



THE WINSTON GROUP

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U.S. Innovation And Competitiveness

Addressing The Talent Gap

Public Opinion Research Sponsored by Business Roundtable
with Support from Compete America



Business Roundtable

TAPPING AMERICA'S POTENTIAL | 2015

Objectives & Methods

◆ Objectives

- Do Americans perceive a decline in U.S. innovation and competitiveness?
- Do they agree that the solution involves three prongs:
 - Increasing the pipeline of U.S. students in science, technology, engineering, and math (STEM)
 - Attracting and retaining the world's best and brightest students to study and work in these fields in the U.S.
 - Bolstering funding for basic research

◆ Methods

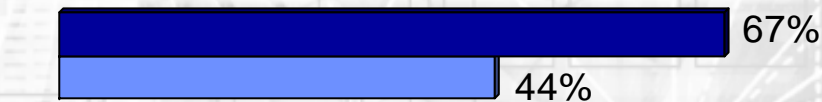
- Four focus groups conducted September – October 2005 among parents of high school/college students in Raleigh, NC and Philadelphia, PA; educators in Raleigh, NC; high-level opinion leaders in Washington, DC
- Three national surveys conducted November – December 2005:
 - 804 voters (plus oversample of 73 Hispanics); November 19 – 22
 - 1,000 voters; December 28 – 29
 - 250 opinion leaders in government, business, nonprofits; November 16 – December 5



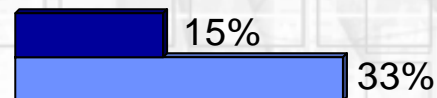
U.S. Seen As Top Economic Power

Strongest Economic Power Today

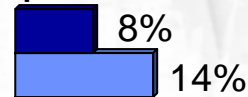
United States



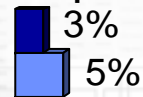
China



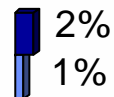
Japan



European Union



India



■ Opinion Leaders
■ Voters



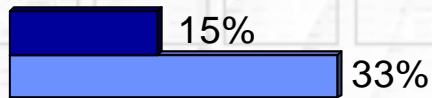
U.S. Seen As Top Economic Power But Expected To Drop To Second Place

Strongest Economic Power Today

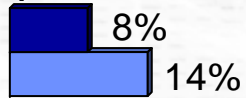
United States



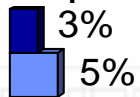
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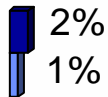
Japan



