TIME USE REPORT:
A DAY IN THE LIFE
INTRODUCTION:

WHAT DOES AN UNDERSTANDING OF TIME TELL US?

Everything we do is situated in time, and exploring how we spend our time – what we do, where we go, who we spend time with – are fundamental and invaluable for those looking to understand the forces and priorities shaping our lives today.

This report presents data from a groundbreaking study of time, conducted in the UK and seven other countries across Europe over the last year. Trajectory worked in conjunction with Oxford University’s Centre of Time Use Studies and Research Now to collect the data, with whom we also collaborated on our Geography of Time project in 2011, which explored urban living in the UK.

This report presents an overview of the key insights and trends the study has revealed, but the depth of the data supporting it is immense. The full data provides comprehensive information on daily life, including: for each minute of the day, detail on main activities and secondary activities, enjoyment of what we’re doing, where we are, who we are with and what devices we are using.
MODERN LIFE IN EUROPE

Throughout the day we see the lives of individuals converging and diverging across key moments and activities. In many ways, the fundamentals of life—needing to eat, sleep, work and relax—have always governed our routines, and in 2016 we see these activities remaining central to our lives. But within these pillars of the day there are enormous changes to the way we live our lives compared to years gone by.

There are also key differences across Europe, dictated by cultural preferences, climate and the nature of our economies. Differing climates—and sunlight hours that contrast in length—drive different types of daily routine in, say Finland and Spain. But across Europe we see evidence of there being a great deal that unites us, and the UK in particular is as likely to be tacked very close to the continental average as it is to be an outlier in different types of activity.

Just about any consumer across Europe—who is likely to go about their day while carrying a smartphone, tablet or laptop (or all three)—is testament to the remarkable extent of digital technology in our daily lives. The connectivity such devices provide makes them utterly pervasive; we use them at home, at work and elsewhere. They are both adjuncts to long-existing activities and creators of entirely new ones. In innumerable ways, our lives are now increasingly digitalised.

They are also increasingly deregulated. Consumers across Europe have (and exhibit) greater flexibility over what they do, how they do it and where they do it than ever before. Part of this is driven by technology—which while creating lots of new fun things to do also means we can more easily work wherever we are, on the train, at home, while on holiday. But there are other drivers of this deregulation too, including changes in the way our lives are legislated—in the UK, it is barely a decade since alcohol licensing laws were relaxed, and only a generation since Sunday retail trading was expanded. Additionally, our lives are less governed by traditional and restrictive views of, for example, gender roles. 2016 sees more women working, and a slightly more equitable division of labour at home.

These factors—digitalisation and deregulation—give us great freedom to live our lives on our own terms, but with this freedom comes great time pressure, and a less solid demarcation between work and home life, which takes careful balancing to avoid negative consequences for our wider wellbeing.

This report takes you through a day in the life of consumers across Europe...

METHODOLOGY

The data were collected by Research Now using their online panels for The University of Oxford’s Centre for Time Use Studies and Trajectory between November 2015 and May 2016. They consisted of nationally comparable populations in the UK, France, Italy, Germany, Spain, Sweden, Finland and the Netherlands. Each country provides over 1,000 “days” of data (with more than 9,000 days of data across the 8 countries, based on interviews with over 6,000 consumers).

Trajectory is a consumer insight and futures consultancy, founded in 2008 by three of the most respected and experienced research professionals in the UK market. Our work is often groundbreaking and thought provoking, and explores how the world is changing.
This Study of Time offers a unique insight into the differences and similarities between consumers across Europe, challenging perceptions of how the rhythm of the day unfolds across eight countries. The research presented in this report tests national stereotypes and reveals the impacts time use has on productivity and wellbeing across the continent. Despite variants, which drive routines organically such as climate, our analysis of data from all listed countries reveal a set of common time use drivers: deregulation and digitalisation, which challenge traditional associations of place, time and activity.
The analysis suggests that though the countries studied live out each day in varying ways, the fundamental drivers of how and why that time is spent are the same:

- The deregulation of life, showing how people increasingly feel free to live their lives where, when and how they choose. In the context of time use, specific days and specific times of day are no longer so rigidly tied to certain activities such as meal times, work or leisure.
- The digitalisation of life, facilitating the capacity for new information technologies, especially mobile technologies, to drive deregulation by making possible more unconventional and creative use of time.

The objective of the study was to gain a comprehensive understanding of how consumers in 2016 spend their time, and to explore ways in which the changing rhythms of modern life are experiencing the same socio-political and technological changes with the deregulation and digitalisation of life.

