

WHAT THE FUTURE: LEISURE

Americans need a break.
But can we take it? PAGE 3

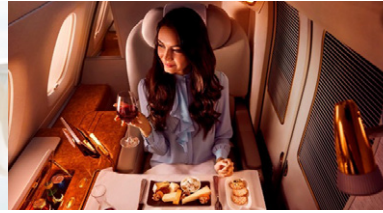
Our obsession with being busy is killing
leisure time. How brands can help PAGE 7

Why Gen Z holds the key to future
travel spending growth PAGE 14

How TV, our favorite hobby, is
evolving for advertisers PAGE 18

+ Executives from Visa, Hilton and WNDR
Museum, and experts on leisure attitudes
and TV share how the future of how we
spend our time off is shifting

Contents



Introduction

- 3 Americans need a break. But can we take it?

Shifts

- 6 Hybrid living, screen life and living for today

Tensions

- 25 The opinions that will shape the future

Future destinations

- 27 Future Jobs to Be Done

Perspectives and research

Thought-provoking insights from industry leaders and Ipsos experts

- 7 **Our obsession with being busy is killing leisure time. How brands can help**

Professor [Selin Malkoc](#) explains how our productivity mindset is shaping our leisure time.

- 10 **Why the future of travel will be more streamlined and more personal**

Hilton's [Jess Petitt](#) discusses how travel companies can meet peoples' new R&R priorities.

- 13 Where influential top earners favor experiences over spending

- 14 **Why Gen Z holds the key to future travel spending growth**

Visa's [Michael Nevski](#) posits whether Gen Zers' emerging travel patterns are a stage or a lasting shift.

- 17 Why all brands need to care about a financial services revolution

- 18 **How TV, our favorite hobby, is evolving for advertisers**

Media analyst [Amanda Lotz](#) explains how media companies can thrive in the streaming age.

- 21 How experimental art is reaching young audiences in new ways

- 22 **How digital venues are reshaping the way we experience arts and culture**

WNDR's [Chris Freeman](#) envisions a future of multisensory exhibits that continually evolve to inspire awe.

Americans need a break. But can we take it?

Imagine it's 2032. We are somehow even more stressed and pressed for time than we were in 2024. How will we find time to relax, unplug, enjoy our hobbies and afford our "free" time?

Studies have shown that Americans are generally working fewer hours than they were at the start of the 20th century. Yet the amount of time we have for leisure hasn't increased as we spend more time on all those other things that are neither work nor leisure, like cleaning, traffic, schlepping the kids around, trying to fix our Wi-Fi routers and spending an hour on hold with customer support.

Does it count as leisure if you're spending an hour trying to figure out if any of the 17 streaming services you subscribe to are showing the movie you want to watch? It's no wonder Ipsos data shows that most people feel generally overwhelmed by their choices in life.

But even our leisure can be overwhelming. People turn to Facebook and mobile apps to map out and maximize every second they spend on their Disney vacations. A friend recently overheard a first date at the restaurant where she was dining. The goal-oriented guy told his would-be girlfriend, "I only read nonfiction because I want to learn new things."

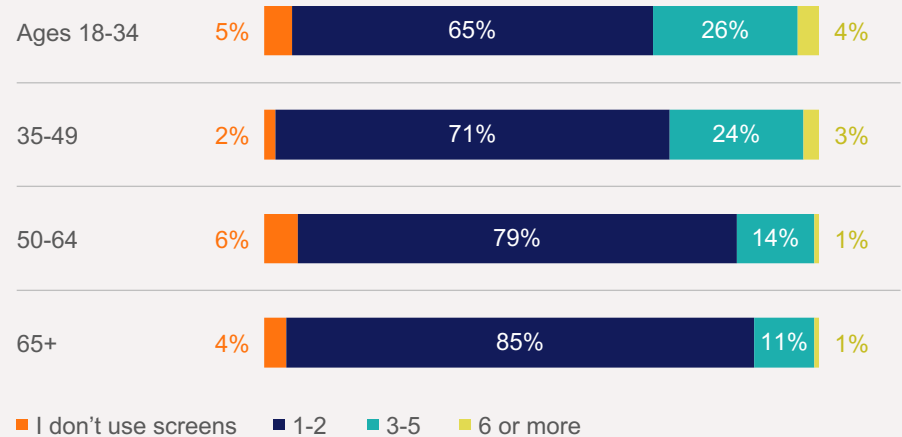
84%

of Americans agree it is important to them to feel productive each day.

(Source: Ipsos survey conducted June 17-19, 2024, among 1,122 U.S. adults.)

Younger Americans are more likely to use multiple devices at once

Q. On a typical day, how many screen devices do you have running at once (e.g., TVs, computers, laptops, monitors)? (% Total)



(Source: Ipsos survey conducted June 17-19, 2024, among 1,122 U.S. adults.)

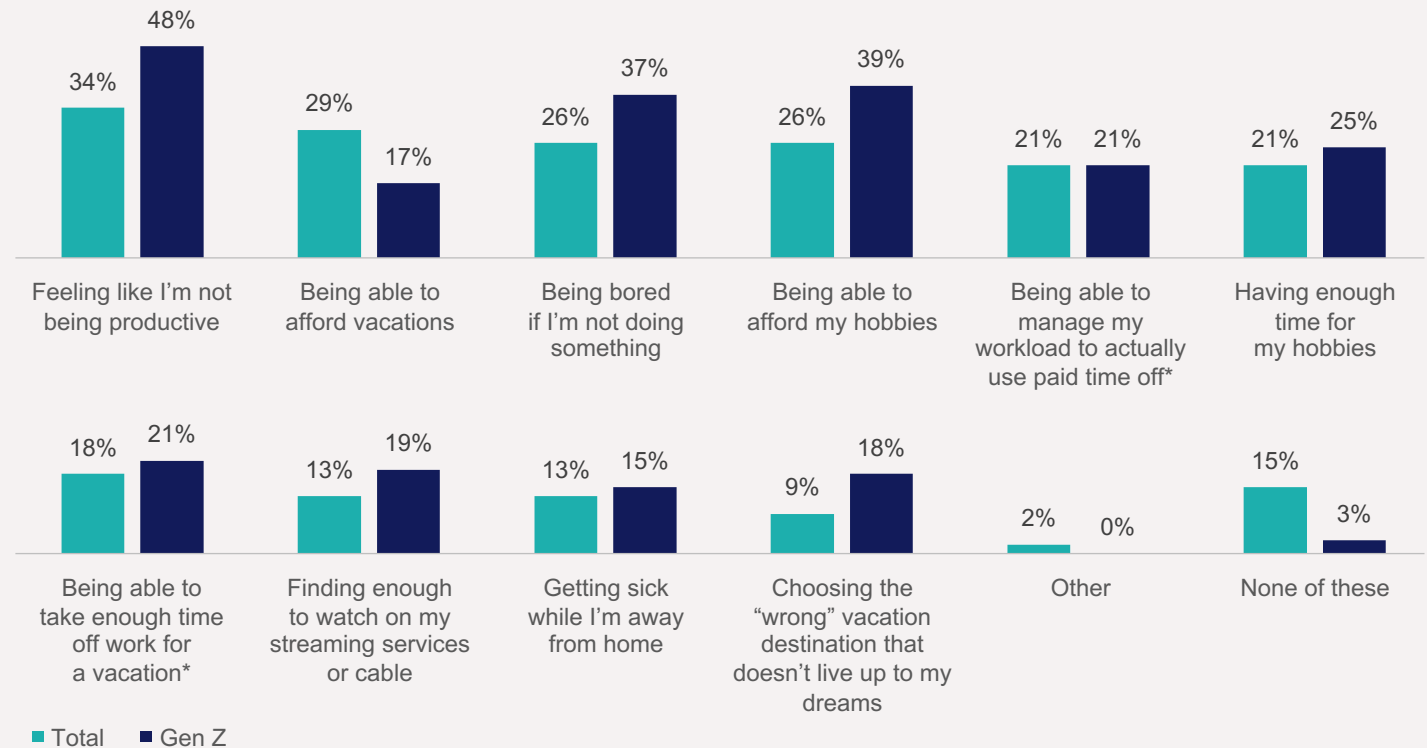
We yearn to travel, but there are tensions. Americans keep setting new records for the busiest travel day. Portions of the global tourism economy are booming but residents are revolting — squirting water guns at tourists in Barcelona, Spain, on one extreme, and banning tourists entirely due to a lack of water in parts of Italy on another. Copenhagen is rewarding tourists for climate-friendly behavior. As we show on our cover, climate change might alter our desired destinations and clothing as we travel, or it might mean we spend more leisure time indoors.

If our leisure time is limited, or arguably even precious, how are we spending it? Professor Selin Malkoc, whom you'll meet later, makes a useful distinction between active and passive leisure time. Passive time is all the time we spend chillaxing on the couch with our screens or a book. Active leisure time is the “going out” stuff. For now, Americans spend about a quarter of their weekdays on leisure, twice that on weekends. Will that change in the future? If so, how?

