

Changes to the leisure time landscape and its impact on out-of-home entertainment and arts

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March 16, 2018

Analyzing consumer behaviors and trends for leisure and entertainment requires a different approach than analysis for consumer goods. To analyze leisure, there is another very important dimension that needs to be examined, the expenditure of time, as leisure involves experiences and experiences consume time. So to best understand consumer leisure trends and behaviors, and more specifically out-of-home (OOH) entertainment and the arts, it is important to also examine time spent in leisure and its quality in addition to its expenditures and participation.

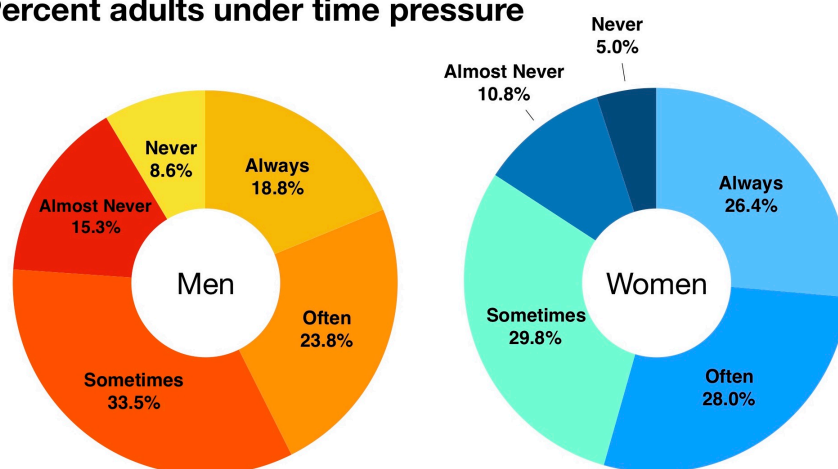
This paper examines consumer trends and behaviors for leisure, especially as it relates to OOH entertainment and arts.

Time poverty

Numerous studies indicate Americans have the feeling of being rushed, not having enough time, being pressed for time and being harried more than ever before, what researchers call time famine or time poverty.¹ A 2015 Gallup Lifestyle poll found that six in 10 working American adults (61%) said they do not have enough time to do what they want compared to 32% of non-working adults.²

Daniel Hamermesh found in his research that when asked "How often do you feel rushed or pressed for time?" 43% of men and more than half of women (54%) felt always or often rushed and pressed for time.³

Percent adults under time pressure



Source: Stressed out on four continents: time crunch or yuppie kvetch, Hamermesh, Daniels; Lee Jungmin (2005)



His research found that adults in couple relationships with at least one working partner

with higher earnings perceive more time stress for the same amount of time spent working at a job and for household work as lower income households. He called the significant influence of higher full earnings in generating time stress “yuppie kvetch.” Hamermesh attributed the kvetching to both working longer hours and having higher incomes to spend when they did have spare time for leisure; basically, the more money they had, the more pressured they are as they try to find ways to spend it all.^{Ibid} Of course, working longer hours to earn more money also contributes to time famine.

Conversely, Hamermesh found that people who have less money don’t complain about not having enough time. Not surprisingly, they’re more concerned about their incomes.^{Ibid}

A 2011 research paper in the Social Indicators Research journal looked at time use data for the American population and calculated both the discretionary time and the time poverty rates for different population subgroups. Discretionary time was defined as the amount of time an individual has left after the minimum time required for all necessary activities (things that an individual must perform such as sleeping and grooming) and all committed activities (such as work, childcare and household work). Discretionary time includes things such as education, shopping, civic activities, religious activities, eating and drinking, sports, exercise, recreation, socializing and leisure. The chart below shows the median discretionary daily hours for different composition households.⁴

Median discretionary hours for U.S. adults by household composition



Source: Kalenkoski, Charlene M., Karen S. Hamrick, and Margaret Andrews. "Time poverty thresholds and rates for the US population." *Social Indicators Research* 104.1 (2011): 129-155.

