

Just 1%

The Power of Microtrends By Mark Penn & E. Kinney Zalesne

An Introduction to Microtrends

In 1960, Volkswagen shook up the car world with a full-page ad containing just two words: THINK SMALL. It was revolutionary—a call for the shrinking of perspective in an era when success was all about gain, even when you were just driving down the street.

America never quite got used to small when it came to cars. But ask two-thirds of America, and they'll tell you they work for small business. We yearn for the lifestyles of small-town America. Many of the biggest movements in America today are small—hidden, for just a few to see.

Microtrends is based on the idea that the most powerful forces in our society are the emerging, counter-intuitive trends shaping tomorrow right before us. With so much focus on poverty as the cause of terrorism, it is hard to see that it is richer, educated terrorists who have been behind many of the attacks. With so much attention to big, organized religion, it is hard to see that it is newer, small sects that are the fastest-growing.

But small choices have redefined society. We used to live in the “Ford economy,” where workers created one black car, over and over, for thousands of consumers. Now we live in the “Starbucks economy,” where workers create thousands of different cups of coffee, for individual customers.

That explosion of choice has, in turn, created hundreds of small, intense communities defining themselves in new ways. So now, we can no longer understand the world in terms of a few megaforges sweeping us all along. Rather, society is being pushed and pulled by “microtrends”—small, under-the-radar forces that can involve as little as 1 percent of the population.

In fact, by the time a trend hits 1 percent, it is ready to spawn a hit movie, create a political movement, or even start a war. In today's mass societies, it takes only 1 percent of people making a

dedicated choice—contrary to the mainstream’s choice—to change the world. Highlighted below are just a few examples.

Any marketing guru or political consultant will say the key to communications is short, short, short. Bumper sticker messages. You can’t expect people to listen for more than 8 seconds. Well, slow down. As the chapter on Long Attention Spanners shows, there is a serious and growing group of people who are tired of the sound bite. They like to wrap themselves in ideas and activities that take commitment. They will engage you at length, if you respect their interests and concerns. So – shrink it all up at your peril.

Another example is Extreme Commuters. Forecasters of a decade or so ago said we’d all be telecommuting by now, with the workplace virtually defunct. Well, some people telecommute, but an equal number (about the 1 percent bullseye) travel more than 90 minutes each way to get to work. That has huge implications for traffic, gas prices, and car design—not to mention employers’ plans for where to locate. If you want to make smart business decisions, look at the different, intense ways people are making choices about their lives.

And the phenomenon is hardly limited to the U.S. Vietnam once fought a war in defense of Communism, and the Communists still rule. But you know what? Vietnam may now be the #1 entrepreneurial hotspot on earth.

Microtrends is about the niching of society. People are self-defining in smaller and smaller ways, and neither “gut sense” nor conventional wisdom will likely get you to the truth. Go straight to the numbers, and let’s do some microtrending together.

Long Attention Spanners

It is conventional wisdom that America's attention span is shrinking. A couple of decades ago, we cut our sixty-second TV ads down to thirty, and now apparently the "right" length of an Internet ad is fifteen seconds. We reduce presidential platforms to bumper stickers. We speed-date. When we insta-message our friends, we can't even bother to spell out whole words.

How much more ADD could America be?

Some people operate on a totally different wavelength....They want substance, not style and flash.

But—slow down a minute. (Yes, a whole minute.) For every *Tuesdays with Morrie*, there is a Tom Wolfe novel. For every frenetically animated, two second pop-up ad on your computer screen, there is a carefully scripted thirty-minute infomercial on your TV—an industry that rakes in over \$90 billion per year.

Some people operate on a totally different wavelength. From books to movies to products to news, they want more depth, more information, real answers to more of life's questions. They want substance, not style and flash. So while many marketers and politicians have been perfecting communications aimed at "ADD America"—packing wallops of a message into the nanoseconds they think their audience will give them—they would be wise to pay some attention to America's "LAS," or Long Attention Span folks, too.