### The UK and Europe

Although unique in some regards – for example, less use of digital technology during the early evenings – the UK is consistently middle of the road compared to our European neighbours, and is unlikely to be an outlier in any individual activity.

Our nearest neighbours, behaviourally, are Germany, as our daily routines are similar in patterns, as is the amount of time we spend on different activities. Across Europe, climate and geographical proximity create a natural clustering of countries – north-western Europe, Scandinavia and southern Europe.

### Technology:

- Our use of technology has risen enormously over the course of the century so far as our lives have become increasingly digital. In the UK, at least 1 in 4 people are using a connected device during the day, a dramatic rise from 2000 where at no point in the day it was higher than 1%.
- Though it is undeniable that UK usage of devices is recognisable to fifteen years previously, as a country, we are least likely to be technologically active during the early evening, with only one in three UK consumers (31%) using a laptop, tablet or smartphone at 5:30pm, compared with the rest of Europe, and only 18% using a device while eating in the evening. This suggests the traditional importance that mealtimes still have in the UK, where there is less tolerance for digital distractions.

### Working Culture:

- During the week, paid work dominates our lives. At any time, between 9:00am and 5:00pm at least 1 in 5 people across Europe are working. The only exceptions to this are Finland and Sweden, where the working day extends well beyond 5:00pm for many across the continent – at 6:50pm nearly 1 in 8 Italians (12%) are still working, and at 7:00pm nearly 1 in 5 (18%) people in Spain are yet to finish.
- The UK are the slowest European country to start work – it takes until 08:30am for a quarter of British adults to be working. The day also extends well beyond 5:00pm for many across the continent – at 6:50pm nearly 1 in 8 Italians (12%) are still working, and at 7:00pm nearly 1 in 5 (18%) people in Spain are yet to finish.
- However, during the rest of the day the UK’s use of technology is very much like the rest of Europe. There is a sharp rise in every country of people using a device of some kind at 8:00am – whether a mobile device such as a smartphone or tablet, or a laptop or desktop computer – demonstrating that at the same point during the day, the use of technology picks up in all countries.

### Enjoyment:

- Enjoyment at the weekends is rated consistently higher than during the week as consumers aim to make the most of their free time.
- But our free time is changing, both at the weekends and during the week. At the weekends, the late afternoon is a new, critical time for out of home (OOH) leisure, as between 4:00pm and 6:00pm on Saturdays and Sundays we are much more likely to be outside, shopping, eating or socialising than at the turn of the century. Another significant change comes in the profile of the evenings, with the OOH peak today coming at around 7:00pm – when we are twice as likely today to be out as we were in 2000.
- Across Europe, we are fundamentally social creatures, and as such while time spent at home can be relaxing, sitting in front of the TV is no match for going out.

Such findings offer a wealth of insight into the factors that govern how the consumer of 2016 lives their life today. This report is merely an introduction to the vast intricacies that the data provide on European life and serves as evidence that, though different, these eight countries are experiencing the same socio-political and technological changes with the deregulation and digitalisation of life.
The day begins at different times and at different speeds for consumers across Europe. By 9:30am the majority of people in Europe are awake, but the alarm clock goes off at different times for nations across the continent.

At 6:00am, over 90% of adults in Spain are still asleep, while 31% of Germans have already begun their day. Over the next couple of hours, the majority of people are awake, although there are considerable differences across the continent, with 22% of those in Finland are still in bed at 9:00am, compared to just 7% of Italians.
The time people wake up depends on a host of factors – from their routines at home, demands placed on their time by childcare, or by starting work early. Across Europe, climate is likely to be a key factor as well, with sunrise and sunset providing different bookends to the day.

Those with less pressure on their time are most likely to get the most sleep, and the amount we work has a critical bearing on this. In the UK, for example, those working the most hours – either 30-39 hours a week or 40+ hours per week – are likely to sleep the least (7.9 and 8.0 hours sleep). Those in the UK who say they are under the greatest time pressure are also least likely to sleep for very long. Overall, people who say they feel under no time pressure get an extra hour’s sleep each weekday compared to those saying they are under a high degree of time pressure.

But where is this sense of time pressure coming from? In the UK, we are sleeping later than ever before – for example 25% of people are still asleep at 8:00am today – up from 23% in 2000 and 14% in 1974. At 9:00am, we are more than twice as likely to be asleep than we were at the same time in 1974.

While lack of sleep may not be a contributor to our sense of busy-ness and time pressure, our hectic morning routines may well be. Digitalisation and the steady integration of technology into our lives is a part of this.

