

Has video game play crowded out & displaced time and attendance at out-of-home entertainment venues?

*Getting to the root cause of
declining repeat appeal*

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A White Paper by:



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Time is the currency of experiences.¹ People only have a limited amount of free time. The internet and digital technologies have introduced a wide variety of new digital activities that are transforming everyday life and competing for peoples' free-time.^{2,3,4}

There is a perception that Americans spending more time on their screens playing video games is displacing, crowding out other forms of leisure, including time spent attending out-of-home (OOH) entertainment and arts/cultural (E&A) venues.

Our company's research of many different types of OOH entertainment, especially traditional-type family entertainment centers (FECs), finds many are experiencing a decline in participation and visits, including repeat visitation. Research by PGAV^{5,6} has also found a decline in attendance at 13 of 16 different types of entertainment attractions, including significant declines in repeat visits to FECs.

We've heard complaints from a growing number of OOH entertainment operators that they believe at-home video game play is a contributing cause for the decline of visits to their centers.

We decided to dig into the data and research to determine exactly what leisure time changes are actually taking place and whether video game time is crowding out and displacing time and attendance at OOH E&A. And if it isn't, what might be the cause of declining attendance, especially repeat visitation, at many traditional types of OOH E&A?

First we will review data on changes to Americans' time use, then review academic research findings, followed by a discussion and analysis of what we interpret everything to indicate.

Changes to out-of-home entertainment and arts

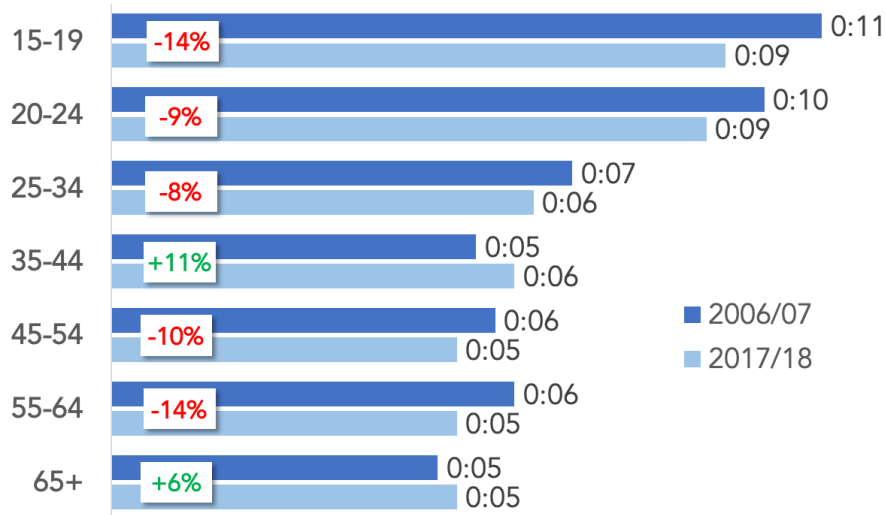
The *U.S. Bureau of Labor Statistics' American Time Use Survey* surveys about 12,000 people each year on how they spend their time. We dug into their data and analyzed changes in the time spent attending OOH E&A venues (including travel time). We compared the annual average for the two years right before the Great Recession and the launch of the smartphone – 2006/2007 – with the annual average for most current years available – 2017/2018.* The averages in all our ATUS analyses are for the entire population, those participating as well as those not attending.

* We averaged two years together for the beginning and end time periods in order to increase the sample size for small population subgroups and smooth yearly variation.

During that 11-year time span, there was an overall 5% decrease in OOH time spent attending OOH E&A venues varying from over nine fewer hours per year for ages 15 to 19 to 3.7 hours more per year for ages 35 to 44.⁷

Figure 1

Total time spent per day on entertainment & arts*, by age, 2006/07-2017/18 (in hours:minutes)



*Includes travel

Source: U.S. Department of Labor, American Time User Survey



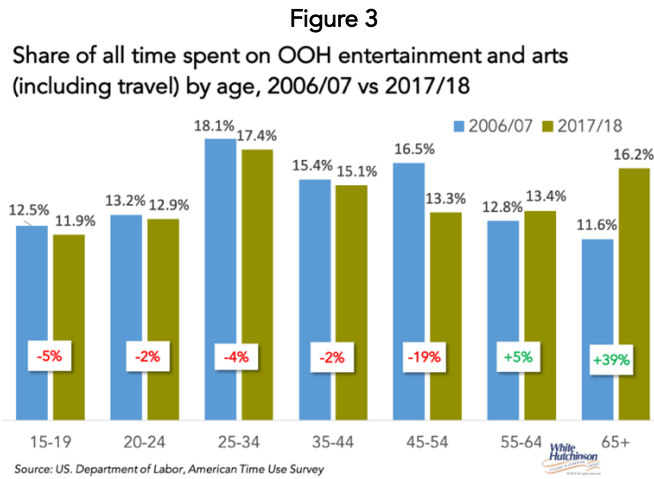
Assuming an average attendance and travel time of 2.5 hours per visit, the decrease in time spent has resulted in the following changes to the number of visits to OOH E&A venues per year for the different age groups.

Figure 2

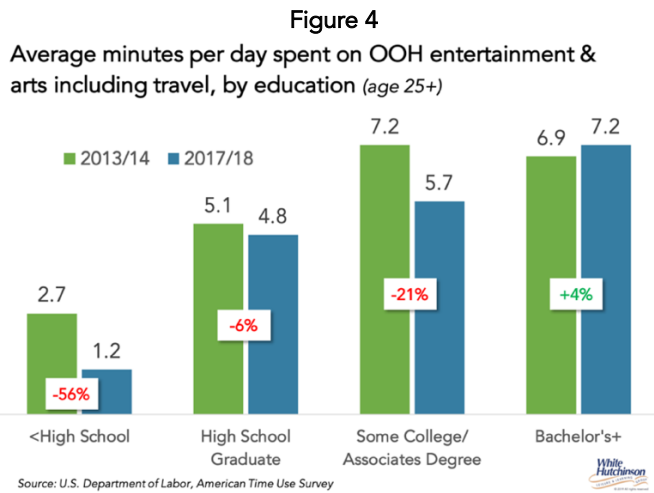
Annual change in number of E&A Visits 2006/07 - 2017/18			
Age	Change		Number 2018 Visits
	Hrs per Yr	E&A Visits	
15-19	(9.1)	(3.7)	23
20-24	(5.5)	(2.2)	23
25-34	(3.6)	(1.5)	16
35-44	3.7	1.5	15
45-54	(3.7)	(1.5)	13
55-64	(5.5)	(2.2)	13
65+	1.8	0.7	13

The greatest decline has been with the youngest age groups. Ages 15-19 are on average making 3.7 fewer trips a year attending E&A, and those age 20-29, 2.2 fewer trips. However, these two age groups still remain the most active participants in OOH E&A, attending on average approximately twice per month. Ages 25-44 are attending around 1.3 times per month and age 45 and older are only visiting about once a month. The 35-44 age group has increased their E&A attendance as has the oldest group, age 65+.

