last among Midwestern states. This decline occurred even as nominal domestic losses narrowed toward breakeven, indicating that neighboring states experienced stronger resident retention or net inflows during the same period.

International migration followed a similar trajectory. Iowa ranked among the strongest states in the region during the early 2020s immigration surge, reaching second at its peak. However, its position fell to 10th in 2024 despite peaking nominal flows. The state declined further to 11th in 2025 as foreign migration slowed nationwide. Taken together, Iowa's overall net migration ranking within the Midwest stood at 11th in 2025, unchanged from the prior year.

FIGURE 8.



Source: U.S. Census Bureau, CSI Analysis

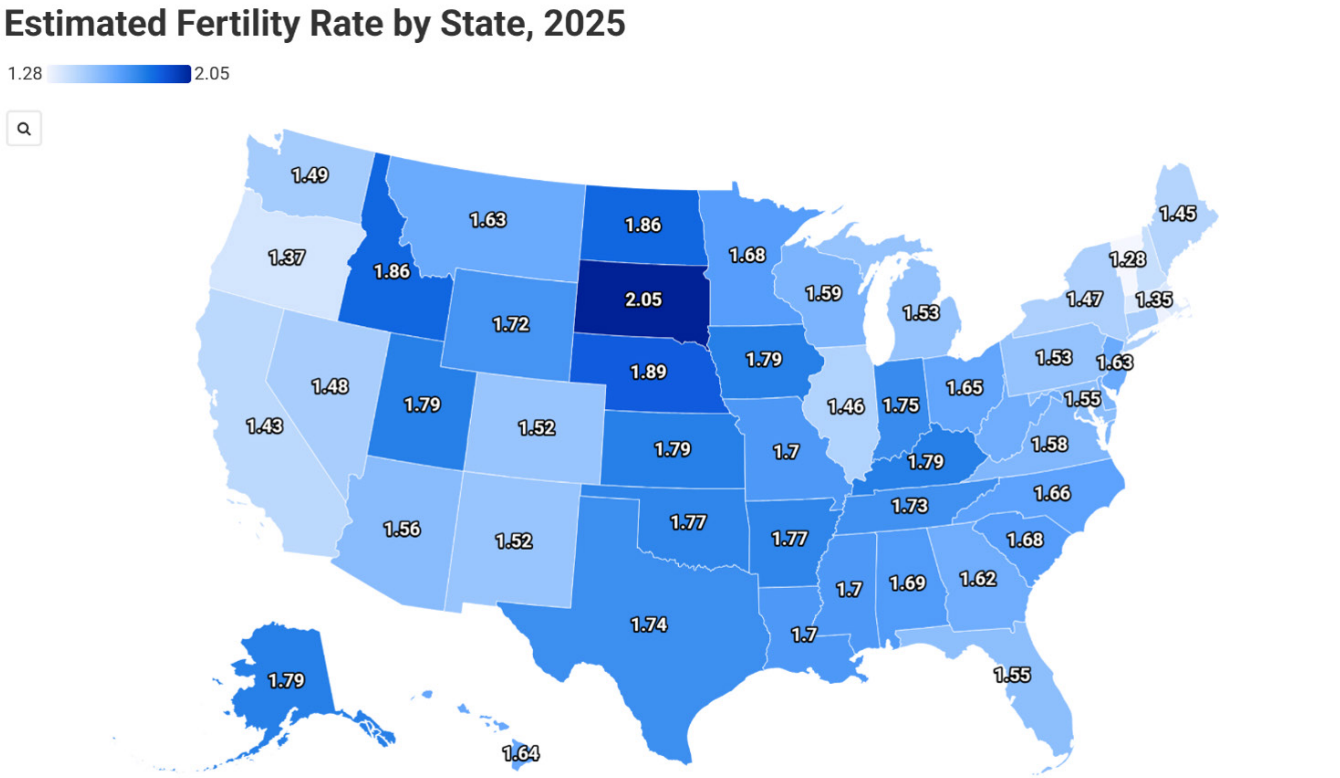
BOTTOM LINE

Iowa's population continues to expand, but the foundations supporting that growth are weakening. Natural population growth has declined significantly, domestic migration remains persistently negative, and recent volatility in foreign migration highlights Iowa's increasing reliance on immigrants to sustain workforce and economic growth. Compared to national and regional peers, Iowa's demographic competitiveness has deteriorated, particularly in migration-driven population expansion. Iowa's weaker performance in both domestic and international migration increases the risk of slower workforce growth and reduced economic expansion compared with neighboring states facing similar conditions.