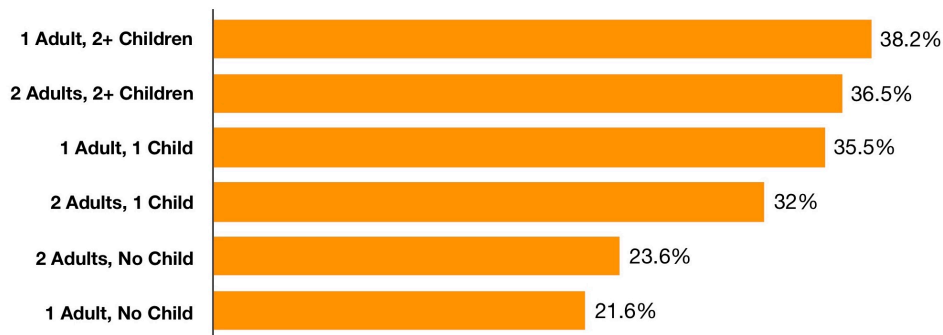


The presence of a child makes a big difference in the amount of discretionary time. For one-adult households, the addition of one child reduces discretionary time by 2.9 hours a day. Adding a second child decreases it by another 18 minutes or 0.3 hours. For two-adult households, the addition of one child reduces discretionary time by almost 2 hours (117 minutes). With two or more children, discretionary time declines by an additional 0.6 hours.^{Ibid}

For households without children, single adult households have 0.8 hour more discretionary time per day than two-adult households.^{Ibid}

Using 60% of median discretionary time to define when an adult would be experiencing time poverty, the researchers calculated the following time poverty rates for households with an employed adult and with middle class and higher incomes.^{Ibid}

Time poverty rates for U.S. adults in households with an employed adult and with middle class and higher income



Source: Kalenkoski, Charlene M., Karen S. Hamrick, and Margaret Andrews. "Time poverty thresholds and rates for the US population." *Social Indicators Research* 104.1 (2011): 129-155.



A U.S. Census Bureau study also examined time poverty rates. Researchers looked at the work status of parents with children in the household. They found that working parents had more than three times the time poverty rates as their non-working counterparts (26.5% versus 7.8%).⁵

Researcher Robert Goodin and associates examined American adults' actual spare time, or what is often called free time, that could be used for leisure activities. They found that for all types of households, those without children had between 4.3 and 5.7 hours more free time a week than comparable households with children (stay-at-home women in single-earner couple households had 18.3 hours less per week, or more than 2.5 hours less per day, when there were children.)⁶

Spare Time per Week			
Type Household	No Kids	With Kids	Difference
Dual-earners			
Men	36.7	31.0	-5.7
Women	33.0	28.7	-4.3
Single-earner couples			
Stay-at-home women	55.1	36.8	-18.3
Employed men	34.8	30.0	-4.8
One adult - employed			
Men	38.3	33.9	-4.4
Women	33.9	29.6	-4.3

Ibid

The type of household clearly has an impact on time poverty. Adults in households with children have significantly less free time and are more likely to be time poor than

households without children. Also, for households without children, single adult households have more free time than two adult households.

Researchers Kalenkoski and Hamrick looked at how time poverty affects behavior and found that time-poor individuals spend only one-quarter of the amount of time in sports and exercise as non time-poor adults (27%). They also found that time-poor adults are more likely to have Bachelor's degrees or higher and also be younger than non time-poor.⁷

Researchers Sullivan & Gershuny in their 2017 research paper found that "the professional/managerial class is more likely to be under time pressure . . . and among both women and men, those in higher status occupations report feeling more rushed than those with lower occupational status."⁸

There is a clear relationship between higher education and higher incomes and being time poor, with people who are earning the most money to spend on leisure not having enough time to spend it on leisure. This makes time feel more precious. Gallup in 2011 reported, "The more cash-rich working Americans are, the more time poor they feel."⁹

Judy Wajcman, in her book Pressed for Time, also attributes time scarcity to the fragmentation of time with such things as "mobile technologies causing interruptions with the incessant pinging of phone, text and email messages," to "the increasing complexity of scheduling personal, domestic and work activities," to "the difficulty of arranging shared time with family and friends in a desynchronized society" and because it is impossible to consume the vast availability of leisure options.¹