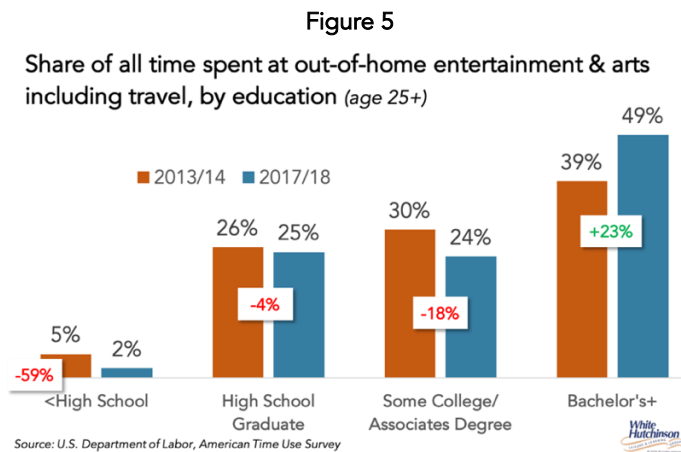
The share of all time spent on OOH E&A has shifted over the 11 years. There has been a shift of share from ages 15 through 54 to ages 55+ ^{lbid}



Time spent at OOH E&A for age 25 and older varies greatly by education level. OOH E&A time increases with education levels. Since 2012/13 (earliest data available by education), average OOH E&A time has decreased for lower education levels and increased for bachelors and professional degree adults. ^{lbid}

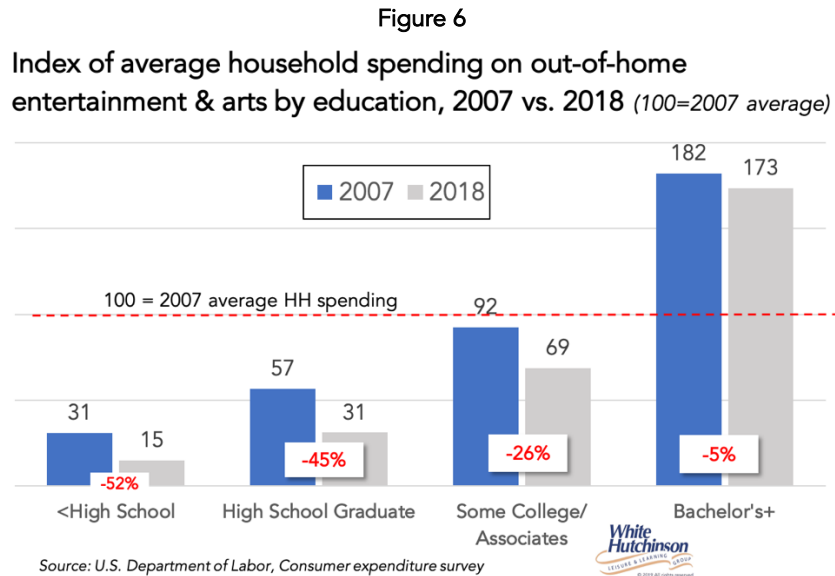


What is even more noteworthy is that the share of all time at OOH E&A has significantly increased for bachelors+ adults from 39% of all such time to almost one-half in 2018 (49%). There is a gentrification trend for OOH E&A.

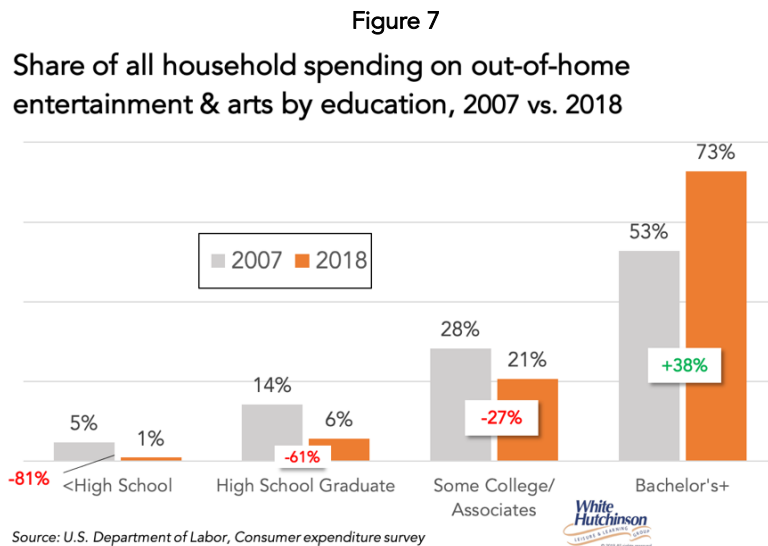


This gentrification trend is attributable to not only an average increase in time being spent by bachelor+ individuals, but also population growth, 95% of which has been with bachelor+ adults over the four-year period. The share of the adult population age 25+ with a bachelor's+ degree has grown to a larger share of the total population, now 38%.^{1bid}

Changes in spending on OOH E&A also confirms these general trends. Since 2007, households with less than a bachelor's degree have experienced significant declines in spending.⁸

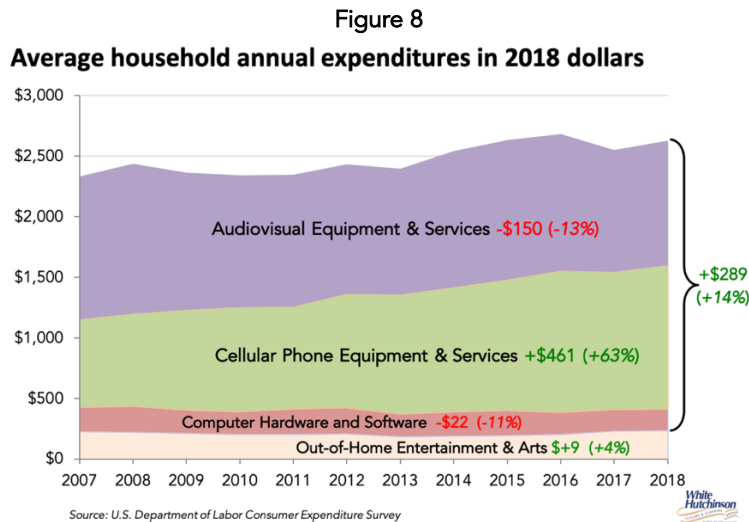


A larger share of all OOH E&A spending has shifted to bachelor's+ households. Their share of all spending has increased by 20 percentage points from a little over half in 2007 (53%) to nearly three-fourths in 2018 (73%).^{1bid} This further confirms the OOH E&A gentrification trend

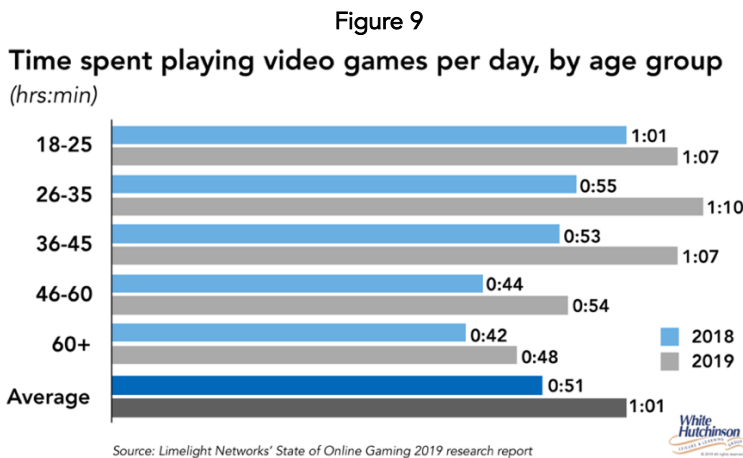


Although time at OOH E&A has decreased overall by 5%, spending on it has increased by 4% (inflation-adjusted) since 2007.^{7,8} That increase is small compared to the 14% (inflation adjusted) increase in spending for digital screen hardware, software and equipment. The

increase in digital spending correlates to the significant increase in time that Americans are spending with leisure screen media.