It's probably not a good sign that we stress about our leisure time. Nearly half of Gen Zers say they have productivity FOMO when they're relaxing. Many worry about having enough time for hobbies or being able to afford them. Or even about being able to get away from work long enough to take vacations. Almost one in five Gen Zers stresses about picking the wrong vacation destination. Whether that's because it won't look good on social media or some other sort of buyers' remorse would make for good follow-up research.

Gen Zers are more worried than the average adult about using their free time

Q. Which of the following, if any, do you find most worrying when thinking about your own leisure or free time?



(Source: Ipsos survey conducted June 17-19, 2024, among 1,122 U.S. adults, including *601 employed adults/70 employed Gen Zers.)

So how do we spend our leisure time?

In short, we spend our time more passively than actively and overwhelmingly on screens. We often have several screens in front of us, but we still consume a lot of “TV” types of content on our actual TV screens.

As we saw in *What the Future: Parenting*, that screen time, when it comes to kids, is also a source of frustration and tension within households. Maybe that factors into the rise in the “get away from it all and unplug” vacation that appears in Hilton’s 2024 Trends Report, an annual global survey of travelers. That even includes sleep being a new activity in tourism. Often that just means getting away from our constant contact and streams of content.

Toward balance?

But that’s not the entire story. For some, blurring our work and our leisure affords us opportunities we want to seize. For those who can work remotely, “bleisure” travel, or combined business and leisure travel, has hung on post-pandemic, whether that’s working in exotic destinations so you can have your vacation but not have to take it all as paid time off (PTO) or taking advantage of work-paid airfare and tacking on a couple of days for fun.

Or it’s using credit card reward points racked up from work travel to fund personal trips — a perk that is currently endangered, as we’ll discuss later. And for still more, employers are experimenting

(successfully) with four-day workweeks, where people trade longer workdays for fewer. Granted, Greece is trying a six-day workweek. About half in our Future of Leisure poll say that even *one extra hour per day* would help them achieve better balance in life.

How can brands help?

- We are a culture obsessed with managing and maximizing our time. Brands can help. Make the customer experience and the user experience simpler in any possible way you can. Reduce the overhead for your customers who interact with your services. Minimize the amount of leisure time spent navigating your website, looking for products on shelves, etc.
- Help people savor and enjoy their hobbies, travel, streaming and other leisure experiences. Help them share, not in a FOMO-inducing way, but rather in a way that connects them with friends and family.
- Reward people for their focus. Sure, ad breaks will happen in our streaming, but the constant alerts, pop-ups and flashes detract from what we’re all trying to do — namely, relax.



Matt Carmichael is editor of *What the Future*.



60%

of Gen Z adults think climate change will make planning vacations more difficult (i.e., potential destinations, times of year to travel, etc.) in the next five years.

(Source: Ipsos survey conducted June 17-19, 2024, among 1,122 U.S. adults, including 126 Gen Zers.)

Shifts: Hybrid living, screen life and living for today



Trevor Sudano is a principal at Ipsos Strategy3. trevor.sudano@ipsos.com

Hybrid living: Blurred work and life and greater flexibility and diversity of schedules will not have a single impact on leisure.

Instead, while reduced commutes and flexible working may offer more free time for leisure activities throughout the day and week, blurring work-life boundaries and irregular hours can disrupt past typical leisure activity times like nights and weekends.

Communication and planning may be required for activities that used to be a bit more pre-baked, while at the same time spontaneous leisure may grow.

Screen life: Social media and influencers are already reshaping the leisure landscape and are poised to continue their impact. Platforms like Instagram and TikTok expose users to a constant stream of travel destinations, hobbies and experiences, influencing what people consider fun.

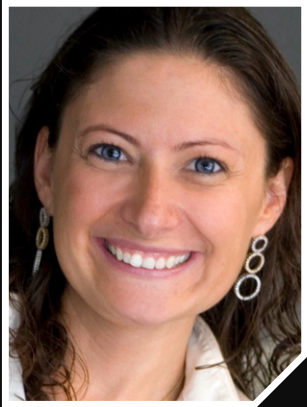
Carefully curated content can spark trends in activities and destinations, impacting how individuals spend their leisure time and money, and what demand looks like. However, this constant exposure can also lead to social comparison and feelings of inadequacy, potentially impacting the enjoyment of leisure activities, or making them more performative.

Living for today: With so much uncertainty in the world today, and the underlying stress and anxiety that accompanies it, people are expressing more of a “live for today” mentality than in the past.

People are prioritizing experiences and immediate gratification over longer-term planning or goals that might now feel like a long shot or completely out of reach (e.g., home ownership). This could lead to a rise in spontaneous trips, adventurous activities, and more of a focus on creating shareable moments to build up a memory bank. This increased desire for experiences may also increase demand for premium and luxury leisure activities.



Our obsession with being busy is killing leisure time. How brands can help



Selin Malkoc

Distinguished professor of marketing, Ohio State University

For many Americans, leisure time isn't just about relaxation. We're increasingly focused on being productive, avoiding FOMO and collecting experiences to share on social media. Selin Malkoc, distinguished professor of marketing at Ohio State University who studies leisure time, says our tech-driven, productivity-oriented mindset is making leisure more stressful and less enjoyable. When she thinks of the future, she says businesses can offer consumers more immersive virtual experiences, chances to disconnect and remind them of the art of idleness.

78%

of people with no children in the household agree they are satisfied with the amount of time in their schedule for leisure or free time.

(Source: Ipsos survey conducted June 17-19, 2024, among 1,122 U.S. adults.)



What The Future interview with Selin Malkoc

Kate MacArthur: How do you define leisure?

Selin Malkoc: First, leisure does not equal free time, because we do things with our free time that we do not always consider leisurely. I would divide leisure into two big pieces: What we call passive leisure, which is the equivalent of watching TV or just chilling. Then active leisure is where you purposefully engage in activities like going to parks, going to museums, meeting someone, going for a walk and engaging in a hobby.

MacArthur: How will AI and digital technologies change leisure time by altering work and productivity?

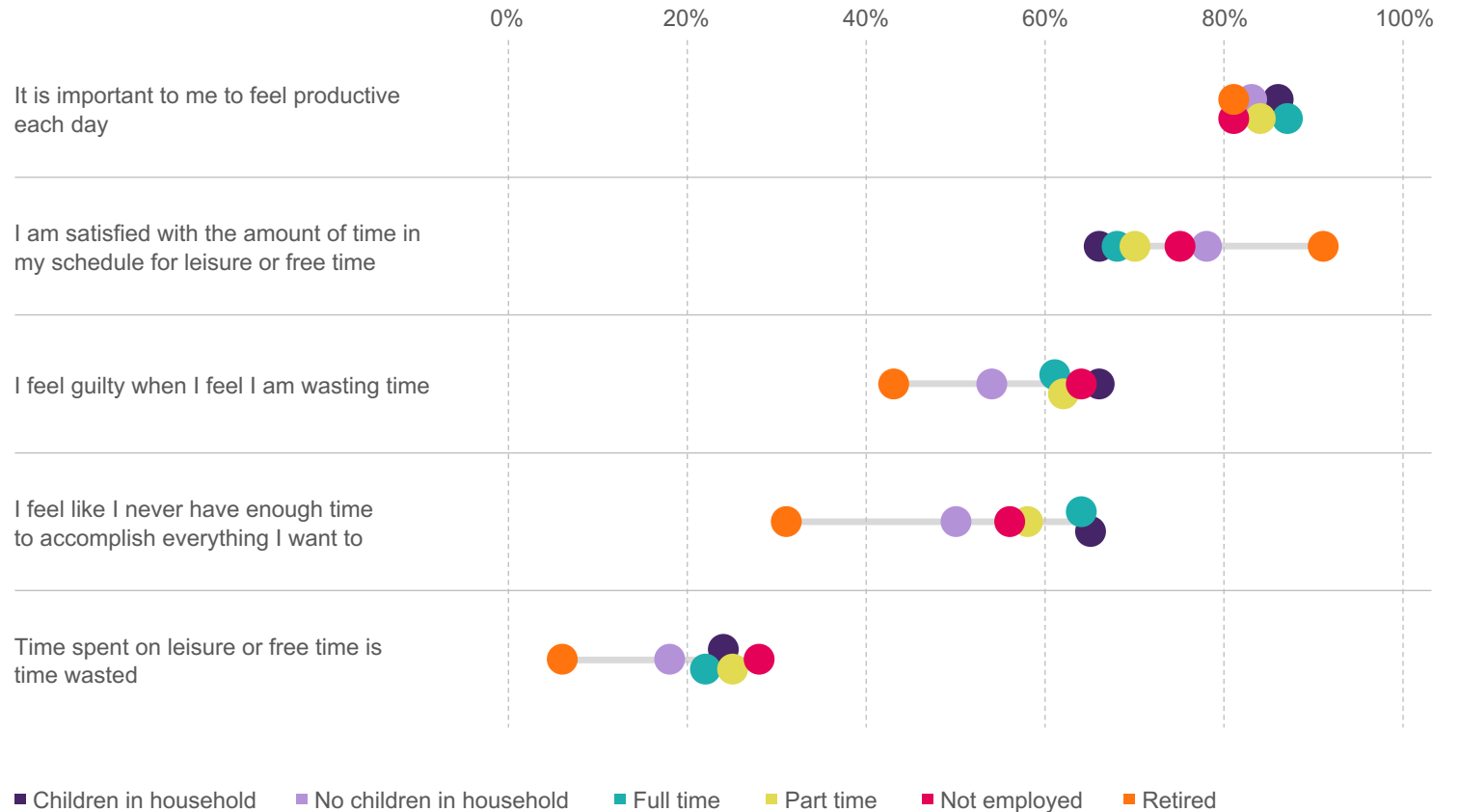
Malkoc: I don't know if AI is giving us more time per se. If you ask people today, they report that they're busier than ever, something we call time famine. Some 80% of Americans endorse this belief that they are short on time. That cannot be if technology is giving us time.