European Union



India



Opinion Leaders
Voters

Strongest Economic Power in 20-30 Years

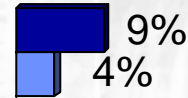
China



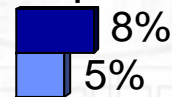
United States



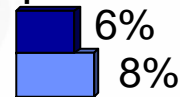
India



European Union



Japan



Opinion Leaders
Voters

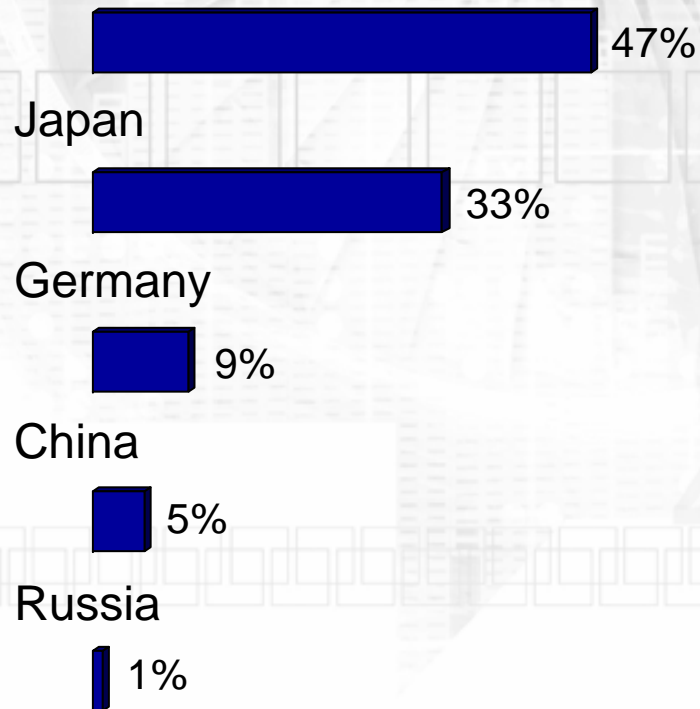


In 1997, America's Economic Future Looked Brighter

Adults Nationwide/May 1997

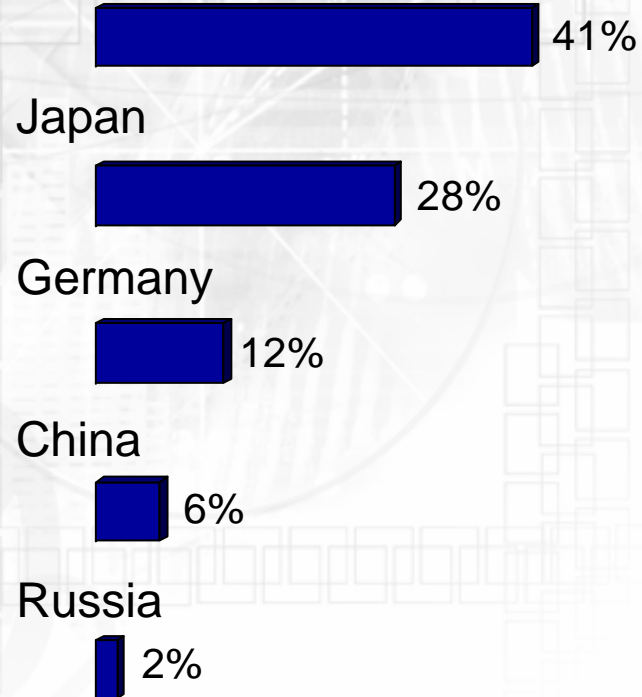
■ Country with strongest economy today

United States



