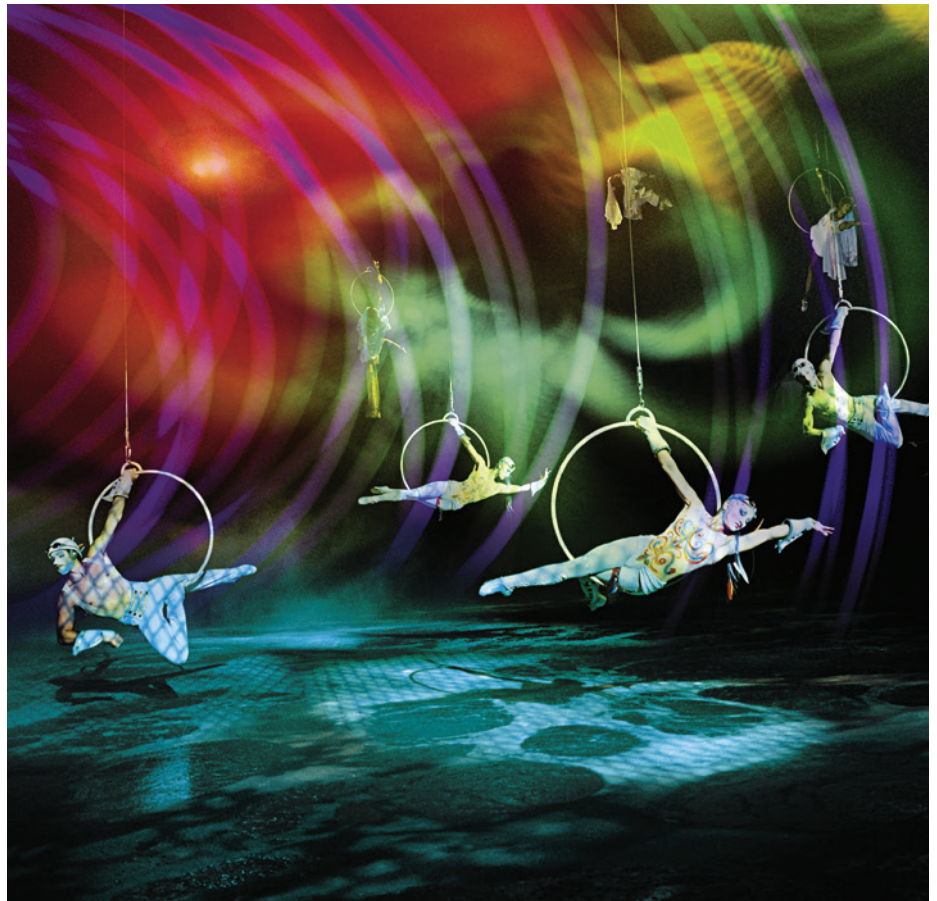


THE TRUTH ABOUT ENTERTAINMENT WHITEPAPER



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22	Challenges in modern entertainment
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INTRODUCTION



THE POWER OF ENTERTAINMENT

While entertainment is most often equated with the lighter things in life, we shouldn't underestimate the fundamental role it plays in our lives and in society. While it may not be essential to our physical survival, in many ways entertainment defines us. Indeed, 82% say that 'without entertainment in my life I wouldn't be me' and an impressive 93% see entertainment as essential to health and happiness.



From music to TV to film to live shows, it can feel as if we're drowning in entertainment content and choices and yet, paradoxically, many feel as if they aren't getting enough of it. 56% say they rarely feel entertained these days and half feel regularly under-stimulated by their environment.

It's also true to say that not all entertainment is created equal. While digital experiences proliferate, if Americans are asked to choose between live and digital experiences, 66% would choose live. Hardly surprising perhaps when 83% feel we spend too much time looking at screens today.

According to consumers, live entertainment confers numerous superior benefits, including great memories, being immersed in the experience, the change of scene, sensory stimulation and quality time with loved ones. When asked about the most memorable kind of entertainment experience, the most highly rated experiences are 'a trip with friends and family' followed by "live music," which are indicative of the power and lasting impact of collective and group entertainment.



2 in 5 can't remember the last time they went to a live show and 25% have never been to a music concert!

And yet, despite all of this, the data indicates that we should be making more time to experience live entertainment. 2 in 5 can't remember the last time they went to a live show and 25% have never been to a music concert! The majority say that in an ideal world, they would attend 8 live music concerts a year and yet at most they attend 2. Similarly, the average American says they would ideally go to 5 comedy shows a year and yet they barely make it to 1.

Cont.

INTRODUCTION

While the vast majority see entertainment as essential, it's not something we consistently make time for. Half of people point to a lack of time and too many responsibilities as being their major entertainment barriers and 70% wish they had more time to dedicate to entertainment. Depressingly, 62% say that when they have free time the most important thing is to catch up on errands and 23% say that when they have too much fun they feel guilty!

While there are several challenges the entertainment industry must overcome, from lack of prioritization to access, the future is looking remarkably bright. We actually see a strong reciprocal relationship between digital and live emerging, with 59% saying that the more time they spend on a screen, the more they crave live experiences. Meanwhile, smart technology integration into the live experience itself can bring an added layer of immersion and adventure. Interviewed experts predict a new generation of innovative experiences that will cater to audiences in new ways (think music festivals for the over 50s).

Encouragingly, the majority of Americans believe that entertainment will be better in the future than it is today and this rises to 69% among Millennials, who are arguably already shaping the future of entertainment.



METHODOLOGY

In order to explore the multifaceted role that entertainment plays in our lives today, we designed a multistage methodology:

DESK RESEARCH SURVEYING

- 48 articles
- 28 research reports
- 11 books
- 9 publications

EXPERT ROUNDTABLE

With academic and nonacademic experts in entertainment, drawn from a range of different disciplines.

QUANTITATIVE SURVEY

Conducted in the US, China and Japan, with a 2,000-person-strong, nationally representative sample in each market.

QUALITATIVE RESEARCH

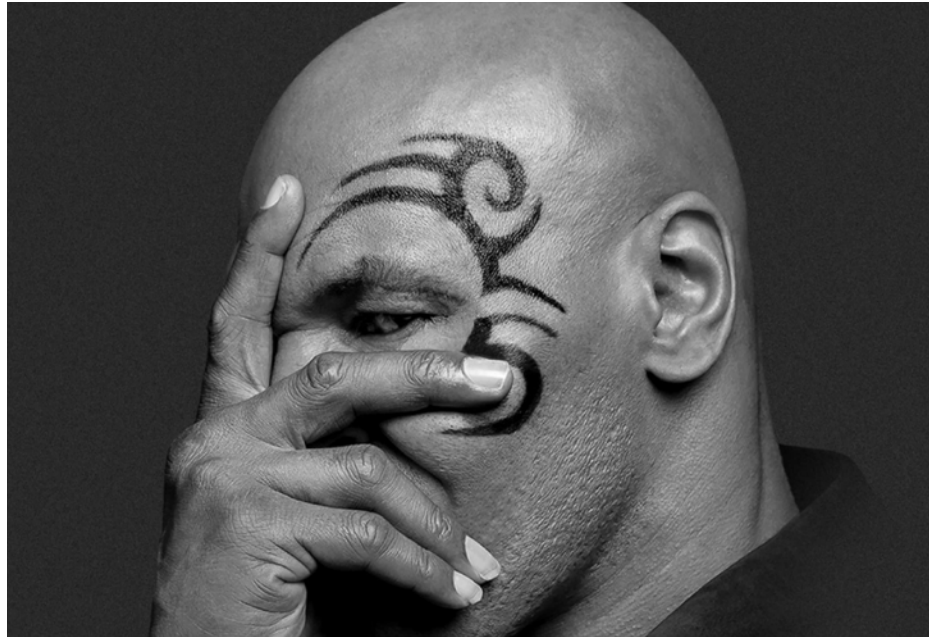
In the form of 5-day-long mobile ethnographies conducted with 40 people in Los Angeles, New York, Houston and Atlanta. As part of the research respondents were tasked with attending a live entertainment event and journaling their experience before, during and after the event.



The majority of Americans believe that entertainment will be better in the future than it is today.

1

DEFINING ENTERTAINMENT TODAY



Before we can start to explore the role that entertainment plays in our lives, we need to take a step back and ask ourselves the question ‘what is entertainment?’

Entertainment is a big word. In many ways it’s too big to be contained by a single definition. And while what it does for us on a human level might be relatively unchanged throughout history...what entertainment looks like, and what types of entertainment are particularly resonant, is constantly evolving.

If we ask the Internet, entertainment encompasses everything from film, TV, radio (mass media) to theatre, concerts, festivals, magic (live entertainment) to fairs, museums, galleries (exhibition entertainment) and gaming, dining, athletics (participatory entertainment).

“ *Entertainment is anything you love doing—knitting, painting, driving a car. It’s whatever catches your eye and makes time go by.* – Brian, Atlanta, 19

Yet beyond the different categories and activities that fall under the entertainment banner, it’s also interesting to consider how experts and academics have defined entertainment; what criteria must a particular activity meet to be defined as truly entertaining?

For example, one of the world’s oldest philosophers, Aristotle, argued that there are 3 core components to anything that qualifies as entertainment:¹



Aristotle argued that there are 3 core components to anything that qualifies as entertainment

1

Mimesis: It helps us explore life, free of consequences

2

Mythos: It can be recognized as distinct from the chaos of real life

3

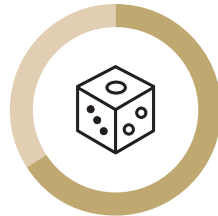
Catharsis: It offers us an emotional release

1 cont. DEFINING ENTERTAINMENT TODAY

But what if we ask real people in the world today? What does entertainment mean to them?

According to the respondents in our research, at the highest level, entertainment is equated with fun, escapism and stress management. Which certainly offers some crossover with Aristotle's original thesis!

TOP 3 DEFINITIONS FOR 'ENTERTAINMENT'



It's about passing the time in a fun way

66%



It's an escape from my everyday routine

61%



It's a way of relaxing to deal with stress

59%

However, it's also true that not all entertainment is created equal. By taking a deeper look at the data we can identify 6 important dimensions (which we call 6Es) that the best entertainment should aspire to deliver against.

ESCAPISM: Does it help me briefly forget the challenges of real life?

61% say they use entertainment to escape the everyday routine

ENDURING: Does it stay with me long after the curtain falls?

56% say the #1 benefit of live entertainment is that it is memorable

EMPATHY: Does it bring me closer to others?