Across Europe, between 7:00 and 7:50am, the majority of people are waking up. In all countries, at 8:00am, there is a sharp rise in every country of people using a device of some kind – whether a mobile device such as a smartphone or tablet, or a laptop or desktop computer. In Italy, by 8:00am 31% of people have used a device (rising to 44% by 9:00am). In the UK at 8:00am, 25% of people are using a device – reaching 37% an hour later.

Our use of technology has risen enormously over the course of the century so far as our lives have become increasingly digital. In 2000, the number of people using the internet, through any device, was at no point in the day higher than 1%. Today, we are almost constantly connected to the internet via smartphone, tablet or computer. Peak device usage in the UK comes at 3:50pm, when 43% of people are using a device of some kind.
Peak device usage in the UK comes at 3:50pm, when 43% of adults are using a device of some kind. In 2000, no more than 1% of people were ever using the internet at the same time.

Connected devices such as smartphones or tablets are invaluable aspects of our lives in many ways, helping to connect us to information, people, news and culture on a scale never seen before. Along with these benefits, they also help erode the demarcation between work and life – for millions of working people, those checking their phones in the minutes after they wake up are likely to be checking emails or their daily calendars – effectively starting the working day before breakfast. For those feeling under high time pressure, checking into work (digitally, if not physically) as soon as they get out of bed, could be a contributing factor. Across a longer timeline, the changing profile of the UK economy is also a factor here, with a greater proportion of people employed in service economy jobs rather than manufacturing or industrial work. For these people, the day is likely to start later, and the nature of work is very different.

Across Europe, Breakfast habits vary widely, with the peak (the point at which the highest number of people are eating at any one time) diverging by more than an hour.

### ‘Peak’ Breakfast
- **07:30 – France, Finland**
- **07:40 – Netherlands**
- **07:50 – Italy**
- **08:00**
- **08:10**
- **08:20 – Spain**
- **08:30 – UK, Sweden**
- **08:40**
- **08:50 – Germany**

Breakfast itself is an increasingly less defined mealtime than in the past. At 8:00am in 1974, 14% of people were having something to eat – the peak today is half an hour later (reflecting our increased use of the snooze button) and only 11%. As the graph below demonstrates, the shape of the mealtime is also different to those seen in both the seventies and at the turn of the century – flatter and lower. This indicates that people are having breakfast over a greater period of time than before, with different lifestyles and routines meaning that while most people will have some sort of meal in the mornings, what they eat and when they eat will vary widely.

Greater flexibility over when consumers are able to do certain activities is an example of the Deregulation of Life. Driven by a mixture of changing social roles (such as more women working than in previous generations), legislative changes (such as those allowing shopping on Sundays and pubs to be open longer hours) as well as technology use, this deregulation allows consumers unprecedented control and flexibility over their lives and routines. This means that the rhythm of the day is much less defined than before and potentially means consumers can run their lives with greater freedom. Changes to mealtimes are an example of this, with greater flexibility meaning there is not a single breakfast time across the country, but rather an elongated period of time in which different consumers – at different points in their day – might have something to eat.

Often, our mornings continue with us leaving the house, with many required either to head to work or to complete the school run, which can be concentrated within a relatively short period of time. In the UK, 20% of people leave the house for the first time between 7:00am and 8:00am. While there is some divergence across Europe in these morning routines, the UK is consistently mainstream – finding itself at neither the later nor earlier end of the scale.
WORKING

During the week, paid work dominates our lives. At any time, between 9:00am and 5:00pm at least 1 in 5 people across Europe are working (the only exceptions to this are Finland and Sweden, where the working day ends for many at around 4:00pm). But the working day is no longer a simple 9:00am - 5:00pm – for many, the deregulation of life has seen greater flexibility in working hours and resulted in a gradual erosion of this regimented working pattern.

In Germany and Sweden, for example, more than 1 in 10 people (11%) are already working at 7:00am – and by 8:00am this has risen to 1 in 4 (25%). The UK are the slowest European country to start work – it takes until 08:30 for a quarter of British adults to be working. The day also extends well beyond 5:00pm for many across the continent – at 6:50pm nearly 1 in 8 Italians (12%) are still working, and at 7:00pm nearly 1 in 5 (18%) people in Spain are yet to finish.

But working’s peak is not in the afternoon – but is instead mid morning for every country except Finland (which comes in shortly after lunch).