Bittman, Brown and Wajcman in their research concluded that the frequent use of the cell phone increases the sense of being rushed and pressed for time during working hours, but not during non-working hours.¹⁰

Our leisure time has become fragmented into small segments and that is contributing to the feeling of time poverty. The leisure hours we have are increasingly broken up into rigid blocks, sort of like a television schedule, that may, individually, be too small to accommodate out-of-home leisure activities. So instead we are limited to shorter-duration, casual leisure activities at home. This of course limits our leisure choices and makes us feel we lack time for what we would like to do.

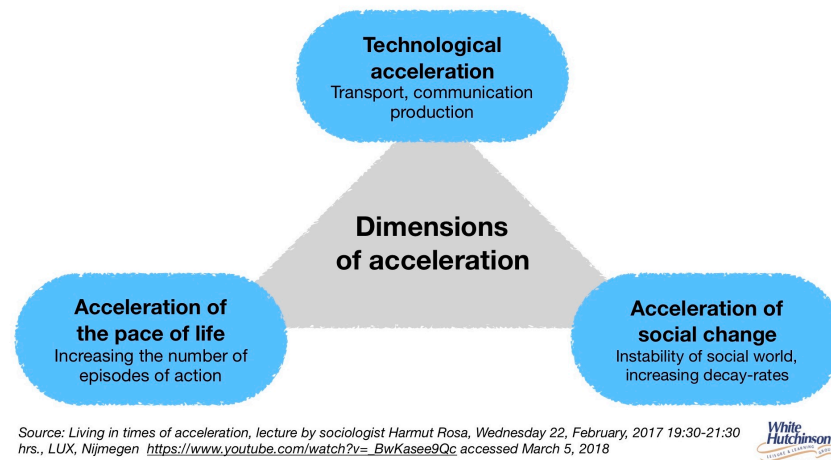
Social acceleration

Sociologist Hartmut Rosa argues that "social acceleration;" the acceleration of technological change, of social change and the pace of life, is responsible for the feeling that time is running faster. Rosa says there is an ever increasing mismatch between the time we have and the time to fulfill our "to do" list. Hence, we are always short on time and we feel that

time is running faster. He goes on to argue that technological innovation enables increases in our options for social and consumer activities, which in turn, generates time scarcity as

Three dimensions of social acceleration

Social acceleration: Setting the world in motion-speeding up it's material, social and intellectual fabric



we want to do more of those increased options. Rosa says that although we may have an impressive array of time saving devices that accelerating technology change has brought us, the amount of things that we need or want to do is increasing faster than the time being saved by those devices. One example he gives is social media, which "make it quick and easy to stay in touch with people. Soon you're in touch with vastly more people than you previously were and you're spending far more time maintaining those contacts than you ever would have when the only option was to write a letter." ^{11,12,13}

Time deepening

Time use researchers also argue that the phenomenon of "time deepening," doing more and more things quickly and simultaneously is contributing to the feeling of time scarcity.

Feeling there is not enough time to do everything, feeling rushed, leads to what is called *time deepening*. Time deepening is a shift from thinking of doing things in either-or-terms - doing either one activity or another - to doing activities simultaneously. Time deepening can occur in four ways:

1. Attempting to speed up a given activity, do it faster
2. Substituting a leisure activity that can be done more quickly for one that takes longer
3. Doing more than one activity at once - multitasking, especially using digital technology
4. Undertaking a leisure activity with more precise regard to time - tight scheduling ^{14,15}

Today many people using time deepening are able to avoid the sacrifice of one activity for another, seeking instead to do it all and see it all, and do it and see it immediately and simultaneously. The emphasis is on cramming lots of experiences into shorter time frames.

Just think about someone watching a TV show while having a snack and texting a friend. Or how about driving while drinking a coffee and talking to someone via a Bluetooth connection to your smartphone (this of course is not a safe multitasking practice).