How do we know the LAS are out there?

Let's look at sports. Fully half a million Americans run marathons, races of 26 miles or more. Almost 200,000 try triathlons, the toughest of which are ironman triathlons—marathons plus a 2.4 mile swim plus a 112-mile bike ride. It's not like they could just as easily win a 50-meter sprint. These are people who wrap their heads (and bodies) around something and stick with it for far, far longer than one could reasonably expect. They are in it for the long haul.

Whether it's half a million marathoners or *Atlantic Monthly* readers, or 50 million crossword-puzzlers, LAS Americans are not just the Fringe Attentive.

Golf, which takes easily four hours per round and is as much a game of the head as it is of the body, has grown in the last twenty years into a \$62 billion industry, well outpacing the shorter-term-gratification “amusement, gambling, and recreation” industry. The much faster moving game of tennis has been declining in interest, as more people want to slow down, take their time, and immerse themselves for long periods of time, lost in thought or sport.

Or look at reading. Even as the average Internet page gets about sixty seconds per hit, magazines with 13,000-word, reflective articles like *Atlantic Monthly* have increased their readership to

nearly half a million, or almost by half since 1980. Between 2002 and 2005 alone, the circulation of *Foreign Affairs*—truly a publication of all words and no pictures—grew 13 percent.

The real kicker is puzzles. Apparently, 50 million Americans do crossword puzzles, which can mean anything from ten minutes to three hours of wrestling with arcane synonyms, bad puns, and your own limited spelling. Puzzle-lovers are especially found on the West and East Coasts, where we think of time as being the most hurried.

And of course there's Sudoku, the insanely addictive game where you have to fill in the blank squares of a grid so that each nine-cell row, column, and mini-grid contains all the numbers from 1 to 9. In 2003, practically no one had heard of Sudoku; now Sudoku books fill several shelves in most mainstream bookstores, and generate over \$250 million in global sales.

Whether it's half a million marathoners or *Atlantic Monthly* readers, or 50 million crossword-puzzlers, LAS Americans are not just the Fringe Attentive. In fact, despite what you learned in marketing school, tuning in for the long haul is really quite mainstream.

The biggest-grossing movie ever in America was *Titanic*, which ran for more than three hours.

24, the TV show that took five Emmys in 2006, makes you watch a whole season just to know what happens in one day.

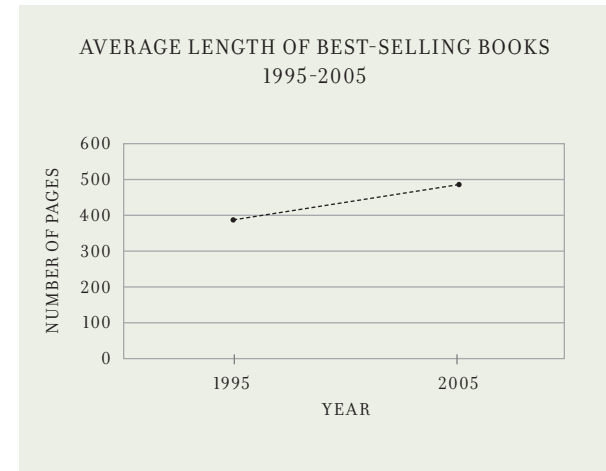
Harry Potter, the most popular book series on earth, proved that not only do we love long stories, we'll wait in lines as long as Lord Voldemort's snake to get the next installment. Long novels, from Thomas Pynchon to James Michener, are huge sellers. Series fiction, from John Updike to Patricia Cornwell, sustains our attention for literally decades at a time.

In fact, in 2005, the best-selling books in America were, on average, more than 100 pages longer than they had been ten years before. And even back in 1995, the average top ten seller was a hefty 385 pages!

My favorite is political speeches. Every public speaking expert on earth will tell you that short and sweet means powerful. The Gettysburg Address, they recall (with a wistfulness that makes you think they think they were there), was under 300 words and took President Lincoln less than three minutes to deliver.

