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This is an extremely
significant report --
I urge you to read it
carefully!

The Foresight Group

Bill

Industry House

Stockholm, Sweden

September 20, 1979

What's Really Happening in the U.S.

By John Naisbitt

Senior Vice President, Yankelovich, Skelly and White

Publisher, The Trend Report

It is a special pleasure for me to be back in Sweden and to be with such a broad representation of Swedish businesses. Today I will be talking with you about 10 important emerging trends in the United States. Let me list them first, and then return to each of them for a more detailed discussion.

1. The United States is rapidly shifting from a mass industrial society to an information society, and the final impact will be more profound than the 19th Century shift from an agricultural to an industrial society.
2. There is more decentralization than centralization taking place in America--for the first time in the nation's history: the power is shifting not only from the President to the Congress, but--less noticed--from the Congress to the states and localities.
3. National political parties today exist in name only; issue politics and referendum politics are replacing party politics; new parties will be formed, but they will be local--not national.
4. The American society is moving in dual directions of high tech/high touch. The introduction of every new technology is accompanied by a compensatory human response--or the new technology is rejected.

5. Ageism has replaced racism and sexism as the society's major anti-discrimination preoccupation. The recession of concern regarding racism and sexism will last for from five to ten years.
6. There are the beginnings of a job revolution in American, a basic restructuring of the work environment from top-down to bottom-up.
7. Equal access to capital will be the new rights issue, following earlier claims to equal access to education and health care.
8. Throughout the U.S. notions of "appropriate scale" are reshaping our physical and organizational environment.
9. Issues of corporate governance--involving questions of leaderships of American companies--will have an important impact on business in the 80's.
10. The most important trend in the century is the continuing shift of the United States from a representative democracy to a participatory democracy.

Before dealing with each of these trends, I will briefly outline our methodology. In developing the Trend Report for our clients, we rely almost exclusively on a system of monitoring local events and behavior. We are overwhelmingly impressed with the extent to which this is a bottom-up society, and so we monitor what's going on locally rather than what's going on in Washington, or in New York. Things start in Los Angeles, in Tampa, in Hartford, in Wichita, Portland, San Diego, and Denver. It's very much a from-the-bottom-up society.

The tracking concept employed in determining these trends has its roots in World War II. During the war, intelligence experts sought to find a method for obtaining the kinds of information on enemy nations that public opinion polls would have normally provided. Under the leadership of Paul Lazerfeld and Harold Lasswell, a method was developed for monitoring what was going on in these societies that involved doing a content analysis of their daily presses.

Although this method of monitoring public thinking continues to be the choice of the intelligence community--the nation annually spends millions of dollars doing

newspaper content analyses in various parts of the world - it has rarely been applied commercially. In fact, we are the first, and presently the only group, to utilize this concept for analyzing our society. We have been doing content studies every day since 1970 of the 206 major newspapers in the United States.

The reason this system of monitoring the changes in society works so well is that the "news hole" in a newspaper is a closed system. For economic reasons, the amount of space devoted to news in a newspaper does not change over time. So, when something new is introduced into that news hole, as it is called, something or a combination of things has to go out or be omitted. The principle involved here can be classified as forced choice within a closed system.

In this forced choice situation societies add new preoccupations and forget old ones. We keep track of the ones that are added and the ones that are given up. Evidently, societies are like human beings: I do not know what the number is, but a person can only keep so many problems and concerns in his or her head at any one time. If new problems or concerns are introduced, some existing ones must be given up. We keep track of what preoccupations Americans have given up and have taken up.

The information collected on various issues or topics is not just extrapolated, but is also used to look for patterns. For example, there are five states in the United States where most social invention occurs. The other 45 states are, in general, followers. California is the key indicator state; Florida is second, although not too far behind; with the other three trend setter states being Washington, Colorado and Connecticut.

An example of this phenomenon is provided by a look at who the governors are in these five states. Connecticut and Washington are the only two states where women have been elected governor in their own right. The other states

have elected the "new" politician: Graham, Lamm and Brown. The new politics has little to do with the old liberal-conservative dichotomies. Rather, it has to do with appropriate scale, decentralization, fiscal conservatism, and a lot of experimentation.

Now, let's look at the 10 trends.

