



PENN
SCHOEN
BERLAND

Newsweek



GLOBAL INNOVATION SURVEY

11.20.2009

METHODOLOGY:

4,800 adults across the US, China, Germany and the UK responded to an online questionnaire from September 28 to October 13.

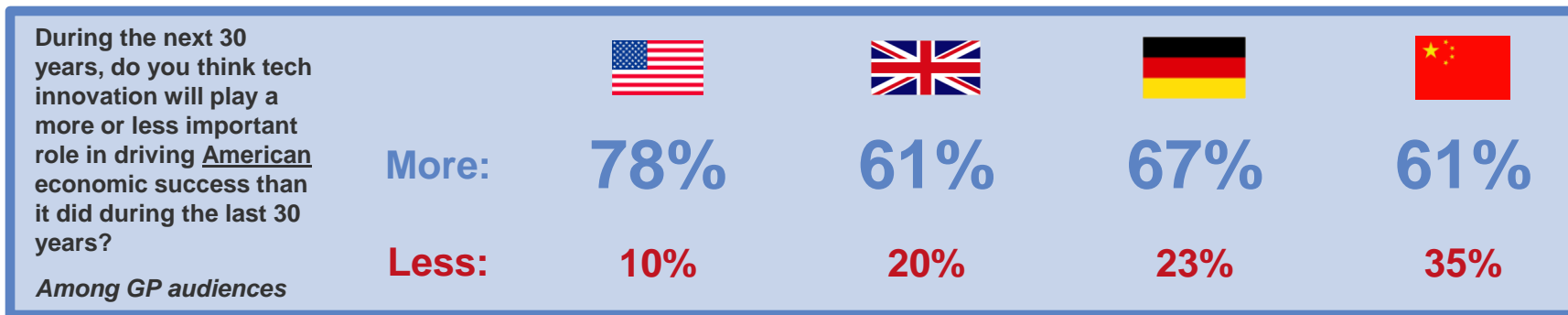
Margin of error is 3.10% in each country.

NEW YORK • WASHINGTON • DENVER • SEATTLE • LOS ANGELES • SAN FRANCISCO • AUSTIN • LONDON • HONG KONG • BEIJING • DUBAI

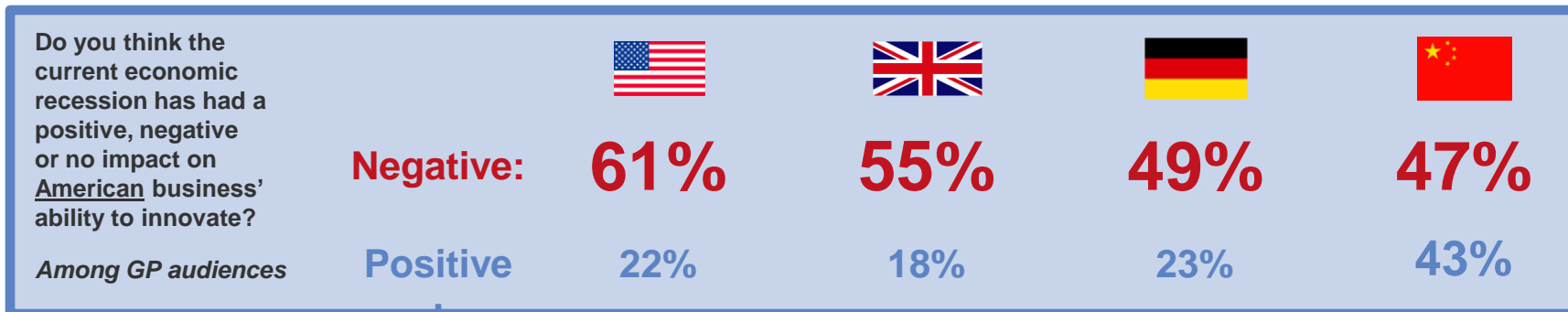
©PENN, SCHOEN & BERLAND ASSOCIATES, LLC.

MOST SAY INNOVATION IS MORE IMPORTANT THAN EVER, BUT WORRY ABOUT RECESSION'S IMPACT

Large majorities in every nation agree technological innovation is more important than ever to US economic success over the next 30 years



However, global consensus that the recession has had a negative impact on American businesses' ability to innovate



AMERICANS HAVE SIGNIFICANT DOUBTS ABOUT THEIR ABILITY TO STAY AHEAD

When thinking about today...