■ Country with strongest economy in 10 years

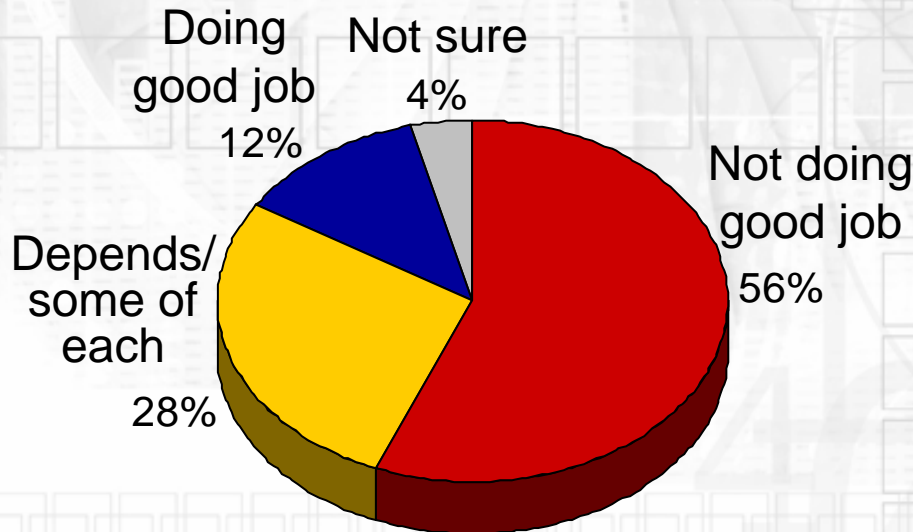
United States



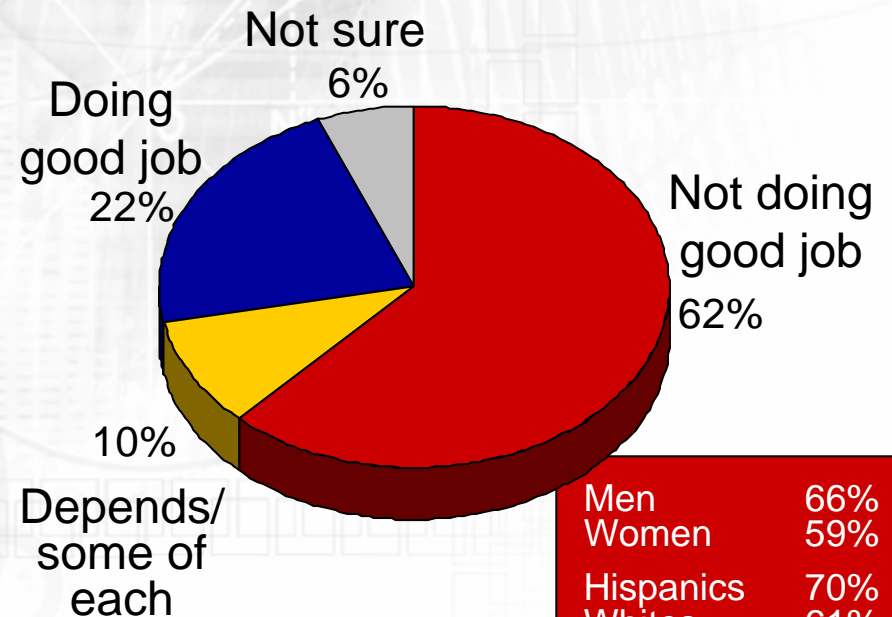
Serious Problems Lie Ahead: *Americans Say High Schools Failing*

Are public high schools adequately preparing graduates to meet the demands they will face in college and the work world?

Opinion Leaders



Voters



Men	66%
Women	59%
Hispanics	70%
Whites	61%
Afr Amer	62%
Parents	58%

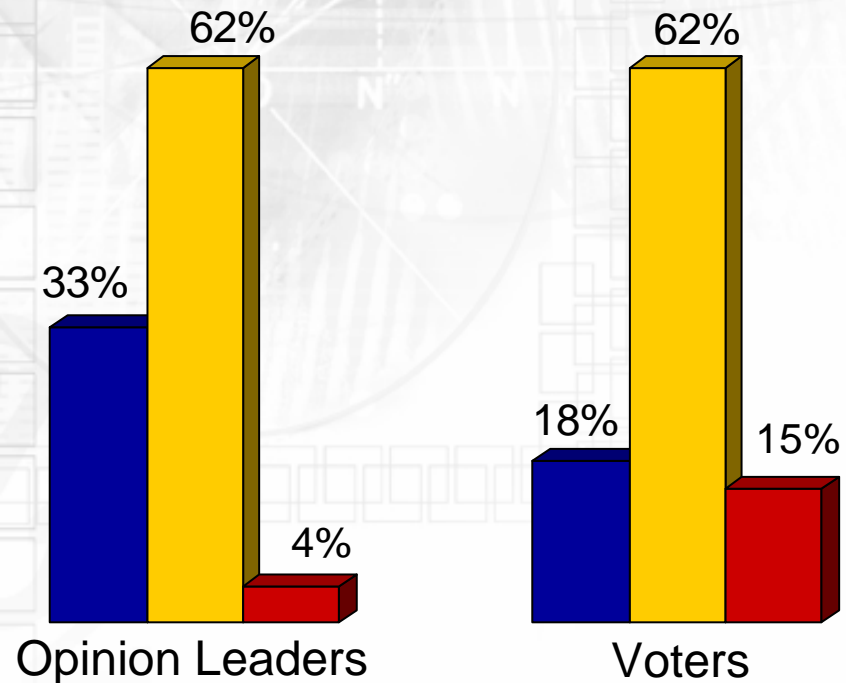
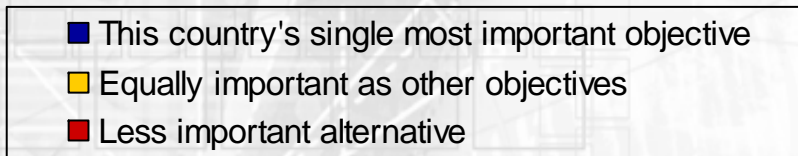