1. The United States is rapidly shifting from a mass industrial society to an information society, and the final impact will be more profound than the 19th Century shift from an agricultural to an industrial society.

In 1950--I want to talk about the percentage of the labor force in the various sectors--in 1950, 65 percent of people working in this country were the industrial sector. That figure today is around 30 percent. It's gone from 65 to 30 percent since 1950. (In 1900, at the turn of the century, it stood at 35 percent.) In 1950, the number of people in the information sector of the society--information occupations--was 17 percent--and now exceeds 50 percent. Now, for years we have been hearing that we are moving into a service society. Yet, the service sector (absent information occupations) has remained relatively flat--about 11 or 12 percent for decades. It is clear that the post-industrial society is going to be an information society.

One of the important things to notice about this shift is that the strategic resource in the industrial society was capital; the strategic resource in the post-industrial information society is knowledge and data (and that's not only renewable; it's self generating). That explains the explosion of entrepreneurial activity in the U.S. Because the strategic resource is now what is in our heads, access to the system is much easier. Not only will we see an impressive increase in the creation of new small firms, but if large institutions are to survive, they will restructure to encourage entrepreneurial activity within their institutions.

Now, the mass institutions that were created, that were consonant with the industrial society are now out of tune with the times. Just as in 1800 the fact that 90 percent of us in the labor force were farmers dictated the societal arrangements of the day, the fact that most of us were in industrial occupations until recently dictated the arrangements of a mass industrial society--which are now out of tune with the new information society. Let me give you three examples. Labor unions. In 1950, with 65 percent of the work force in this country in the industrial sector, more than 30 percent of the workers in the country were members of unions. That is now 19 percent. There is no way that is going to do anything but continue to go down, as we move more and more into the information society. Network television. Network--notice I'm saying network, not television--network television started down last year, and it is a long, slow, irreversible slide downward. I'll talk more about that later. Things like department stores and national chain stores which are in tune with the mass, industrial society have been yielding over the last decade and a half to things like boutiques. This phenomenon, the breaking up of the mass instrumentalities, you'll see everywhere.

Starting a year ago, the number one occupation in the United States became a clerk, replacing the laborer, and the farmer before that. Farmer, laborer, clerk: a brief history of the United States.

In connection with this shift to an information society, it is important to notice a powerful anomaly developing: as we move into a more and more literacy-intensive society, our schools are giving us an increasingly inferior product. SAT scores (the tests to qualify for college) have been going down each year for more than a decade. We all experience that our young people are not outstanding when it comes to writing and arithmetic. Consider this: for the first time in

the history of the United States, the generation that is graduating from high school today is less skilled than its parents. !

2. There is more decentralization than centralization taking place in America--for the first time in the nation's history: the power is shifting not only from the President to the Congress, but--less noticed--from the Congress to the states and localities.

Trends move in different directions, at different speeds. They have different weights. About two or three years ago, the heft and feel of the movement toward decentralization became heavier than the heft and feel of those forces toward continued centralization. You remember, in the '50's and into the '60's (and beyond) we celebrated individual diversity. In the '60's, we started to celebrate ethnic diversity. Polish is beautiful, as well as black is beautiful. We started to celebrate our ethnic restaurants, which of course had been there all the time. And we started to celebrate ethnic diversity. An extraordinary thing happened, by the way, in the late '60's. We gave up the myth of the melting pot. For years we had taught our children in fourth grade civics that America was a great melting pot, as if we were all put in a giant blender and homogenized into Americans. Now we have given up that myth and recognize that it is our ethnic diversity that has made us such a vital, creative country. Then a phenomenon of the '70's has been jurisdictional diversity, geographical diversity. We have no national urban policy today because a national urban policy is out of tune with the times. The only national urban policy that would be in tune with the times is the national urban policy that would respond to local initiatives. It is an inappropriate question to ask, Are we going to save our cities? That's an either/or formulation. It doesn't work in the new multiple option society. The point is, we'll save some of our cities; we will not save others. We'll save some of our cities a little bit;

we'll save others a great deal. That's also why we're not getting a national health policy, because you can't do a top-down monolithic kind of policy anymore because of the tremendous diversity that's going on in the United States.