52% use entertainment as a way to bond with others or meet new people

EXPERIENTIAL: Does it engage my senses in some way?

47% enjoy the sensory stimulation associated with live entertainment

EDUCATION: Does it impart knowledge, or expand my world?

36% look to entertainment to expose them to new ideas and cultures

EMOTIONAL: Does it make me feel something?

30% look to experience 'strong emotions' when being entertained



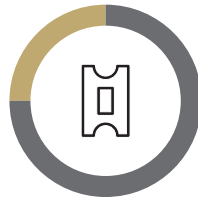
61% say they use entertainment to escape the everyday routine.

When we ask people about the types of experiences that are most top-of-mind when they think about entertainment, it's also interesting to note that 4 of the top 5 are out-of-home experiences and 3 of the top 5 are live entertainment experiences.

1 cont.

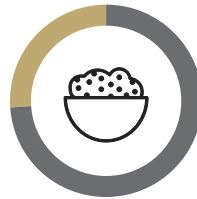
DEFINING
ENTERTAINMENT
TODAY

Q. Which of the following activities would you describe as entertainment?



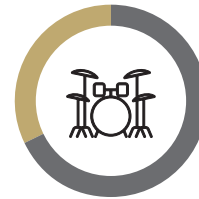
Watching movies
in a movie theater

75%



Watching movies
at home

74%



Attending a
music concert

68%



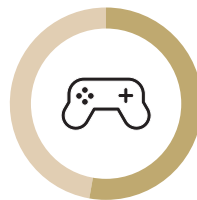
Attending a live show
or performance

66%



Attending a live
sporting event

55%



Playing games just for
fun (including video)

53%



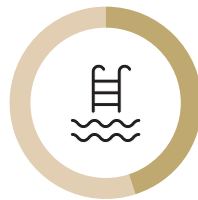
Dining at a
restaurant

51%



Visiting a
museum

46%



Pool or beach
activities

45%



Reading
a book

43%



Going dancing
or bars/nightclubs

39%



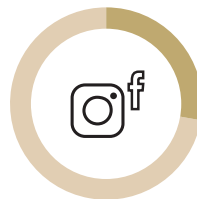
Playing games for a
chance to win money

35%



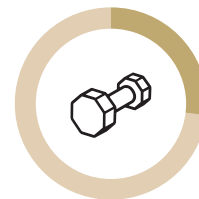
Shopping
at a mall

32%



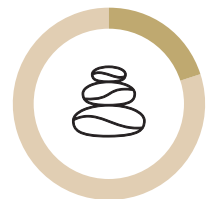
Scrolling through
social media

28%



Exercising/
sporting activities

27%



Receiving a
spa treatment

20%



75% describe watching movies in a movie theater as entertainment.

When entertainment meets (even some of) the 6Es above, it can have a major impact on our lives. This framing helps us to explore the powerful role that entertainment can and does play in our lives today.

1 cont.
DEFINING
ENTERTAINMENT
TODAY

As with the US, the role of entertainment in Japan and China is primarily about escapism, relaxation and spending time with loved ones. However, key over-indices reveal nuances to this story in these two markets.

CHINA

For the Chinese, entertainment has a role in social cachet.



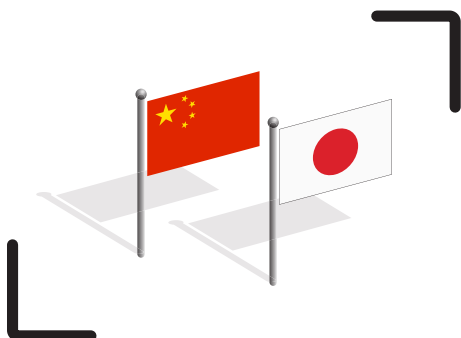
Nearly 1 in 3 Chinese say that it's a way of being in the know and taking part in popular culture (compared to **23%** of Americans and **17%** of Japanese).

The notion of pop culture, so familiar in the West, is relatively new in China, where public entertainment was tightly controlled by the government and censorship limited the extent of self-expression. With economic liberalization, greater exposure to global entertainment (such as Hollywood and K-pop), and seamless dissemination through digital channels, there has been a renaissance in celebrity culture and the related industry of gossip magazines, fashion blogs, beauty influencers, advertising and so on. In an already collectivist, relationship-oriented culture, 'inner circle' knowledge of this new glamorous stratum of homegrown tastemakers lends a desirable degree of social cachet.

- Nearly 1 in 3 Chinese say that entertainment is a way of being in the know and taking part in popular culture (vs. 23% of Americans and 17% of Japanese)
- 21% of Chinese say that entertainment is about competition and the thrill of pitting their physical or mental skill against other people (vs. 12% of Americans and 4% of Japanese)

This filters through into which activities they are more likely to call entertainment. Obviously, sports play into the idea of competitiveness. Shopping and social media play into the friendly social one-upmanship characteristic of developing markets with burgeoning consumer cultures—again, a relatively new entertainment experience in a country where economic development has only recently put disposable income in the pockets of the middle class, and enabled mass-scale consumer culture.

- 1 in 3 Chinese agree that 'Exercising/sporting activities, including adventure sports, is entertainment (vs. 27% of Americans and 17% of Japanese)
- 38% say shopping at a mall is entertainment (vs. 32% of Americans and 16% of Japanese)



1 cont.
DEFINING
ENTERTAINMENT
TODAY

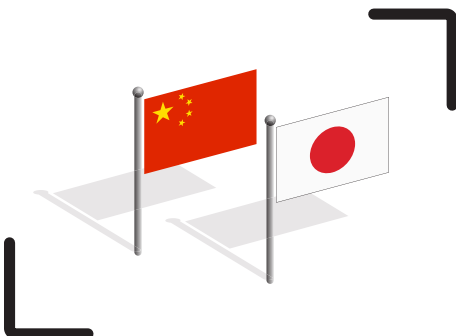


JAPAN

Entertainment is more traditional in Japan—it is a specific moment or event that removes the spectator from the everyday and allows them to appreciate the talent and artistry of a performer. In this sense, entertainment is more differentiated from leisure in Japan than in the US or China. While entertainment is about awakening the senses, leisure takes on the more quotidian function of relaxation and quality time with friends and family.



42% of Japanese say entertainment is about excitement and awakening senses that aren't stimulated on a daily basis (vs. **33%** of Americans and **26%** of Chinese)



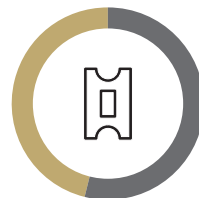
Given this somewhat more traditional definition of entertainment, the Japanese are less likely than either the Chinese or the Americans to consider activities that don't involve an element of performance as entertainment.

- For instance, only 7% of Japanese would consider receiving a spa treatment as entertainment (vs. 20% of Americans and 18% of Chinese)
- Only 16% of Japanese would consider reading a book as entertainment (vs. 43% of Americans and 26% of Chinese)

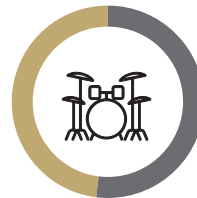
1 cont.
DEFINING
ENTERTAINMENT
TODAY



In this context, it is perhaps unsurprising that all the top 3 activities identified by the Japanese as entertainment are out-of-home experiences:



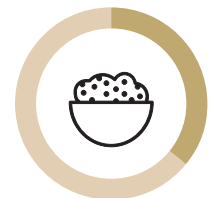
Watching movies
in a movie theater
54%



Attending a
music concert
52%



Attending a live show
or performance
50%



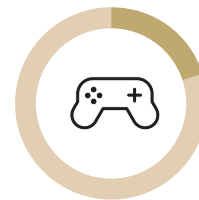
Watching
movies at home
36%



Attending a live
sporting event
32%



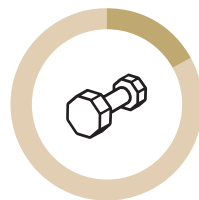
Visiting a
museum
24%



Playing games just for
fun (including video)
20%



Dining at a
restaurant
20%



Exercising/
sporting activities
17%



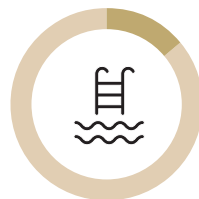
Going dancing
or bars/nightclubs
16%



Reading
a book
16%



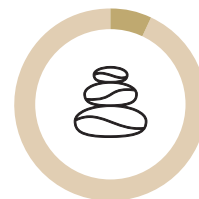
Shopping
at a mall
16%



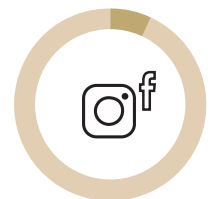
Pool or beach
activities
14%



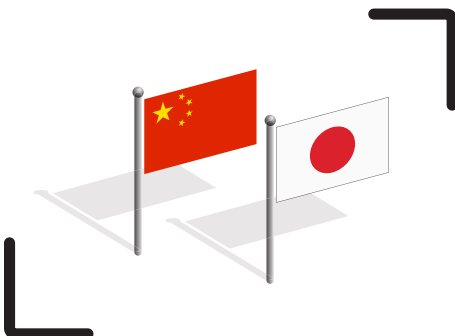
Playing games for a
chance to win money
10%



Receiving a
spa treatment
7%



Scrolling through
social media
7%



2

UNDERSTANDING THE POWER OF ENTERTAINMENT

“*Is entertainment a fundamental human need? Sure. But that's just the start of the question...the question then becomes, 'What needs and desires are being satisfied by entertainment?'*” – Dr. David Grazian, Associate Professor of Sociology, University of Pennsylvania



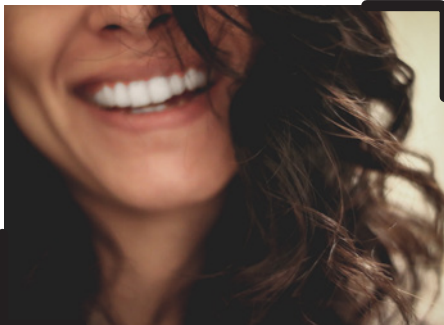
92% of Americans agree on the fundamental role entertainment plays in our lives.

This isn't to say that it's fundamental to keeping us alive, such as food, shelter and water—certainly not. However, it is crucial to who we are as people, with unique personalities, interests and opinions. In this sense, it is not a fundamental survival need but essential nonetheless.

How is this claim backed up? How does this actually play out in the modern world?