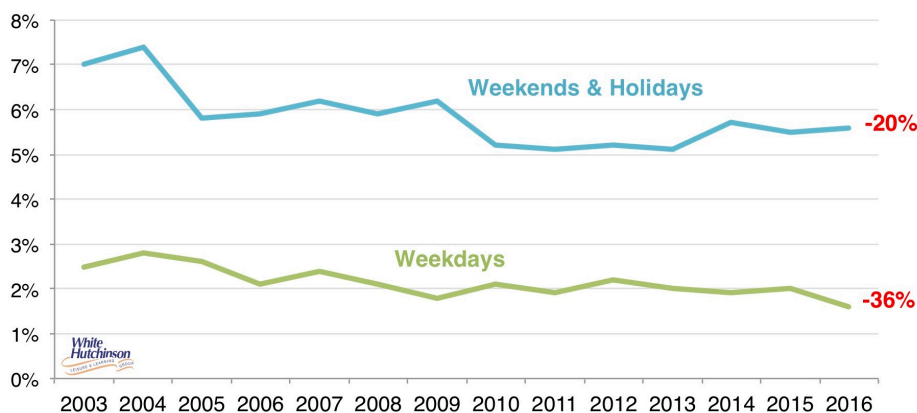
Impact on OOH entertainment

When there is less free time, especially when there is time poverty, it's the leisure discretionary time activities, especially the out-of-home (OOH) ones that require the most time, such as sports, recreation and entertainment (including their travel times) that will likely be reduced the most or eliminated completely.

A recent survey by McCann Truth Center found that half of people (49%) point to a lack of time and too many responsibilities as being their major barriers to enjoying more entertainment. 70% say they wish they had more time to spend on entertainment.¹⁶

Examination of data from the American Time Use Survey¹⁷ suggests that time poverty is contributing to a decline in participation at OOH entertainment and arts activities. A declining percent of the population is participating in an OOH entertainment or art events on the average day.

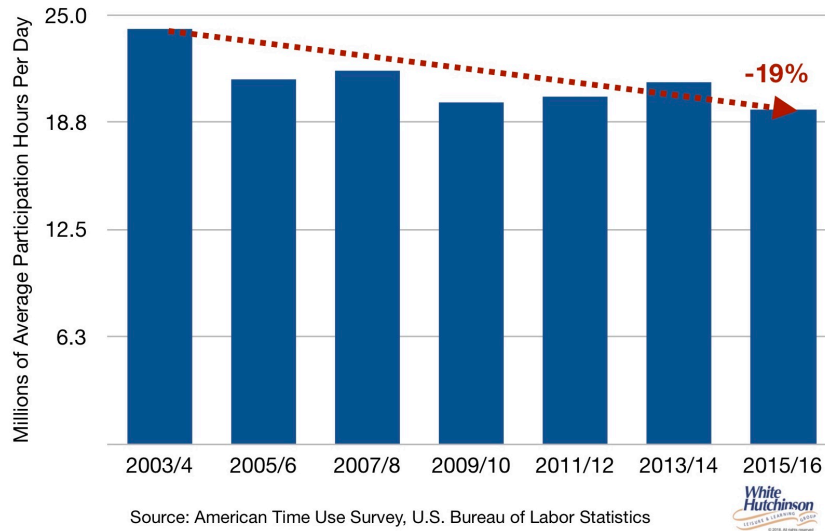
Percent of population age 15+ who participated in out-of-home entertainment & arts on an average day