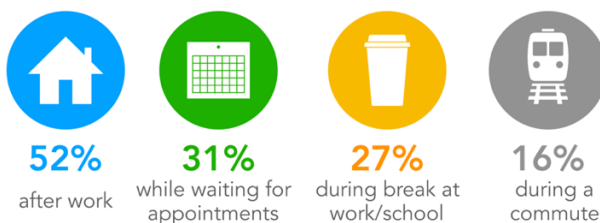


There is little doubt that Americas are spending more time playing video games. *Nielsen* found that the percentage of the population age 13 and older that play video games has increased from 58% in 2013 to two-thirds (66%) in 2018.^{ibid} *Limelight Networks* found the average 18+ adult currently spends a little over one hour per day playing video games (1hr:1min), a one-sixth, 10-minute per day increase over 2018.⁹



This data includes multitasking, such as playing video games on a smartphone during commercials while watching TV or in spare time while waiting for something.¹⁰

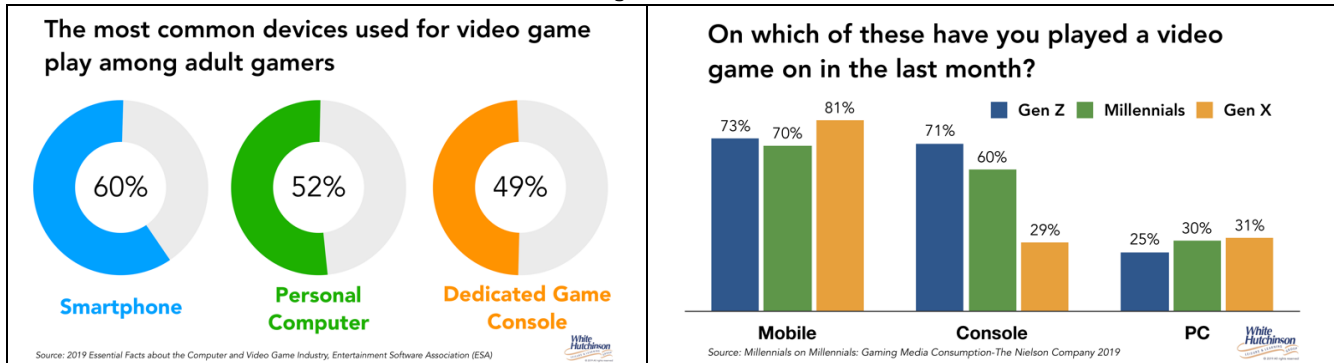
Figure 10
Gamers play throughout the day



Source: 2019 Essential Facts about the Computer and Video Game Industry, Entertainment Software Association (ESA)

Smartphones continue to be the preferred videogame playing device¹⁰ as people can use them wherever they are throughout the day and not be restricted to consoles or personal computers at home. Almost half of total gaming time is now spent on mobile devices (smartphone + tablet).¹¹

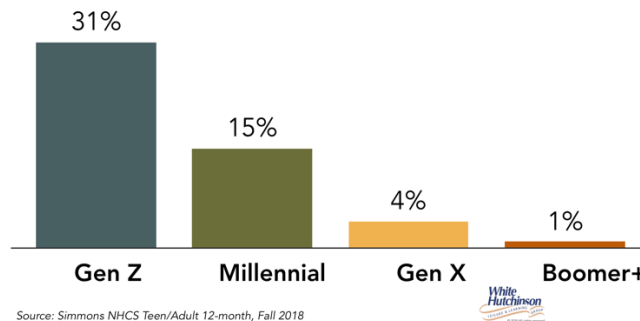
Figures 11 & 12



Video games have high appeal to the youngest people. 31% of Gen Z consider video games their main source of entertainment. This preference skews very high for males. For males age 17-21, 47% says it's their main source of entertainment, and for boys age 12-16, it jumps to 57%. For females the same age ranges, it is only 10% and 13% respectively.¹²

Figure 13

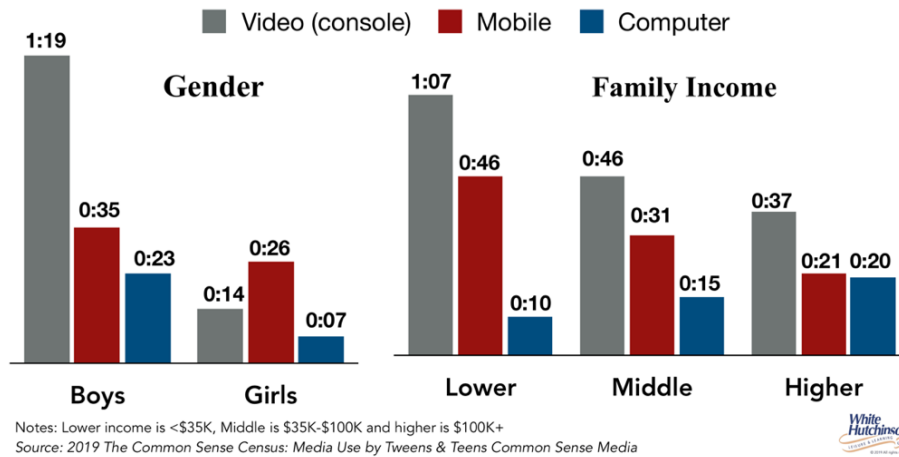
Percent that agree video games are my main source of entertainment



2019 video game time varies by gender and socioeconomics.^{ibid} Research by *Common Sense Media* found that for 8- to 18-year-olds, the daily time and device used to play video games 2019 varies by gender and family income. Boys and those from lower income families spent the most time playing video games. For boys, the majority of time is spent playing on gaming consoles whereas for girls, it was on mobile screens.^{ibid}

Figure 14

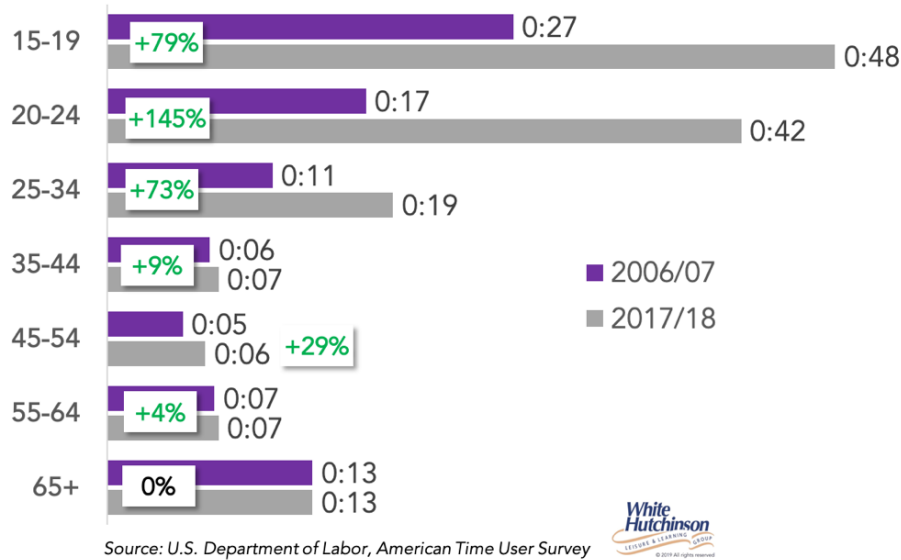
Average daily time spent gaming by 8- to 18-year-olds, by demographics, 2019 (in hours:minutes)



We also used the *American Time Use Survey* data to analyze changes in average primary time spent playing games[†] during two two-year periods – 2006/07 and 2017/18^{**}.