The research suggests that entertainment's benefits are far-reaching. At a macro level, it has had a role to play in the grand narrative of human evolution, and on a more personal level, it helps us maintain health and happiness. Its role can be summarized in at least four crucial principles:

- Fundamental to our evolution
- Fundamental to identity formation
- Fundamental to bonding and memory-making
- Fundamental to our overall wellness



Entertainment plays a role in maintaining health and happiness.

2 cont.

UNDERSTANDING THE POWER OF ENTERTAINMENT

“ *Almost everything we do, unless we’re doing it to earn money for the survival needs like food and shelter, we basically only do them for entertainment... it drives us.* – Noam Dworman, Owner, Comedy Cellar (NYC)



FUNDAMENTAL TO OUR EVOLUTION

It’s easy to think about entertainment, first and foremost, as ‘the fun stuff in life’—those things you get to do when you’re done with all of your responsibilities. And that’s certainly the way many people understand the role of entertainment in their lives. As we saw earlier,



61% of Americans describe the role of entertainment in their lives as an escape from the everyday routine.

And while that’s absolutely true, entertainment also plays a more serious role: it helps our brains develop, and allows us to evolve. Anthropologist and neuroscientist Melvin Konner points to the fact that the smartest mammals are also the most playful, and compellingly argues in *The Evolution of Childhood*—the product of 30 years’ research—that play may be the primary means nature has found to develop our brains.²



The smartest mammals are also the most playful.

“ *Imagination is vital, when that gets turned into entertainment at its best, it’s wonderful* – Michael Bronski, Professor of Practice in Media, Harvard University

“ *Entertainment stimulates the pleasure and reward centers of the brain which are very central not only to humanity but throughout evolution, this is what had driven all species.* – Dr. Valorie Salimpoor, Neuroscientist, Baycrest Health Sciences

2 cont.

UNDERSTANDING THE POWER OF ENTERTAINMENT

External stimuli are significant catalysts of development—one study showed that animals in enriched environments with toys, given the ability to play, experienced neural growth, while those deprived of play experienced neural death.³

In modern culture, we've seen a renewed fascination with play for adults. From the emergence of adult coloring books to the predictably Brooklyn-based adult preschool, people are finding ways to integrate new forms of entertainment into their lives. Because entertainment didn't just help us evolve thousands of years ago – it helps us continue to develop today.



FUNDAMENTAL TO IDENTITY FORMATION

Through music, film, art, and games, entertainment imparts values that we absorb as we consume it—shaping who we are. Although such a claim would be impossible to verify, the linguist Mark Liberman has joked, not without merit, that “The Simpsons has apparently taken over from Shakespeare and the Bible as our culture’s greatest source of idioms, catchphrases and sundry other textual allusions.”⁴



“The Simpsons has apparently taken over as our culture’s greatest source of idioms, catchphrases and sundry other textual allusions.” – Mark Liberman



91% of Americans say they can’t imagine their lives without their favorite books, music, films, bands and sports.

As the data on the next page indicates, entertainment plays a powerful role in shaping everything from future hopes to friendships and fashion choices.

2 cont.

UNDERSTANDING THE POWER OF ENTERTAINMENT

Q. To what extent has entertainment influenced YOU?



The person
you are today

76%



Your choice
of vacation

75%



Your hopes
for the future

63%



What you look
for in a partner

62%



Who you are
friends with

62%



Your fashion
sense

51%



Your choice of
where to live

47%



Your career
choice

42%



Millennials have higher rates of agreement for every dimension listed above, suggesting that entertainment plays a particularly pivotal role for this generation.

“ *Music is a big reason why I am who I am today.* – Anna, Atlanta, 18



Entertainment helps us identify who we belong with, bringing us together to form like-minded tribes.

Certainly, entertainment also helps us identify who we belong with, bringing us together to form like-minded tribes of Burners, Deadheads, gamers, and *Game of Thrones* fans. These groups facilitate self-expression and foster a sense of belonging—both of which, according to Maslow's famous hierarchy, are fundamental human needs. Entertainment is so tribal that a quarter of men claim to have ended friendships over entertainment preferences!

“ *Entertainment becomes a way in which individuals find their tribes, develop self-esteem, and reach self-actualization.* – Ken Spring, Associate Professor of Sociology, Belmont University

2 cont.

UNDERSTANDING THE POWER OF ENTERTAINMENT



FUNDAMENTAL TO BONDING AND MEMORY-MAKING

As we form these tribes, we seek to bond with others and make lasting memories. Research has shown that novel experiences actually boost memory retention,⁵ which reinforces the bonds that family and friendship are built upon.

The collective nature of entertainment is demonstrated by the fact that 63% said they are most entertained when they spend time with family, 49% selected time with a partner and 44% chose time with a small group of friends. Given that entertainment is primarily thought of as a social (rather than solitary) activity, a third of people even say they would feel embarrassed if they went to a movie theatre alone.

But we don't need neuroscientists to tell us that entertainment, and sharing new experiences in particular, helps us grow closer to people. As part of the qualitative research, people were asked to attend a live entertainment event. The ones who attended with close friends, or family, reported intense moments of bonding and powerful, memory-making moments of catharsis.

- “*Last night I took my daughter to Kinky Boots and it actually made us cry! It opened up all these conversations for us. It was unbelievable.* – Leslie, New York City, 45
- “*My live event was almost like therapy for me and my friends! It was great to unwind, come together with others, and do something different.* – Cheryl-Ann, New York City, 33
- “*Empathy is one of the strongest things we learn from entertainment: being able to look at someone's life with a perspective allows us to place ourselves in society and expand our ideas of what life can be.* – Gypsy Snyder, Director/Choreographer



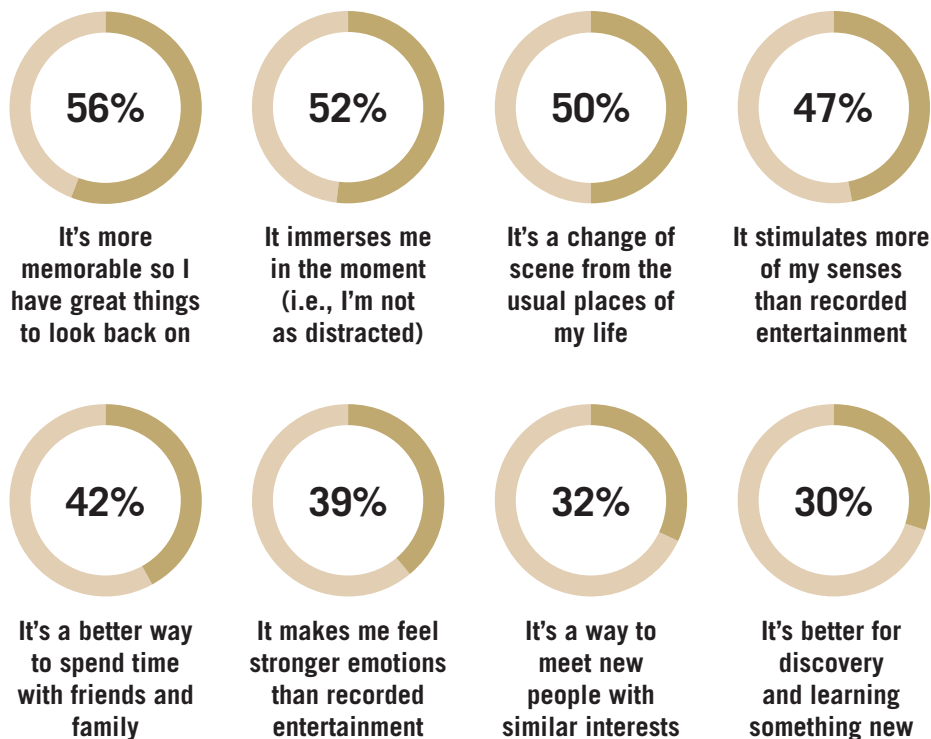
As we form these tribes, we seek to bond with others and make lasting memories.

The benefits of live entertainment when it comes to both memory making and bonding are pronounced with: **56%** describing it as ‘more memorable’ and **42%** indicating that it is ‘a better way to spend time with friends and family.’

2 cont.

UNDERSTANDING THE POWER OF ENTERTAINMENT

Q. What, if any, is the advantage of live entertainment over recorded entertainment?



This data is compounded by the fact that when asked about the most memorable kind of entertainment experience, the most highly rated experiences are 'a trip with friends and family' followed by 'live music,' which are indicative of the lasting impact of collective and group entertainment.

Neuroscientists and consumers alike note the power of collective entertainment in generating a heightened emotional response:

“ *The measured emotional response of people watching a live musical performance with other people is significantly larger than that of people alone at a performance, or alone listening to a recording.* – Dr. Valorie Salimpoor, Neuroscientist, Baycrest Health Sciences

“ *I love the feel of the crowd and everyone being together with a common goal* – Joy, Houston, 31



39% say they feel stronger emotions than recorded entertainment.

A 2017 study published in Psychology of Music found that individuals engaging with music through dancing and attending live music events reported higher subjective well-being scores than those who did not.⁶ No wonder 69% of Americans agree the world would be a better place if people got more live entertainment.

2 cont.

UNDERSTANDING
THE POWER OF
ENTERTAINMENT



FUNDAMENTAL TO OVERALL WELLNESS

As wellness regimens become increasingly holistic—spanning emotional and mental health in addition to physical health—there is a strong case to be made for entertainment to become a larger part of the wellness conversation. Indeed, 93% see entertainment as essential to health and happiness.

We can start to see how this might be the case when we consider that 56% of people say they have a go-to piece of entertainment for when they're feeling low, whether this is favorite TV show, piece of music or poem—something that never fails to lift their spirits and cheer them up.



Interestingly, **52%** of Americans say they use entertainment to switch off, and **48%** say they use it to switch on.

This shows how entertainment occupies two seemingly contradictory but powerful emotional roles: to stimulate and provoke thought, but also to escape and pacify, thereby helping us attain greater balance when it comes to mental health.

As we've seen throughout this chapter, entertainment is so powerful that its effects are evident in everything from our daily wellness to the history of human civilization itself.

The claim may sound grandiose, until we imagine what the world might be like without sports games to cheer at, nightclubs to let loose at, books to grip us, or TV to keep us on the edge of our seats.

“*A world without entertainment would be a dull, lifeless world. We live for entertainment.* – *Carla, Atlanta, 27*



Entertainment is fundamental to our wellness.

2 cont.

UNDERSTANDING THE POWER OF ENTERTAINMENT

All three cultures agree on the fundamental nature of entertainment.