Source: American Time Use Survey

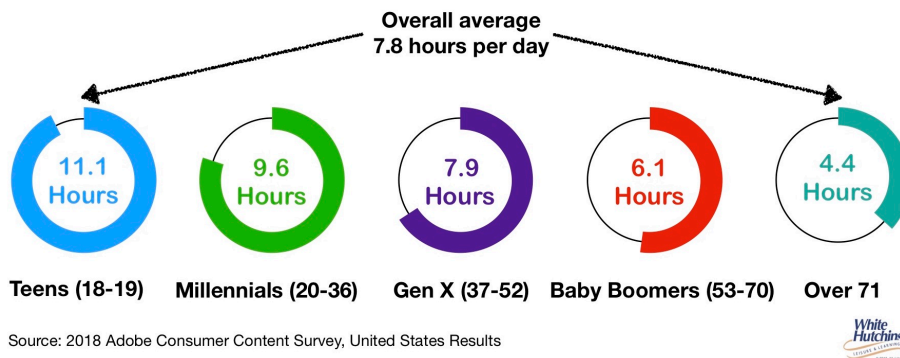
Not only is there a drop in participation, but there also a drop in average time spent by the population age 15+. So even with a one-seventh (+14%) increase in the total population age 15+, the total population spent a total of nearly one-fifth less total time at OOH entertainment and arts venues (-19%) in 2016 compared to 2003.

Average Total Daily Hours of Participation in Out-of-Home Entertainment & Arts, 2003 - 2016 (age 15+)



Some of the decline of time spent participating in OOH entertainment and arts is also due to an increase in time spent online and on digital devices. Between 2008 and 2016, the time U.S. adults spent with digital media more than doubled.¹⁸ In December 2017, adults spent nearly an average of one-third of their day (7.8 hours) engaged with digital devices.¹⁹

Average hours of digital device usage per day - December 2017



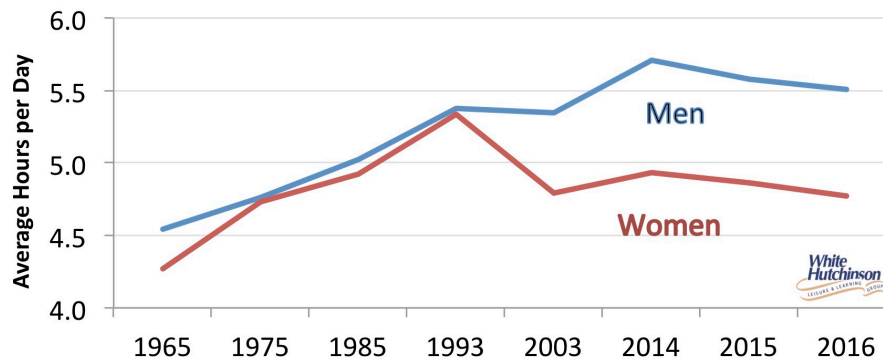
Research by economist Scott Wallsten found that leisure time spent on digital devices crowds out, displaces time spent in other activities, including OOH leisure activities.²⁰ As engagement with digital devices and evolving forms of at-home digital technology such as virtual and augmented reality increases, it is likely that OOH entertainment and the arts will continue to see declines.

Increasing leisure time

The feeling of time poverty is actually counter to the amount of leisure time Americans enjoy, which is higher now than over five decades ago. On average since 1965, Americans have gained one-sixth more leisure time a day (+17%), an additional 44 minutes each day. Males have gained the most at nearly a full hour per day (58 minutes) whereas females have gained just one-half hour (30 minutes). Males have an average of one-half hour more

leisure time a day than females.²¹

Average hours of leisure per day



Source: Federal Reserve Bank of Boston and American Time Use Survey

Conspicuous time poverty as status

Although it would seem that being time poor would be looked at as undesirable, we've seen an epic cultural shift whereby leisure time isn't the status symbol it once was. On the contrary, a busy and overworked lifestyle, being harried and time poor, being pressed for time has become an aspirational status symbol. In the past status was associated with the expenditure of money on stuff (diamonds, cars, real estate, designer clothes). Now consumers signal status by portraying themselves as prosperous through the conspicuous display of busyness and lack of leisure time. The busier you are the more important you seem. People compete to be harried, or at least appear that way. Brigid Schulte, author of the book *Overwhelmed: Work, Love and Play When No One Has the Time*, puts it this way, "Keeping up with the Joneses used to be about 'I have the bigger house and car,' and now it's much more about how much stuff you can cram into your calendar."²²