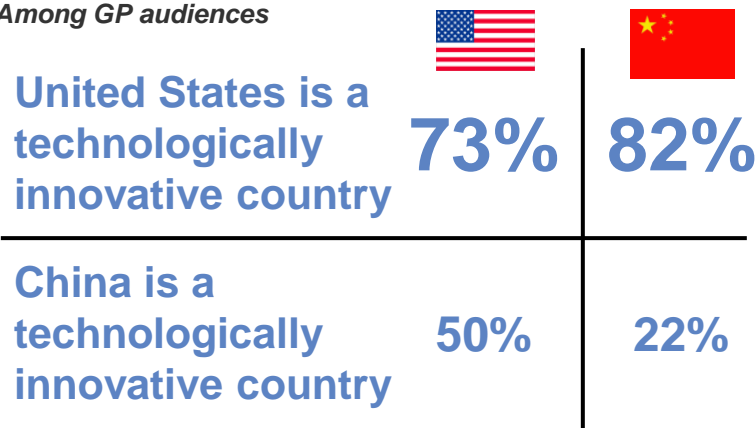
Audiences in both US and China give the US significantly more credit for being a technologically innovative country

But Americans also show signs of self-doubt:

- Americans give China much more credit than the Chinese give themselves (50% vs. 22%) on current innovation
- Americans are split on whether the US is staying ahead of or falling behind China (41% vs. 40%)

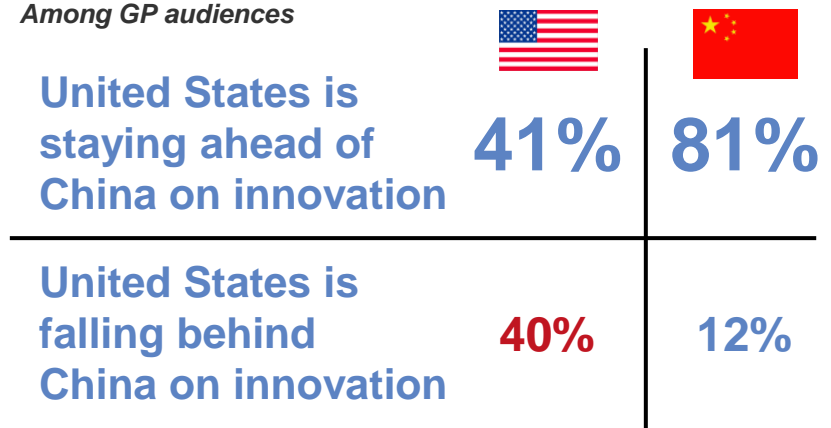
Do you think each of the following... is, used to be, has never been or is not yet but is becoming a technologically innovative country?

Among GP audiences



When it comes to technological innovation, do you think the United States is staying ahead or falling behind each of the following countries?

Among GP audiences



DOWN THE ROAD, AMERICANS REMAIN DOUBTFUL; CHINESE EXPECT TO OVERTAKE U.S.

When thinking about tomorrow...

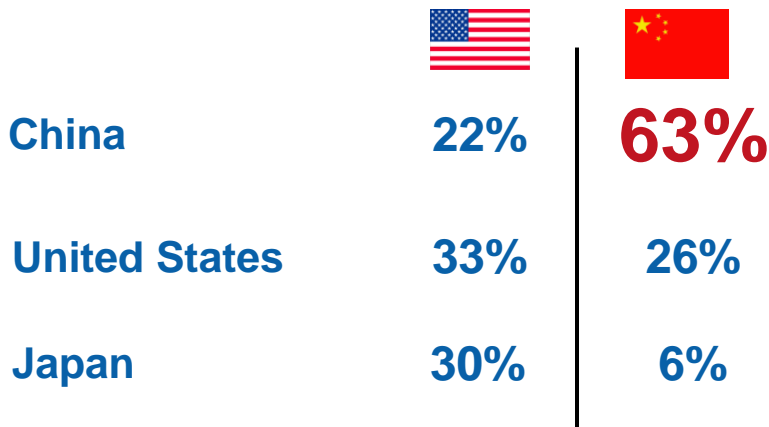
Only 1/3 of Americans say that the next society-changing innovation will come from the United States

Yet a majority of Chinese say their country is most likely to lead tech innovation during the next 30 years

- This Chinese optimism is particularly interesting in light of their own self-assessments today (only 22% think China is currently innovative) and the credit that they give to the US today (81% say US is ahead of China)

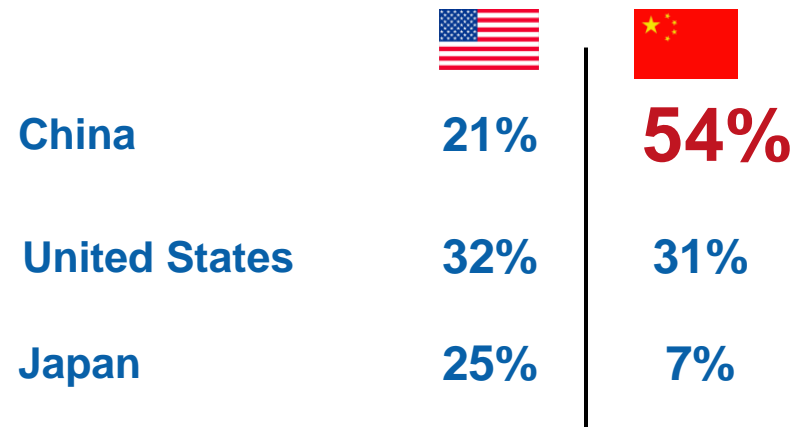
Which one of the following countries do you think will be the global leader in tech innovation during the next 30 years?