Now, where we feel centralization continuing most painfully is in government regulations, as we well know. And that's changing. That's really bending back. It was a Republican, Nixon, who opened China. A Democrat never could have done that. And I think just so, the Democrats are the only ones who're going to be able to at least get the deregulation started, because Republicans would come under too much pressure. You know about the airlines, and you know about the trucking industry, which I thought would be the last to go. The watershed in this, I think, was in February of 1978, when the U. S. House of Representatives voted against a consumer protection agency. What was not, I think, sufficiently underlined at that time was that the first and second term Democrats--a very liberal bunch--voted 43 to 37 against establishing that agency. More and more, we're going to see the political left and right meeting on this issue of being against big government and against government regulations. And that's part of a larger power shift, too, that's going from the President to the Congress--and from the Congress to the states. Proposition 13, I think, has to be understood as having a lot more to do with the initiative trend, or the referendum trend, than it has to do with taxes. We are submitting to the political process questions we never submitted to the political process before. The watershed on that was Proposition 15 in California two years ago, when the citizens in California voted on whether or not to build a plant (a nuclear plant, but nevertheless, a plant). We had never submitted that kind of question to the political process before. Business got very involved in that because they had so much at stake. And in the process, they helped to legitimatize this notion of submitting this

kind of question to the political process. There is no end to it. Last November, more than 300 questions were voted on around the country. There have been many votes on where we can and cannot smoke. Five jurisdictions last year voted on using or not using public funds for abortion. Two cities voted on South Africa. But if you know Davis, California, they vote on anything. Long Beach, California, voted on whether or not to have an oil tanker terminal, and, later, on the color of street lights. We never voted on those kinds of things before, but we're going to see more and more of this. It's a part of this larger, "direct democracy." We'll be voting on a great range of new things.

3. National political parties today exist in name only; issue politics and referendum politics are replacing party politics; new parties will be formed, but they will be local--not national.

Some of this was discussed under the previous trend. But to begin with, let me enlarge the context. It seems that in the United States, all the large, general purpose instrumentalities are folding. An early sign of this was the demise of Life and Look, huge-circulation, general purpose magazines eight years ago. That same year, 300 special purpose magazines were created, most of which are still being published. Four hundred or so were added the following year, and so on. There are now more than 4,000 special interest magazines being published in the United States. This phenomenon is an analogue for what is going on in the U. S. Two years ago, the National Association of Manufacturers and the United States Chamber of Commerce announced they were going to merge for all kinds of wonderful reasons, none of which was true. They were going to merge in order to survive. About a year ago, they announced that they couldn't negotiate the merger, so now, presumably, they're going to die separately (except that the Chamber has lately become much more responsive to the grass roots, and that may save it). The American Medical Association, an umbrella organization, is getting weaker as the groups within it--the pediatricians, the surgeons, etc.--are getting stronger.

Last month two big labor unions, the meat cutters and the retail clerks, merged to form a huge union--for survival. It's the dinosaur effect: they get larger just before they go under.

These kinds of umbrella organizations are out of tune with the times, just as network television now is. Back to the magazine analogue, network television will lose ground to new options: cable, video disks, and new special-interest networks--a Spanish language network and an all-sports network are already underway.

The cross-over in politics came in 1976--a Presidential year--when the number of people contributing to special interest groups, like "Save the Dolphins," exceeded the number of people who contributed to the Democratic and Republican parties combined. That trend is continuing. The two great American political parties now exist in name only. We have a Congress filled with independents. We may get some new political parties, but in tune with the decentralization of the country, they more likely will be local, new political parties. We already have the Right-to-Life party on the ballot in New York State. I am aware of your environment party and your health food party here in Sweden. We will have local special-interest parties developing in the U. S.

The magazine analogue is also instructive in connection with leadership. In the United States, we have all noticed a dearth of leadership. We have no great captains of industry any more, no great university presidents, no great leaders in the arts, or in labor, or in politics. It is not because there is any absence of ambition or talent on the part of those who would be leaders. We don't have any great leaders any more because we followers are not creating them. Followers create leaders--not the reverse--and we followers are not conferring leadership as we did in the past. We are now creating leaders with much more limited mandates: closer to us and on much narrower bands.

4. The American society is moving in dual directions of high tech/high touch. The introduction of every new technology is accompanied by a compensatory human response--or the new technology is rejected.