Figure 15

Total time spent per day playing games, by age, 2006/07-2017/18 (in hours:minutes)

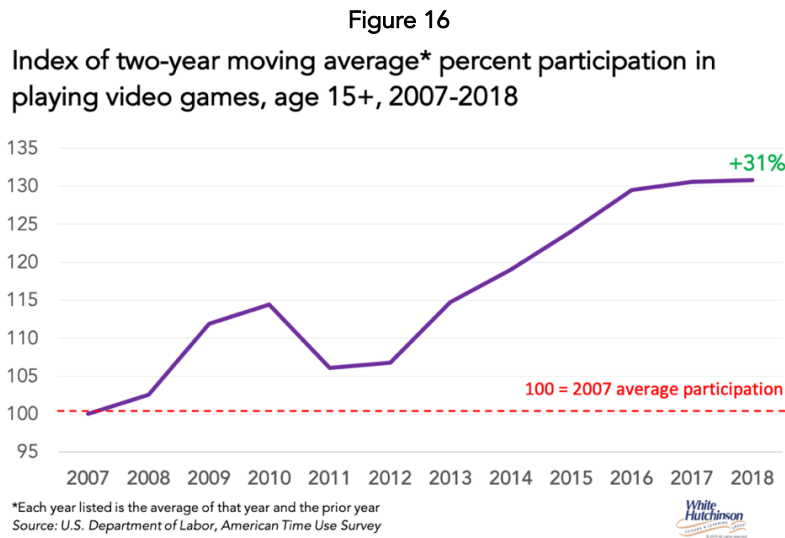


[†] In the ATUS survey, the category “time playing games” not only includes video games, but also board games, which are believed to be a minor portion of the total time with insignificant or no changes over the time period compared to time playing video games responsible for the vast majority of overall increases.

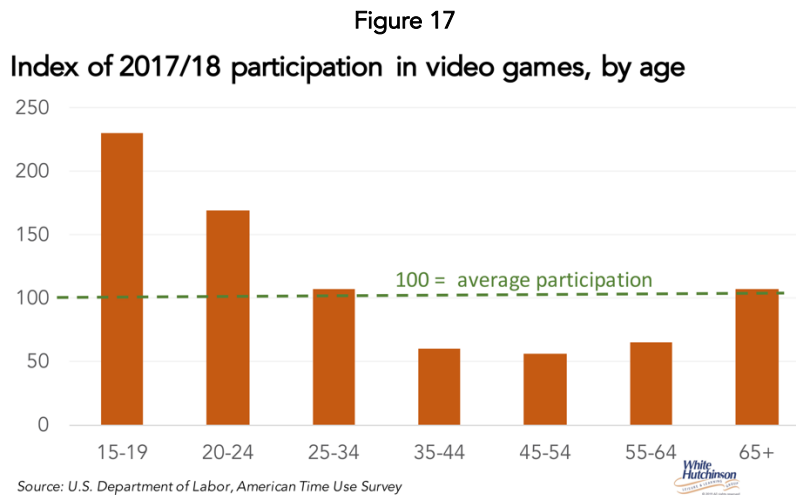
^{**} We averaged two years together for the beginning and end time periods in order to increase the sample size for small population subgroups and smooth yearly variation.

There has been a significant increase in average time spent playing video games by the youngest people. 15- to 19-year-olds spent on average 49 minutes per day playing video games as their primary activity, a 79% increase from the 28 minutes they played in 2006/07. Age 20-24 closely follows, spending an average of 43 minutes per day playing video games, a 145% increase from the 17 minutes they spent 11 years prior.⁷

The overall participation rate of playing video games has increased by almost one-third (31%).

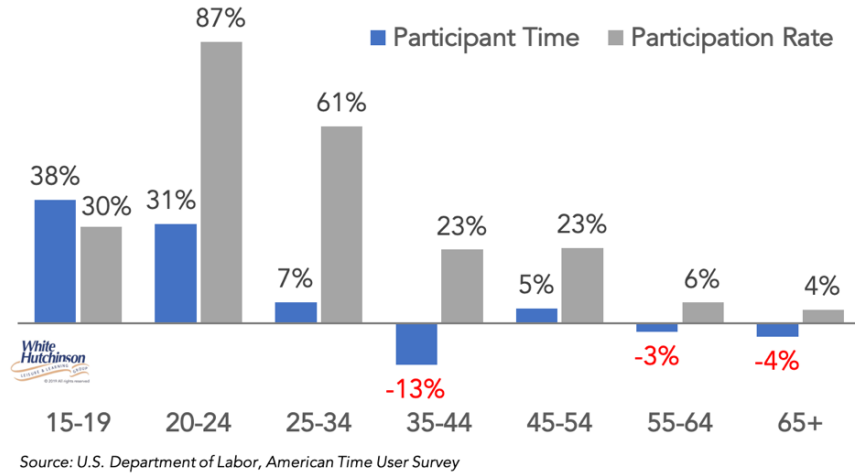


The ATUS data shows that the 15-19 age group has the highest participation rate, with participation declining with age with the exception of ages 65+.



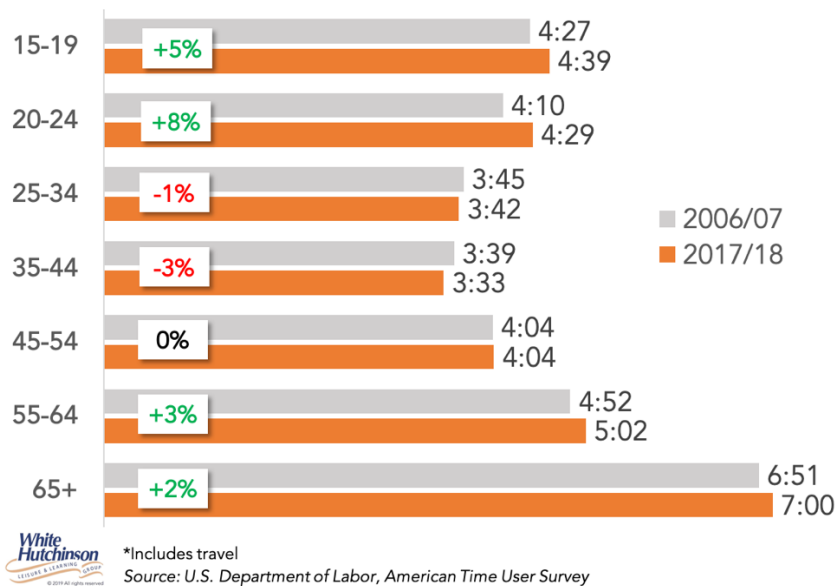
The changes in average time playing video games are due to a combination of changes to both increased participation rates and changes to the playing time of participants.

Figure 18
 Percent change in participant time and participation rate of video games 2006/07 vs 2017/18, by age



One factor that needs to be examined is total leisure time. Available leisure time has actually increased slightly, an average of 9 minutes a day, with the youngest people having the greatest increases in leisure time. ^{ibid}

Figure 19
 Total time spent per day on leisure*, by age, 2006/07-2017/18 (in hours:minutes)



However, increases in total leisure time have not totally offset the increases to the time playing video games. For ages 15-44, there is generally one hour more increase in average video game time play than increase in overall leisure time per week. The increases in video game time not offset by increases in total leisure time must be displacing time from other activities.

Figure 20

Net offset in changes to video game play time by changes to total leisure time 2006/07-2017/18 (hrs/wk)			
Age	Change to video game time	Change to total leisure time	Not offset by changes to leisure time
15-19	2.5	1.4	(1.1)
20-24	2.9	2.2	(0.7)
25-34	0.9	(0.3)	(1.3)
35-44	0.1	(0.8)	(0.8)
45-54	0.2	0.1	(0.1)
55-64	0.0	1.2	0.0
65+	0.0	1.0	0.0

What academic research found

All this data seems to suggest that more leisure time devoted to playing video games may be displacing time for OOH E&A. However, it does not establish a cause and effect relationship. Perhaps there are other factors contributing to or causing the changes to OOH E&A time and attendance. To try to find out, we dug into the academic research, much of which used analysis to determine the statistical significance of changes in time use. Some of the research examined overall digital and/or leisure screen time, some examined the effects of just video game time. It ends up everything isn't as clear cut as the previous data would appear to indicate. In fact, things are much more nuanced and in many cases, completely different.