Although work carries on until later in the afternoon for many, there is a significant dip in the middle of the day for most countries across Europe, which in most cases indicates people stopping work for lunch. The nature and extent of this break tells us a great deal about the working culture of different employee populations, and – where that dip is less pronounced – about the deregulation driving people’s lives. In the UK, for example, this break is far less pronounced than in countries such as Spain and France.

PEAK WEEKDAY WORKING
(time when the highest proportion of people are working)

- 10:50 – SWEDEN
- 11:00 – FRANCE
- 11:10 – GERMANY
- 11:20 – ITALY, NETHERLANDS
- 11:30
- 11:40 – UK
- 11:50 – SPAIN

PEAK WEEKDAY WORKING

% WORKING (WEEKDAYS)

TEMPOGRAM: TIME OF FIRST TRAVEL (WEEKDAYS)

A tempogram shows cumulatively the proportion of people doing an activity. This chart shows the proportion of people who have travelled at some point since the day began.
Employees in France, Italy and Spain are all very likely to stop working over lunch, whereas those in other nations (including the UK) are less likely – indicating that they carry on working throughout their lunch break (if they stop to eat at all). A lack of a lunch break or another break in the working day is a likely contributor to our perception of time pressure, and even those who do have a break will likely find it short-lived. The afternoon peak of working is very similar to the morning peak – suggesting that many workers who do stop for lunch return to work shortly after.

This is not the case in Italy and Spain, where the afternoon working peak is considerably lower than the morning peak. Such a contrast might suggest that those nations working through their lunch break are working more, overall, than others. However, this is not the case – Italy and Spain, the countries very likely to stop for lunch, and those least likely to go back to work afterwards, actually do the most hours of paid work per day. The UK, by contrast, does the least.

The reason for this contrast is that the shape of the labour market in the UK is different to other nations in Europe. A third (33%) of our employed UK sample worked part time, more than any other nation (with several countries, including Germany, Spain and Italy, having fewer than 20% part time workers). But even with our part-time and full-time samples, the UK has a greater number of people working 1-8 hours per week (14%, against a European average of 7%) and a lower proportion of people working more than 40 hours a week (30% vs 45%).

Despite these differences in hours worked, nearly 84% of adults in the UK say they are sometimes or always “rushed” – and those who agree they are under time pressure are likely to spend more time working than others, and less time sleeping. Compared to the rest of Europe, this is an average level of time pressure – more than Germany (80%) but some way below those in Italy, where 95% of people say they always or sometimes feel rushed.

Additionally, those in the UK who have a high level of satisfaction with the amount of leisure time they have tend to work (on average) an hour less per day. Managing a work/life balance is a key aspect of maintaining a healthy level of wellbeing, but for some this is not being achieved. A clear implication here – considering the prominence of time pressure and the apparent lack of a lunch break – is that working throughout the day means we feel busier even if we end up doing less.

Although work dominates the week, even at its peak, no more than around half of people are working at any one time. For those not working, the week is dominated by other tasks, including household chores, shopping and childcare. Again, in these activities we see significant differences between different European nations.

---

**LUNCH BREAKS – STOPPING AND STARTING WORK**

This chart shows the proportion of people stopping work at lunchtime as a decline in the number of people working, and then the corresponding rise in the proportion working in the early afternoon.

**AVERAGE HOURS OF PAID WORK PER DAY (WEEKDAYS, ALL EMPLOYED OR SELF EMPLOYED)**

Part time workers defined here as those who typically work fewer than 30 hours per week.
Despite the slow progress men in the UK have made when it comes to household chores, they do a greater proportion than others in Europe. Only men in Sweden and Finland do more (37% and 33%), while men in Spain (28%), France (24%), and Italy (23%) lag even further behind.

Across many activities, in 2016 consumers enjoy a great deal more flexibility over when they do things than they might have done in the past. An example of this is shopping, where a number of changes to the way we live has seen shopping become a near 24 hour activity, rather than one restricted by opening times and accessibility.

The UK, for example, appears out of sync with the rest of Europe, in that parents are more likely to be looking after their children throughout the day—the peak of childcare in Britain is 3:50pm, around 2 hours before the rest of Europe.

In the past, household tasks and chores have been gendered, with women typically doing the vast majority of things like cooking, cleaning and washing. Even in 2016, there is still a significant imbalance in the division of household labour, but men have made some progress, doing more of the total workload than in the past.

This is another indication of the deregulation of life at work, with changing social roles — and gender roles being a key part of this — less relevant than before (although as the chart shows, there is still a great deal of progress to be made). Technology is also playing a part here, with the total amount of time spent on such chores greatly reduced with the proliferation of time-saving devices — such as microwaves and dishwashers.