Americans Support Emphasis On STEM To Bolster U.S. Position

View of increasing U.S. innovation/competitiveness through STEM

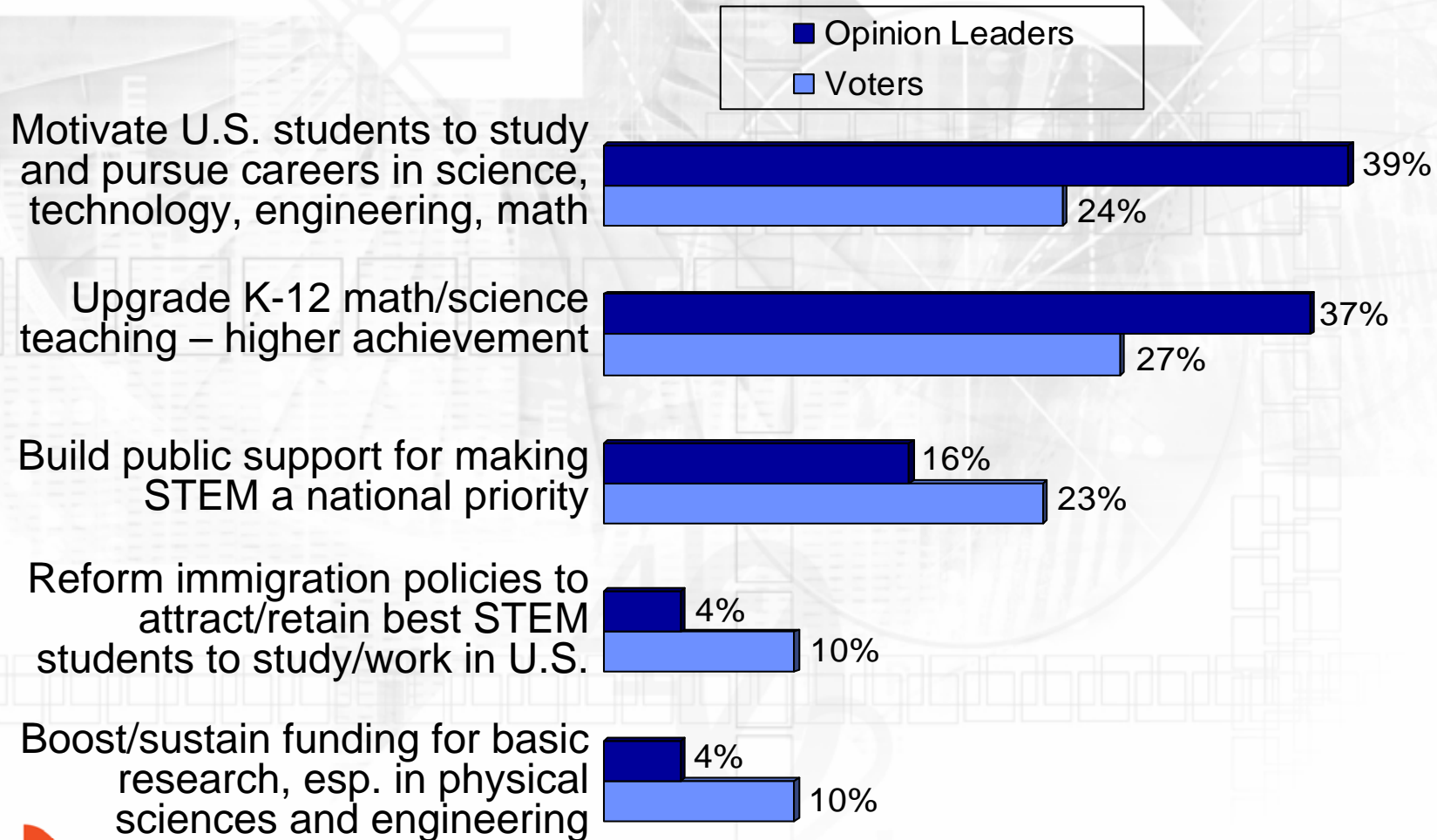
“[As a response to] the challenge of increasing innovation and competitive-ness in today’s global economy, some recommend improving America’s science and technology capabilities by significantly increasing the number of highly educated students and workers in science, technology, engineering, and math. Compared with the other challenges facing the U.S. – such as national security, transportation, health care, energy, and the legal system – is this effort to increase innovation and competitiveness. . . .?”

86% of voters believe that we must increase the number of workers with a background in science and math or our ability to compete in the world economy will be severely diminished.