In their 2016 research, Silvia Bellezza and her research associates examined different aspects of busyness and leisure time. Their research found that busyness is associated with long hours of work and less leisure time and that a busier individual is perceived as having a more meaningful job. They make the argument that not only has a busy and overworked lifestyle, rather than a leisurely one, become an aspirational status symbol, but also that modern day social media has opened up a new way to communicate one's level of busyness to a large number of people through status updates and tweets, enhancing the efficacy of busyness as a more appropriate status signal. Showcasing the use of timesaving apps, services and devices is also used in social media to infer busyness, regardless of how busy a person truly is.²³

The researchers argue that portraying oneself as harried and busy is a more disguised and socially acceptable way to signal social status than traditional forms of luxury consumption, as inferences of status for people that use expensive luxury products can be tainted by views that those people are extrinsically motivated and less likeable. Using busyness to signal status avoids those negative side effects. They also say that harried people are

perceived as high status not only for their busyness, but also if they are portrayed as enjoying and living their lives to the maximum – working hard and playing hard.^{Ibid}

Judy Wajcman in her book Pressed for Time found high status is associated with a busy, frenetic existence in which work and leisure are crowded with multiple activities with those people who work long hours and are the busiest at work having the most voracious pattern of leisure consumption and highest leisure density—ceaselessly packing more and more activities into the same time period. Wajcman found that dual-earner couples with dependent children have the highest level of participation in leisure activities that require both time and money.¹

Leisure time quality

Wajcman's research found that men have higher quality time than women. They have more hours of leisure undiluted by unpaid work (such as home chores), their leisure time is less likely to be interrupted and the duration of their blocks of pure leisure time are longer than women's, whose leisure time is more hurried as it is more fragmented into periods of shorter duration.^{Ibid}

The stress of time famine spills over and impacts the quality of leisure time that people do have. Max Haller and research associates examined leisure time stress, an increasing "time consciousness" during leisure, the feeling of being rushed and that it will be difficult to accomplish a leisure activity in a given time. They found that people who feel rushed in their leisure time also consider themselves time poor and that over one-third of Americans feel rushed in their leisure time (37%).²⁴

Robert Putnam says the fragmentation of our leisure time has decreased its quality, "Our extra 'free time has arrived (and then disappeared) in tiny packets scattered across the workweek—long enough to channel-surf, but not enough for deep relaxation and leisure, ... and not enough for social intimacy and civic engagement, both of which are declining, according to time use studies."²⁵

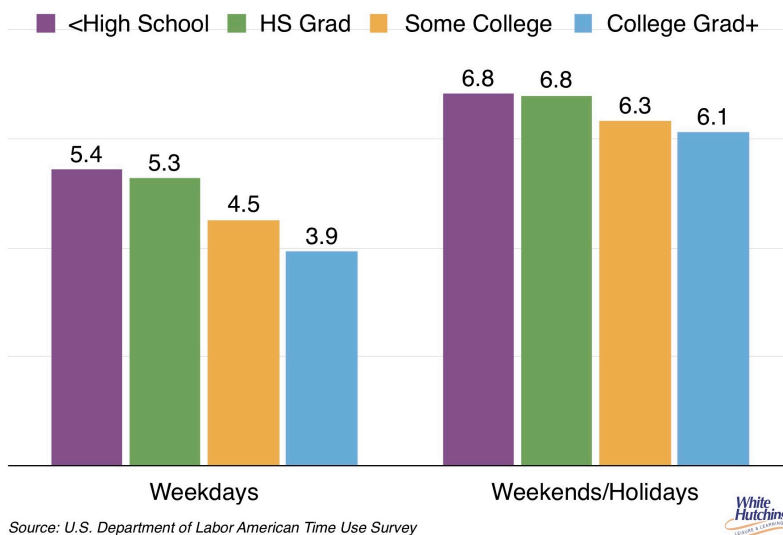
Collecting leisure experiences

Wajcman argues that we live in a time where we want to do the most with our leisure time so we have an insatiable pursuit to experience as many options as possible from the vast array of leisure options the world now offers. She calls this the secular version of happiness.^{Ibid} As a result, we are seeking a variety of leisure experiences that we only do once. We want to check off items on our experiential check list, move on to the next one and add to our collection in order to build our experiential CVs. This also makes us feel that we used our time productively.²⁶ And to narrate our social identities and gain social capital we share them on social media. Shareworthy experiences are the new social capital.