In addition to **92%** of Americans, **94%** of Chinese and **83%** of Japanese say that it is a human need.

We've mapped out four ways in which entertainment is fundamental:

1. Fundamental to our evolution
2. Fundamental to identity formation
3. Fundamental to bonding and memory-making
4. Fundamental to our overall wellness

While entertainment's role in human evolution is universal, spanning the entire human race, its dynamics in identity formation, bonding and wellness vary with culture.

CHINA

The Chinese are effusive about entertainment's role in identity formation. In the country's collectivist past, where a centralized economy resulted in more limited variety of dress, home décor or personal taste, people are effusively embracing the chance to explore greater self-expression, as foreign brands and culture explode the boundaries of the possible. Entertainment has been a crucial compass as they navigate this brave new world.

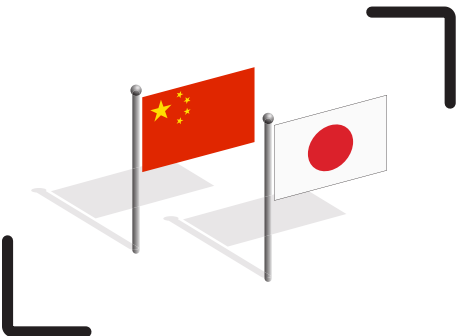


91% of Chinese say they can't imagine their lives without their favorite books, music, films, bands and sports (vs. **91%** of Americans and **81%** of Japanese)



85% of Chinese say that 'Without entertainment in my life I wouldn't be me' (vs. **82%** of Americans and **69%** of Japanese)

No wonder that the Chinese are more likely to agree that entertainment has influenced multiple aspects of their lives than Americans or Japanese.



2 cont.

UNDERSTANDING THE POWER OF ENTERTAINMENT

Q. To what extent has entertainment influenced...



**Your choice
of vacation**

CHINA: 83%
US: 75%
JAPAN: 71%



**The person
you are today**

CHINA: 80%
US: 76%
JAPAN: 67%



**Your hopes
for the future**

CHINA: 79%
US: 63%
JAPAN: 49%



**Your fashion
sense**

CHINA: 77%
US: 51%
JAPAN: 44%



**Who you are
friends with**

CHINA: 77%
US: 62%
JAPAN: 46%



**What you look
for in a partner**

CHINA: 72%
US: 62%
JAPAN: 46%



**Your choice of
where to live**

CHINA: 70%
US: 47%
JAPAN: 39%



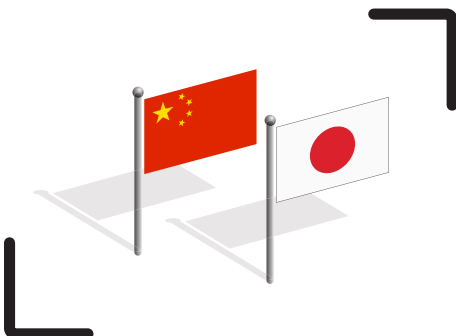
**Your career
choice**

CHINA: 66%
US: 42%
JAPAN: 36%

But as with most things in China, identity formation through entertainment is not a solitary exercise. It is a deeply social one, and so reinforces entertainment's role in bonding and memory-making. Whether it is with just one special person, such as a best friend or partner, or a large gaggle of friends, entertainment is inextricably linked with socializing in China.

- 31% of Chinese are most entertained when they are with a big group of friends (vs. only 15% in the US and 12% in Japan)
- 50% of Chinese say they are most entertained when they are with their best friend (vs. 34% of Americans and 39% of Japanese)
- No wonder 21% of Chinese say one of the advantages of live entertainment over recorded entertainment is that they can share it through social and get more likes (vs. 14% of Americans and only 6% of Japanese)

Given this context, it's no surprise the Chinese see entertainment as part of a holistic approach to wellness. In a culture that has long had a tradition of holistic medicine, the opportunities are ripe to talk about entertainment as another crucial component



2 cont.

UNDERSTANDING THE POWER OF ENTERTAINMENT

to well-being, given its significant benefits to mental, emotional and social health, amongst others.

- 95% of Chinese agree that having lots of good entertainment in your life is essential to health and happiness (vs. 93% of Americans and 84% of Japanese)
- 66% of Chinese say they have a go-to piece of entertainment (book/movie/TV show/song) for when they're feeling low (vs. 56% of Americans and 48% of Japanese) and 71% of Chinese say they have a go-to piece of entertainment (book/movie/TV show/song) for when they're happy (60% of Americans and 52% of Japanese)



JAPAN

Japan's uniqueness (and conservativeness) as a culture very much filters through into the entertainment landscape.

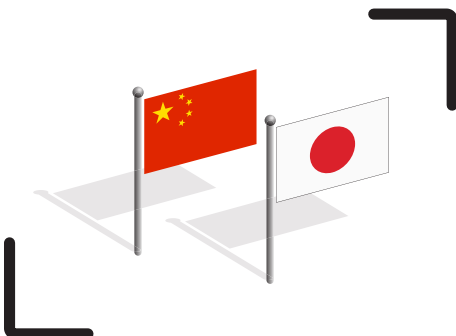


Substantial (though compared to the US and China, smaller) majorities of Japanese agree that without entertainment in their lives they wouldn't be themselves (**69%**) and that they can't imagine their lives without their favorite books, music, films, bands and sports (**81%**).

They are also significantly less likely to agree the entertainment has influenced different facets of their lives:



Only **46%** say entertainment has influenced who they are friends with (vs. **62%** of Americans and **77%** of Chinese) and only **49%** say entertainment has influenced their hopes for the future (vs. **63%** of Americans and **79%** of Chinese).



2 cont.

UNDERSTANDING THE POWER OF ENTERTAINMENT

This is perhaps due to the kinds of activities the Japanese tend to define as entertainment—all largely self-contained events that occupy a specific amount of time at a specific venue (watching a movie, going to a concert, going to the theatre, etc.) rather than the more generalized activities of dining at a restaurant, going to a nightclub or scrolling through social media. The former activities are neatly packaged artistic ‘artefacts,’ whereas the latter activities hold a more spontaneous and contemporary mirror to culture, perhaps shedding some light on why the Japanese perceive themselves to be less influenced by entertainment.

It also helps explain why the Japanese are significantly more likely to say that they are most entertained when they are spending time alone (50% vs. 35% of Americans and 23% of Chinese). Given the focus required at the theatre, cinema or concert hall, they are hardly the most appropriate places for hanging out socially with friends and family.

This is reflected in the top 3 advantages of live entertainment over recorded entertainment for the Japanese:

- It's a change of scene from the usual places in my life
- It immerses me in the moment (i.e., I'm not as distracted)
- It stimulates more of my senses than recorded entertainment

Certainly, these are more solitary criteria than for the Chinese and Americans. In Japan, leisure, rather than entertainment, is more the province of sociability and human interaction. But despite their definition of entertainment, by no means should it be surmised that entertainment for the Japanese is austere, intellectual or analytical.

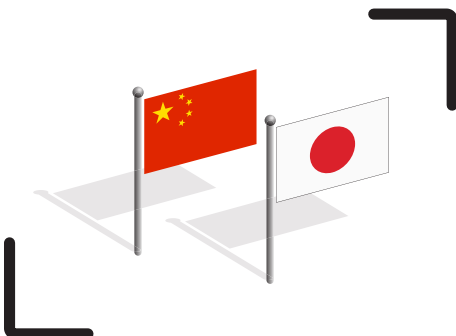
Asked which emotions they most associate with entertainment...

- 59% of Japanese said ‘Pleasure’ (vs. 48% of Americans and 34% of Chinese)
- 39% of Japanese said ‘Joy’ (vs. 32% of Americans and 29% of Chinese)



Indeed, **63%** of Japanese say they use entertainment primarily to ‘switch off’ rather than to ‘switch on’ (vs. **52%** of Americans and **51%** of Chinese)

Given the importance of pleasure, and routinely switching off, no wonder a robust 84% of Japanese say having lots of good entertainment in your life is essential to health and happiness. Indeed, nearly half of Japanese say they have a go-to piece of entertainment when they're feeling low, and just over half say they have a go-to piece of entertainment for when they're feeling happy.



3

CHALLENGES IN MODERN ENTERTAINMENT



Given how fundamental entertainment is to our lives, and how much entertainment we have access to, one may assume that the world is filled with fulfilled and thoroughly entertained individuals. In reality, the research shows that the contemporary landscape, characterized by an abundance of virtual entertainment, has created new challenges to accessing meaningful entertainment experiences. Indeed, almost half of people assert that they ‘rarely feel entertained these days.’

These four key challenges are:

- Choice paralysis
- The rise of loneliness
- Universal access
- Lack of prioritization

CHOICE PARALYSIS

On average, 300 hours of video are uploaded to YouTube every minute,⁷ meaning that every 30 days more content is made available online than all major US television networks combined have aired in the last 30 years. The seemingly limitless entertainment options people have at their fingertips isn’t without its drawbacks. In fact, many of the challenges can be linked to the sheer amount of entertainment available today—and how people, and brands, have responded to this explosion of entertainment.



300 hours of video are uploaded to YouTube every minute.

3 cont.

CHALLENGES IN MODERN ENTERTAINMENT



In fact, **46%** of Americans say that they spend more time deciding what to watch than actually watching it, rising to **62%** of Millennials.

As many as 50% of people say they sometimes end up doing nothing, because they can't decide what to do, again rising to 64% of Millennials. No wonder 2 in 5 people flat out agree that we have **too many** entertainment options these days.

“*There are so many new series. Netflix originals, Hulu originals, Amazon originals, and I just can't keep up! It's overwhelming, and I don't know that it's worth it.* – Cheryl-Ann, 33, NYC

While the options are seemingly endless, screen time has reportedly reached its limit.



E-marketer predicts that by 2018 growth in time spent with media will be **.1%**.⁸ Consumers are screen fatigued; **83%** agree we spend too long looking at screens and **56%** are often looking at two or more screens at the same time.

“*We're already at a peak in the amount of scripted television shows that can be consumed. The amount of music that can be generated is infinite. The amount of time you have to listen to it is not infinite.* – Harold L. Vogel, Author, *Entertainment Industry Economics*

But has the proliferation of screens and cheap, easy-to-consume content flattened our average entertainment experience to match the sameness of daily life? For many, daily life can be somewhat monotonous. Half of Americans agree their environment regularly under-stimulates them. At its best, entertainment serves to snap us out of that lull.