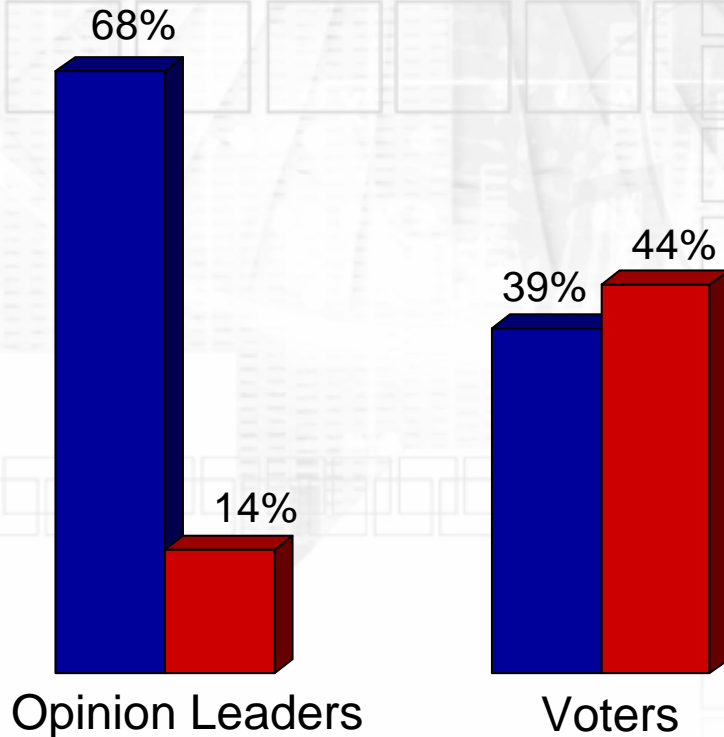
Improve Education At Home First

Single most important element of TAP recommendations



Disparity On Best Strategy For Competing In A Global Economy

- Get smarter on issues like education, emphasize science/technology, immigration policy to retain highly educated foreign-born students/workers
- Get tougher on issues like jobs going overseas, adopt an immigration policy with stricter limits on hiring foreign-born workers



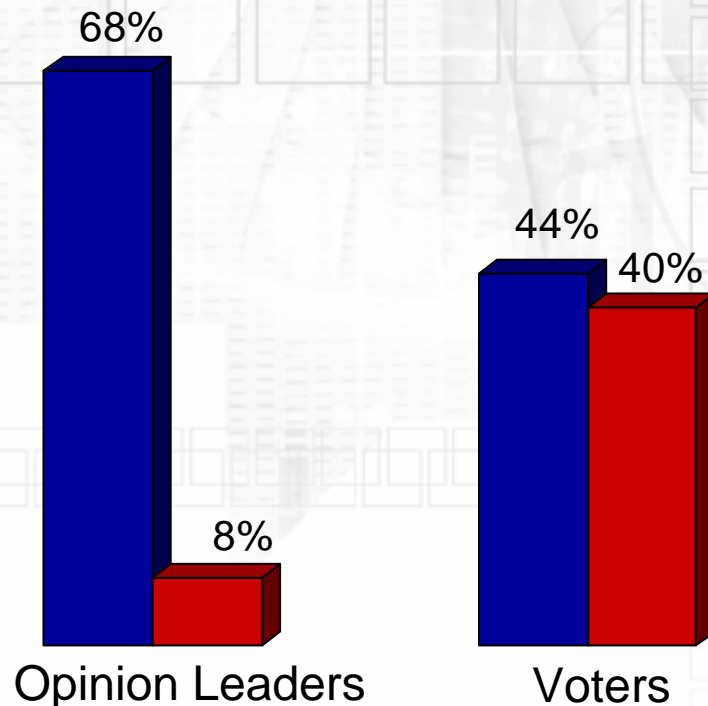
<u>Voters</u>	<u>Smarter</u>	<u>Tougher</u>
Age 65/over	27%	54%
High school/less educ	28%	55%
Post-graduate educ	56%	28%
Liberal Democrats	56%	29%
Non-liberal Dems	38%	45%
Non-conservative GOPs	32%	56%
Conservative GOPs	37%	48%
Hispanics	55%	30%
Immigrant family	41%	39%



Public Divided On Value of Highly Educated Foreign-Born Workers

Overall view of highly educated foreign-born workers in U.S.