But in 1995, President Clinton gave a 9,000-word State of the Union address that took seventy-six minutes to deliver—and it was both the longest and one of the most successful in history. Nearly every year, more than twice as many Americans watch the State of the Union address as watch the final game of the World Series.

So while many politicians try endlessly to cram big thoughts into a few small words known as a sound bite, President Clinton mastered the art of issues-based campaigning. He took the issues and the voters seriously, and rather than give them just “red-meat speeches” (that, say, John Kerry was famous for), he explained issues in a thoughtful and detailed manner. Senator Hillary Clinton is this kind of politician, as was, for all his other troubles, Richard Nixon. No doubt some voters regard



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their speeches as boring or wonky. But candidates like that do it out of a distinct respect for people, and a belief that V. O. Key said fifty years ago, “the voters are not fools.”

Key had a profound influence on how I approach polling and the voters. He systematically studied presidential races in America and determined that each one has been decided on the basis of real, rational, and thoughtful reasons, not on the basis of who wore the better tie. His thinking is the basis for a lot of the work I do—that the rational side of people is far more powerful in many areas of life than the purely gut or emotional side. For every person who decides in a *Blink*, there is someone who decides only after a serious, intellectual mud-wrestle. And it is the latter type of voter who generally decides elections—the swing voters who go through a process of making real judgments, not snap ones.

The importance of the Long Attention Span in politics should not be underestimated—America itself is a country founded on long intellectual documents embodying powerful ideas that were debated long into the night. And in most other countries, when my colleagues and I bring in American-style political advertising on issues, it handily defeats old-style song-and-rally spots.

Finally, in the commercial world, look at some of the “upset” brand advertising like Dyson vacuums. Here a CEO painstakingly details the physics of the vacuum he invented, and sweeps market share away from the leader.

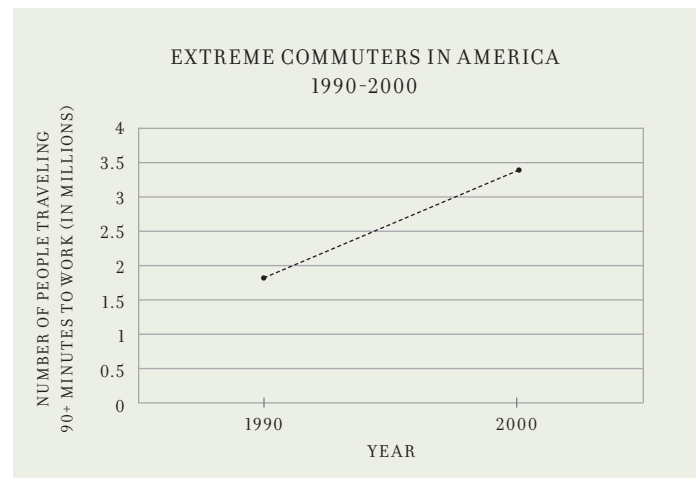
So be careful before you accept the conventional wisdom that Americans can’t concentrate, that we are too distractible for sustained narrative, and that political office always goes to the candidate with the cleverest tag line. In fact, a sizable number of us—often the most interested key decision makers—will listen for as long as you can talk, read for as long as you can write, and follow for as long as you are willing to explain something. Sometimes people say less not because they are such clever marketers, but because they have less to say.

Extreme Commuters

There is perhaps no more common experience in America than the daily ritual of going back and forth to work. About 150 million of us work, and only 3 percent of us work from home. So pretty much everyone else—something like 145 million people—leave home every morning, travel to a workplace, and make our way back again at night.

Years ago, there were studies that said people wouldn't tolerate a commute longer than forty-five minutes. Well, we're inching there: our current average is now 25 minutes, up almost 20 percent since 1980. According to a 2005 *Business Week* report, in 1990, only 24 percent of all workers left their home counties to get to the office. Now, 50 percent of new workers do.