“*[Entertainment] allows us to be free, in our mind, in our spirit, in our lives. It helps us to be able to deal with the troubles of the world, being able to know there is a brighter day, you have something to look forward to.* – Carla, Atlanta, 37

Yet Americans are less entertained today, despite the wide variety of options they have available.



56% are often looking at two or more screens at the same time.

3 cont.
CHALLENGES
IN MODERN
ENTERTAINMENT



54% of Americans agree “entertainment was better in the past than it is today,” and **44%** agree they rarely feel truly entertained today. Surprisingly, **43%** of Americans say they have never been to a nonmusical live show (i.e., dance, comedy, theatre) yet **53%** have binged-watched a TV show in 2-3 days.



Perhaps some of that can be attributed to the fact that grabbing bite-sized content in the two minutes of dead time between life's daily duties simply isn't as compelling as being fully immersed and present during a sustained entertainment activity. Watching a video on YouTube while waiting to check out at a supermarket, or scrolling through Instagram during one's lunch break, offers fewer of the benefits associated with entertainment than listening to live jazz at a cocktail bar or watching a thrilling movie at the cinema with family. Could it be that constant availability, and the passivity of consumption by 'feed,' has deadened the feeling of immersion and liberation that true entertainment brings?

“ *Entertainment is so boring sometimes. A lot of times people will repeat other people's posts so sometimes I see the same thing over and over. It's also addicting. If the feed is boring I won't just put it down, I'll keep looking for more people to follow.* – Leslie, New York City, 45

According to our respondents, the homogenizing impact of algorithms can intensify this problem.

“ *The filter bubble is driving me crazy!! I always see the same posts over and over again, the same types of ads, and instead of seeing new content, I'm only shown the same views and concepts continuously, which is not what I want.* – Sydney, New York City, 19



Scrolling through Instagram during one's lunch break offers fewer of the benefits associated with entertainment.

3 cont.

CHALLENGES IN MODERN ENTERTAINMENT



THE RISE OF LONELINESS

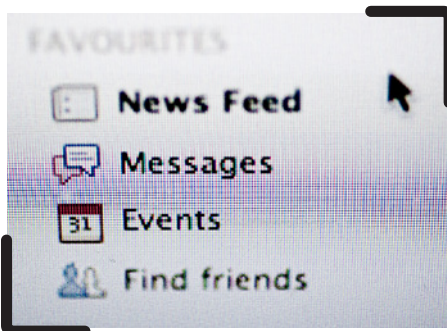
In recent times, there has been a robust conversation around the ‘invisible epidemic’ of loneliness, spurred by the steady decline of public life as people stop attending places of worship, local businesses give way to online commerce, and the number of single-person households grows.⁹

At the same time, technological advances have made entertainment increasingly digital and, in some ways, more individualized.



64% of Americans feel more entertained when spending time with others, but as devices get smarter, it becomes less and less necessary to connect with others to access entertainment.

Consumers are changing what it means to be alone, connecting virtually, as they game online, post in forums and share every moment of note on social media. However, these digital friendships aren’t necessarily translating into real-life connections.



67% say they rarely connect in real life with people they’ve met online.



60% of Americans say social media has expanded their entertainment options, but **67%** say they rarely connect in real life with people they’ve met online.

And yet, as we saw in the previous chapter, belonging and connectedness are key needs when it comes to experiencing true entertainment.

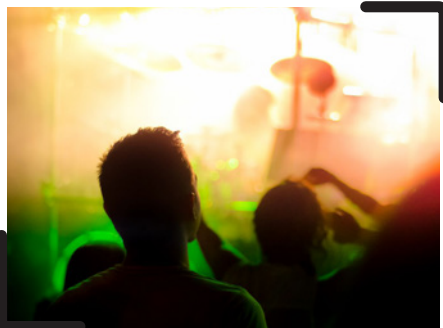
3 cont. CHALLENGES IN MODERN ENTERTAINMENT

“ We need entertainment. It's our way of sharing ideas, of expressing things. We need to laugh, to come together at events, to relieve the stress of day to day life. – Daniel, 38, Houston

Some are now making the case that these online connections might actually be making us lonelier. A recent study in the *American Journal of Preventative Medicine* found that “those in the highest quartile of social media use frequency have more than three times the odds of having greater perceived social isolation.”¹⁰



57% of Millennials say that “Social media often makes me feel more isolated”—no wonder **73%** of the same age group think that the world would be a better place if people went to live entertainment more often.



Millennials are more likely than older generations to cite the cost of entertainment as a barrier.

As we explore the rise of digital entertainment it is important to understand how this relates to the live entertainment experience. On the one hand, there is evidence that this digital proliferation is driving demand for live: 59% of people say that the more time they spend with a screen, the more they crave live entertainment.

On the other hand, for a third of Americans digital proliferation could be driving some amnesia of live entertainment's significant benefits. 1 in 3 Americans say they don't see the value in live entertainment now that they can access everything at home, and 2 in 5 say they can't remember the last time they went to a live show. However, three-quarters of people say that once they go to a show, they remember how great live entertainment is.

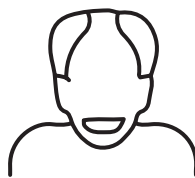
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CHALLENGES IN MODERN ENTERTAINMENT



UNIVERSAL ACCESS

Given that many people regard entertainment as essential to their overall health and happiness, it's unsurprising that certain audiences are seeking greater access to entertainment experiences on their own terms. But for some groups, access to entertainment is more difficult than for others—though not always for the same reasons. Unsurprisingly, Millennials, for instance, are more likely than older generations to cite the cost of entertainment as a barrier. Meanwhile for seniors, mobility is the key issue. And irrespective of age, people in rural areas complain of lack of access, since most entertainment options are centered in urban areas that can sometimes be several hours' drive away.



SENIOR CITIZENS

Options: 1/4 people 65+ say mobility is an issue when it comes to accessing entertainment



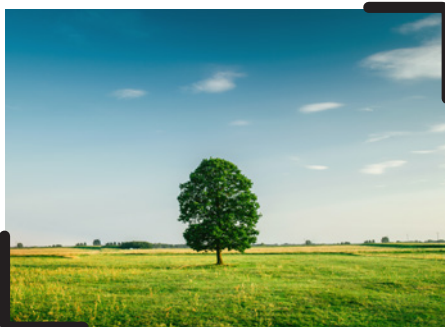
MILLENNIALS

Cost: 75% of Millennials say they have wanted to attend a live experience but it was too expensive



RURAL AMERICANS

Proximity: 76% of those in rural areas say there's a lack of entertainment options in their localities



People in rural areas complain of lack of access to entertainment.

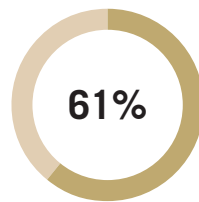
LACK OF PRIORITIZATION

However, even when none of these external barriers apply, people can be their own worst enemies when it comes to getting enough entertainment. Much of this comes down to our fraught relationship with time. Indeed 2 of the top 3 barriers to having more entertainment are 'Lack of time' (49%) and 'Too many responsibilities/things to do' (48%).

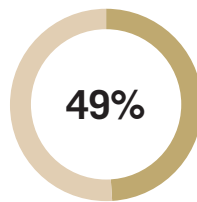
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CHALLENGES IN MODERN ENTERTAINMENT

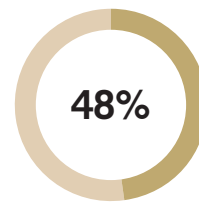
Q. What stops you from having more entertainment in your life?



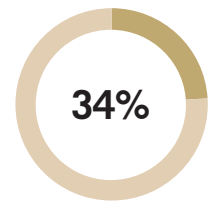
Lack of money



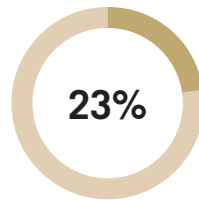
Lack of time



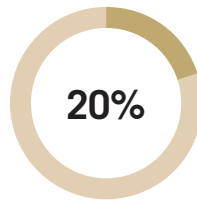
Too many responsibilities/
things to do



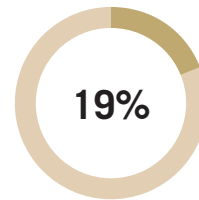
Lack of options in my local area



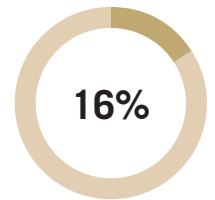
Lack of friends who like the same things as me



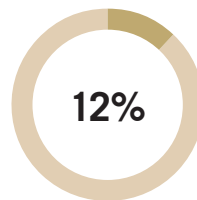
Lack of truly new and exciting entertainment options



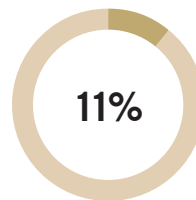
No partner to enjoy entertainment experiences with



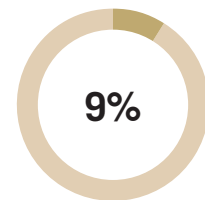
Lack of knowledge about the entertainment options available



It's hard for me to access entertainment because of health/physical mobility



Lack of friends who have the same income as me



Get distracted by my phone/technology

However, despite the fact that 70% of people say they wish they had more time to spend on entertainment, the guilt factor associated with entertainment, which still carries the stigma of being frivolous, can get in the way even when they legitimately do have time for leisure.



70% of people say they wish they had more time to spend on entertainment.



62% say that when they have free time the most important thing is to catch up on errands, and 36% of women (over 1 in 3) describe entertainment as ‘an indulgence I allow myself occasionally’ (vs. 28% of men).

3 cont.

CHALLENGES IN MODERN ENTERTAINMENT

1 in 4 people even admit that they feel guilty when they're having too much fun. Despite the fact that they recognize entertainment as important, it's only something they'll allow themselves after the laundry's been done, the garage reorganized or the lawn mowed.

Given that entertainment has been framed as a treat rather than as a human need, most people are under-entertained. There is a notable difference between the variety of entertainment types they would like to have and the amount they actually partake of, suggesting that there is a huge opportunity for brands to remind people that taking a break and spending quality time truly being entertained is not something that should sit at the bottom of their to-do lists.

How many live sporting matches would you watch every year?



How many vacations would you take in a year?



How many live comedy shows would you attend every year?



How many times would you go to a casino in a year?



How many spa treatments would you get a year?



How many hours of video games would you play in the average month?



How many times would you go to a live music concert in a year?