In 1961, 20% of cleaning and tidying was done by men. Today, that figure is 32%.
Deregulation refers to our greater flexibility over what we do, when we do it and how we do it.

**Deregulation of Life**

**Then and Now**

Since the 1970s, our lives have become much less routine...

**Mealtimes are a thing of the past**

In 1974, 25% of people stopped what they were doing to have lunch at 12:30pm

Today, only 15% of people are eating at that time – and at least 10% of people are eating at any point between 12:00pm and 2:00pm

**We also shop whenever we want**

In the 1970s, people stopped shopping at 5:00pm – by 6:00pm, just 0.6% were shopping. Now, enabled by later opening hours and technology, 4% of people are shopping at 6:00pm

**We spend longer in bed in the mornings**

In the 1970s we were early to rise, with more than half of us awake at 7am, and nearly 75% awake by 7:30am.

Today, we enjoy a lie in, with 38% of us still asleep at 7:30am, and 18% still asleep an hour later

**% Shopping, by time of day (All days, UK)**

**% Eating, by time of day (All days, UK)**
WHAT IS IT?
We are constantly connected as never before, whether at home, at work or out and about. This digitalisation is both changing what we do, and creating new activities.

THE UK: ALWAYS ON
Today, many of us are carrying a connected device with us throughout the day.
57% of us have our phone with us in the morning, between waking up and 9:00am.
77% of us have our phone with us throughout the day, between 9:00am and 6:00pm.

In the UK, 43% of people are using a device of some kind at 3:50pm.
In France, 45% of people are using a device at 5:10pm.
In Italy, 52% of people are using a device at 4:50pm.

THE AFTERNOON IS THE DIGITAL PEAK ACROSS EUROPE
Between 3:00pm and 5:30pm across Europe people are most likely to be using a digital device of some kind.

THEN AND NOW

2000

IN 2000, OUR LIVES WERE ANALOGUE - AT MOST, ONLY 1% OF US WERE USING THE INTERNET AT ANY ONE TIME

67% of us have our phone with us in the evening, between 6:00pm and going to bed.
### Rhythm of the Day

<table>
<thead>
<tr>
<th>Time</th>
<th>UK</th>
<th>France</th>
<th>Italy</th>
<th>Germany</th>
<th>Spain</th>
<th>Sweden</th>
<th>Finland</th>
<th>Netherlands</th>
</tr>
</thead>
<tbody>
<tr>
<td>6:00am</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>12:00am</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>6:00pm</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>12:00pm</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Key:**
- Waking
- Device Check
- Breakfast
- Leave House
- Work
- Lunch
- Shopping
- Return Home
- Dinner
- TV
- Social Check In
- Bed
Although still centred around the middle of the day in many countries, later opening times, and the ability to shop while at home via the internet mean that the shopping day is more stretched than before. The peak for shopping in Spain, for example, is 7:00pm, and in Germany at 5:30pm. In the UK, more people shop during the day overall, but the day is still very stretched, with as many people shopping at 7:00pm in the evening as there are at 3:00pm. In the UK, especially, the shopping day has become stretched as never before, a sign of both our increasingly digitalised and deregulated lives.

At 6pm today, 4% of people in the UK are shopping – more than triple the amount in 2000, and nearly seven times the amount in the 1970s. Although the shopping day starts at roughly the same time, and in the same way, it carries on for much longer (indeed, today, unlike in previous years, it never really stops).

Consumers in the UK are three times more likely to be shopping at 6:00pm than they were in 2000
At 5:30pm, nearly one in three UK consumers (31%) are using a laptop, tablet or smartphone – but this is the lowest in Europe at this point in the day.

The overall peak in technology use is in Italy, where for parts of the afternoon more than half of the adult population are using a device of some kind. The UK is actually consistently less likely than many other European nations to be as connected – by the late afternoon (around 5:30pm) consumers in the UK are less likely to be using a device than anywhere else in Europe.

As technology use peaks in the afternoon – and especially with mobile and tablet use peaking later in the afternoon or early evening – consumers are from this point more socially active than during the rest of the day. From late afternoon, as the working day ends, consumers are more likely to turn to social media and other methods of contacting friends (including email, text and phoning). But across Europe, there is a divide in the exact nature of this peak. In certain nations, namely France, Italy, Germany, Finland and the Netherlands, the peak comes early in the evening (around 7:00pm) – possibly prior to making plans for the evening. In the other European nations included in the study, namely the UK, Spain and Sweden the social peak comes much later, between 10:00pm and 11:00pm.
EVENING

As important as how we spend our time is where we spend it. A majority of people spend most of their time throughout the day somewhere other than their home – during the week this is often at work. For many, it is not until we arrive home in the evening that the working day is truly over.