MacArthur: Then what's happening?

Malkoc: The notion that comes up — which my research looks at — is that how we define ourselves as busy or free is a bit in our heads. We create demands for our time, and then we trap ourselves into it. This doesn't mean that technology didn't give us time, but that we found other ways to fill our time with things we feel we must do.

Parents and workers are most likely to feel pressed for time

Q. How much do you agree or disagree with the following statements? (% Agree)



(Source: Ipsos survey conducted June 17-19, 2024, among 1,122 U.S. adults.)

MacArthur: I've seen various articles or essays about the need to be bored. Where do you stand on this?

Malkoc: We as humans, and especially Americans, treat time as a resource. Those serendipitous moments that you didn't plan for are sometimes the most memorable ones. But you have to have unscheduled idle time to allow for them.

MacArthur: Which technologies do you find interesting or worrying in how they affect our use of time and our perception of leisure time?

Malkoc: I've been doing research looking at what we call more of a materialistic mindset when consuming experiences. What enables that is social media. When people share their experiences using certain hashtags or words that signal [a trend], it not only hurts their well-being to some extent, it also hurts the perceptions of other people judging you. The irony is we are doing this to impress people, and maybe it's having the opposite results.

Gaming, for some populations, concerns me, especially because it disables person-to-person contact. But gaming could become more social. The technology with VR is developing in that direction to bring people together during those gaming activities and make it feel like they are playing like they are together.

MacArthur: How can brands be part of the time famine solution rather than contribute to the problem?

Malkoc: As any company that creates a less packed, more relaxed enjoyment style. You could have a resort that is more a leisurely lifestyle. That was the original idea of all-inclusive resorts. You can go back to the original idea that you don't have to make decisions, you just come and chill, and we'll give you good service.

MacArthur: How might hybrid and flex employment or the four-day workweek shift leisure time?

Malkoc: A four-day workweek in theory sounds like a great idea. But a lot of white-collar jobs and, increasingly, jobs in general, are task-based, not hourly based. If your work is defined by hours, we can say a four-day workweek will work. But task-based jobs, I don't know if we can do that because we need people to finish tasks. Unless we are going to extend deadlines drastically, work will need to get done, and it will need to come from somewhere.

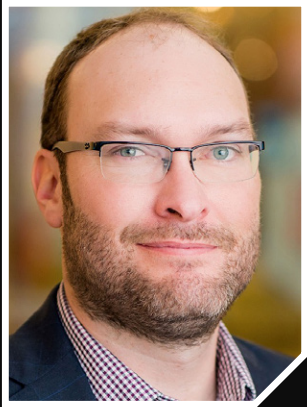
When you make things flexible, life bleeds into work hours, but then also work bleeds into life hours. What that means for leisure is that work bleeds into leisure sometimes if you cannot make those cutoffs.

Kate MacArthur is managing editor of What the Future.



Some 80% of Americans endorse this belief that they are short on time. That cannot be if technology is giving us time.”

Why the future of travel will be more streamlined and more personal



Jess Petitt

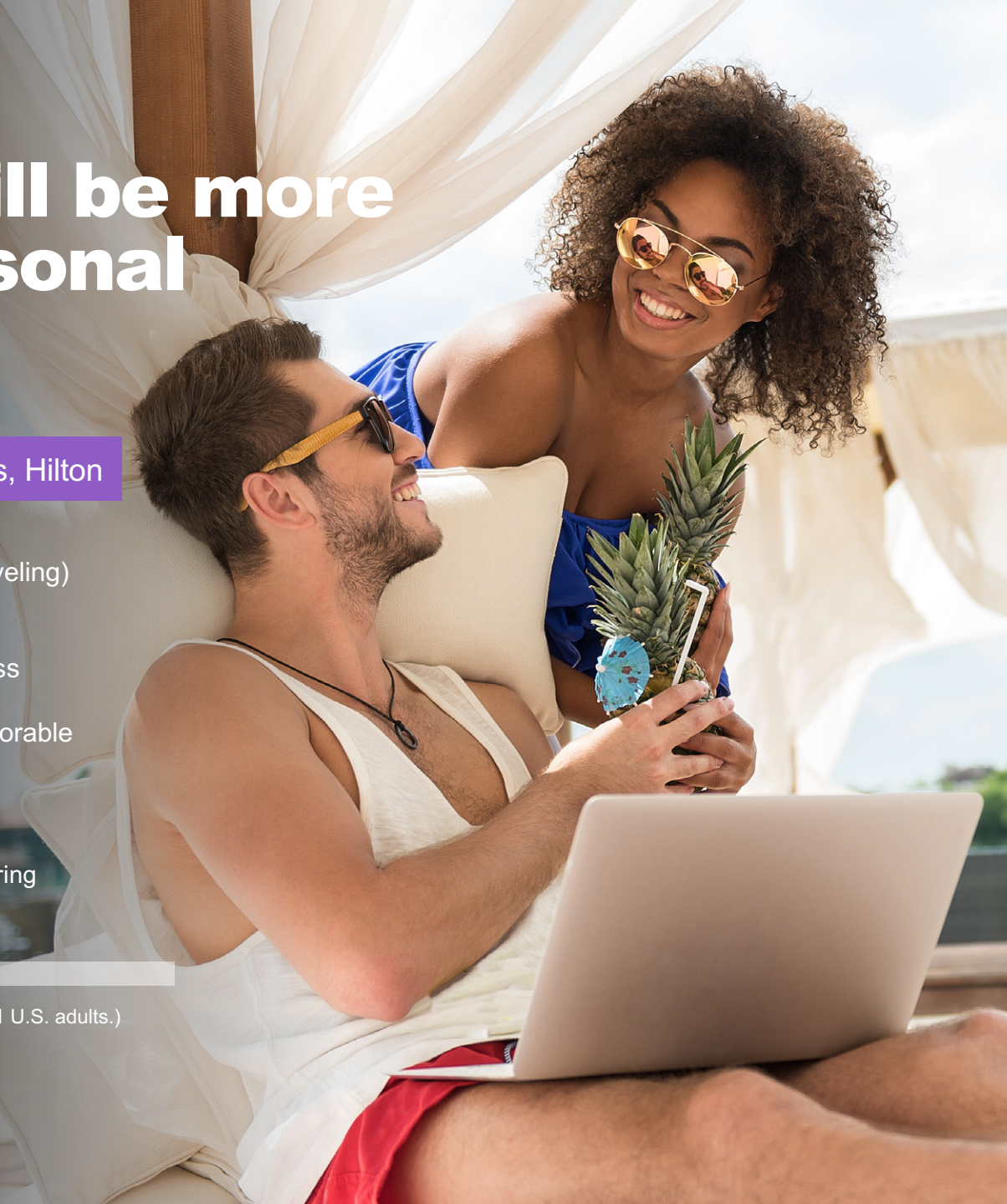
Senior VP, commercial strategy, insights and analytics, Hilton

It's an interesting time to be on the road: Post-pandemic shifts toward blended travel have persisted. Gen Z has come of (traveling) age with a global perspective. And Americans of all ages are prioritizing experiences over products. That means hotels are serving a diverse range of visitors with distinct needs. But Jess Petitt, who leads Hilton's global analytics function, thinks new innovations and attitudes will provide travelers with more memorable (and relaxing) vacations.

50%

of Americans ages 18-34 say they are likely to travel by plane internationally during the summer of 2024.

(Source: The Ipsos Consumer Tracker, conducted May 14-15, 2024, among 1,081 U.S. adults.)



What The Future interview with Jess Petitt

Christopher Good: The post-pandemic era brought a lot of changes to travel. Which shifts are sticking around?