How many times would you dine at a restaurant in a month?



The lasting power of these experiences shouldn't be underestimated; **53%** say that their most entertaining experience happened more than 3 years ago yet **56%** think back to their most entertaining experience at least once a month; **25%** think back to it once a week!



The cost of entertainment is a barrier to attending more live events.

In summary, from external factors such as overwhelming choice, the cost of entertainment and proximity issues, to more deeply rooted psychological ones, such as its associations with frivolity, there are a number of barriers to reaching the 'balanced diet' of entertainment constructed by consumers above. The good news is that the future is bright as consumers and brands co-create the next era of entertainment.

3 cont.

CHALLENGES IN MODERN ENTERTAINMENT



We've mapped out four barriers to modern entertainment:

1. Choice paralysis
2. The rise of loneliness
3. Universal access
4. Lack of prioritization

Issues of access (#3) are universal:



72% of Chinese (compared to **63%** of Americans and **57%** of Japanese) say that there are very few entertainment options in rural areas.

This is unsurprising in a country where rapid urbanization has left rural areas behind on the path to development, leading to a concentration of entertainment in the more prosperous and cosmopolitan cities.



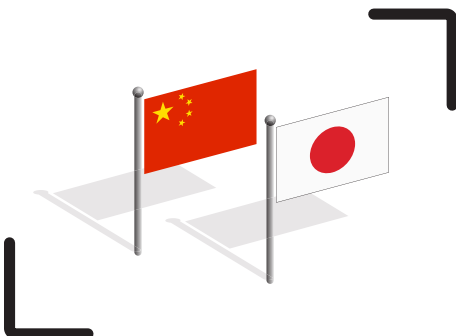
Further, older generations feel left out, with **55%** of Chinese 55+ year-olds saying there are very few entertainment choices for people of their age (vs. **36%** of American 55+-year-olds and **46%** of Japanese 55+-year-olds).



As in the US, cost is an issue in Japan, with **69%** of Japanese saying that if you don't have much money it's hard to find ways of entertaining yourself (vs. **61%** of Americans and **65%** of Chinese).

In fact, lack of money is the #1 barrier to entertainment in Japan, more so than lack of time or lack of options, with 62% of Japanese citing this (vs. 61% of Americans and 41% of Chinese).

However, cultural nuances do inform the way the other barriers play out.



3 cont.

CHALLENGES IN MODERN ENTERTAINMENT



CHINA

Many of the barriers in the US are replicated in a more intensified way in China as the country has leapfrogged the developed world in technological innovation, before human behavior has adequately adapted to find an equilibrium. Certainly, the burgeoning choice in the consumer economy has created its own serious choice paralysis.

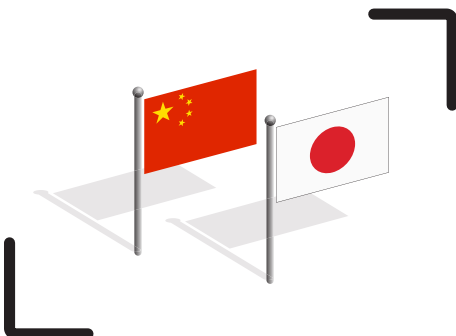
- A whopping 86% of Chinese agree that we have too many entertainment options these days (vs. 40% of Americans and 45% of Japanese)
- 69% of Chinese say they spend more time deciding what to watch than actually watching it (vs. 46% of Americans and 47% of Japanese)

Further, despite the inherently social nature of entertainment in China, the omnipresent, addicting, all-consuming screen has resulted in a greater feeling of social isolation. As mobile devices have proliferated, social networks have begun to build more utilities into their platforms (for example, WeChat users can order movie tickets and hail taxis in the app), sucking people even deeper into the digital sphere.

- 56% of Chinese say social media often makes them feel more isolated (vs. 45% of Americans and 42% of Japanese)
- 69% say they rarely connect with the people they meet online in real life (vs. 67% of Americans and 69% of Japanese)

In addition, entertainment's associations with frivolity does mean that it is not prioritized as it ought to be. Pressure to succeed in China's booming professional economy means that there's always something more you could be doing to further your career, rather than taking a moment to enjoy the fruits of your labor.

- 71% of Chinese say that 'When I have free time, the most important thing is to catch up on errands' (vs. 62% of Americans and 73% of Japanese)
- 36% of Chinese agree that if they have too much fun they tend to feel guilty (vs. 23% of Americans and 28% of Japanese)



3 cont.
CHALLENGES
IN MODERN
ENTERTAINMENT



JAPAN

In Japan, the barriers to entertainment very closely resemble those in the US, suggesting a developed market affinity in the evolution of the entertainment industry and everyday people's behaviors in this category. Here, too, there is choice paralysis, though to a lesser degree than in China, perhaps because consumers have had a few decades to acclimatize to the expansive entertainment marketplace.

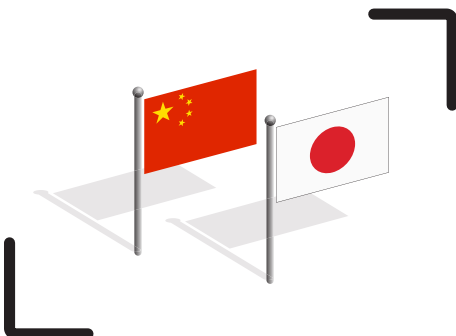
- Similar to the US, 45% of Japanese say we have too many entertainment options these days (vs. 40% in the US and 86% in China)
- 46% of Japanese say they sometimes end up doing nothing because they can't decide what to do (vs. 50% of Americans and 61% of Chinese)

Here, too, screens and digital media have contributed to the rise of social alienation and loneliness:

- Similar to the US, 42% of Japanese say social media often makes them feel more isolated (vs. 45% of Americans and 56% of Chinese)
- 68% of Japanese agree that these days we spend too long looking at screens (vs. 83% of Americans and 85% of Chinese)

However, when it comes to feelings of guilt around self-indulgence and pleasure, the Japanese are more similar to the Chinese in registering higher levels of these emotions. Both these cultures, which value hard work, professionalism and high performance, approach entertainment with greater caution, rather than risk erring too much on the side of dissipation.

- 73% of Japanese say that 'When I have free time, the most important thing is to catch up on errands' (vs. 62% of Americans and 71% of Chinese)
- 28% of Japanese agree that if they have too much fun they tend to feel guilty (vs. 23% of Americans and 36% of Chinese)



4

LOOKING TO THE FUTURE OF ENTERTAINMENT



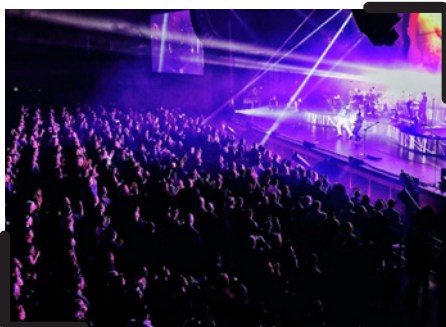
As culture and technology continue to evolve, there are a number of exciting opportunities at the frontier of entertainment that brands seeking to stay on the cutting edge should be aware of, both in terms of people's relationship with and perspective on the category.

The research identifies 3 compelling trends that could impact the shape of the industry to come:

- Live goes from strength to strength
- Augmented Reality to Alternate Reality
- New experiences for new audiences

LIVE GOES FROM STRENGTH TO STRENGTH

The popularity and cultural relevance of live events has hit a resurgence in recent years. North American concert industry income continues to rise, hitting an estimated \$7.3 billion in 2016, compared to an estimate of barely over \$1 billion 20 years ago. In many ways, screen time is driving the "IRL (in real life) renaissance."¹¹



Global concert industry income continues to rise, hitting an estimated \$7.3 billion in 2016.



59% of people say that the more time they spend with a screen, the more they crave live entertainment. Discovery online is also driving this trend, with **45%** reporting that they were first introduced to an act online but then wanted to see them live.

4 cont.

LOOKING TO THE FUTURE OF ENTERTAINMENT

“ People can spend all day every day watching famous comedians on YouTube, and that makes them want to go out more than they ever did.

– Noam Dworman, Owner, Comedy Cellar (New York City)

“ I think live continues to just get bigger and bigger. We'll continue to see more and more on-platform programming come to the live space.”

– Michele Bernstein, Partner, WME

AUGMENTED REALITY TO ALTERNATE REALITY

Much of the conversation among marketers and technologists in the entertainment space has centered on using innovation to augment the live experience. An obvious example of this is AR, but another is 4D cinemas (which incorporate touch, smell and other senses into the movie-watching experiences).

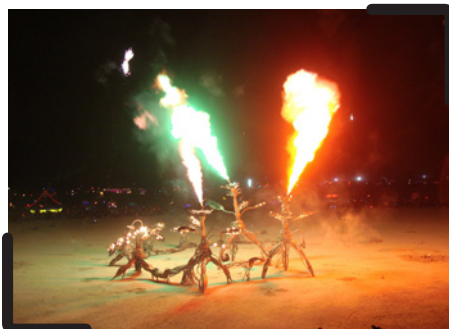
In addition to enriching and augmenting their existing environments, people are increasingly interested in creating and inhabiting totally alternate realities.



53% prefer entertainment that transports them to a fantasy realm over real world experiences. **49%** of people have tried or would like to try VR technology in the future.

Arts festivals, Burning Man perhaps being the most prominent example, are being conceived as worlds apart, with their own social mores, rules and lexicons, often in opposition to those of the ‘outside world.’ They have very much become liminal spaces in which people can conceive of an alternative social structure and renegotiate the rules of public interaction, commerce and taboos.

“ Entertainment is kind of an in-between space, a ‘carnival’ space, between reality and fantasy. It changes the norms for behavior so we can try out risks and alternative identities and transgress boundaries. – Lynn Zubernis, Professor of Psychology, West Chester University



Arts festivals are being conceived as worlds apart, with their own social mores, rules and lexicons.

In the live space, one of the most exciting recent developments is immersive theatre, as troupes have dismantled the fourth wall to greater and greater degrees to bring the audience more fully into the performance.



48% think that too much entertainment today means spending too much time sitting down/not moving.

4 cont.