The greater distance is all about jobs leaving cities for suburbs, and workers leaving suburbs for "exurbs." It's like a big chase to the outer rings, with more and more people paying the price in commuting. But as a result, in 2000, almost 10 million Americans traveled more than an hour to get to work—up from fewer than 7 million ten years before.



Source: U.S. Census, Journey to Work, 2000

And at the extreme of this trend are—aptly named by the Census Bureau—“Extreme Commuters,” people who travel at least 90 minutes each way to get to work. In 2000, there were 3.4 million such commuters in America, almost double the number from ten years before.

Extreme Commuting is enough of a phenomenon that in the spring of 2006, Midas Muffler held a contest to reward

America's Longest Commuter. Attracting thousands of entries, Midas gave the prize to David Givens of Mariposa, California, who drives 372 miles round-trip every day to his job at Cisco Systems in San Jose. (He leaves his house every morning at 4:30 a.m., makes one stop for coffee, and is in his cubicle at Cisco by 7:45. At 5:00 p.m., he reverses the trip, getting home around 8:30).

Who are these 3.4 million Extreme Commuters, and why are they working so far from home?

For the most part, people who live far from work can't afford to live near it. New-home prices have nearly tripled since the mid-1980s, and now average almost \$300,000. Folks just can't buy houses in the major metropolitan areas where they work. According to Census data, the state that saw the largest increase in commute times between 2002 and 2003 was West Virginia—where housing is still affordable, but more lucrative work in Washington, D.C., Pennsylvania, and Ohio draws workers out of the state from 9 to 5 (or, if you count the commute, from 4:30 a.m. to 8:30 p.m.).

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Other Extreme Commuters do it for the quality of life. As land prices decline, the farther the land is from cities, people are deciding to endure the long commute in exchange for a bigger house, bigger lawn, less gridlock, and less crime. Not to mention nature. Something like 25,000 people from the Pocono Mountains in Pennsylvania commute for hours into New York City every weekday—but on the weekends, they have hiking, skiing, and cool mountain air.

And some dual-earner couples are becoming Extreme Commuters not so much for economic or lifestyle reasons, but rather for logistical ones. As the number of two-worker households increases, so do the chances that one or both will need to trek to work. Princeton, New Jersey, famous for the university, has also become a popular suburb for couples who need to commute to both New York City and Philadelphia.

Indeed, the worst commutes in the nation are in the New York and Washington, D.C., metropolitan areas—at an average of thirty-four and thirty-three minutes, respectively. It's serious enough that these commutes, plus high gas prices, are pushing people back to mass transit.

But still, over 3 million people—the magic 1 percent for a microtrend—are waking up with the stars and crossing state lines and even weather zones to get to work, and public policymakers, public health officials, and the business world may want to take note.

First of all, this is a group that cares intensely about gas prices. A whopping 76 percent of all commuters drive alone to work, and that figure is presumably even higher among Extreme Commuters. (It's really hard to rally a carpool at 4:30 a.m., or for your same 125-mile route.) Gas prices can make or break this group's careers. Mr. Givens, the winner of Midas Muffler's Longest Commute award, said that when he won, he was spending about \$800 per month on gas. An Extreme Commuter in North Carolina bristled when President George W. Bush said in his 2006 State of the Union address that Americans were "addicted to oil." Are we, she demanded, or are we just trying to get to work? People in the cities may not mind a gasoline tax, but these 3 million people won't be voting for a gas tax candidate anytime soon.

Extreme Commuters are also at greater risk for dangerous behavior like road rage, as well as health problems. Dr. John H. Casada, a specialist in road stress, has said that the longer people's commutes are, the more likely they are to suffer road rage—which can lead not only to violence, but also heart attacks, strokes, and ulcers.

Longer commutes are also linked to obesity. Researchers at Georgia Tech have found that every thirty minutes spent driving increases your risk of becoming obese by 3 percent. In a 2005 *ABC/Washington Post* poll on traffic, 4 in 10 drivers said that while in traffic jams, they eat.

