But misconceptions & concerns still common

In home vs OOH
‘Damaging’ role of technology
The dangers of being ‘always on’
Unhealthy lifestyles vs. The Assault on Pleasure
THE BIRTH OF THE PLAY SOCIETY
The increasing importance of leisure

How important is the following in your life?
(\% responding ‘very’, UK)

European Values Survey/World Values Survey/Trajectory Global Foresight
More time to play

Then: inflexible lifestyles mean work comes first

Now: more people with control over more of their time
Tech-enabled leisure
Quarterly growth in spend, %, from pre recession peak

Source: ONS Consumer Trends /Trajectory
We do more than anyone else

% of people doing at least 6 leisure activities (from 10 listed)

Source: Trajectory Global Foresight 2013-14
CONTEMPORARY LEISURE
Paradoxes of modern leisure
Key Leisure Trends
These people cannot be millionaires! They don't look like millionaires, they don't dress like millionaires, they don't eat like millionaires, they don't act like millionaires—they don't even have millionaire names. Where are the millionaires who look like millionaires?  
THE DIGITALISATION OF LEISURE
“In our society, the public space of the social movements is constructed as a hybrid space between the Internet social networks and the occupied urban space: connecting cyberspace and urban space in relentless interaction, constituting technologically and culturally, instant communicates of transformative practice

…the networked space between the digital space and the urban space, is a space of autonomous communication.”

Manuel Castells, Networks of Hope and Outrage, 2012
New leisure moments created
FOMO & JOMO

Always on – never missing out

Digital downtime – checking out

So many choices
So little time!
IN VS. OUT
In home vs. Out of home: In home is winning

% of people doing activities falling into the following categories, by time of day

- In home leisure 2000
- In home leisure 2011
- OOH leisure 2000
- OOH leisure 2011
Modern home comforts
On price, OOH can’t compete
But staying in is no match for going out.
OOH is changing, not dying

The games have changed, but the occasions stay the same
Leisure out of home

% of people doing each of the following, 2014

- Eat out: 71%
- Walk for pleasure: 65%
- Visit parks/gardens: 54%
- Cinema: 54%
- Shopping: 51%
- Theatre/concert: 49%
- Art gallery/museum: 46%
- Watch sport live: 37%
- Play sport: 29%
- 28%

Source: Trajectory Global Foresight, 2014
FURTHER AHEAD
The benefits of the leisure society

Total annual retail/leisure expenditure
Material vs. Enrichment

16% of people who are dissatisfied with their leisure time are satisfied with their life overall – compared to 71% of people with high leisure satisfaction.

Source: Oxford Economics / Trajectory Global Foresight 2013-14
Leisure at the centre of society

Source: PricewaterhouseCoopers 2005
The leisure society has been a long (and hard fought) journey.
But more people now have more control over more of their time.
Modern leisure’s paradoxes are far removed from the routines of the past.
But the central thread is control – with technology providing greater access.
Key leisure trends driving polarisation:
- Health vs. Hedonism
- Value vs. Luxury
- Activity vs. Inactivity
- Social vs. Alone
Volunteering/activism emerging as a key part of the experiential economy.
In-home has benefitted from the downturn…
…but people enjoy OOH more than anything else.
Economic and personal benefits of leisure should not be understated.
In the future, we could see the rise of the true experiential economy…
…but if not at a societal level, tailored, VIP hedonism could rise.
Thank You

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