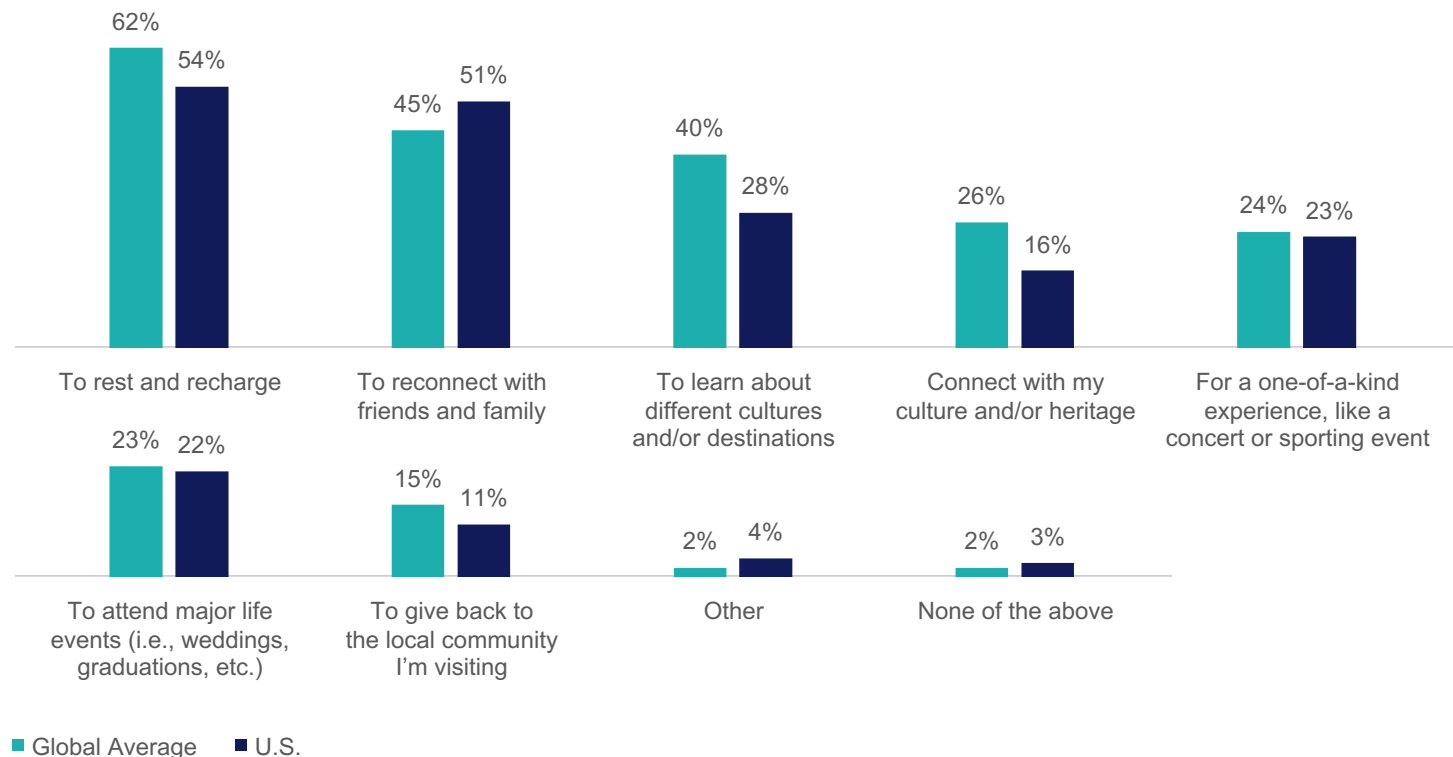
Jess Petitt: The summers of 2021 to 2022 were the strongest leisure-travel periods we've ever experienced in our industry, and people were reintroduced to travel in a different way — blending leisure travel with a business trip or having the option to work remote from anywhere. Historically, Sunday nights are the quietest, because it's the transition between a leisure guest who is staying over the weekend, and a business traveler arriving on Monday for the workweek. We saw that shift through the pandemic, when extended-stay business travel was *really* hot. That's now starting to normalize, but some form of "bleisure" is here to stay.

Good: Why is that?

Petitt: [The pandemic] created more of an appreciation for travel and the underlying human connection that travel creates. When people travel, they also care about being ingrained in the culture of the place that they're visiting. You're no longer just traveling to that suburban office park, right? You want to be ingrained in the place and be a part of that local experience, whether you're in Peru or Ithaca, New York. We've done our own survey of 10,000 customers across nine countries, and it's really cool to see how consistent this desire is.

Rest and reconnecting are people's top priorities for leisure travel

Q. Which of the following best describes why you plan to travel for leisure in the next year? (% Total)



(Source: Hilton/Ipsos survey conducted June 23-July 7, 2023, among 6,823 adults 18+ across nine countries, including 632 U.S. adults, who plan to travel for leisure or bleisure in the next 12 months.)

Good: How are generational shifts factoring in?

Petitt: We recently found that nearly two-thirds of global travelers are saying they're going to reduce their personal spending so they can prioritize leisure travel this year, [and we're hearing that] especially from Gen Z and Millennials. That's a powerful shift.

Good: Do you think social media plays a part in that?

Petitt: I do think so. But it might not be FOMO — I feel like that oversimplifies the feeling that people have — so much as a reminder that this is actually possible, right? It's that, "Oh yeah, I could do that. I could work from there next month for a little bit." The accessibility through social media and through economic means, as well as just the ability to travel, it's a powerful combination.

The reasons people travel are changing, too. Forty-five percent of folks across generations [say they are] traveling to reconnect with friends and family. It really does speak to the human connection.

Good: How else are younger travelers' priorities changing?

Petitt: Gen Zers and Millennials are intentional about their wellness choices. For instance, we found 25% are avoiding alcohol before bedtime because of the importance of a good night's sleep. And that matters

for us because our customers say that the No. 1 reason they want to travel right now is to rest and recharge.

Good: How is tech changing travel?

Petitt: Eighty percent of customers and travelers are now telling us they expect to book their entire trip entirely online. That wasn't the case five-plus years ago, and the rate is even higher for Millennials and Gen Z. We deployed Digital Key, a technology that enables you to check in using your phone as your key, for the first time back in 2015, but adoption has increased significantly since the pandemic. Customers are starting to appreciate how travel apps reduce friction.

Good: Is AI a part of that picture?

Petitt: Looking forward, generative AI will allow humans, particularly those who are providing service on property, to focus less on the mundane and more on the higher-touch service interactions. But the next evolution of that is going to be around content generation and finding ways to help customers determine the types of travel experiences that they want to have. Imagine a world where you have a virtual travel agent on your phone helping you determine where you want to travel to and all the details of the trip you want to take. We're really excited about that potential.

Christopher Good is a staff writer for What the Future.



Eighty percent of customers and travelers are now telling us they expect to book their entire trip entirely online.”

Where influential top earners favor experiences over spending

A new global study on “influentials” (that is, the top 20% of earners) — which Ipsos has expanded to cover a range of global markets — finds that many high-income individuals would pick an all-expenses-paid vacation over a shopping spree of equivalent value. But not all of them.

In the U.K., U.S., and Hong Kong, upwards of 70% of influentials would choose the vacation — a finding that reflects just how durable interest in luxury travel is within these markets. But this pattern doesn’t hold true everywhere. In India, for instance, 86% of comparably high earners would choose the shopping spree.

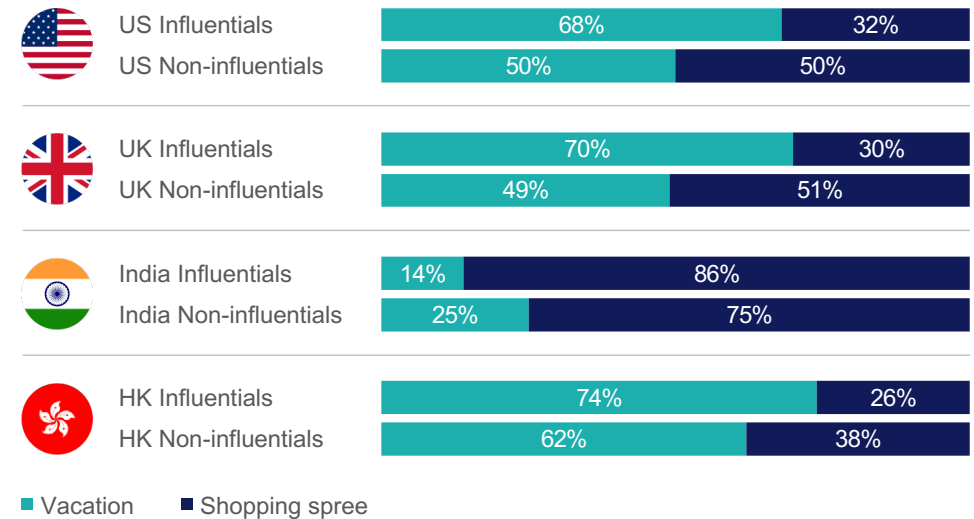
This is a reminder that businesses need regionally precise and demographically representative data to get an accurate picture of their customers’ preferences. By understanding these variations, brands can build better rewards programs, marketing campaigns and other initiatives to maximize engagement with influentials.



Ashley Henry is a senior research analyst with Ipsos’ Global Influentials team. ashley.henry@ipsos.com

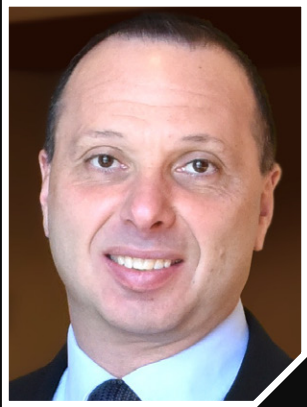
Influential adults prefer vacations over shopping

Q. Which would you rather have, a shopping spree or a vacation worth*[...]?



(Source: Ipsos Global Influentials 2024 Q2 Barometer. *Vacations and shopping sprees worth USD\$15,000+, UK £15,000+, Rs. 1,250,000+ HK\$100,000+.)