Robert Putnam's 2000 book, *Bowling Alone*, notably found that for every extra ten minutes you commute, you have 10 percent less time for family and community (unless, I guess, you take your kids with you to daycare at your workplace). But since many Extreme Commuters signed on to the bargain in pursuit of small-town life, that seems particularly unfortunate, or particularly self-sacrificing. Many Extreme Commuters do this for their families—to give them a better life with better schools. Others wait for the weekends to enjoy the reason they drive all this way during the week.

The Extreme Commuter group also has important commercial implications. According to a *Newsweek* report in 2006, fast food restaurants are coming out with whole meals that fit in cup holders, and some cars are now outfitted with more cup holders than seats. Gas stations are putting touchscreen menus at the pump, so people can order sandwiches while they're filling the tank and have them ready for pickup when it's time to drive away. Satellite navigation systems now come with real-time traffic options, to help drivers avoid gridlock. The next battleground, say observers, is luxury seats. People who spend more than three hours per day behind the wheel are likely to be very interested in extra-comfort features like back massages. (So far, no one has developed a sanitary, socially acceptable and portable car toilet.)

Finally, Extreme Commuters are a group with serious time on their hands. Some audio companies claim you need just sixteen hours of their language tapes to go from zero Spanish to a full foundation. At that rate, Extreme Commuters listening in their cars can habla español in a week without giving up any other activities. And after a couple months, they could be U.N. translators, if their current jobs don't work out.

Or books on tape. Extreme Commuters are the transportation equivalent of speed readers. They could get through *War and Peace* in twelve days, or *The Da Vinci Code* in five.

Lyndon Johnson said he was declaring war on poverty and beginning massive urban renewal because, he predicted, 95 percent of Americans were going to live in cities. But in fact, people have spread out across the country to suburbs and exurbs faster than anyone could have predicted. (This just proves how hard it is to make assumptions about what America will look like fifty years from now—while you're focused on a few big trends, other microtrends seep in and upset your expectations.) Employers who moved to the suburbs did get closer to some of their workforce. But for a whole

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group of other workers, all their employers' relocation did was encourage them to move farther out—suggesting that for a lot of people, the most important thing is a house, a yard, and a quieter life, no matter what the cost in money or time.

The bottom line is that more and more Americans are on the road—but not so much like Jack Kerouac, looking to find themselves. More likely, they are looking for a cup of coffee and a to-go danish, hoping the gridlock will be bearable today, and knowing that they'll take the exact same route tomorrow.

THE INTERNATIONAL PICTURE

When the European Economic Community (EEC) was founded in 1957, its mission was to tear down trade barriers and ensure that all Europeans could travel freely among the member countries. Little did founder Jean Monnet know that such “free travel” would give rise to today’s European Extreme Commuter—and even its jet-setting Mega-Commuter.

Within Europe, the British win the prize for the longest average commute, at forty-five minutes—a good twenty minutes longer than the average commute in the U.S. The overall average commute in the European Union (the EEC’s successor) is thirty-eight minutes, with Italy clocking in at twenty three and Germany at forty-four.

But the interesting story lies not only in the tedious commute time, but in the sheer number of miles that many commuters voluntarily cover. Fully half of passengers in the Chunnel’s high-speed train, the Eurostar, which travels over 200 miles between France and England, are commuters—mainly people who live in France and work in London. (In 2007, for the first time ever, a French presidential candidate held an election rally outside France—trying to appeal to the nearly half-million French citizens who live and/or work in London.)

Even more dramatic are the Mega-Commuters who don’t just drive or take the train, but fly to work. One European travel firm has predicted that by the year 2016, the number of people who work in the U.K. but live elsewhere—and not just northern France, but also Barcelona, Palma, Dubrovnik, and Verona— will reach 1.5 million. Low-cost airlines make this possible. In 1994, there were zero low-cost airlines; in 2005, there were sixty. Airlines like Ryanair, easyJet, and SkyEurope carried some 200 million passengers in 2003 alone.

