



future  
of free **Time**  
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future foundation



[lastminute.com](http://lastminute.com)

# 1. Executive Summary

## Overview and Introduction

Ten years ago, we still had Concorde, smoking in restaurants and Top of the Pops. We were concerned about the end of the dotcom bubble, the launch of Windows 2000, the tragedy of 9/11. The economy grew at 3.9%, our hopes for national football glory rested on the shoulders of David Beckham, and Stella McCartney designed Madonna's wedding dress for her marriage to Guy Ritchie.

We did not have Facebook, YouTube or Spotify; mobile phones had small, pixilated displays and had but a few Tetris-type games. Apple was known mostly for the iMac, we did not have iPhones or iPods and RIM had not launched its Blackberry yet.

And ten years ago, who would have predicted space tourism as a near term holiday reality or that iris scanning would speed people past immigration queues?

We all dream of discovering new, off-the-beaten-track experiences, of reducing long haul flights from hours to minutes, or of a truly customisable holiday that is tailor made to our every need.

But what is the future of free time? How will we be spending our precious free time in the next decade and beyond?

## The Future of Free Time

This report, prepared by Future Foundation for lastminute.com, explores the 'Future of Free Time' – the future of travel, leisure, holidays and experiences.

This first phase of our research has focussed on the futures we can confidently see – the near term trends, changes and developments that will shape the way we all spend our free time in the next five to ten years. A second phase will look further ahead to 20 years and further.

Our first phase research has revealed the emergence of three key trends:

- **The rise in an enriching experience economy**
- **New demographic groups of free time**
- **The 'Informed Leisure Consumer'**



lastminute.com, the leading online travel and leisure retailer, has commissioned this report to gain further insight into how consumers utilise their 'free time' now and obtain a clearer picture of how this may look in the future. As the expert in leisure, from travel and holiday bookings to theatre tickets, spa treatments, music events and dining experiences, lastminute.com will utilise this research to obtain further vision into the future of free time – taking into account consumer needs and the socio-economic landscape to ensure they are at the forefront of the leisure industry.

## The Experience Economy

The social meaning of free time is changing.

**Authentiseeking** As people turn their backs on the conspicuous consumption that defined the pre-credit crunch 80s and 90s, a new type of traveller is emerging that demands a luxury experience over simple material luxury. Our research paints a picture of the new enriching experiences consumers may look for in their free time and the emerging trends that can be identified.

**Novelty Seekers** will also drive the market to explore newer, more daring, more dangerous and more bizarre travel and lifestyle experiences.

**Go-Nowhere-Gamers** Perhaps most worryingly, a new generation of will reject travel all together in favour of gaming, social networking and 'always on' media.

## Demographic Change

As the demographics of society continue to evolve, new groups emerge in travel and leisure.

**Social Soloists.** Gone are the days of the embarrassing single supplement. A new generation of **Social Soloists** is emerging that proudly embraces their single status as a passport to travel and experiences. We explore this new market opportunity for the travel and leisure industry.

As we age as a nation, a new band of **Ageless Aspirations** travellers will emerge. This new group refuses to be defined by age and will continue to demand increasingly active and enriching activities, from medical travel to personal improvement, mental wellness to active holidays where older people set the pace.

Finally a new kind of demographic mixing will take hold in the form of **GranTravel**, a new generation of active grandparents who travel with their grandchildren, making the most of their free time and spending power, while the parents continue to work.



## Informed Leisure Consumer

Developments in technology will continue to have a major influence on how consumers research, book and enjoy their free time in the future.

We delve into three key areas:

The increasingly **Connected Recommendation Society** where decisions are influenced by online communities, more instant-than-ever booking facilities and the extension of leisure experiences through technology. We explore the opportunities for consumers and the challenges for the travel and leisure industry.

With one in three of all hotel bookings in Tokyo now made on the day of arrival through a mobile phone, we explore the growth in **Instant Booking** leisure – a new world where interactive, instantaneous and location based technology promises to fundamentally change the way we enjoy our free time.

Technology will continue to disrupt and improve lifestyle experiences too. **iLeisure** sees future leisure activities become more interactive and brings a world of opportunities **to add the theatre**, live feedback and engagement demanded by the iPod generation.

### A Vision of Future Free Time

In the quest to delve into the future of free time, Future Foundation and lastminute.com have carried out expert interviews, original and desk research, and long-term trend analysis and forecasting.

This is our vision of the Future of Free Time.