With the introduction of television, for example has come the group therapy movement, which, in turn, has led to the personal growth movement and the human potential movement (watching TV in bed with someone is, of course, very high tech/high touch).

Similarly, the high technology of the medical field (brain scanners and heart transplants) has led to a new interest in the family doctor and neighborhood clinics. A novel high tech/high touch example is citizen band (CB) radio: people using this technology to get in touch with another human being - anybody! And, moving closer to our offices, the high technology of word processing has initiated a revival of handwritten notes and letters. Jet airplanes have led only to more meetings. A poignant example of high touch/high tech is how the high technology of life-sustaining equipment in hospitals lead to a new concern for the quality of death (and to the hospice movement).

Whenever institutions introduce new technology to customers or employees, they should build in a high touch component; if they don't, people will try to create their own or reject the new technology. That may account, for example, for the public's resistance to automation and electronic accounting.

One of the reasons for the immense interest in and popularity of the movie, "Star Wars" appears to be that it is not so much a contest between human beings and technology (the movie is not anti-science) as it is between human beings who have used technology - within human control and scale - and others who have been dominated by it. The good guys are not anti-technology: when Luke Skywalker flies in on that final run, the "force" with him, he turns off his computer, but not his engine. This might also signal that we are moving towards a critical point of being over-computerized. Some sort of rebellion might well occur here-unless a high touch experience with home computers mitigates against it.

5. Ageism has replaced racism and sexism as the society's major anti-discrimination preoccupation. The recession of concern regarding racism and sexism will last for from five to ten years.

In the United States concern about racism started to recede about eight years ago and concern about sexism started to recede about two years ago. There's sort of a tolerance box in the United States society--we can only handle so much concern, or so much information, or so much attention in connection with discrimination. And that box in the 1960's, was almost completely filled with concerns about racism. About eight years ago, concerns about racism in this society started to recede, and that box started to fill up with concerns about sexism. Two years ago concerns about sexism started to recede in this society. And that box quickly filled up about two-thirds with concerns about ageism. And I think that recession on concerns about sexism and racism will continue for four or five years, as we are more preoccupied with concerns about ageism. Part of the ageism concern, of course, led to the extending mandatory retirement 65 to 70. This next Congress, I'm pretty sure, is going to wipe that out. There's going to be no mandatory retirement in the United States, just as there is none in the bellwether states of California and Connecticut. At the same time, early retirement is a very strong and continuing trend. There're both there--multiple-option. Ralph Tyler used to say, "You can tell if you're being educated if your options are increasings." And the reverse if they're decreasing. And that's why he was concerned about specialization. In fact, there's new evidence that shows that your I.Q. actually goes down in the process of getting a Ph.D. We all suspected that. In any case, multiple-options. Number five, and just as quickly, even though concerns about sexism are in recession--and that doesn't mean we're not going to be concerned. That means that there's a readjustment of priorities. And in that concern about sexism in this society, we're moving from the point of equal pay for equal work to a new idea that's being pushed called "equal pay for work of comparable value." Why should a carpenter get more than a nurse? Well, we know

why a carpenter gets more than a nurse: because men are carpenters and nurses are women, and men decide. Why should a dog-catcher get more than someone in a daycare place? These are the new questions that are being asked.

Business is wholly unprepared for a complete removal of mandatory retirement in the U.S. Many companies in the United States are already operating in a slow-growth mode. Some are even in a no-growth mode. One of the biggest problems created in such circumstances is the slow down in promotions. When a company is growing very fast, with people being promoted all the time, the place practically runs itself. But how do you manage an institution where you can't promote people? Or where promotion comes very slowly.

Our universities are trying to manage in a negative-growth mode. The tenure system is going to eliminate an entire generation of scholars because there is no place for them. If you add to a slow - or no-growth mode the end of mandatory retirement (no matter how much you sweeten the incentives to leave early, many people will exercise an option to stay on), it complicates tremendously the task of running an institution. It further dries up the principal incentive for good performance: promotion.