Why Gen Z holds the key to future travel spending growth



Michael Nevski

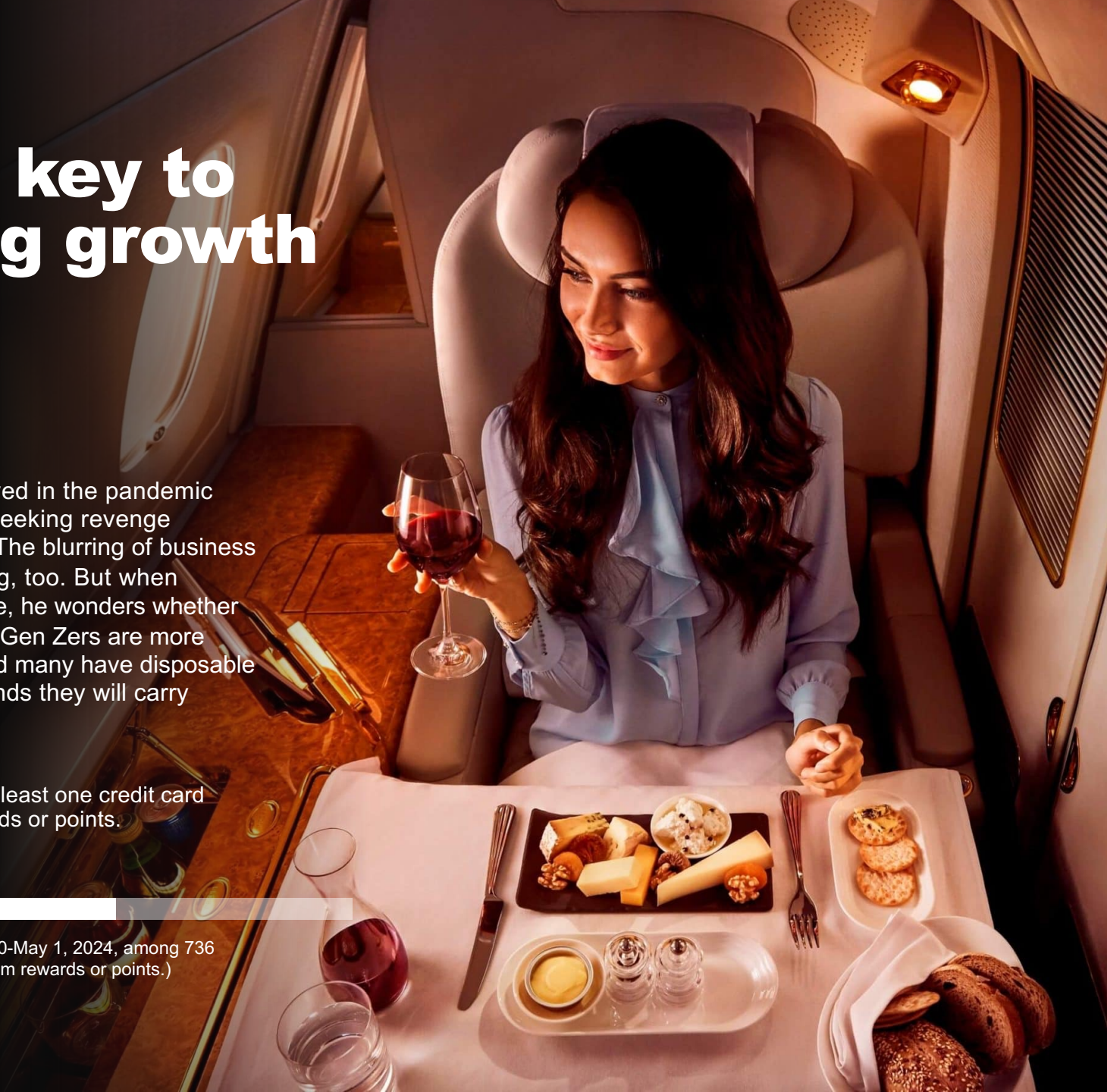
Director, global insights, Visa

“Revenge travel” to make up for trips shelved in the pandemic continues, even as parts of the world are seeking revenge against the influx of tourists in their towns. The blurring of business and leisure, or bleisure travel, is still a thing, too. But when Visa’s Michael Nevski thinks about the future, he wonders whether the travel patterns we see emerging among Gen Zers are more of a life stage (they’re young, untethered and many have disposable income to spend on travel) or are these trends they will carry with them as they age.

71%

of Americans have at least one credit card that gives them rewards or points.

(Source: The Ipsos Consumer Tracker, conducted April 30-May 1, 2024, among 736 U.S. adults who say they have a credit card that gives them rewards or points.)



What The Future interview with Michael Nevski

Matt Carmichael: When it comes to travel spending, what are you seeing these days?

Michael Nevski: People are pulling back because of inflation, because of geopolitical events, because people are constantly bombarded and distracted. But while they would pull back in terms of the spending in certain areas of their life, they would still spend on travel because even if they don't have any specific reason to go, they just have an urge to go and to take a vacation.

Carmichael: Will that continue as the economy shifts?

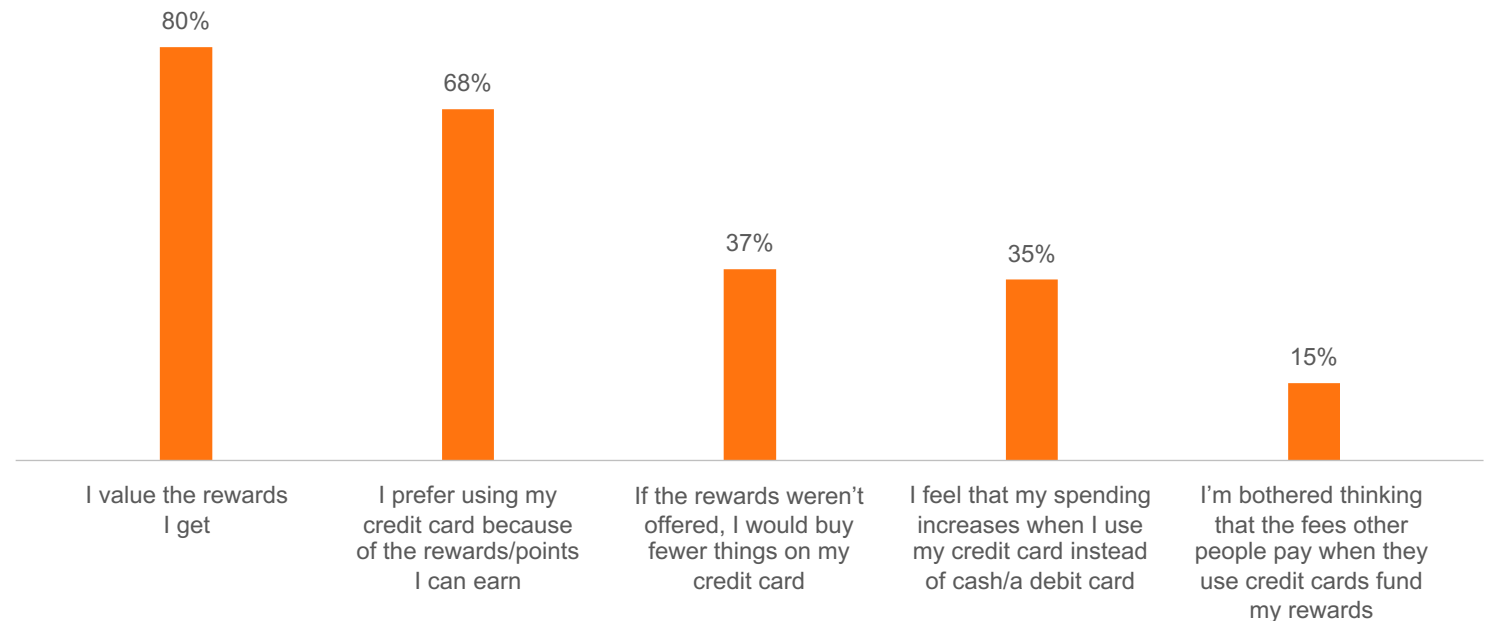
Nevski: It's not going to be huge growth. It's going to be very moderate. On one hand, there is an opportunity. You've heard the term "bleisure" where people take more opportunities when they travel on business and take a few extra days to just enjoy the area. But at the same time, companies are trying to pull back on spending on business travel, whether it's domestic or international.

Carmichael: Business travel has always helped float the travel industry. Can leisure and bleisure make up for lost business revenue?

Nevski: I would be lying to you if I said it will. Any major spending growth is going to have to come from Gen Z.

People highly value credit card rewards

Q. To what extent do you agree or disagree with the following statements? (% Agree)



(Source: The Ipsos Consumer Tracker, conducted April 30–May 1, 2024, among 736 U.S. adults who say they have a credit card that gives them rewards or points.)