Displacement of OOH leisure by information and communication technology

A study of 15- to 84-year-olds using the Swedish Time Use Survey² compared heavy, medium and light information and communication technology (ICT) users and found that time spent on ICT is largely associated primarily with the availability of free-time. Little indication of displacement was found for out-of-home activities with low and medium ICT use, but there were indications of displacement with heavy users of ICT (people who spend one hour or more daily, two hours on average). They found that heavy ICT users spend more time alone, are more home-centered and take time away from sports and outdoor recreation, but not from OOH entertainment and cultural activities. They found that a high level of ICT use relates more to an introverted lifestyle.

Another research study of age 15-24 Swedish youth compared heavy, medium and light ICT users.¹³ It found that there is no such thing as a homogeneous group of 'digital natives.' Heavy users (predominately video gaming) had more free time on weekdays and spent more time on ICT, performing activities alone and at home. They spent slightly less on entertainment and culture and less on socializing. On weekends, heavy users spent less time on OOH activities such as sports and recreation and real-life social interaction, but time

spent on OOH entertainment and culture was no different than medium and light ICT users. Heavy users were predominately male and most common amongst the youngest (age 15-19) students, those living alone and those with low incomes. Light users of ICT have low and infrequent levels of use. Medium ICT users on the other hand adjust their private ICT use to their available free time windows and do not give ICT a particularly high priority as a leisure activity.

A third Swedish study¹⁴ of 20- to 29-year-olds found no indication that ICT use promoted (or displaced) free-time activities such as sports, outdoor recreation, entertainment and culture. It found that people with more time for leisure activities also spent more time online.

Displacement of OOH leisure by video games

The research on the displacement OOH entertainment by video game play also tends to disprove the theory. Although little of the research directly looked at the impact on OOH entertainment, there is considerable research that shows that video game play does not decrease OOH socialization, but rather facilitates it, suggesting that there is no decrease in OOH leisure.

For instance, a Spanish study examining screen media use by 15 and 16-year-olds found that male gender correlated with the use of video games and that sedentary screen time does not displace participation in physical activity.¹⁵ While a second Spanish study of 12- to 16-year-olds found a positive association between time spent on computer/video games and light physical activity.¹⁶

Outside of Spain, a study using the U.K. National Survey of Cultural Participation of adults age 16+ found that video game players are greater consumers of culture such as attending cinemas, culturally specific festivals (including circus and carnivals) as well as concerts, performing arts and visiting heritage sites.¹⁷

However, when displacement does occur, it is not necessarily OOH entertainment that is displaced. An American study¹⁸ found that the entertainment crowded out, displaced the most by playing video games, are digital leisure activities, primarily television viewing followed by computer use.

There has been a considerable amount of research on the social aspects of video game play.

One study¹⁹ along with a comprehensive review of research on video games²⁰ found clear evidence of socialization as a main motivation for videogame play.

A study of players of the World of Warcraft MMORPG (massively multiplayer online role-play game) found that players used the game to extend real life relationships, meet new people and form relationships, suggesting that online gaming is a social activity and facilitates social activity. It found that World of Warcraft was as social as a team sport.²¹

A study of MMORPG players^{ibid.} found that as much as players enjoyed the socialization aspects of play and the time they spent online, they enjoyed real-life social activities more. Two-thirds of the gamers in the study did not find the socializing aspects of the online world to be more pleasant and satisfying than offline socialization—the gamers showed no signs of having experienced any sort of deterioration in their real world interpersonal relationships. Many met up with their online friends in real life, suggesting that online gaming facilitates social activity.

One study found that playing prosocial games such as MMORPGs consistently predicted offline socialization and friendships.²² Another study found that many friendships made with online gaming expanded into the real world.²³

A study of MMORPG players from 45 countries found that the social interactions in online gaming form a considerable element in the enjoyment of playing and that the type of game play can be extremely social with a high percentage of gamers making life-long friends and partners.²⁴

A longitudinal study of gaming- and non-gaming-related friendship among social online video game players suggested that social online video game play does not have negative real-world consequences on players' offline friendships or levels of offline social support.²⁵

Indeed, research suggests the fallacy of the premise of video gamers as innately anti-social or lacking in social skill. One thesis²⁶ found that there are not extensive associations between social skills and online video game involvement and that video game players' desire to socialize offline did not vary with their level of gaming involvement. The thesis came to an interesting conclusion, "It can be concluded that the online game playing community is not a population of reclusive, socially inept, individuals who have turned to online video gaming environments for social refuge. It can also be concluded that increased online video game involvement does not inevitably lead to worse social outcomes as more involved online players did not demonstrate the all-encompassing, maladaptive social skills that are anecdotally attributed to them."

A preface to a book on the culture of video gaming made a very good point about grouping all video game players together, "We cannot homogenize video gamers, their players, and their culture. It is, of course, obvious to anyone with even a passing knowledge of video games that playing a game such as *World of Warcraft* on a personal computer is very different to playing *Call of Duty* on a games console, which is vastly different to playing *Candy Crush Saga* on a mobile phone."²⁷

Discussion and additional analysis

What does all this data and research tell us about the impact of the growing use and time playing video games on OOH entertainment? Is it having a negative impact? Is it displacing participation and visits to OOH entertainment?

An important finding of the research is that we shouldn't reach conclusions about the impact of video game play based on overall data for any age or cohort group. There is wide variation between people in any age group. There is also a variation on the types of devices they use to play video games, the types of games played and when and how much they play.

Displacement by video game play?

One overall finding of the academic research is that the time spent playing video games is largely associated with the availability of free time. As free time increases, so does time playing video games. Heavy users generally have the most free time.

Video game play on a smartphone, the most common device used, allows filling free time while waiting for an appointment or commuting on public transportation with video game play, which doesn't take time away from leisure activities such as OOH E&A. Data from the *Entertainment Software Association* shows that only 52% of video game players play after work (Figure 10).¹⁰ It appears only some video game play is taking place at home where it could be replacing other leisure activities.

The research found that online gaming, and in particular the popular genre of video games, MMORPGs, are a very social activity and actually complement and facilitate offline socialization. A finding in one study was that video game players are also greater consumers of OOH culture and other forms of OOH leisure destinations. All the academic research disproved any displacement of OOH entertainment by video game play, with the possible exception of a very small group of young, male, heavy-use video game players. But even for them, research, with one exception[‡], didn't find any displacement of OOH entertainment, just other types of OOH leisure.