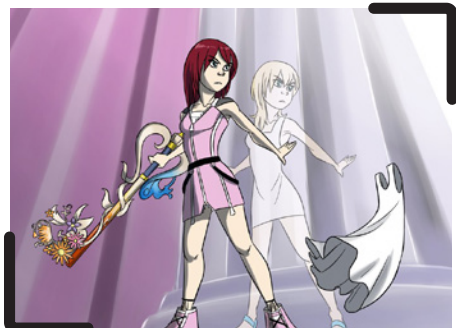
LOOKING TO THE FUTURE OF ENTERTAINMENT



Companies such as Punchdrunk, Secret Cinema and Third Rail Projects are building an antidote to this, by consistently reinventing themselves to push the boundaries of audience participation. Escape Rooms are another example of a novel entertainment experience that forces people to work together to solve puzzles in order to escape a locked room. 1 in 5 people say they have tried Escape the Room or would like to in the future, rising to 1 in 4 women and 1 in 3 Millennials.

“ *The future of live entertainment really seems to be going full force into creating an adventure for the individual or for the group. The audience wants to be simultaneously challenged and empowered.* – Gypsy Snider, Co-founder, Les 7 Doigts de la Main

In addition, fictional TV / film worlds are being owned and expanded by fans. Alternative Universe fan fiction that imagines characters from Sherlock Holmes as high school students, or an imagined romance between existing characters, far expand the boundaries of an entertainment property beyond the creator's original vision. And not just in private but in the public realm through Internet fan communities, signaling fans' desire to be part of the creative process.



Alternative Universe fan fiction expands the boundaries of an entertainment property beyond the creator's original vision.



46% of Americans say they regularly use technology to produce their own entertainment and **1/3** Americans consider themselves an entertainer.

Entertainment companies are starting to take note, and leveraging these communities to co-create the next generation of entertainment.

“ *We have now this new phenomenon of consumers generating content and they are driving the production of many of these new forms of entertainment. This is the idea of the prosumer.* – Ken Spring, Associate Professor of Sociology, Belmont University

4 cont.

LOOKING TO THE FUTURE OF ENTERTAINMENT



In real life, semi-official and amateur meetups or conferences are an opportunity for fans to go no holds barred at cosplaying their favorite fictional characters.

“ *There is that desire for us to go out and be the heroes that we’re playing in these video games or that we’re watching in different kinds of entertainment.*
– Meghan Camarena, YouTuber and Actress

However, VR technology will unquestionably be a driving force of this new era. As unique experiences continue to hold social capital, entertainment companies will push the boundaries of immersiveness, personalization and sensuousness, creating live experiences unlike anything patrons have ever lived before. As virtual reality technology, holographic technology and AI provide entertainment designers with the tools they need, expect them to engineer ever more mesmerizing and exciting experiences.

Already, entertainment engineers are integrating haptic feedback into VR systems, bringing taste, smell and touch into the audiovisual experience.¹² Oculus recently showed that AI can be used to greatly enrich digital characters, even showing through its “Fall in Love VR” experience that romance with an artificial intelligence may not be as far-fetched and futuristic as we may think.¹³ The impact on game design, but also brand mascots and other digital personalities, could be revolutionary, if they are able to interact with each person in a unique way, based on continuously learning about their individual personalities and preferences.



Entertainment companies will create live experiences unlike anything patrons have ever lived before.

“ *In the future, we should be able to travel the world in 4D—go anywhere we want and really be immersed.* – Sydney, New York, 19

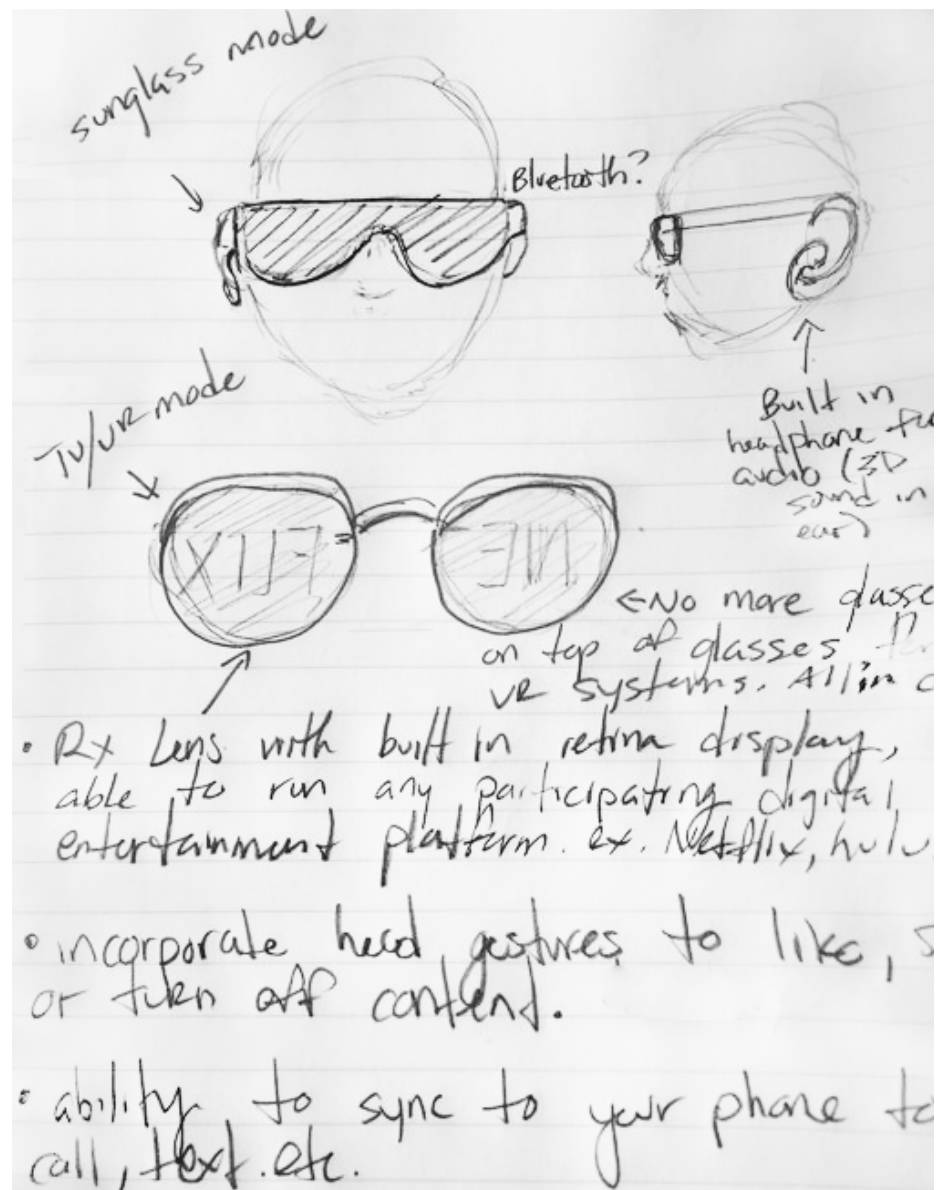
“ *In the future there should be live streaming VR festivals for people who can’t afford to actually be there!* – Matt, Los Angeles, 21

The most exciting future scenario is one in which live and digital don’t really compete, but rather one where the two coexist drawing from and enhancing their unique advantages. As technology becomes ‘lighter’ not just physically but also ergonomically, we’re potentially headed toward a future where it sits entirely in the background, and isn’t an added element that we need to consciously think about maneuvering.

4 cont.

LOOKING TO THE FUTURE OF ENTERTAINMENT

This came through in the qualitative research, where consumers created new entertainment experiences which they wish existed, including a “Celebrity Hologram Club” where people can come and dance the night away with holograms of their favorite celebrities. Similarly, one consumer built a whole new piece of all-in-one eyewear with earbuds, powered lenses, a sunglass mode, VR capabilities and connectivity to Netflix, YouTube and other video content platforms—the perfect device to bridge IRL and digital realities.



Consumers created new entertainment experiences which they wish existed.

4 cont.

LOOKING TO THE FUTURE OF ENTERTAINMENT



NEW EXPERIENCES FOR NEW AUDIENCES

Millennials and seniors face distinct challenges when it comes to entertainment (see ‘Universal Access’ in Chapter 3) but brands are already recognizing the opportunities that lie therein. For instance, experts suggest that Millennials could benefit as entertainment companies stratify pricing to offer no-frills access to the venue. Higher-priced tickets offering additional benefits such as exclusive online content, access to a priority line at the bar, free merchandise and so on would be made available for those who want a more exclusive experience.

“*I think there’s going to be a ticket price for every level of fan. How we buy airline tickets is how we will buy entertainment tickets.* – Michele Bernstein, Partner, WME

Similarly, seniors, with their size and spending power, constitute an under-tapped demographic that entertainment brands are moving to court. Live entertainment such as festivals and concerts such as The Classic East and Desert Trip (also known as “Oldchella”) cater to the tastes of this generation, featuring artists from their youth such as Paul McCartney and The Rolling Stones. At Desert Trip 2016, the average age of fans in the audience was 51, according to the *Los Angeles Times*.¹⁴

“*I think we will see more mature festivals come out like a BottleRock in Napa, which appeals to grownups essentially. Like my parents might go to a festival. They’re done in such a setting that it lends itself all the things that appeal to people as their kids move out of the house and they become empty nesters.* – Michele Bernstein, Partner, WME



Seniors constitute an under-tapped demographic that entertainment brands are moving to court.

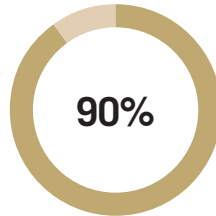
Las Vegas, perhaps the entertainment capital of the US, is well-placed to put itself at the center of the conversation about innovating for new audiences.

4 cont.

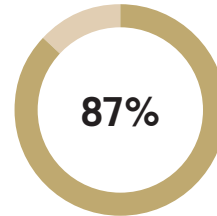
LOOKING TO THE FUTURE OF ENTERTAINMENT



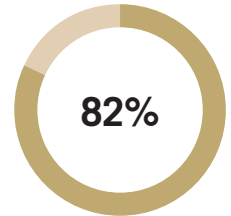
82% of people agree that there's something for people of all ages in Vegas, and **76%** agree that there's something for people of all income levels in Vegas.