Carmichael: How do demographics play into the trends?

Nevski: Almost 30% of all households in the United States are single-person households. That will continue to rise. It influences how people interact with the world, interact with businesses and interact with each other. Because they're living in isolation in a sense, it's very important for them to leave their homes and interact with people and businesses.

This way, single people can socialize and see the world. And when they take those travel vacations, they want to stay active. They want to do something, whether it's kayaking or some kind of group activities, so not just being relaxed and laying down on the beach. People also want to be spontaneous. That means sometimes booking at the last minute.

Carmichael: There are two main types of single-person households at opposite ends of the age spectrum. How are they spending differently?

Nevski: It changes the activities, but also the destinations. Older Baby Boomer singles would prefer to go on a cruise with very well-planned activities or go to a resort. It's like a 55-plus community where it's all catered to them.

Younger people would be open to some cross-sell or upsell of excursions or hiking or doing something intense and active, and doing it in a group. Older households focus more on accommodations. That means more premium cabins or seats on a plane.

Carmichael: How do travel trends apply to non-travel brands?

Nevski: There are co-brand and partnership opportunities with restaurants or quick-service restaurants or hotels. Where brands can cross paths with their targets is while they are in a social mood or purchasing products and services at the grocery store, to which they make more frequent trips. Because, again, for the customer, shopping is a way of leaving the house and socializing with friends and family.

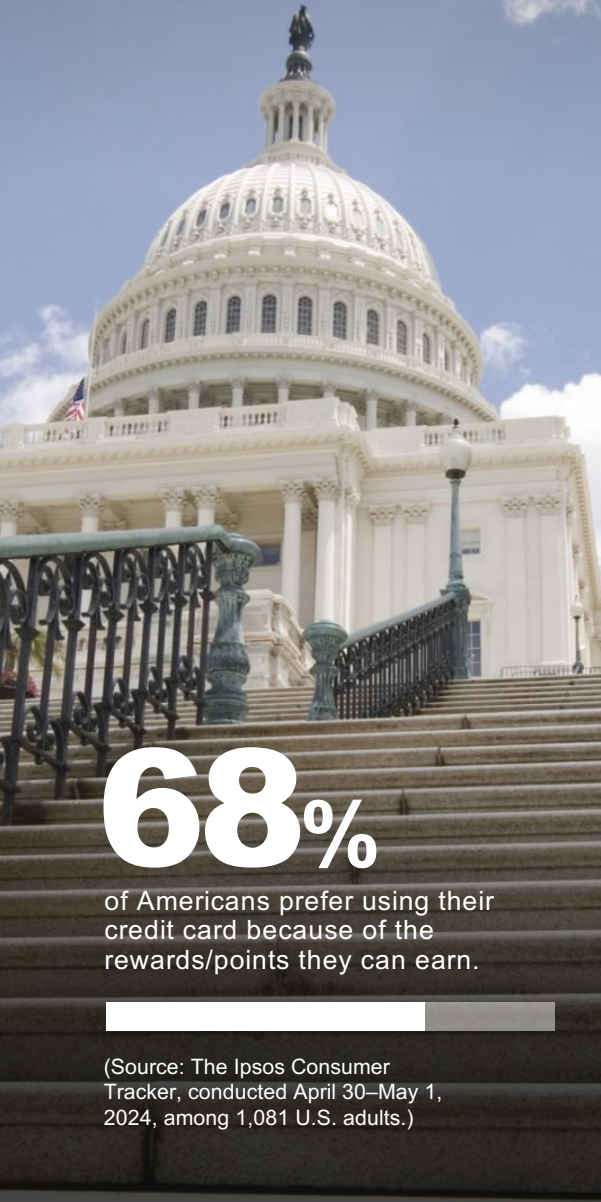
Carmichael: What else are you looking at?

Nevski: There is a demand from the market for a trade-off of efficiency versus time. As one of the cruise companies says: "Less time to get there and more time being there." That's the aspect of leisure that needs to evolve.

Matt Carmichael is editor of What the Future.



Any major spending growth is going to have to come from Gen Z."



68%

of Americans prefer using their credit card because of the rewards/points they can earn.

(Source: The Ipsos Consumer Tracker, conducted April 30–May 1, 2024, among 1,081 U.S. adults.)

Why all brands need to care about a financial services revolution

From vacations booked with rewards miles to shopping sprees funded by cash-back benefits, many Americans finance their leisure with their credit card points.

A regulatory shift could change this. While some proponents of the Credit Card Competition Act say change is needed in the credit processing industry to lower merchant fees, others warn this policy change could spell an end to valuable rewards programs.

Three in four Americans say they have a credit card that gives them rewards, and two in three of them prefer to use that card because of the points it earns, according to the Ipsos Consumer Tracker. That means this proposed policy is high stakes not just for financial services players, but for every business that processes transactions.

Payments companies and lenders may not be able to predict the future, but they can monitor regulatory moves and consumer sentiment and incorporate foresight into their business strategies to develop messaging, steer stakeholder engagement efforts, and/or prepare for potential outcomes. From today's proposals to tomorrow's regulatory shifts, businesses can't afford to be out of the loop when their business model and customer base are at stake.



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How TV, our favorite hobby, is evolving for advertisers



Amanda Lotz

Professor of media studies, Queensland University of Technology

People's leisure habits are changing, especially in how we watch television. Americans still spend more time watching TV than any other leisure pursuit, according to the American Time Use Survey. But evolving consumer behaviors, and a transforming media landscape are reshaping how people engage with content. Amanda Lotz, a renowned media analyst and professor of media studies at Queensland University of Technology, sees a more complex video space that will require companies to know *why* people are watching more than *where*.

54%

of Americans agree they spend too much time on screens and 44% say they find it "difficult" to unplug.

(Source: Ipsos survey conducted June 17-19, 2024, among 1,122 U.S. adults.)



What The Future interview with Amanda Lotz

Kate MacArthur: Our survey shows that most people watch on multiple screens. What is that telling us?

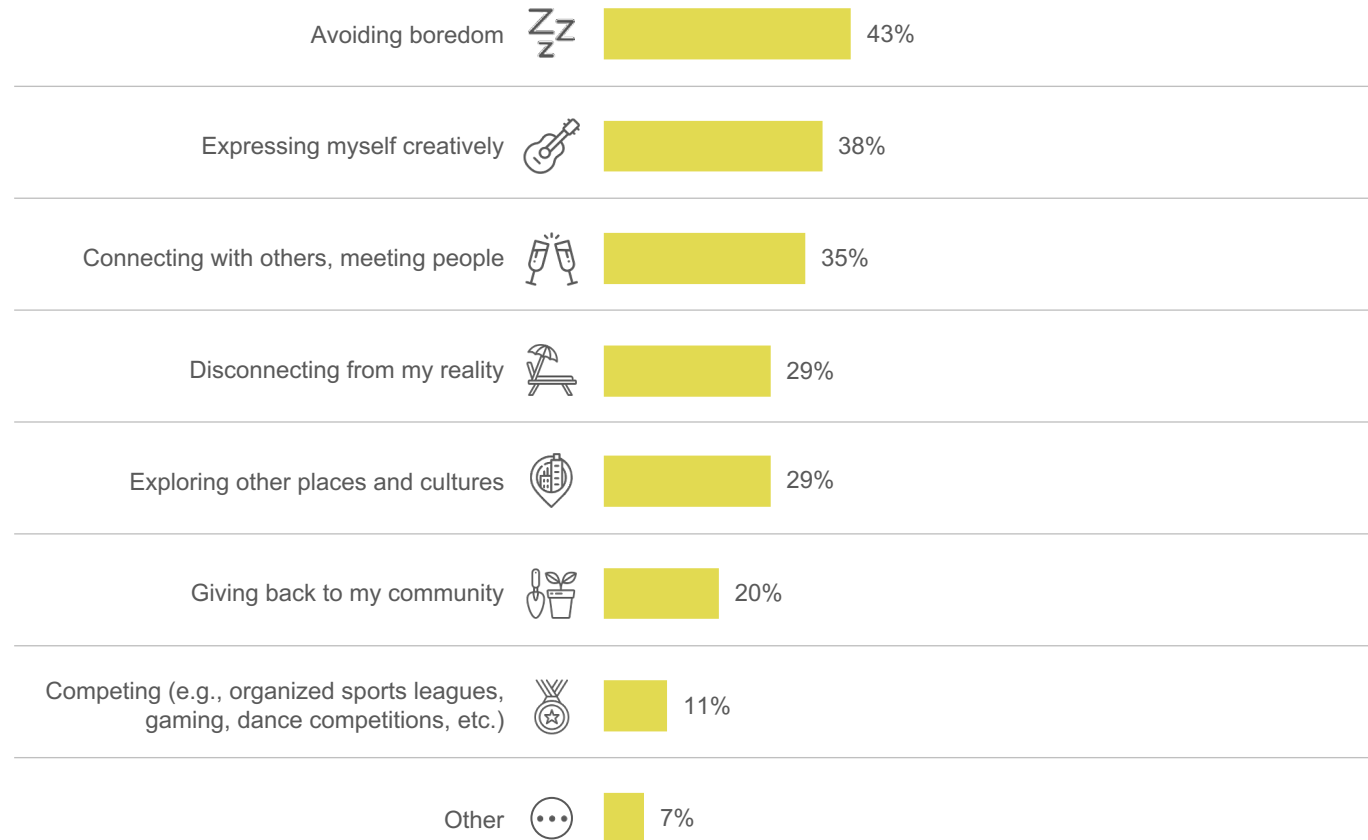
Amanda Lotz: I'm less concerned about the screen — I don't know that that tells us much, other than the conditions of where people are — and, instead, trying to think more about motivation. The user is trying to achieve something. Maybe it's connection, which might be achieved by a social media feed or watching a show or movie with someone. At other times, maybe we just need to pass time. So it's coming back to understanding human behavior. Now humans can satisfy a lot of different needs with a wide array of media, on different screens, and not just video.