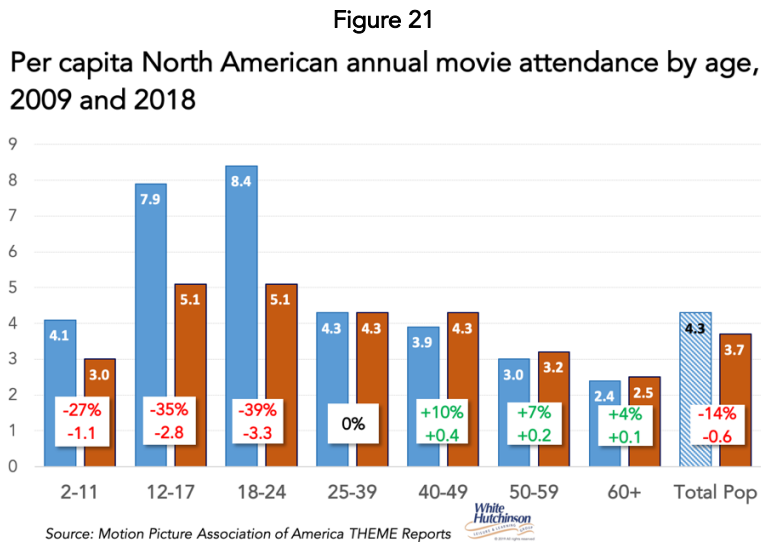
[‡] The study only found OOH E&A displacement on weekdays for age 15-24 heavy users
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The entertainment activities crowded out the most by playing video games are not OOH ones, but rather television viewing followed by computer use for leisure¹⁸

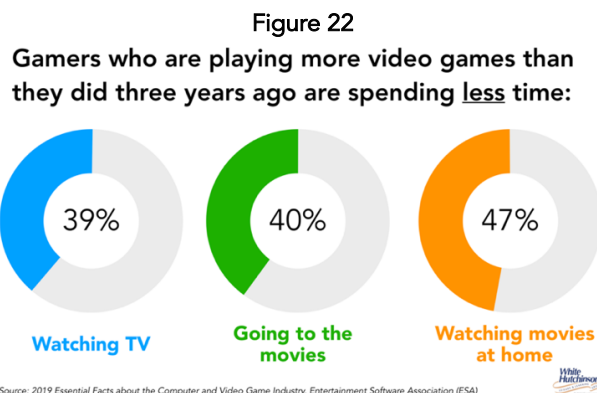
Examining the root cause for declining OOH E&A attendance

There was scant evidence that the increase in the time being spent playing video games is crowding out, displacing time attending OOH entertainment, resulting in declining attendance, especially for traditional family entertainment centers (FECs). Yet the ATUS data on time use indicates a decline in time and visits at OOH entertainment and cultural facilities (Figure 1) even after accounting for increases in total leisure time (Figure 2). So, what is the cause if it isn't increasing video gaming time?

The greatest decline in visits to OOH E&A has been with ages 15-19 and 20-24, 3.7 less and 2.2 fewer annual visits, respectively. Per capita movie attendance has been on a steady decline since 2002. We only have per capita age attendance data back to 2009. It shows the largest per capita decline in moviegoing has been with the 12 to 24 age group, averaging about three fewer visits per year.



This strongly suggests, along with research from the *Entertainment Software Association* (below) that most or all of the decline in visits to OOH entertainment by the younger age groups has occurred with moviegoing and TV viewing, not with other types of OOH E&A.



The ATUS data confirms that the 20 to 44 age group, while increasing their time playing video games, has decreased their TV viewing time. Decreasing movie attendance combined with decreasing television/video time appears to account for all the other leisure time displaced by increased video game for these younger ages.

Figure 23

Changes in time in hours per week 2006/07 - 2017/18			
Age	Change to OOH E&A time	Change to video game time	Change to total TV time
15-19	(0.2)	2.5	0.1
20-24	(0.1)	2.9	(0.8)
25-34	(0.1)	0.9	(1.4)
35-44	0.1	0.1	(0.3)
45-54	(0.1)	0.2	1.2
55-64	(0.1)	0.0	2.8
65+	0.0	0.0	3.1

This is consistent with the academic research that found that increased time playing video games was predominately displacing passive type entertainment on screens, especially television, not active or physical types, suggesting that cinema screen time is also a form passive screen time. It would appear that if despite what the research found, there is any crowding out of OOH E&A by screen time for the 15 to 44 age group, it is mostly due to less movie attendance and television/video viewing.

OOH E&A time and the number of visits for the 25 to 34 age declined by almost exactly the amount of time and number of visits it increased for the 35 to 44 age group (Figure 2), so for the combined group there was really no change, it's just that time and visits have shifted to the older of the two age groups.

Both the 45 to 54 and 55 to 64 age groups had declines of time and visits to OOH E&A. Older adults participate far less and spend less time with social media and video games. However, they have significantly increased their time watching television as the above chart shows, by far more than their decline in time and visits at OOH E&A. It could well be that increased television time is the displacement cause for older adults.

Although the overwhelming majority of the academic research didn't find any, there is one small subset of the youngest age groups, the at-home, addicted heavy-use console video game players, mostly male adolescents and the youngest males²⁸ from lower socioeconomic

households²⁹, who have probably reduced their OOH E&A. However, they are a small minority of the overall population. Research into Internet gaming disorder (IGD) – “persistent and recurrent use of the Internet to engage in games, often with other players, leading to clinically significant impairment or distress,”³⁰ has found that addicted video game players are no more than 5% of adolescents³¹ and only around 1% to 1.4% of the general population^{32,33,34}. If those small numbers of players spend a massive amount of time playing video games that crowds out time at OOH E&A, that would explain the average decline for each age group that the ATUS OOH E&A time results show.

We find that rather than increasing video game play participation and time, there is a combination of a number of factors that are the root cause for the decline in attendance, especially repeat attendance, at traditional entertainment venues:

1. Commoditization of experiences

One overall shortcoming of traditional attraction-based OOH E&A is that any experience quickly becomes commoditized. The 2nd time you have an experience, it is not as good as the first. The 3rd time you have an experience, it is not as good as the 2nd. Customers say, “been there, done that”.¹ Instead of repeating it, they move on to something new.

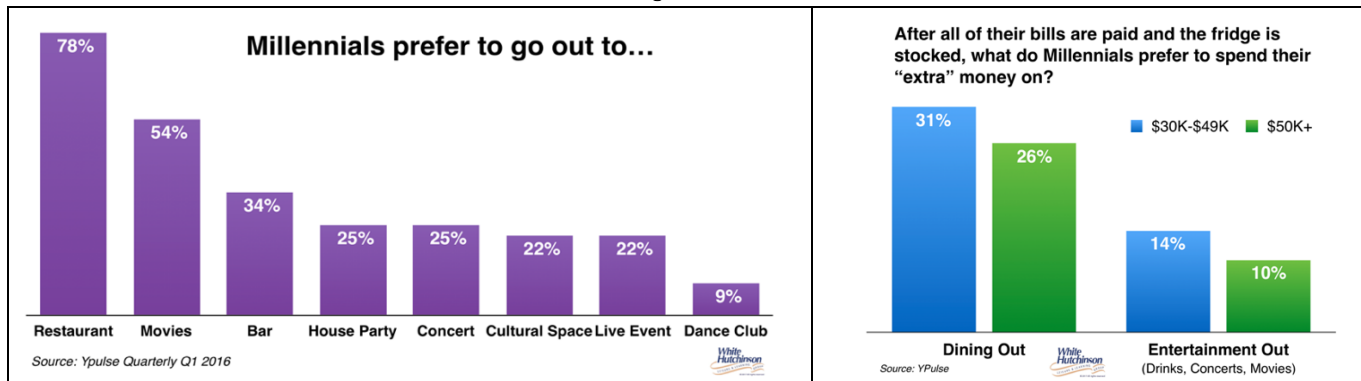
2. Novelty seeking

It’s human nature to seek new experiences rather than repeat ones. Our brains are hard-wired by evolution to crave novelty. The desire for novelty, to explore something new, is rooted in enabling us to learn something new about our environments and how to survive. Novelty triggers the production of dopamine, making us feel good, which, in turn, increases a person’s motivation to seek more novelty.

3. Change to what is OOH entertainment

What the data, and especially the ATUS data, doesn’t capture is a cultural shift in what is considered and valued as entertainment. 53% of Americans now consider themselves foodies³⁵. Foodies love food and are very interested in trying different types of food, so are on a quest of adventure and discovery for new foods and the latest food trends. This has resulted in many dining out occasions now being considered as entertainment. *YPulse* in their studies found that almost two-thirds (62%) of Millennials, the prime age group for many forms of OOH entertainment, now consider a good night out as more about the food, three times the percentage that rate live music as a good time out. They also found that Millennials prefer to go out to a restaurant over any other type of OOH entertainment, including the cinema, concerts and live events.