While Mega-Commuting is growing fast in Europe, the phenomenon is in its earlier stages in Asia. Some emerging discount airlines like Jetstar, Oasis, and AirAsiaX offer low fares, but they still have to compete with the dominant state-controlled airlines. But you can expect that Asians, too, will seize on this trend as soon as they’re able. The Chinese already spend an hour or more driving to work on average—compared to that, how big a deal are twice-daily flights?

Vietnamese Entrepreneurs

In America, most people still think of Vietnam as the place where we became involved in a no-win war, based on a lack of cultural understanding. Fifteen years; 58,000 U.S. soldiers' precious lives; a humiliating escape in April 1975 from the roof of the American embassy in Saigon/Ho Chi Minh City.

The failure against which all U.S. military campaigns have been judged ever since. The war itself was based on the domino theory—the idea that if Vietnam became communist, so would country after country in Asia, and the balance of power would fall to communism. Boy, was that theory wrong.

But the belief that Vietnam-style communism would be a repeat of North Korea's was so ingrained that what has actually happened in Vietnam is almost unimaginable to most Americans. While our former enemy the communist government is still in power there, Vietnam has become one of the most entrepreneurial spots on earth. Where America once sent soldiers, and then POW recovery teams, we now send cash. Personal, eagerly shelled out, cold hard cash, for everything from black pepper to coffee to rice to seafood. In 2006, Americans spent nearly ten times more on goods from Vietnam than the Vietnamese spent on goods from us.

In the past fifteen years, Vietnam has done more than just about any other country on earth to reduce poverty and build up its middle class. Across the country, the number of abject poor—those who make less than \$1 a day—dropped from 51 to 8 percent. Neither China nor India has that good a rate.

In Vietnam's two largest cities, the poor (defined as those making under \$250 per month) dropped from 60 percent in 1999 to just 25 percent in 2006. And at the same time, the middle class (making \$251–\$500 per month) nearly doubled—to more than half of Vietnam's urban population. And “middle class” in Vietnam means what it means elsewhere these days: Almost half of these people have cell phones, almost half have computers, and nearly 20 percent have personal e-mail

at home. Vietnamese purchases of beauty and baby products have shot way up. Personal entertainment spending has doubled since 2003 alone. Since 2001, the percentage of Vietnam's city-dwellers who own bank accounts has nearly tripled, to more than a third of the population.

Many of Vietnam's entrepreneurs are in food-related businesses, perhaps because of the large food production industry in that country. From the very successful Dr. Ly Quy Trung—CEO of the Pho 24 restaurant, with fifty locations in Vietnam, Indonesia, and the Philippines—to the low-income mom-and-pops pasting handwritten signs in their front yards advertising homemade pho (noodles) or refurbished scooter engines—Vietnamese at every level are leaping into the entrepreneurial fray. Other businessmen and women are pioneering the high-tech sector, with Vietnam having been called a “second India” of software exports, and rising as a force in telecom.

And all this growth is likely to keep going. Almost three-quarters of Vietnamese children of secondary school age are in school—up from about one third in 1990—which is a higher rate of growth than either China or India can boast. Infant mortality is down. Life expectancy is up. Foreign money is pouring in. In 2005, the economy grew at a remarkable 8.4 percent, making it one of the fastest-growing economies in the world.

All these happy numbers are reflected in—or driven by—the Vietnamese people's extraordinary optimism. According to world surveys conducted by Gallup International Voice of the People, Vietnam is regularly the most optimistic country on earth—with more than 9 out of every 10 citizens saying this year will be better than last. In fact, on that measure, Vietnam beats the second-most optimistic country—Hong Kong—by a good 20 points. (Wondering which country is the most pessimistic? Greece, edging out even Iraq.)