MacArthur: Are the motivations of consumers and media in direct conflict with each other?

Lotz: Well, we are not in a mass media business anymore, and the economics of that context are not suited for the current era. A multifaceted video environment isn't going away. It requires services to be the destination that fulfills a certain motivation or a certain experience and does so well. That's the strategy that works in that complex environment, rather than what worked in the conditions of scarcity that existed in the past. If the choice is a comedy, a drama or news, and people don't want any of those, they can go somewhere else and still have something that is comparably satisfactory.

People most want to avoid being bored in their free time

Q. When thinking of your day-to-day hobbies, what are your top priorities? (% Total)



(Source: Ipsos survey conducted June 17-19, 2024, among 1,122 U.S. adults.)

MacArthur: How do new technologies create new strategies for advertising-based media?

Lotz: The language historically was “least objectionable programming.” But with addressable ad tools, platforms can sell ads based on demographic categories but independent of what is being watched. Advertisers don’t have to buy viewers in “Stranger Things” on Thursday night. They can buy men 18 to 25 on Thursday night, and it doesn’t matter what they’re watching. That’s a crucial difference in the implications of bringing advertising in, because that means that you don’t need to start flattening out the programming and going for a “least objectionable” strategy.

MacArthur: How will AI affect the business?

Lotz: AI is going to be useful for certain things: dubbing, subtitling, the digital effects. That’s clear. The idea that AI is going to completely take over creativity and the telling of stories — I’m skeptical about that. Will there be content around the edges created by AI? Probably. We don’t know what the business model is here. The challenge is finding a value proposition for enough viewers in this environment where there are a lot of different ways to satisfy our leisure needs.

MacArthur: How long can streaming services raise subscriber prices before we see a shakeout?

Lotz: The shakeouts are starting to happen. If we look at advertising over time, a ton of new money is not sitting somewhere about to come into the sector. It’s a fixed pot. It’s expensive to make content. If we fragment where the attention is too far, we start to lose a business model that can create original content. There’s not room for all the players, especially when you have Amazon and Apple playing a related but entirely different game. And then you have this whole other sector [social] that is not based on licensed content, and a lot of people find a lot of satisfaction there. The attention keeps getting spread more broadly, and the decreasing dollars in professional video make costs of production challenging.

MacArthur: Can you envision a post-screen era, and what that would look like?

Lotz: The thing that’s still on the horizon, and we’re seeing it with Roblox, Minecraft and Fortnite, is the increased use of, let’s call it, mediated sociality. It’s not a replacement for going to a movie. It’s not a replacement for playing a video game. It’s about a virtual social experience that is better than we’ve had yet. You can do some things on the phone, yes. But we haven’t quite gotten to an experience that feels like what it’s like to go to Papa’s house and play checkers with him. That’ll still involve a screen but won’t be content being created for an audience.

Kate MacArthur is managing editor of What the Future.



I’m less concerned about the screen ... and, instead, trying to think more about motivation. The user is trying to achieve something.”

How experimental art is reaching young audiences in new ways

From the Renaissance to cubism, shifts in technology and society have always shaped artistic expression. Recent polling from Ipsos finds that young audiences are engaging with experimental art in-person and online — a development that could influence future patrons and audiences.

One in five Americans watched or participated in media arts (that is, art that incorporates technology, film and video, animation, and/or robotics) in the past year. It's still a niche — nowhere near as popular as, say, a trip to the zoo, or even a conventional museum — but has gained ground with younger audiences, who were nearly as likely to make those visits online (26%) as IRL (31%).

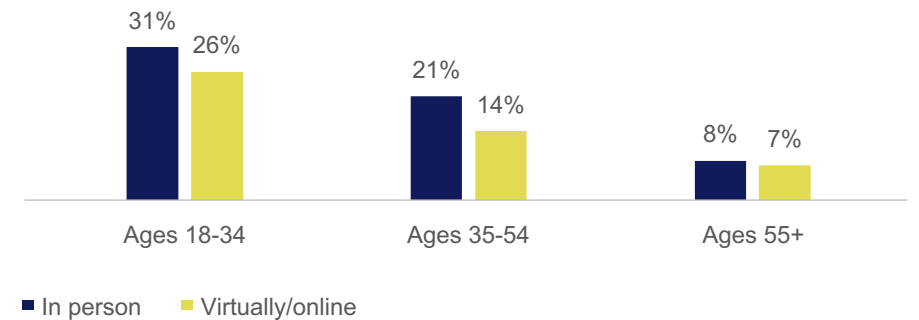
That matters for curators and dealers, but it also offers a window into Gen Z's shifting entertainment preferences. Online media won't *replace* galleries any time soon, if ever. There will always be a crowd for the Mona Lisa. But in the arts, as in other fields, young Americans are increasingly adding screen time to their leisure time.



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Young adults are more open than older peers to experience arts and culture virtually or online

Q. Thinking about "arts and culture," have you visited, attended, or watched media arts (artwork using technology, film and video, animation, robotics, etc.) during the past year in person or virtually/online? (% Total)



(Source: Americans for the Arts survey conducted July 5-11, 2023, among 3,062 U.S. adults.)

How digital venues are reshaping the way we experience arts and culture



Chris Freeman

President, WNDR Museum

Just as art is being disrupted by technology, so are cultural exhibits and attractions. The growth of immersive, digital art experiences like Meow Wolf, the Museum of Ice Cream and Color Factory are reshaping how we experience art, culture and science. Chris Freeman is president of the multisensory tech and art experience WNDR Museum, which opened in 2018 in Chicago. When he thinks what the future, he's thinking how these venues will continually evolve, but always inspire awe and wonder.

50%

of Americans have never visited, attended or watched an arts or cultural display virtually or online.

(Source: Americans for the Arts survey conducted July 5-11, 2023, among 3,062 U.S. adults.)



What The Future interview with Chris Freeman

Matt Carmichael: How do attractions like yours compare to legacy museums?

Chris Freeman: There’s a definition in Webster’s [dictionary for museums], and we don’t apply. If you apply how society or culture views a museum, we are there to stimulate thought and share creativity in a uniquely meaningful way, and we intend to elicit reactions in the same way that art does. A lot of what we do is art. We have makers and creators who create things with the intention of eliciting and extracting awe and wonder.

Carmichael: So in what category would you fit?

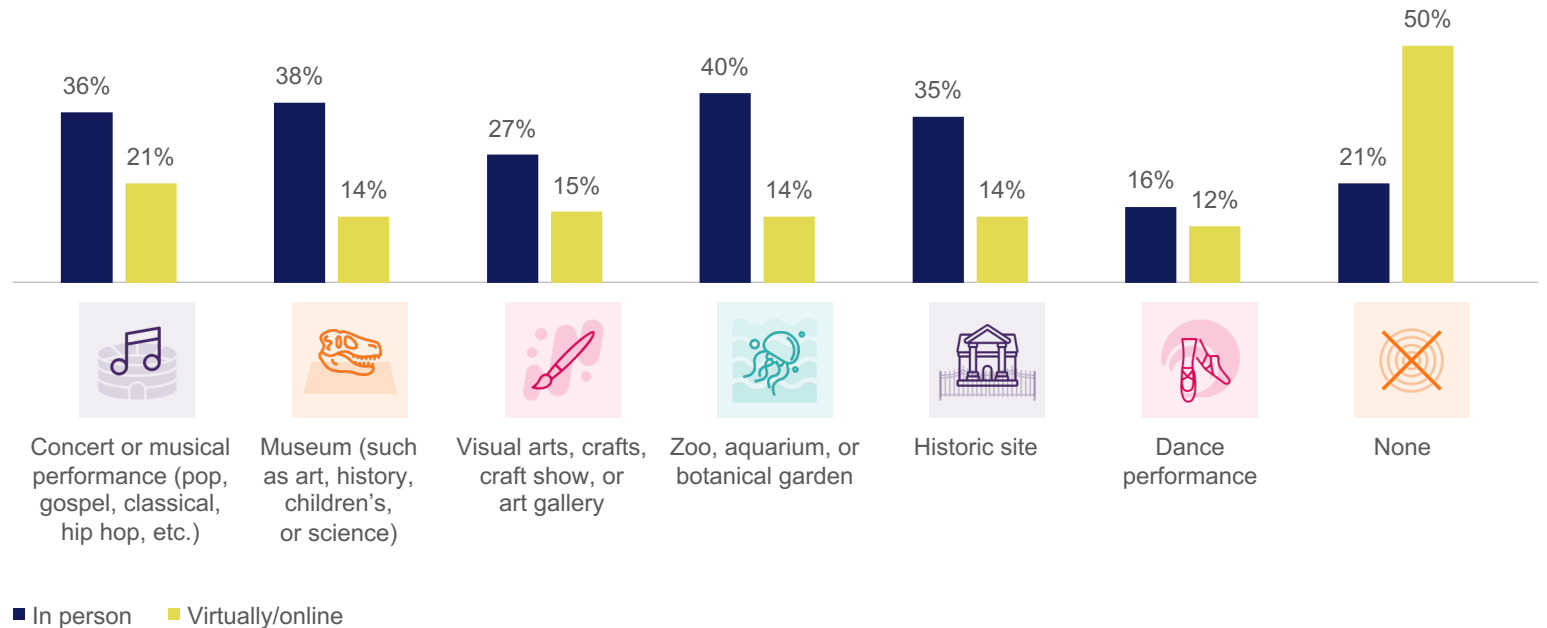
Freeman: The category that’s become known as immersive experiential, which, depending on who you’re talking to, we fit in or don’t. Where WNDR differentiates itself is we go a couple levels deeper in trying to connect with the guest and really invest in the experience with hospitality and bring that level of engagement. So trying to kinetically align and push together in a way that when two things collide — that is, the guest and our experience — that should impress awe on them and their group, and create wonder and excitement.