Figures 24 & 25



Along with restaurant dining, there has been a growth in the number of live and special events and festivals where the focus or a major component is food, beer and wine. An *EventBrite* survey found that 62% of Americans would go to an event just for the food.^{1bid} In fact, they found food is the second most important factor people consider when deciding to attend any event—outranking both the quality of the performers or speakers and who else is attending. *YPulse* in their research has also found that food-focused events are especially popular with younger adults.³⁶ The craft brewery boom has also resulted in many destination breweries. The number of destination wineries and distilleries is also growing across the country. Visits to many of these are now considered OOH entertainment, especially by the younger generations.

What this means is that people are going out to new and different categories of entertainment that the ATUS data doesn't capture, suggesting that OOH entertainment visits have not have declined if time visiting those food- and drink-oriented events and destinations had been included, especially for the younger age groups where the ATUS data shows the greatest OOH entertainment time decline. In fact, there may actually have been an increase in OOH entertainment time and visits if such events and destinations had been included.

4. Voracious leisure consumption

Setting aside the above foodie, live and special event and festival entertainment argument, even if the overall populations' time for OOH entertainment has declined, the number of visits still might not have declined for the higher socioeconomic consumers or the overall population.

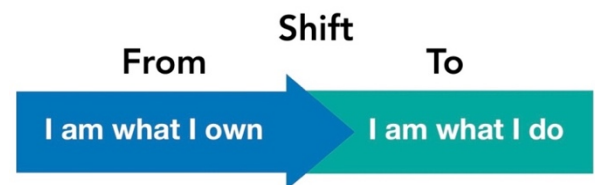
Surprisingly, although higher-educated individuals enjoy less leisure time than lower-educated individuals, research³⁷ shows that the higher socioeconomic, especially managers and professionals, feel time pressure, and so engage in what is referred to as voracious consumption of leisure, more so than others³⁸ to feel more productive with their limited leisure time and also as a marker of status distinction, sort of a "badge of honor." Harried

people are perceived as high status not only for their busyness, but also if they are seen as enjoying and living their lives to the maximum – working hard and playing hard.³⁹ Voracious leisure consumption involves participation in a wide variety of out-of-home leisure activities and a high frequency of participation—doing more and more quickly, what you might call optimization of out-of-home leisure time. This involves shorter spells being spent on each activity. So, the higher socioeconomics' number of visits is greater than lower socioeconomic consumers for the same amount of time. What the ATUS data shows is an average for each age group. The higher socioeconomic segment of each age group is voraciously packing the most activities into the leisure time they have, while the lower socioeconomic is the segment with decreasing time and visits.

And since the bachelor's+ population is now a larger share of the population having grown from 28% of age 25+ in 2007 to 38% in 2018 and having grown from 39% to nearly half (49%) of all time spent at OOH E&A (Figure 5), the assumption in Figure 2 that the average time visiting OOH E&A in both 2007 and 2018 was 2.5 hours may be mistaken. The average time of visits in 2018 may be less than in 2007 since a greater share of visits are now by bachelor's degree+ adults. This would result in a greater number of visits than assumed in 2018, thus resulting in no change, or even a greater number of visits for ages 25+.

5. Conspicuous leisure and social media

There is another influence that is driving variety seeking of experiences rather than repeat visits, especially for teenagers and younger adults including Millennials. In the experience economy, priorities for participation in leisure and entertainment experiences have changed. The dimension of status and self-identity, the measure of social capital has shifted from owning envious material goods and stuff to participating in envious experiences. Today, what you do now matters way more than what you own. Nearly three-quarters (74%) of Americans prioritize experiences over products⁴⁰. Especially for younger adults, an impressive selfie capturing a memorable leisure experience is as enviable as a new car or fancy watch was to their parents. Conspicuous consumption has been transformed by social media.⁴¹ Conspicuous consumption of goods is out, conspicuous consumption of leisure is in.



The new experience economy means that the pursuit of experiences, including entertainment, has taken on a more prominent role in people's lives than in the past. People are using experiences to express who they are or want to be, to build their identity and status on social media.^{42,43,44,45,46,47} Two-thirds of Americans would rather be known for their experiences than their possessions.⁴⁸ Experiences are the ultimate status symbol, especially for millennials.⁴⁷ Experiences, including OOH E&A, are the new social currency.

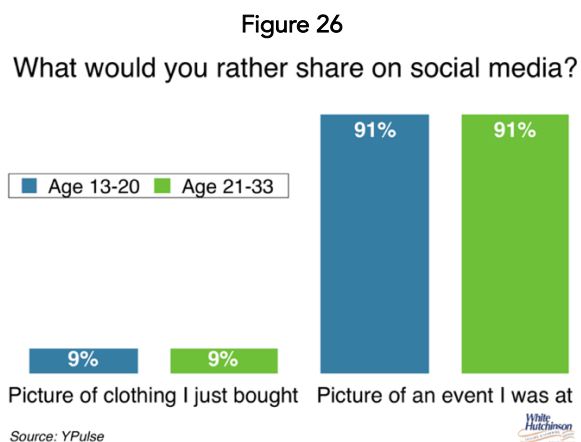
The importance of experiences as status and social currency has been amplified by the adoption and growth of social media, and especially, the introduction of the smartphone just twelve years ago.^{49,50,51, 52,53} Now you can instantly broadcast the experiences you are having on *Facebook*, *Instagram* and other social apps. 48% of millennials and 61% of millennial parents say they attend live events so they have something to share on social channels.⁵⁴ A large percentage of Americans, especially younger adults, consider experiences better if shared on social media.

Postings on social media can be viewed as important as the experiences themselves.⁵⁵ For 20- and 30-somethings especially, if it isn't *Instagrammable*, if it isn't sharable, it's probably not worth doing.

Judy Wajcman in her book Pressed for Time argues that we live in a time where we want to make the most productive use of our leisure time, so we have an insatiable desire to pursue and experience as many options as possible from the vast array of leisure opportunities the world now offers. As a result, we are seeking a variety of collectable 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 have used our time productively.^{56,57}

This means that once you've participated in some OOH entertainment experience and shared it with your friends and followers on social media, there is no longer any status value to be gained by repeating and sharing it again.

Today, experiences are more likely to be posted on social media than material purchases.



People share their spending on experiences more frequently than material purchases.¹⁹

6. Influence of envy and FOMO

To get people to spend their time and money at any experience requires getting their attention in an increasingly distractible world amidst an increasing wide array of options

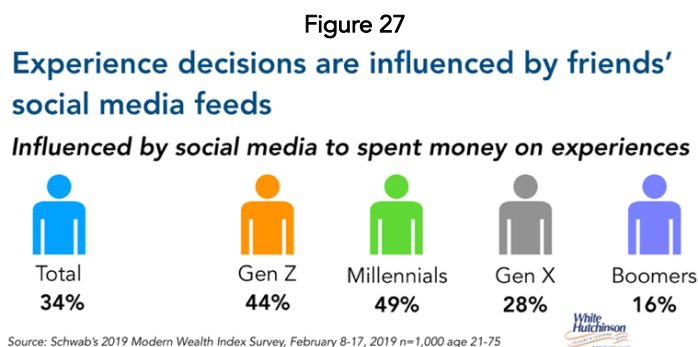
available for spending that time.¹ Seeing peoples' conspicuous leisure postings on social media generates that attention and motivates people to experience things they otherwise might never have known about.⁵⁸

Experience postings on social media trigger more envy by followers than material purchases⁵⁹ and results in FOMO (fear of missing out), creating the desire and motivation to participate in the experiences that people are doing in social media posts, to "keep up with the Jones." *Ibid.*,^{60,61} Nearly 7 in 10 (69%) millennials experience FOMO.⁶² Millennials find more value in a photo-worthy experience because they are inspired by the content they see posted online.⁶³ Research studies have found this for both travel and food photos that are posted by participants for self-status seeking and that are aspirational for followers to also experience.^{64,65,66,67,68,69} This has increased conspicuous consumption of leisure, participation in and posting of as many unique, novel and admirable experiences as possible. In many instances, the postings of experiences are viewed as more important than the experiences themselves.

