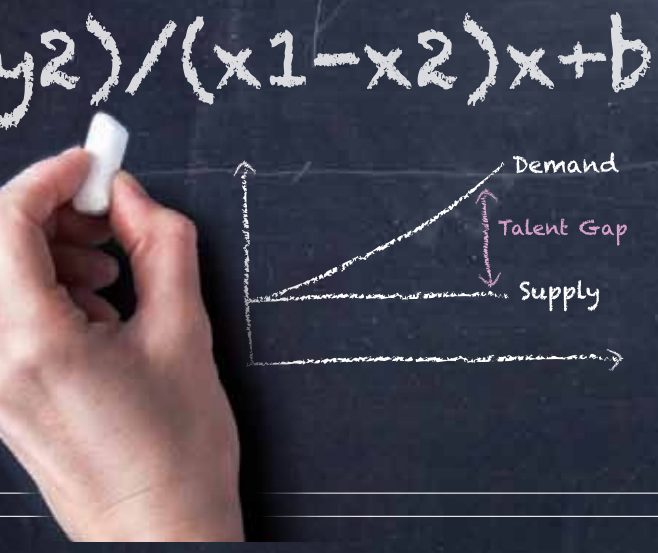
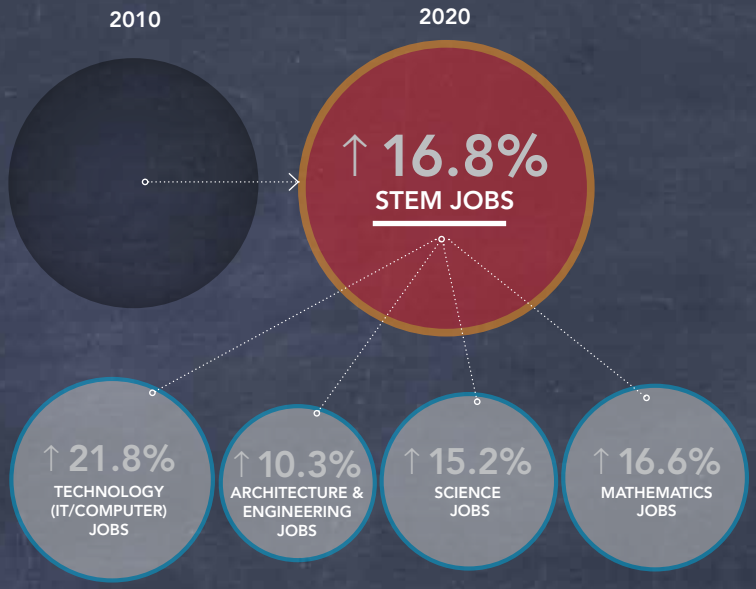
THE STEM TALENT GAP

SCIENCE TECHNOLOGY ENGINEERING MATHEMATICS

STEM workers in the U.S. are a part of an increasingly global economy of innovation. This new reality is fueling demand both in traditional STEM occupations and throughout other sectors across the economy that demand similar competencies. Couple this with the underrepresentation of growing worker populations and defection of STEM-capable workers into other careers and we are left with a significant talent gap that shows no signs of letting up.

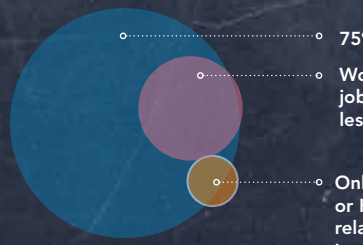


DEMAND FOR STEM PROFESSIONALS IS EXPECTED TO ADD MORE THAN ONE MILLION NEW STEM JOBS TO THE U.S. WORKFORCE



STEM WORKERS ARE TURNING TO FREE AGENCY:
BETWEEN 2009 – 2011, THE GROWTH OF SELF-EMPLOYED STEM WORKERS IN THE U.S. WAS NEARLY TWICE THE RATE OF GROWTH FOR ALL SELF-EMPLOYED WORKERS

POPULATION SHIFTS IN THE U.S. ARE TRANSLATING INTO MORE WOMEN AND MINORITIES ENTERING THE WORKFORCE, HOWEVER THESE GROWING WORKER POPULATIONS ARE SEVERELY UNDERREPRESENTED IN STEM FIELDS



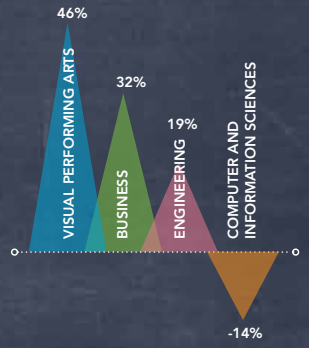
75% men

Women fill close to half of all jobs in the US, but they hold less than 25% of STEM jobs

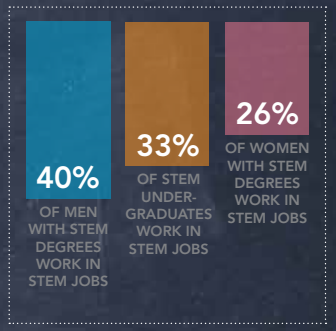
Only half as many non-Hispanic Black or Hispanic workers have STEM jobs relative to their overall representation in the U.S. workforce

THE NUMBER OF STEM BACHELOR DEGREES AWARDED IN THE U.S. HAS REMAINED RELATIVELY FLAT FOR THE PAST 15-20 YEARS.

Change in degrees awarded 2008/09 compared to 2001/02



EVEN THOUGH STEM CAREERS IN THE U.S. OFFER JOB SECURITY AND HIGH EARNINGS GRADUATES ARE DEFECTING FROM STEM JOBS

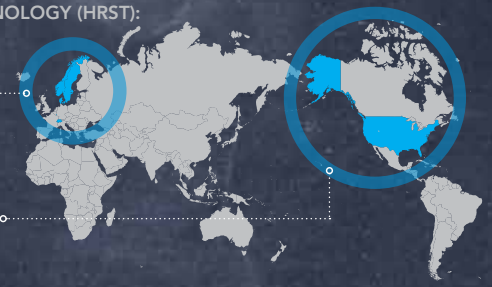


GLOBAL STEM CONCENTRATIONS

AS A PERCENTAGE OF EMPLOYMENT, THE FOLLOWING COUNTRIES HAVE THE HIGHEST SHARE OF HUMAN RESOURCES IN SCIENCE AND TECHNOLOGY (HRST):

LUXEMBOURG
SWEDEN
DENMARK
SWITZERLAND
NORWAY

THE U.S. (RANKED 12TH)



TOP 11 STEM OPPORTUNITY MARKETS

IN ADDITION TO HAVING STRONG CONCENTRATIONS AND LARGE VOLUMES OF STEM JOBS, THE FOLLOWING METRO AREAS ARE EXPECTED TO EXPERIENCE HIGHER RELATIVE STEM GROWTH RATES IN THE NEXT FIVE YEARS:

1. Atlanta-Sandy Springs-Marietta, GA
2. Baltimore-Towson, MD
3. Boston-Cambridge-Quincy, MA-NH
4. Dallas-Fort Worth-Arlington, TX
5. Houston-Sugar Land-Baytown, TX
6. Minneapolis-St. Paul-Bloomington, MN-WI
7. San Diego-Carlsbad-San Marcos, CA
8. San Francisco-Oakland-Fremont, CA
9. San Jose-Sunnyvale-Santa Clara, CA
10. Seattle-Tacoma-Bellevue, WA
11. Washington-Arlington-Alexandria, DC-VA-MD-WV

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