Carmichael: What do you call the things in your buildings?

Freeman: We’ve been calling them exhibits or the creative, but they are most definitely experiences.

Americans still prefer to attend arts and culture in person

Q. Thinking about “arts and culture,” have you visited, attended, or watched any of the following during the past year “_”?



(Source: Americans for the Arts survey conducted July 5-11, 2023, among 3,062 U.S. adults.)

Carmichael: Going back to Webster’s definition, museums are guardians of a collection of things. You don’t have that legacy. What does that free you to do or constrain you from doing?

Freeman: We needed to say, “WNDR: come here for an experience” without saying that. So that’s where the museum name came in. And out of the gate, we populated this building with one of the most prolific experiential artists, Yayoi Kusama, and that is a multimillion-dollar exhibit. That was WNDR’s privilege and pleasure to bring real, authentically credible, fine art as an entry to see the rest of the thing.

Carmichael: How do you balance the need to create these experiences but also satisfy peoples’ desire to make it Instagrammable?

Freeman: That is the most top-of-mind thought when we walk into work every day, especially the leadership of the company, because there are people that have charged us with, “You’re an Instagram museum.” That is the perpetual split because we want to entertain, and with a certain segment of our population that comes in here, they want the art and they want to really live and breathe the maker, creator, artist side of this business.

Carmichael: You are creating an entirely new competitive set for legacy museums. How challenging is that for those museums?

Freeman: We don’t necessarily consider anybody competition per se, depending on the audience that we’re talking about, because the category is still so nascent.

Carmichael: Do you think traditional museums are going to become more experiential?

Freeman: There’s a lot of trial and error going on. Some big whiffs out there, expensive ones, too. But there’s a lot of cool and talented people doing stuff as well. I can throw out MSI [Museum of Science & Industry] as one of those companies.

Carmichael: What are AR and VR going to do to all these spaces?

Freeman: Everything has changed from exclusively visual to embedding a level of kineticism and touch and interactivity to the experience. Looking at some of the experiential stuff, it’s nonstop stimulation. It’s, “Try this taste this, smell that, do this,” and whoa, my senses are going crazy.

Matt Carmichael is editor of What the Future.



There are people that have charged us with, ‘You’re an Instagram museum.’”

Tensions that will drive change:

Climate a factor in leisure spaces or not?

The future is always in tension. We can measure those contradictions today with forced-choice questions. And we can plot them against each other in a classic 2x2 grid. That allows us to visualize where we are today, but also to imagine what the possible futures are if those tensions shift over time — and how far they would have to move to get us to a different future from our baseline.

CLIMATE CHANGE WILL MAKE SOME PLACES LESS DESIRABLE TO VISIT

This world is perhaps more plausible than we usually see this far from where a tension starts. Climate change will likely affect the places we go and our activities. And it's likely that immersive virtual experiences will continue to get better. So it's not hard to imagine a world where we wind up spending more time in virtual spaces either by choice or by necessity.

I'D RATHER SPEND MY FREE TIME IN VIRTUAL SPACES

The part of this world that feels implausible is the lack of climate impacts on the places we visit, especially since that's already happening. But in the scenario where we do find resilience and mitigation, we could still wind up spending more time in virtual spaces as they become cooler (pun intended), more immersive and more engaging. Oh, and affordable. Let's not forget that important variable.

In today's world, we prioritize spending our time in real spaces, but we recognize that climate change is a reality. Functionally, we're already seeing trends shift in terms of when and where we vacation (so long, Greece, hello Finland!). But think, too, about the implications to other leisure time. How long will outdoor sports or kids summer camps last in Phoenix?

I'D RATHER SPEND MY FREE TIME IN REAL SPACES

In this world, people just keep on keeping on. Does that mean that climate change doesn't affect travel and recreation? Maybe school summer vacations shift to autumn vacations. Perhaps we see a sudden rise in resilience measures and more efficient buildings and HVAC systems — especially in schools. Perhaps we get clothing that wards off the heat and insulates the cold. Regardless, our sense of adventure perseveres.

CLIMATE CHANGE WON'T IMPACT TRAVEL AND TOURISM IN THE NEXT FEW YEARS

Tensions that will drive change:

Get more time for hobbies or make more time?

The future is always in tension. We can measure those contradictions today with forced-choice questions. And we can plot them against each other in a classic 2x2 grid. That allows us to visualize where we are today, but also to imagine what the possible futures are if those tensions shift over time — and how far they would have to move to get us to a different future from our baseline.

**A FOUR-DAY WORKWEEK WOULD
MAKE MY LIFE MORE BALANCED**

In this world, we look for more balance from a four-day workweek, but maybe realize that's out of reach. So we take a breath, pause and carve out time for our hobbies and leisure pursuits. For related brands, this could lead to an increase in demand for hobby supplies and gear. The question is, where does that time come from and what trade-offs do we make to get there?

I PRIORITIZE MAKING TIME FOR MY HOBBIES

In this world, the four-day workweek just doesn't work for us. Having an extra day off sounds nice, sure. But we don't see the balance being worth the trade-off of four longer workdays. If four-day workweeks don't take off, we could potentially find ourselves here, finding time to be mindful, relax, unplug and enjoy the things we enjoy. Except for gamers, this would likely mean less time with screens and more time with our hobbies.

In today's world, we long for more time. And it's easy to see that continuing. While four-day workweek experiments have gone well in some companies and some parts of the world, they have yet to fully take off. And Greece is leaning the other way with a six-day week! So in this baseline future, we find the time we can — and maybe there isn't too much — for our hobbies.

I DO MY HOBBIES WHEN I GET A CHANCE

This world seems quite plausible. We don't want (or don't get) a four-day workweek, and we continue to be stressed for time. We take what we can get for our hobbies, but it's not much. On this side of the grid, it's hard to see how much changes for the hobby industry as more things demand our attention and pull us from what we *want* to do, to what we *need* to do.

**A FOUR-DAY WORKWEEK WOULD
MAKE MY LIFE LESS BALANCED**

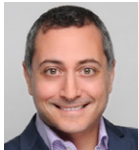
Future Jobs to Be Done



Ipsos spins the traditional “Jobs to Be Done” framework forward with *future Jobs to Be Done (fJTBD)*. This builds on the theory that people buy products and services to fulfill certain needs or accomplish specific tasks. For example, we don’t buy a game system for our home, we hire it to entertain ourselves, our friends and our family, and to escape by immersing ourselves in different worlds.

To bring these jobs into the future, we envision powerful and plausible scenarios through strategic foresight. While many needs are enduring and do not change over time, the context of that job will change along with the potential solutions and alternatives. These scenarios help us define the circumstances in which people may find themselves, like considering whether to risk financial health to make a trendy purchase or save for a rainy day.

We use fJTBD to tie these scenarios to actions that organizations can take to help people meet future needs. While it’s typical in foresight to create fJTBD clusters, we’re sharing one scenario here as an example.



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Help me ensure that I can enjoy the activities that I love, in the way that I love doing them.

In a world where consumers struggle to find time to accomplish all that they *need to do*, they will be more challenged to ensure they make time for themselves to do the things they *want to do*, and how they want to do them.

Potential fJTBD:

- Help me manage my time so I can work to live, not live to work
- Identify new places I can go to immerse myself in new cultures
- Help me detox from screens and enjoy my surroundings in the moment
- Enable me to quickly dive into a leisure activity when and where I want, without a lot of preparation or forethought

Imagine a world where ... people can manage their paid time on (e.g., income-generating time) vs. their paid time off.

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What the Future is produced by the **Ipsos Trends & Foresight Lab**

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