Many different kinds of incentives are now being studied as a substitute for promotions, the principal traditional incentive for good performance. Sabbaticals are one possibility. For example, entire work forces could be given a tenth-year, or eighth-year sabbatical. However, there are more imaginative approaches, and I think the end of mandatory retirement will catalyze many rearrangements in our work force. One intriguing idea would treat a new occupation or career as an incentive. Consider a person who is, say, 44 and a lawyer, but who would rather be a designer. The problem has always been that such a person can't afford, financially, to go back. There is the possibility, however, for the person to have a transitional period, during which he consults backward and apprentices forward, but staying at about his same salary.

It appears, therefore, that the end to mandatory retirement will bring with it many changes in the present arrangement of dividing life into separate periods of education, work and retirement. The question is, how do we, both as individuals and as a society, get out of the "three boxes of life" - an education box, a work box and a retirement box, which are more or less entirely unrelated. There are very few specialists looking at all three of these divisions and their relationship to one another. But I think the end of mandatory retirement and powerful economic reasons will force us to look at them. In 1945, 35 people were in that middle box for every one person on social security. Last year, the ratio was 3.2 to 1, a ten-fold change in 30 years. The amount of work relative to the population has shrunk so much that the people in the middle box are going to have to share their work with those in the other two boxes, the young and the old; and while they are sharing, and not working, they have to have options to do other things.

6. There are the beginnings of a job revolution in American, a basic restructuring of the work environment from top-down to bottom-up.

Whenever pressing economic trends converge with changing personal values, you get change in a society. That's why we can start to look for some revolutionary changes in the workplace. A whole new attitude toward American workers is on the way. And it could result in a revitalization of the spirit of work and America's sagging productivity.

Here's the situation: The productivity growth rate is on a dismal down-swing. It dropped an annual four percent in the first quarter of 1979; this year is expected to be the worst for productivity improvement in the nation's history.

At the same time, over the last two decades, personal values have been changing radically; there's a growing demand for more satisfaction from life. Workers feel it too. Their psychic pain is reflected in their low productivity. They are sick of

being treated like machines in the service of increased productivity. Workers refuse to produce and even deliberately sabotage the products they make.

They are no longer content with the traditional remedies offered up by labor unions, such as more pay, four-day weeks, better health benefits. What they really want, like everybody else, is deep human satisfaction from their work.

But industry had no compelling need to give it to them--until now. These dropping productivity figures will finally force industry, in economic desperation, to give more than token attention to the mental health of workers. The workplace is in for a good shaking up. And the American worker is about to be saved by one of the most unlikely forces in society--call it humanization, personal growth, "the human potential movement," participatory management, the values of the sixties. Call it whatever, it is about to converge with the economic necessity of the seventies and eighties to rescue the American worker from a deadened existence. For one thing, American industry is beginning to eye the way Japanese companies are run. Japan's productivity runs circles around ours. It takes Japanese workers 13 man-hours to build a car, compared with 30 man-hours for American workers.

It's often mistakenly thought that Japanese workers are so productive because they perform like robots, ever subservient to authority. The opposite is true. Unlike American workers, the Japanese are given enormous freedom to both plan and execute their work and solve problems alone without the help or interference from managers. The plants are run not from the "top-down" like ours where managers deliver orders, but from the "bottom up" where workers make many crucial decisions. The whole theory is: given a chance, workers will be creative and self-motivated. Interestingly, the Japanese developed some of their management techniques from the theories of our own humanistic psychologists, such as the late Abraham Maslow.

When the Japanese use their techniques on American workers, the changes are astounding. The Japanese Matsushita Company several years ago took over a bankrupt

Motorola plant near Chicago and began to produce Quasar TV sets. The company retained 1000 co-line workers but dismissed half of the 600 supervisors and managers. Within two years, production doubled and the reject rate of sets dropped from 60 percent to 4 percent. Moreover, through good quality control, the company reduced its annual warranty costs from \$14 million to \$2 million. Just think, too, of the countless consumers who were spared the frayed nerves of dealing with defective products. That alone is a monumental contribution to the nation's sanity.

Our workers are not stupid or lazy. They, like everybody else, want a chance for more personal satisfaction. And they are about to get it--even if the trigger is such an eye-glazing event as lower productivity figures. Industry leaders may not understand such a trend as changing personal values, but they do understand dropping productivity.

7. Equal access to capital will be the new rights issue, following earlier claims to equal access to education and health care.