While FOMO is not an entirely new concept, the intensity of FOMO has significantly increased with the rise of social media.⁷⁰ Social media exposes us to all the experience choices we have. Postings on social media create our desire to participate in as many OOH experiences as possible and to not miss out on anything. We want to consume more experiences and do them more quickly so we don't miss out on anything. A study by JWT Intelligence⁵⁸ found that 70% of adults experience FOMO. Likewise, an *Eventbrite* study found that nearly 7 in 10 (69%) of Millennials reported experiencing FOMO.^{71,62}

Social media and its resulting FOMO has spawned an entirely new category of photo-op-ready OOH spaces like the *Museum of Ice Cream*, *Refinery29's 29 Rooms*, *Museum of Pizza* and *The Color Factory* that are "Disneyland for the Instagram set," that cater to users looking to capture a memorable and envy-inducing experience.^{36, 72}

The 2019 study by *Schwab*⁷³ found that 49% of Millennials and 44% of Gen Z spent money on experiences due to seeing it on social media.



A study by *Allianz Life Insurance Company* found that 57% of people⁷⁴ spent money they hadn't planned to because of what they saw on their social media feeds. The majority (71%)

even admit, “If I’m being completely honest, when I have a fun experience and post it online, I’m doing it at least partly to show my friends that I have a great life too.”

Voracious leisure consumption for the higher socioeconomic and the conspicuous leisure consumption amplified by social media posting of experiences and resulting FOMO have become major motivations for participating in as wide a variety of OOH experiences as possible rather than repeating a few.

7. Almost limitless OOH leisure options

Satisfying the desire for new and unique OOH leisure experience is a recent and growing explosion of OOH options that are now almost limitless.

At the beginning of the 21st Century, community-based entertainment venues used to be limited to a small variety of family entertainment centers. In the last decade we have seen a massive expansion of new types including trampoline parks, *iFly*, adventure parks, escape rooms, zip line experiences, bar arcades, eSport lounges, axe throwing, social eatertainment centers with participatory games and destination-worthy food and drink such as *Punch Bowl Social* and *Top Golf*, eatertainment venues where you can bring your dog, VR, corn mazes/pumpkin patches, golf swing suites, cocktails and mini golf, to name just a few.

Now there is little reason to repeat the visit to any OOH venue or event due to the recent and growing expansion of the wide variety of OOH A&E options, including the growth of the number of festivals, live events, foodie-worthy restaurants, breweries, distilleries and wineries that satisfy voracious and conspicuous leisure consumption and for posting on social media.

The shift to variety seeking rather than repeat visits to the same OOH experience is confirmed by PGAV. Their research has found a marked uptick in the percentage of visitors looking for new unique experiences that are out of the ordinary in some way.⁵ It also found that what they called non-attractions—one- and limited-time events (O<Es) such as live events, festivals and concerts—are winning a greater share of guests’ time and wallets. *EventBrite* found the same trend in their research, that Americans are attending more live events, including festivals, than ever before. 55% of Millennials said they are spending more on events and live experiences than ever before. Nearly half (48%) say they attend live events so they have something to share on social media, capitalizing on FOMO as not all of their friends go.^{47,48,62} And it isn’t just millennials, boomers actually attended more music events each year than millennials and nearly the same number of food and drink events.⁶² More than half of millennials say they go to festivals “to experience something new.”⁴⁷ And half of the attendees surveyed said they attended a live event so they had something to share online. Brick-and-mortar fixed-attraction entertainment venues have lost their repeat appeal (been there, done that) to all the O<Es and new type OOH E&A that are posting-

worthy on social media and can satisfy the appetite for voracious and conspicuous leisure consumption.

Bronner and de Hoog in their research have developed a framework of the four qualities that make experiences most desirable with the highest conspicuous value for posting on social media to gain status and grow social capital:⁷⁵

1. **Configurability:** the degree to which the individual participant can shape the experience. This is rather low for movies but high for vacations. After choosing a movie, the spectator cannot change anything when watching the movie, it just unfolds. Festivals and pop concerts offer more opportunities for adjusting your experience when participating: one can skip performances of musicians one is not interested in. Vacations are highly configurable: you can almost entirely configure your own holiday, in advance as well as while enjoying it.
2. **Physical involvement:** the degree to which one becomes physically involved in the experience. This is high for vacations, because you experience them by being the main participating actor. Movies do not allow you to be physically involved as you are not an actor playing a role, but emotional involvement can be substantial. Festivals and pop concerts encourage actual participation by attendees, with performers inviting them to dance, clap their hands, and sing along.
3. **Frequency:** How often an experience is chosen: vacations are taken only a few times a year and festivals and pop concerts too are not available on a daily or weekly basis. You can go to see a movie everyday if you want to.
4. **The group of people viewing the posting probably have not shared the experience, making the experience unique, therefor status and sharable worthy.**

What this means is that people who post on social media are continually seeking new and unique OOH experiences with these qualities they can share, which in turn creates envy and FOMO with their followers, which in turn motivates their followers to emulate the experiences.

Disruption of legacy OOH entertainment models

Not that many years ago the traditional OOH entertainment center model, especially for family entertainment centers, was based on a brick-and-mortar venue with fixed attractions, games and a snack bar/concession bar that depended on repeat appeal for success. That model no longer works as the vast majority of attractions lack conspicuous value of being social media shareworthy and have therefore lost their repeat appeal. Now, there are so many new and unique OOH leisure options for people that they want to experience and share, that they don't need to visit traditional OOH entertainment venues.

The following chart, using the Bronner and de Hoog framework, shows how social games such as bowling, and amusement attractions found in traditional family entertainment centers rank lower in conspicuous value for people than unique experiences like vacations, festivals and pop concerts that their social media followers probably haven't experienced.

Figure 28

Framework for classifying experiences

	Configurability	Involvement	Frequency	Group Sharing
Vacations	High	High	Low	Average
Festivals	Average	High	Low	Small
Pop Concerts	Average	High	Average	Small
Movies	Low	Low	High	Large
Social Games	Average	High	High	Average
Amusement Attractions	Low	Low	High	Average

Conclusion

With the possible exception of moviegoing, the decline in attendance that many traditional OOH entertainment venues are experiencing, especially declining repeat attendance, is not due to increasing participation in or time playing video games.[§] Instead, the OOH entertainment consumer, their preferences, expectations, values and behaviors have dramatically changed, so we are not dealing with the same person we were only a few years ago. As a result, there has been a transformative and seismic change in out-of-home entertainment culture that is shifting market share away from the traditional family entertainment center business models to an accelerating selection and variety of one- and limited-time, live, new and unique OOH experiences, including many food and beverage experiences now considered as entertainment. Heavily influenced by the values of the experience economy, voracious and conspicuous leisure consumption and social media, repeat appeal has lost out to "been there, done that" and the desire to move on to the greatly expanded landscape of all the new and sharable OOH experiences options that are now capturing consumers' attention, time and money.

[§] except for an extremely small segment, not more than 1.5% of the population who are predominately adolescent males and young male adult video game players

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