On weekdays, more than half of people in the UK are not at home between 9:30am and 4:00pm

Between 9:30am and 4:00pm more than half of people in the UK are not at home – but as the working day ends, the proportion at home starts to increase. The UK is very different to other parts of Europe in this respect – in Spain, for example, most people are not at home until 7:30pm.

The day so far has shown considerable differences across Europe in the way people organise their lives – with mealtimes a particular point of divergence. This is never more the case than with evening meals, where very different routines are apparent in every country across the continent. As well as happening at markedly different times – in the Netherlands, for example, the dinnertime peak is at around 6pm, whereas those in Spain may barely have finished their lunch at that point and won’t eat again until 9:00pm – the nature of the occasion is also very different. As the chart shows, the ‘shape’ of the peak varies by nation, and is indicative of the extent of the routine across the country.

WHERE WE ARE (UK, WEEKDAYS)

% EATING, (WEEKDAYS)
In four nations – the Netherlands, France, Italy, and Spain – the peaks are very high, and the spread is quite narrow – indicating that many people across the nation are eating at the same time. The most defined dinnertime is in Italy, where at 8:20 pm, 38% of the nation are eating. In France, 31% of the nation are eating at 8:10 pm and in Spain, despite their later mealtime overall, 27% of people are eating at 9:10 pm. By contrast, in the UK, Germany and Sweden, no more than 1 in 5 people are ever eating at the same time. In the UK, the dinnertime peak is at 6:30 pm, when 18% are eating.

Mealtimes also change depending on what we do when eating. As explored earlier, since the mid-afternoon, our use of mobile and connected devices has steadily risen and for many, this is not interrupted by a mealtime. Across the continent, large proportions of consumers are very likely to be using a mobile or connected device during dinner. At dinner, the UK is actually the least likely nation across the study to be using a device, with those nations that have more defined and narrower dinnertime peaks more likely to be in front of either a laptop or using their phone. This is perhaps the limit of digitalisation and evidence of the continued role of tradition in certain occasions, with the evening meal in the UK – in many households a key family occasion – less likely to be a place for digital distractions.

The evening is also the time during the week when consumers across Europe are most likely to enjoy leisure time, and here we find that the primary source of entertainment for decades remains dominant – our evenings are primarily spent watching TV or listening to music. Although the primary leisure activity is the same in every country, the times change considerably, always following – and seemingly dictated by – the evening meal.

In the UK, the proportion relaxing in front of the TV is not as high as some other nations, and begins to fade shortly after 10 pm. But it is considerably higher than in previous decades – in 2000, the evening TV peak, at 9:40 pm saw 41% of people in front of the TV. The peak today is at exactly the same time – that much has not changed – but the audience is greater, at 51%.

Although our TV watching still coalesces around the same point in the evening, there is again evidence in this example of deregulation and digitalisation. At the turn of the century, terrestrial TV in the UK was restricted to a handful of channels, with paid-for options available only to a minority. Today, with more than 90% of households connected to the internet, much greater choice is available, either through more channels on the TV itself, or greater options with on-demand services. Consumers are also less likely to be reliant on TV schedules to find something to watch – instead they can watch what they want, when they want.

Despite all these changes, the fundamental appeal of leisure time spent in front of the TV remains – at least during the week.
THE END OF THE DAY

The day concludes in the same way for almost everyone, with going to sleep. But as with starting the day, across Europe we end it at different times.

In the UK we are among the quickest to bed, with 1 in 5 of us asleep shortly after 10:00pm, and more than half asleep by 11:00pm – at this point only a third of people in Italy and a fifth of people in Spain are asleep.

BEDTIMES

(time when more than 50% of people are asleep)

- 23:00 – UK, FRANCE, GERMANY, NETHERLANDS
- 23:10
- 23:20 – SWEDEN, FINLAND
- 23:30
- 23:40 – ITALY
- 23:50
- 00:00 – SPAIN

In the UK we are also more likely to be in bed at an earlier – and perhaps more sensible – time than in the past. While 56% of us are asleep at 11:00pm today, in 1974 this was just 39%. This is not the case for everyone of course, and the minority of people still up in the early hours of the morning is also increasing – in 1974, 5% of people were still up at 1:30am, compared to 8% of us today.