- Positive: critical to American competitiveness, have little to do with U.S. larger concerns over border security/undocumented workers
- Negative: take jobs from U.S. citizens, raise questions about America's larger concerns over border security/undocumented workers

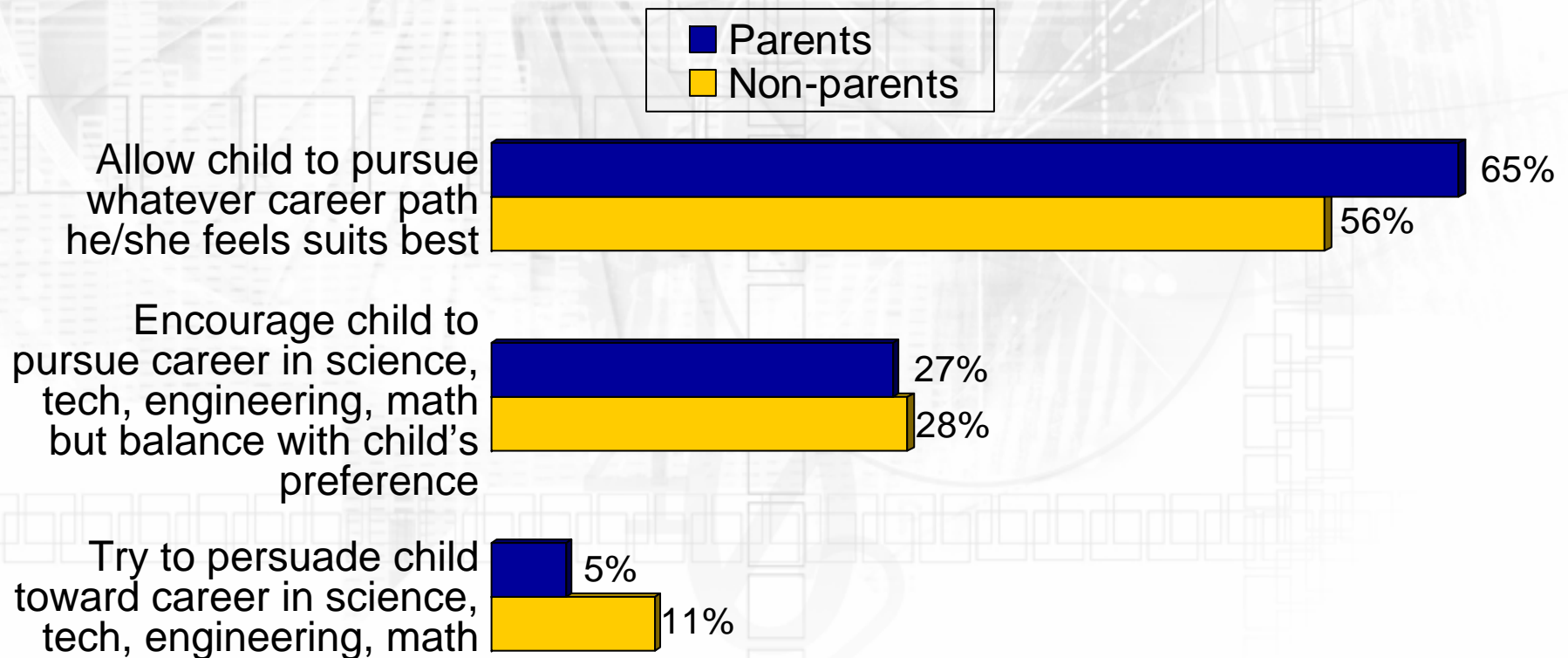


<u>Voters</u>	<u>Positive</u>	<u>Negative</u>
Professionals	58%	30%
White collars	50%	34%
Blue collars	34%	51%
Retirees	34%	46%
Whites	46%	39%
African Americans	18%	63%
Hispanics	57%	30%
Liberal Democrats	51%	35%
Non-liberal Dems	40%	48%
Immigrant family	53%	31%



Americans Reluctant To Influence Children's Career Choices

Jobs requiring technical training – in science, technology, engineering, and math – are growing five times faster than other occupations. Which approach would you take with your child/a child you're close to about career choices?



Strong Leadership Critical To Addressing Talent Gap

- ◆ Americans recognize that the U.S. risks falling behind.
- ◆ Increased emphasis on STEM education receives strong support, but numerous obstacles remain:
 - ◆ Most Americans fail to naturally link education, research, and immigration components of the initiative;
 - ◆ Voters are divided on the value of highly educated foreign-born workers as immigration is an increasingly emotional and intense issue for important political subgroups.
- ◆ Leadership also will be necessary to make careers in math and science attractive to young Americans, as young people are in the driver's seat in choosing a career.