These demographic shifts carry measurable economic consequences. Population changes directly affect workforce availability, job creation, consumer spending, and statewide economic output. Population declines tied to migration slowdowns can reduce economic activity by hundreds of millions of dollars, whereas improved demographic competitiveness could generate significant economic gains. Without sustained improvements in migration attraction or stabilization in natural population growth, Iowa's labor force expansion and overall economic capacity are likely to lag competing states.

APPENDIX

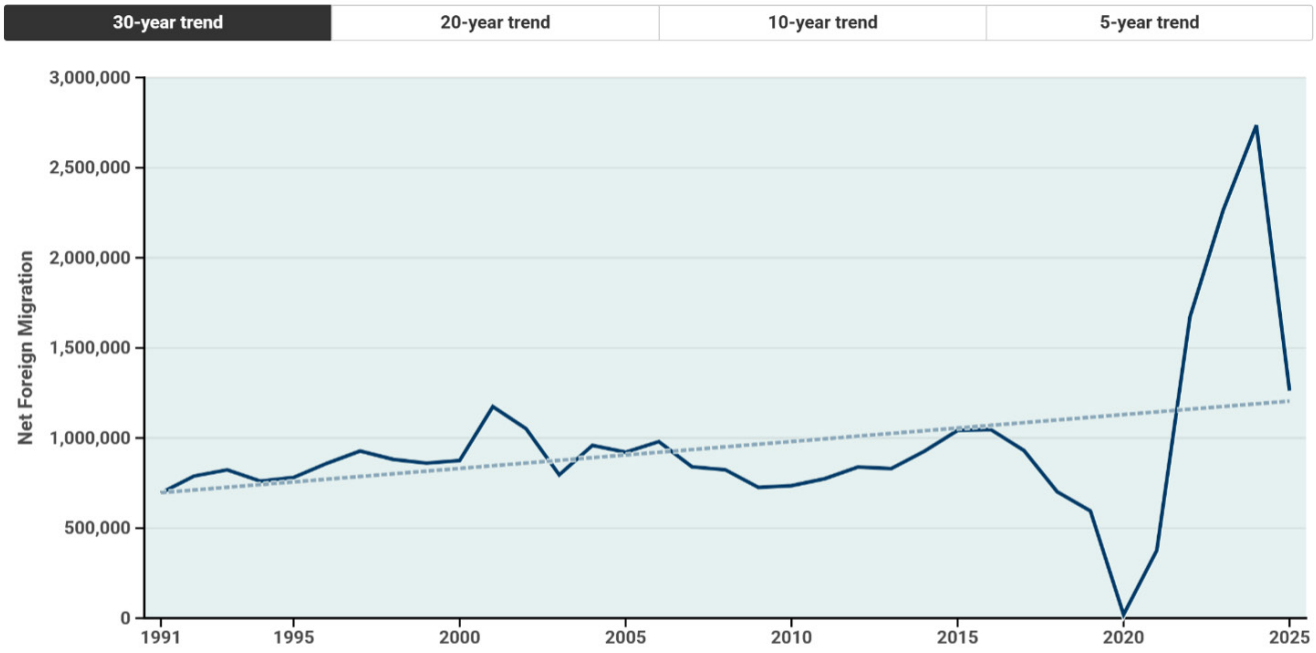
FIGURE 9.



Source: U.S. Census Bureau, Center for Disease Control, CSI Analysis

FIGURE 10.

United States Net Foreign Migration, 1991-2025



Note: The dotted line denotes the trendline for the selected timeframe.
Source: U.S. Census Bureau

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8. Andrzej Wieciorkowski, "Iowa's Future: The Impact of an Aging Workforce," Common Sense Institute Iowa, December 6, 2024, https://www.commonsenseinstituteus.org/iowa/research/workforce/iowas-future-the-impact-of-an-aging-workforce.
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13. The states used in Figure 8 include Illinois, Indiana, Iowa, Kansas, Michigan, Minnesota, Missouri, Nebraska, North Dakota, Ohio, South Dakota, and Wisconsin.