% SLEEPING (WEEKDAYS)

At the weekend, consumers in the UK are likely to spend more time cleaning their house (31mins) than going out for a meal or a drink (22mins)

WEEKENDS – BALANCING WORK AND LIFE

Our lives are less dominated by routine at the weekends, with many of us finding more time for leisure. In the UK, for example, we spend more time on a variety of different leisure activities at the weekends than during the week. But for many of us, the time pressure of the week does not abate here – instead, Saturdays and Sundays are a time for both chores, DIY, and for many of us, more work. The weekends are a prime example of the way the combined forces of digitalisation and deregulation have changed our lives.

MINUTES SPENT ON DIFFERENT ACTIVITIES, BY DAY OF THE WEEK (UK)

- Paid work (including at home)
- Maintenance of house, DIY, gardening
- Clothes washing, mending, sewing
- Cleaning tidying house
- Going out to eat, drink, eg pub, restaurant
- Spending time with friends, family
- Watching tv/video, dvd, radio, other music
- Shopping, bank etc including internet
- Sleeping
Weekend cleaning is not unique to the UK; across Europe, all nations except Netherlands and Finland do more tidying at the weekend than during the week. Those in the UK do not lead the way in cleaning at the weekend – in Italy, people do on average 49 minutes of cleaning a day at the weekend, up from 40 minutes during the week.

On one hand, the weekends are more relaxing – we have nearly an hour’s extra sleep, 40 minutes more in front of the TV and also more time for socialising, shopping and eating out. But this leisure time is balanced with chores – in the UK we spend twice as much time on DIY or household maintenance at the weekend, and on average spend more time cleaning the house than we do going out for a meal or a drink. While we spend much less time working at the weekends, it is still a feature of our time here. On average, those employed do 94 minutes of work on each weekend day, and we do much more work now at the weekends than we ever have done in the past.

On weekend afternoons around 10% of us today are at work or doing work from home – more than twice the number in the 1970s. This is further evidence of the deregulation of life, as not only are our weekday routines departing from their regimented norm, but elements of weekday living are also driving our weekend behaviour. Our ability to work at the weekend is also created by the same factors seen elsewhere with this deregulation – legislative changes meaning that, for example, shops are open on Sundays, and technology meaning that it is easier to take work home from the office if we need (or want) to.

Ultimately, we enjoy weekends far more than the week – in every country across Europe, enjoyment at the weekends is rated consistently higher than during the week. In fact, only in Finland is the weekend peak of enjoyment lower than during the week.

The reason for this is that the weekend provides us with more of an opportunity to do more of what we enjoy, although this increasingly needs careful balancing with chores, household tasks and work. A key aspect of this enjoyment is the leisure activities that we choose to do, and it is here that we see the undisputed importance of out of home leisure as a driver of the things we enjoy the most – whether going out for a drink or a meal, or to an event or the cinema. Across Europe, we are fundamentally social creatures, and as such while time spent at home can be relaxing, sitting in front of the TV is no match for going out.
But the time we spend out is changing, both at the weekends and during the week. At the weekends, the late afternoon is a new, critical time for out of home (OOH) leisure, as between 4:00pm and 6:00pm on Saturdays and Sundays we are more likely to be outside, shopping, eating or socialising than at the turn of the century. Another significant change comes in the profile of the evenings, with the OOH peak today coming at around 7:00pm – when we are twice as likely today to be out as we were in 2000. 15 years ago, the peak was much later in the evening, confirming the decline in drinking habits and shift towards eating out.

Our leisure time during the week is changing too, and providing further evidence of the deregulation of life. OOH leisure on weekdays once stopped in the early evening before picking up again after dinner. Today, OOH leisure maintains a steady level throughout the afternoon.

Across Europe, people enjoy going out or spending time with friends and family more than any other activity.
Across Europe, the rhythms of the day vary, and are driven by an array of factors. For some people, their daily routine is dependent on the nature of their work, their responsibilities at home, or their opportunities for leisure.

Looking at the amount of time different countries spend on activities reveals both a diversity and commonality in equal measure. It also reveals some surprising – and not so surprising – similarities between nations.

Behaviourally, the UK’s closest neighbour is Germany, and the UK as a whole is very firmly European; compared to the rest of the continent, the UK is nestled squarely in the centre of the map – very unlikely to be outlier in any respect. For key activities, that are a part of almost anyone’s day – such as sleeping, eating and working – consumers in the UK spend roughly the same amount of time as the European average.