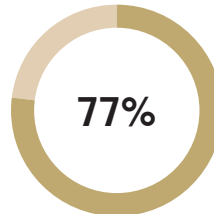
Las Vegas is welcoming and inclusive of people from different backgrounds



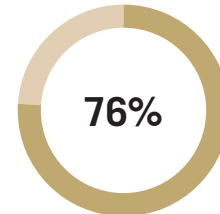
Everybody can find something that suits their interests in Las Vegas



There's something for people of all ages in Las Vegas

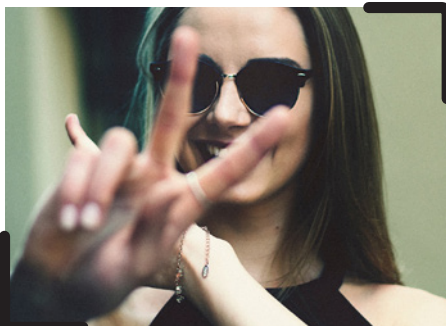


There's enough for families to do together in Las Vegas



There's something for people of all income levels in Las Vegas

As we've seen throughout this chapter, that future of entertainment is very much moving in the direction of recapturing the social benefits of live, i.e., enhancing the identity-forming, bond-making and wellness-inducing power of entertainment. This includes prioritizing live entertainment, though with tech innovations playing a starring role by adding an augmenting digital layer, rather than distracting from the main action. And of course, bringing new audiences into the fold will only serve to spread the benefits of entertainment more broadly in society. Considering the combined influence of these trends, the future looks bright, and consumers agree.



Millennials agree that entertainment will be better in the future than it is today.



54% of people say entertainment will be better in the future than it is today, and at **69%**, agreement is especially high amongst Millennials, who are already shaping the future of entertainment.

4 cont.

LOOKING TO
THE FUTURE OF
ENTERTAINMENT



CHINA

Perhaps as a result of the hegemony of the screen, China is headed towards something of an 'IRL [in-real-life] Renaissance.' Live's conduciveness to social gatherings, and the opportunity it provides people to burnish their social media feeds, means that the future of live looks secure.

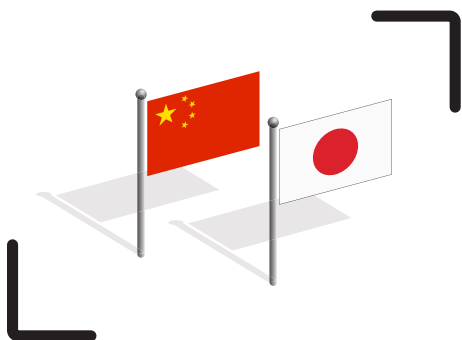


80% of Chinese say that the more time they spend getting entertainment through a screen (TV/computer/tablet/phone), the more they crave live experiences (vs. **59%** of Americans and **45%** Japanese).



Indeed, **74%** of Chinese say they were first introduced to a comedian/band/singer/magician online and then wanted to see them live (vs. **45%** of Americans and **41%** of Japanese)

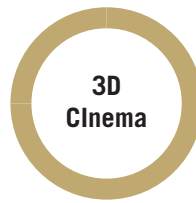
But live does not imply the absence of truly innovative, game-changing tech. The Chinese are hungry for the latest in entertainment gadgetry.



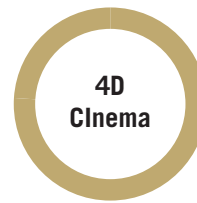
4 cont.

LOOKING TO THE FUTURE OF ENTERTAINMENT

Q. Which of the following entertainment solutions have you tried or would like to try in the future?



CHINA: 39%
US: 43%
JAPAN: 46%



CHINA: 34%
US: 16%
JAPAN: 22%



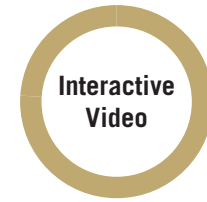
CHINA: 34%
US: 49%
JAPAN: 35%



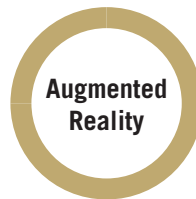
CHINA: 23%
US: 10%
JAPAN: 13%



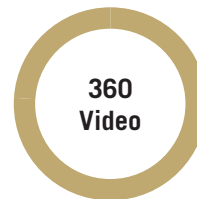
CHINA: 23%
US: 19%
JAPAN: 2%



CHINA: 18%
US: 13%
JAPAN: 8%



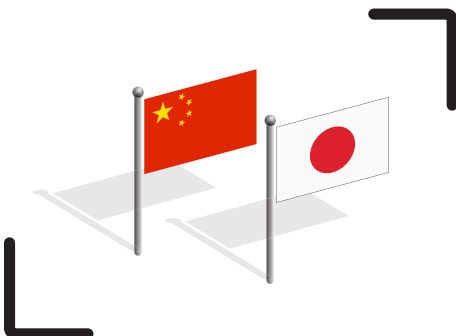
CHINA: 17%
US: 12%
JAPAN: 19%



CHINA: 15%
US: 16%
JAPAN: 13%



CHINA: 14%
US: 16%
JAPAN: 7%



And just as in the US, there is a flourishing culture of ‘prosumers,’ as ordinary people use the tools at their disposal to create entertainment in their own right.

- 66% of Chinese say ‘I regularly use technology to produce my own entertainment, including videos, songs, memes, blog posts, etc.’ (vs. 46% of Americans and 34% of Japanese)
- 40% of Chinese even think of themselves as entertainers (vs. 37% of Americans and 31% of Japanese)

4 cont.

LOOKING TO THE FUTURE OF ENTERTAINMENT



JAPAN

On the whole, the Japanese have a more subdued attitude towards the future of entertainment, perhaps as a result of their conservative approach to the category. They know their minds, and new entertainment has to pass a very high bar for them to take notice of it and be impressed by it.

- Over half (52%) of Japanese say they have higher standards for entertainment today than in the past (vs. 64% of Americans and 83% of Chinese)
- A substantial 71% of Japanese say 'I like to stick to the things I know that I like', rather than 'I'm always looking for something new' (vs. 55% of Americans and 63% of Chinese)
- 64% of Japanese say they like to go into an entertainment experience knowing exactly what they're getting (compared to 66% of Americans and 75% of Chinese)

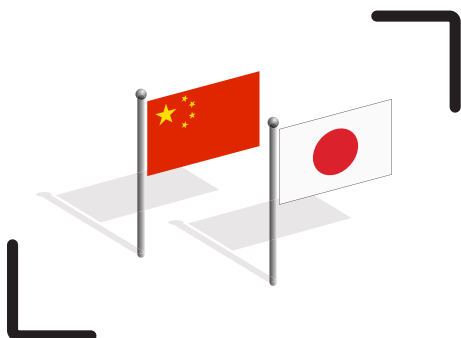
They are also much more balanced when it comes to live vs. digital entertainment compared to the US, perhaps because they show a marked preference for 'fantasy' rather than 'authenticity' in entertainment, which is easier to fulfill in digital media.

- 59% of Japanese say 'I prefer entertainment that creates a fantasy world, where I can escape reality' rather than 'entertainment that reflects the real world and gives me deeper more authentic experiences' (vs. 53% of Americans and 46% of Chinese)
- Forced to choose, only 53% of Japanese would choose to get rid of all online entertainment to save live entertainment (vs. 66% of Americans and 53% of Chinese)

Despite the conservative tastes of the Japanese when it comes to entertainment, and a certain developed market ennui in the category, there is cause for optimism:



60% of Japanese agree that entertainment will be better in the future than it is today (vs. **54%** of Americans and **84%** of Chinese).



CONCLUSION



In conclusion, we've seen that while it can be hard to define exactly what entertainment is, its impact on our lives is very real. One person's entertainment may be another person's boredom, but we all know that we're entertained when we feel it. And the benefits of this feeling extend beyond just escaping from the humdrum routine of everyday life, though this is a significant and frequent use. It has also had a part to play in the history of human evolution itself, through its unique ability to encourage experimentation, innovation and imagination. There are four main ways in which entertainment can be thought of as fundamental to our humanity:

- Fundamental to our evolution
- Fundamental to identity formation
- Fundamental to bonding, and memory-making
- Fundamental to our overall wellness

And yet our relationship with entertainment today is often fraught, not least because the sheer volume of entertainment content available to us has skyrocketed in recent years, leaving us overwhelmed and in a paralysis of choice. It doesn't help that as digital content has ballooned, allowing us to access quick and easy bits of entertainment in the privacy of our homes, some have become less inclined to break out of their isolated bubbles and seek out live entertainment, despite the significant benefits of the latter. Given that we don't prioritize getting enough of many diverse types of entertainment—and are chronically under-entertained as a result—there is an opportunity for brands to change the stigma around entertainment as a frivolous pursuit and reframe it as a necessity. This is especially important for demographics who face higher barriers to access than others, such as Millennials (who are more likely to cite cost as an issue), seniors (for whom mobility is a challenge) and rural populations (whose proximity to entertainment is limited).



Digital content has ballooned, allowing us to access quick and easy bits of entertainment in the privacy of our homes.

Cont.
CONCLUSION



In short, the four main challenges to modern entertainment are:

- Choice paralysis
- The rise of loneliness
- Universal access
- Lack of prioritization

However, the future of entertainment looks bright. As digital media have grown in popularity, there is evidence that this is now beginning to boost live entertainment, and the concert industry has been experiencing a fresh spurt of growth. But live entertainment itself has been evolving as technological innovations and new formats make them richer, more immersive and increasingly like alternative fantasy realities. This is not least due to the larger stake people have in co-creating entertainment, as fans and 'prosumers' use online platforms to make their voices heard.

- Live goes from strength to strength
- Augmented Reality to Alternate Reality
- New experiences for new audiences



Live entertainment has been evolving as technological innovations and new formats make them richer, more immersive and increasingly like alternative fantasy realities.

As these trends play out, we can expect a truly exciting future for the industry, one that is ripe for creative collaboration between brands and consumers, and one that comes closer to fulfilling humanity's fundamental need for entertainment.

APPENDIX

EXPERT PARTICIPANTS

The participating experts in the Truth About Entertainment Roundtable:



Dr. Ken Spring
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Marcel Salas
Anthropologist
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Dr. SJ Kim
Entertainment Engineer
UNLV



Dr. David Grazian
Sociologist
University of Pennsylvania



Gypsy Snider
Co-founder
The 7 Fingers



Dr. Valorie Salimpoor
Neuroscientist
Baycrest Health Sciences



Michael Bronski
Professor of Media
Harvard University



Harold L. Vogel
Author, Entertainment
Industry Economics



Dr. Lynn Zubernis
Psychologist
West Chester University



Noam Dworman
Owner
Comedy Cellar NYC



Strawberry17
YouTuber and
internet personality



Michele Bernstein
Partner
WME

en·ter·tain·ment

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noun

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All statistics without citations are original data points collected as part of the MGM Resorts International *Truth About Entertainment 2017* research study.



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