OOH entertainment time inequity

Along with the inequity of discretionary free time that includes time for leisure activities, there is an inequity in time spent on OOH entertainment and sports. Higher-educated adults who generally also have higher incomes, spend less time in leisure and sports than less-educated adults. College graduates spend 84 minutes less per day weekdays and 42 minutes less on weekends and holidays in leisure and sports than high school graduates.¹⁷

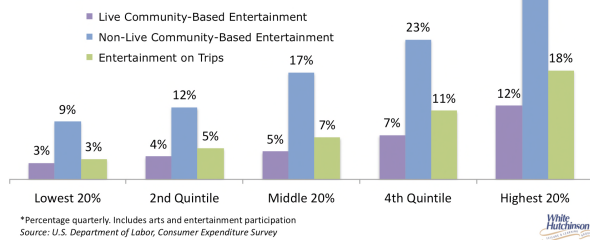
2016 average daily hours spent in leisure and sports activities by educational attainment



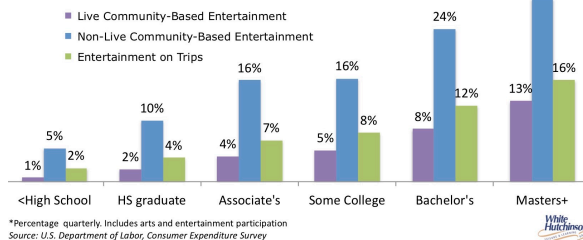
Inequity of participation in OOH entertainment

The spending data shows that the consumers who have the highest rates of time famine, who have the least amount of time for leisure, have the highest participation rates in OOH entertainment.²⁷

Percentage of U.S. households participating in select entertainment activities by quintiles of income, 2016*



Percentage of U.S. households participating in select entertainment activities by educational attainment, 2016*



OOH entertainment spending

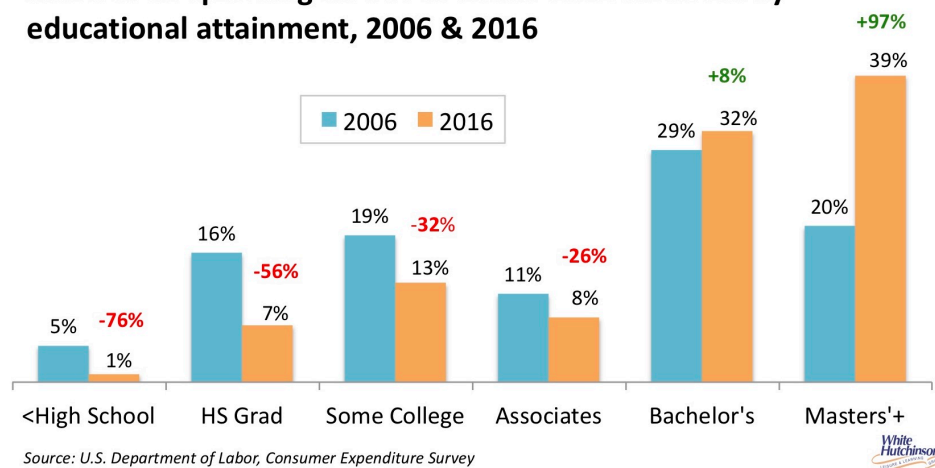
Along with the decline in both participation at and time spent participating in OOH entertainment and arts, there is a decline in spending as well. Compared to spending at the turn of the Century, 2016 average household OOH entertainment spending (inflation-adjusted) has declined by 13%. Spending in the local community has declined by 5% and spending on trips has declined by nearly one-quarter (-24%). As a share of all household

spending, OOH entertainment spending has declined by one-sixth from 0.41% in 2000 to 0.34% in 2016 as a share of all household expenditures.^{Ibid}