Overall there is a natural grouping of different European nations, apparently influenced by organic factors, such as their geography and their climate, which sees Scandinavian consumers grouped closely together, southern European countries (Spain and Italy) grouped together, and in the middle, a cluster of Northern/Western nations: the UK, France and Germany. But their proximity geographically is matched by their proximity to each other culturally and behaviourally. Countries such as Finland and Sweden do not just share a border, but many aspects of everyday life overlap as well.

For example, Sweden and Finland are chiefly differentiated from the rest of Europe by the greater amount of time they spend with friends and family – either in person or contacting them over the phone or internet. The warmer climates of Italy and Spain provide greater opportunities for outdoor leisure, and so are unsurprisingly likely to spend more time going out to eat or drink, playing sport or walking/jogging.

In north-western Europe, consumers in countries such as the UK and Germany are generally more middle of the road compared to their continental neighbours, but are more likely to be found in voluntary work, travelling on the train, in caring roles or fixing the house or garden.

---

**Our Time Across Europe**

Across Europe, the rhythms of the day vary, and are driven by an array of factors. For some people, their daily routine is dependent on the nature of their work, their responsibilities at home, or their opportunities for leisure.

Looking at the amount of time different countries spend on activities reveals both a diversity and commonality in equal measure. It also reveals some surprising – and not so surprising – similarities between nations.

Behaviourally, the UK’s closest neighbour is Germany, and the UK as a whole is very firmly European; compared to the rest of the continent, the UK is nestled squarely in the centre of the map – very unlikely to be outlier in any respect. For key activities, that are a part of almost anyone’s day – such as sleeping, eating and working – consumers in the UK spend roughly the same amount of time as the European average.

Overall there is a natural grouping of different European nations, apparently influenced by organic factors, such as their geography and their climate, which sees Scandinavian consumers grouped closely together, southern European countries (Spain and Italy) grouped together, and in the middle, a cluster of Northern/Western nations: the UK, France and Germany. But their proximity geographically is matched by their proximity to each other culturally and behaviourally. Countries such as Finland and Sweden do not just share a border, but many aspects of everyday life overlap as well.

For example, Sweden and Finland are chiefly differentiated from the rest of Europe by the greater amount of time they spend with friends and family – either in person or contacting them over the phone or internet. The warmer climates of Italy and Spain provide greater opportunities for outdoor leisure, and so are unsurprisingly likely to spend more time going out to eat or drink, playing sport or walking/jogging.

In north-western Europe, consumers in countries such as the UK and Germany are generally more middle of the road compared to their continental neighbours, but are more likely to be found in voluntary work, travelling on the train, in caring roles or fixing the house or garden.
TIME TO GO...

We hope that this summary report has given you an interesting insight into the ever-evolving use of time by consumer citizens in Europe. As identified at the outset, we believe that the two key drivers of this change are:

- **A socio-political driver** – the deregulation of life. The long-term trend that is seeing the breakdown of traditionally prescribed roles and norms in time use. People increasingly feel free to live their lives where, when and how they choose. In the context of time use, specific days and specific times of day are no longer so rigidly tied to certain activities such as meal times, work or leisure.

- **A technological driver** – the digitalisation of life. The capacity for new information technologies, especially mobile technologies, to further facilitate and drive deregulation by making possible more unconventional and creative use of time.

Of course, time use in the individual countries is still to some extent determined by local factors. Climate, for example, has an important role in determining work and leisure patterns. But within the constraints imposed by climate, our data reveal a set of common time use developments shaped by deregulation and digitalisation. All of these challenge traditional associations of place, time and activity.

The implications of these changes are hugely important for anyone wanting to understand consumer citizen behaviour going forward. Whether you work in retail, media, media planning, tech, leisure, travel or provide public services - knowing how people are choosing to use their time is arguably as important as how they are choosing to spend their money. At the very least, the findings presented here demonstrate the potential for time use to determine both how and where we spend.

This report has only been able to showcase the top line findings from a very comprehensive and complex study. We hope it has whetted your appetite for more detailed analysis – of particular activities, consumer segments, days or day parts that are of importance to your sector or organisation. Please do not hesitate to get in touch if so.
In 2008 Trajectory was established by three of the most experienced professionals in the consumer insight and foresight market.

Their complementary specialisms and shared philosophy combined to create a fresh and powerful force in consumer futures consulting.

If you are reviewing strategy, exploring innovation and product development or require quantitative forecasts, please get in touch.

Let’s find out what the future can do for you.