Among GP audiences



Which country do you think will develop the next big society-changing technological innovation

Among GP audiences

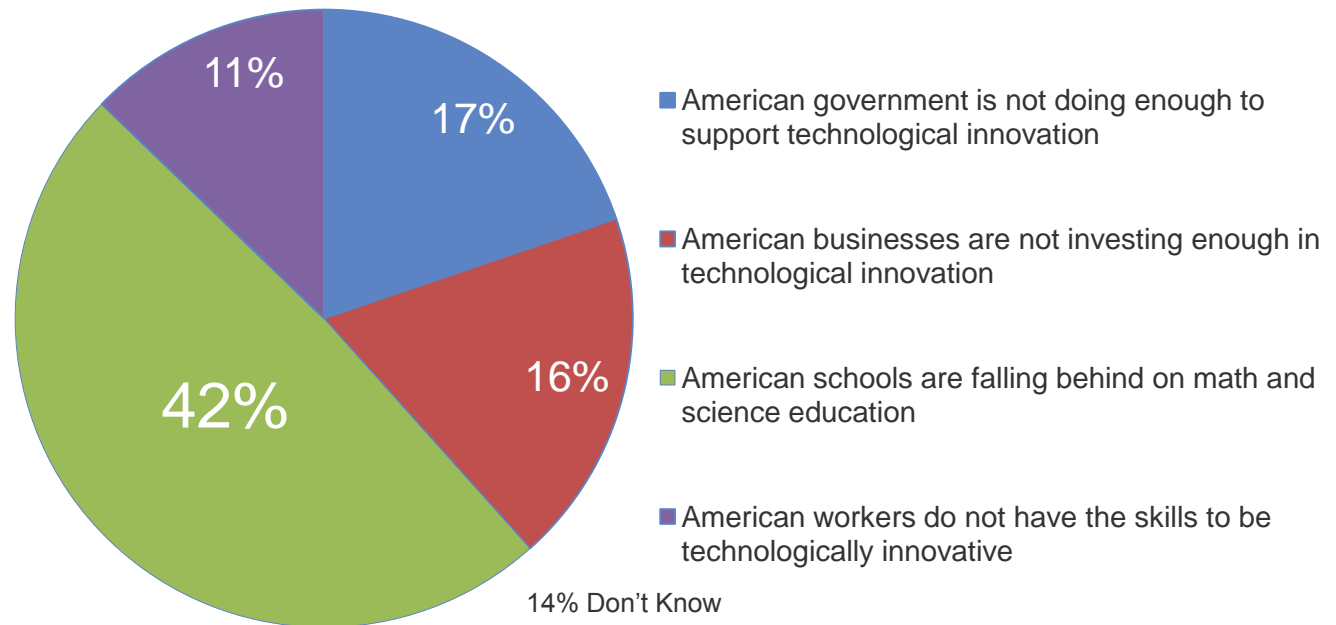


TO STAY AHEAD, AMERICANS SAY WE MUST REDUCE GAPS IN MATH & SCIENCE EDUCATION

Among Americans who think US is lagging at least one other nation on innovation, performance in math & science is seen as the biggest liability

If lagging: Which one of the following is most responsible for US falling behind other countries in technological innovation?

Among GP audience



82% of all Americans think that the US is behind other countries in the quality of its K-12 math and science education

MOST AMERICANS AGREE RESPONSIBILITY FOR DRIVING INNOVATION FALLS ON BUSINESSES

Americans and Europeans rank large corporations and the computer/electronics industry as most likely to develop the next big innovation

- Americans put slightly more faith in start-ups as likely source of innovation
- Europeans and Chinese are more likely to also look to universities
- Energy industry also ranks highly for innovation, esp. with Chinese

Which one of the following do you think will develop the next big society-changing tech innovation?

Large corporation

Small start-up

University or think tank

Government



Computer / Electronics

Energy

Health Care

Telecommunications

Large corporation

University or think tank

Small start-up

Government



Computer / Electronics

Energy

Telecommunications

Health Care

Large corporation

University or think tank

Small start-up

Government



Computer / Electronics

Energy

Telecommunications

Health Care

University or think tank

Large corporation

Small start-up

Government



Energy

Computers / Electronics

Telecommunications

Health Care



PENN
SCHOEN
BERLAND

FOR MORE INFORMATION, PLEASE CONTACT:

BETH LESTER

BLESTER@PS-B.COM

202-962-3042