Social stratification of spending

There is a clear trend of growing inequality in spending on OOH entertainment, or what is also known as social stratification. However, the inequity is a mirror image of that for discretionary leisure time, as the higher socioeconomic households with the least amount of leisure time are increasing those expenditures while socioeconomic households with the most leisure time have declining expenditures. The top 40% of income households now account for nearly three-quarters (72%) of all OOH entertainment expenditures. The top 20% of income households now account for a little over half (51%) of all OOH entertainment expenditures. Bachelor's degree and higher educated households (41% of the adult population) now account for 71% of all OOH entertainment expenditures, an increase of nearly one-half (49%) from just ten years ago.^{Ibid}

Share of all spending on out-of-home entertainment by educational attainment, 2006 & 2016



Recently an increasing share of OOH entertainment spending has shifted to spending on trips and for live entertainment events in the local community. The vast majority of OOH entertainment spending increases since 2013 (71%) was for entertainment on trips, where average household spending increased by one-quarter (24%). Entertainment spending in the local community only increased 6%. Over three-quarters of that increase (77%) was for live entertainment - plays, theatre, concerts, etc. The change for non-live entertainment was basically flat (+2%).^{Ibid}

The higher socioeconomic, time starved consumers who spend the least time in leisure are spending the most for OOH entertainment. This suggests that they are seeking out the higher quality, the more premium, the higher quality OOH entertainment options which have associated higher prices.

The participation and spending data support the observation and conclusion that higher socioeconomic consumers who work long hours and are the busiest at work have the most voracious pattern of leisure consumption and highest leisure density.¹

Endnotes

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- ⁴ Kalenkoski, C. M., Hamrick, K. S., & Andrews, M. (2011). Time poverty thresholds and rates for the US population. *Social Indicators Research*, 104(1), 129-155.
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- ⁹ Rheault, M. (2011) "In U.S., 3 in 10 Working Adults are Strapped for Time", *Gallup* <http://news.gallup.com/poll/148583/working-adults-strapped-time.aspx> accessed 3/5/2018.
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- ¹² Sutton, Oliver (2010) "What is Social Acceleration? Part Four: Harmut Rosa and the Contraction of the Present" *Social Acceleration Blogspot* <http://socialacceleration.blogspot.com/2010/05/what-is-social-acceleration-part-four.html>, accessed 3/5/2018
- ¹³ Rosa, H. (2013). *Social acceleration: A new theory of modernity*. Columbia University Press. Translated by Jonathan Trejo-Mathys
- ¹⁴ Godbey, G. (1976). Time deepening and the future of leisure. *Journal of Physical Education and Recreation*, 47(8), 40-42.
- ¹⁵ Robinson, J., & Godbey, G. (2010). *Time for life: The surprising ways Americans use their time*. Penn State Press.

- ¹⁶ Truth About Entertainment Whitepaper – 2017, McCann Truth Central
- ¹⁷ Bureau of Labor Statistics, U.S. Department of Labor, *American Time Use Survey* is the source for the data used in the analysis. Its category for “entertainment and arts” includes attendance at performing arts, museums, movies/film, gambling establishments, festivals, amusement parks, carnivals, historic sites, carnivals, readings, art/historic/music lectures, and different types of shows such as flower and auto shows.
- ¹⁸ Kleiner Perkins Internet Trends 2017 – Code Conference Presentation by Mary Meeker, May 31, 2017 <http://www.kpcb.com/internet-trends> accessed March 12, 2018
- ¹⁹ 2018 Adobe Consumer Content Survey, United States Results
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- ²⁶ Anat Keinan and Ran Kivetz (2008) ,“Productivity Mindset and the Consumption of Collectable Experiences”, in *NA - Advances in Consumer Research Volume 35*, eds. Angela Y. Lee and Dilip Soman, Duluth, MN : Association for Consumer Research, Pages: 101-105.
- ²⁷ Bureau of Labor Statistics, U.S. Department of Labor, *Consumer Expenditure Survey* is the source of the data used in the analysis. Spending on trips is defined as 50 or more miles away from home or on an overnight trip. Community spending is within 50 miles of home an not on an overnight trip.

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