During the 1950's and 1960's, in the United States, equal access to education was demanded as a right. This was followed by demands for equal access to health care. Now a new equity issue is emerging: a push towards equal access to capital. This is manifested by what has happened to that phenomenon called red-lining. Within a relatively short period of time, this method of grading investment risks has gone from something considered to be a solid business practice to something that is now illegal in many parts of the country. In essence, the question comes down to this: why should you get money to buy a house when I can't get money to buy a house?

As to other areas of the economy, there have been hearings in Washington on whether or not the government should be involved in apportioning the increasingly limited capital pie - in deciding which companies should have access to capital. The question being posed here is: Why should your company get money when my company

is not getting any? And in the area of consumer credit, more and more credit is being advanced as a right, by women, youth, and the poor.

8. Throughout the U.S. notions of "appropriate scale" are reshaping our physical and organizational environment.

Notions of appropriate scale ricocheted through this society as fast as I have seen anything move. It started four or five years ago with E. F. Schumacher's book "Small is Beautiful," which advocated intermediate technologies - e.g., technologies that can increase output without decreasing employment levels. For example, he saw that the use of big combines and chemicals in India to accelerate agricultural production knocked 99 out of every 100 farmers out of work. What the Indians needed, Schumacher concluded, was to increase their technology just a little bit (an intermediate technology, a better plow), so that production would go up without reducing the work force. Notions of intermediate technology were soon broadened in this country to appropriate technology, and then, interestingly, to appropriate scale.

What is the appropriate scale of anything, let alone technology? What is the appropriate scale of government? To raise an army, it is surely federal; whereas for public welfare it may be neighborhood. As to appropriate scale for corporations, if the activity involves putting gas in an automobile it is the neighborhood service station; but if it involves exploration, appropriate scale becomes, by comparison, huge, like raising an army. In general, if corporations start from where people are, they are more likely to be understood and to have their ideas accepted.

9. Issues of corporate governance--involving questions of leaderships of American companies--will have an important impact on business in the 80's.

Corporate governance is going to be a big issue for business in the eighties. That'll be expressed at two levels. One level is on the composition of the Board of Directors, a lot of people pushing for a Board of Directors to be entirely comprised of independent directors with only the CEO being on the board, and he not be the chairman. And the other part of corporate government has to do with

the way decisions are made inside a corporation. Without going into that, and until the question period, let me just say that those are going to be big issues in the '80's for business.

10. The most important trend in this century is the continuing shift of the United States from a representative democracy to a participatory democracy.

Let me tell you what I mean by the shift from a representative democracy to a participatory democracy. In a representative democracy, you elect someone for two, four or six years. And they go out and represent you. And then come back, and if you think they've done a good job, you re-elect them. If not, you turn them out. Participatory democracy says, "Okay, we've elected you to represent us, but if anything comes up that impacts on our lives, you've got to check with us." That's participatory democracy. Now what happened about a year and a half ago is that almost unconsciously, companies said, "Hey, wait a minute." (By the way, it was some companies, because here again, it's not either/or, it's multiple-option.) Some companies said, "Wait a minute, we're participants, too." And companies started to become more and more assertive about things that impacted on their corporate lives. And that is entirely in tune with the times. In the meantime, some of those things that we call corporate social responsibility--are being put on the shelf, as we really, in a much more participatory way--engage the society and speak out and become assertive about those things that impact on our corporate lives. As I said, that is entirely in tune with the times.

As we move further into a participatory society, we must increasingly ask the key guiding question of such a society, namely: are the people whose lives are affected by a decision part of the process of arriving at that decision. This question applies whether we are dealing with our children, our spouses, our employees, our customers, or the citizens of a society.

In closing, I want to say that I think the decade of the 80's will be very exciting for the United States. We are restructuring our society from an industrial to an information society; we are decentralizing at home while at the same time we move into a truly world economy where the re-distribution of labor spells opportunity for all of us; we are becoming an increasingly high touch world as we continue to push high tech; we are becoming a multiply-option, highly market-segmented society; and we will be a more participatory society with greater opportunities for each of us to realize our potential.

In short, we will be a much more complicated society, and the period of working through the structural changes will be painful, but we will be a more interesting and nourishing society.