Whence the capitalist fervor, in a land that battled the capitalist superpowers for the right to institute communism, and won? After the Americans left Vietnam, the party tried pure communism, but bad harvests and economic mismanagement nearly caused a famine. Thus was born doi moi, or

a series of market-based reforms designed to stimulate the Vietnamese economy without sacrificing the party's political power. The U.S. encouraged this direction, with President Clinton in the mid-1990s ending the U.S. trade embargo and normalizing diplomatic relations. By 2002, Vietnam had amended its constitution to guarantee equal treatment for state and private companies, and eliminated several bureaucratic hurdles to the registration of private companies. The rest of the world began warming up to Vietnam, both diplomatically and economically. In 2001, the U.S. and Vietnam signed a bilateral trade agreement, and in December 2006, Vietnam joined the World Trade Organization and the U.S. Congress approved permanent normal trade relations. In perhaps the final chapter of the story of the U.S.-Vietnam military conflict, in 2006, President George W. Bush lifted the U.S. embargo on arms sales to Vietnam.

Of course, it's not all sunshine. Officially, America still regards Vietnam as an "authoritarian" state that abuses human rights. The banks still heavily favor state-owned enterprises, and entrepreneurs have little collateral to offer since the state still owns all the land. Corruption is rampant; intellectual property rights are few; and the court system is still beholden to the Communist Party. Income taxes are high, and power shortages are routine. In rural areas, where the bulk of Vietnam's population still lives, income has not risen nearly as fast as in the cities.

But the rate of economic progress in a place as ravaged as Vietnam underscores a serious entrepreneurial force, which the world would do well to attend to. Look, in the coming years, for substantially increased investment in that nation. The domino theory was wrong because communism in its pure form has been unable to generate a sustaining economic model better than capitalism. Democracy has actually had more trouble getting established than capitalism because enlightened communist states (which do not include North Korea) have been realizing they can hold on to political power if they loosen up on the economic reins. By introducing modest economic freedom, they have been able to enjoy continued political domination—we see that on a huge scale in China and Russia, and now we see it here in Vietnam. These regimes have learned that acknowledging and accommodat-

ing economic spirit is the only way to hold on to political power, and that as long as people have economic rights, they may not be so concerned about human rights. America was founded on the opposite principle—that human and political rights must come first—but these states are turning that theory on its head with some surprising success.

Look also for lessons regarding Vietnam's age structure. In most industrialized and developing countries in the world, we are having aging crises—certainly in America, Europe, and Japan, the populations are living longer than ever, and not being replaced at nearly the rates they used to be. In Vietnam, by contrast, over 60 percent of the nation's 84 million people are under age 27. While a youthful age structure is not always a recipe for success—the world nations with the lowest median age are struggling countries in Africa—it could be here, given the country's serious focus on education and the optimism that pervades the country, particularly among young people.

And if you want to start a business, especially selling goods to Americans, hop a plane to Vietnam and see what you can get made there for speedy exportation. The workforce is booming.

Thirty years after the U.S. failed to defeat communism in Vietnam, that country is a model entrepreneurial nation, trading goods, arms, and ideas with some of the biggest capitalist powers on earth. In a sense, this would be the equivalent of Iraq, thirty years from now, having rejected formal democracy but working with the U.S. to teach other nations town hall plebiscites and online presidential chats. It sure doesn't seem likely now. But neither, when you watched Marlon Brando descend into hell in *Apocalypse Now*, did you imagine that one day you'd buy Vietnam's coffee and rice at ten times the rate they're buying ours. 🇻🇳



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[*Microtrends*](#).

ABOUT THE AUTHOR

Mark Penn was dubbed “the most powerful man in Washington you’ve never heard of” by The Washington Post. Penn is the worldwide CEO of Burson-Marsteller. He was pollster to President Clinton in his 1996 re-election campaign, and has been an adviser to Senator Hillary Rodham Clinton, Microsoft Chairman Bill Gates, numerous corporations, and 25 foreign heads of state. E. Kinney Zalesne has served as a White House Fellow, Counsel to U.S. Attorney General Janet Reno, and Executive Vice President and President of two national social-change organizations.

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