



Le **Comptoir
Prospectiviste**
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Lab for Strategic Foresight
New Social Practices
and the Futures of Organizations



Tailor-Made Foresight Research





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WHAT IS FORESIGHT?

Foresight is much more than thinking ahead.

It is a powerful approach to exploring possible futures.

It opens up new horizons of imagination and knowledge.

It guides collective action and decision-making by weaving long-term perspectives into the present.

**A compass for
navigating uncertain
territory**



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LVMH



KEOLIS





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Be agile



Surf the waves

Dare to disrupt

Be smart



**An
instruction
manual for
navigating
the
unexpected**

Aims of the mission:

- Exploring the future contexts of Travel Retail
- identifying evolutions
- exploring possible responses



What's ahead for Tax Free and Travel Retail

a forward-looking study for a world in transition

Our method



Desk research

**Cannes
2024 visit**



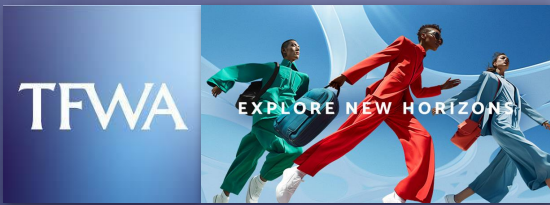
**40 interviews with
industry
stakeholders:**
(The Trinity,
sociologists, key
players in the
business...)



**3 foresight design
workshops with
20 travel retail
stakeholders.**



*They enthusiastically participated in the
entire project, enriching our exploration at
every stage.*



WHAT'S AHEAD?

Key Learnings





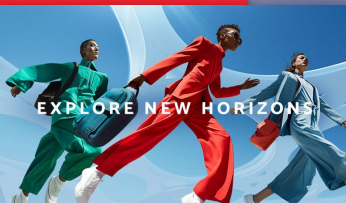
KEY LEARNINGS

Seamless Technology

There will be no step
backward



First “Ratchet Effect”: technology is a permanent escalation



KEY LEARNINGS

A Passenger Centric Ecosystem

There will be no step
backward



Second “Ratchet Effect”: the challenge is how to convince passengers to arrive earlier by choice.



Emotional and Sensorial Experience

There will be no step
backward



Third “Ratchet Effect”: key passenger mantra
“what’s in it for me?”



KEY LEARNINGS

Narrative Retail

Emerging trend: passengers will need to be given something to remember.



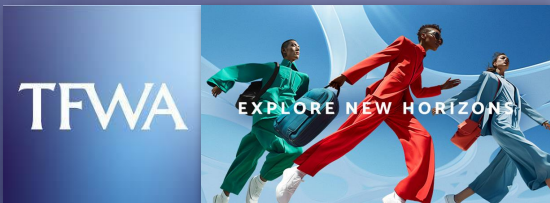


KEY LEARNINGS

***I Say One Thing ...
But Do Something Else***

Behaviour Alert: ... you can't always take the passenger's word for it.





WHAT'S AHEAD?

Routes to the future



NEW POSSIBLE ROUTES...

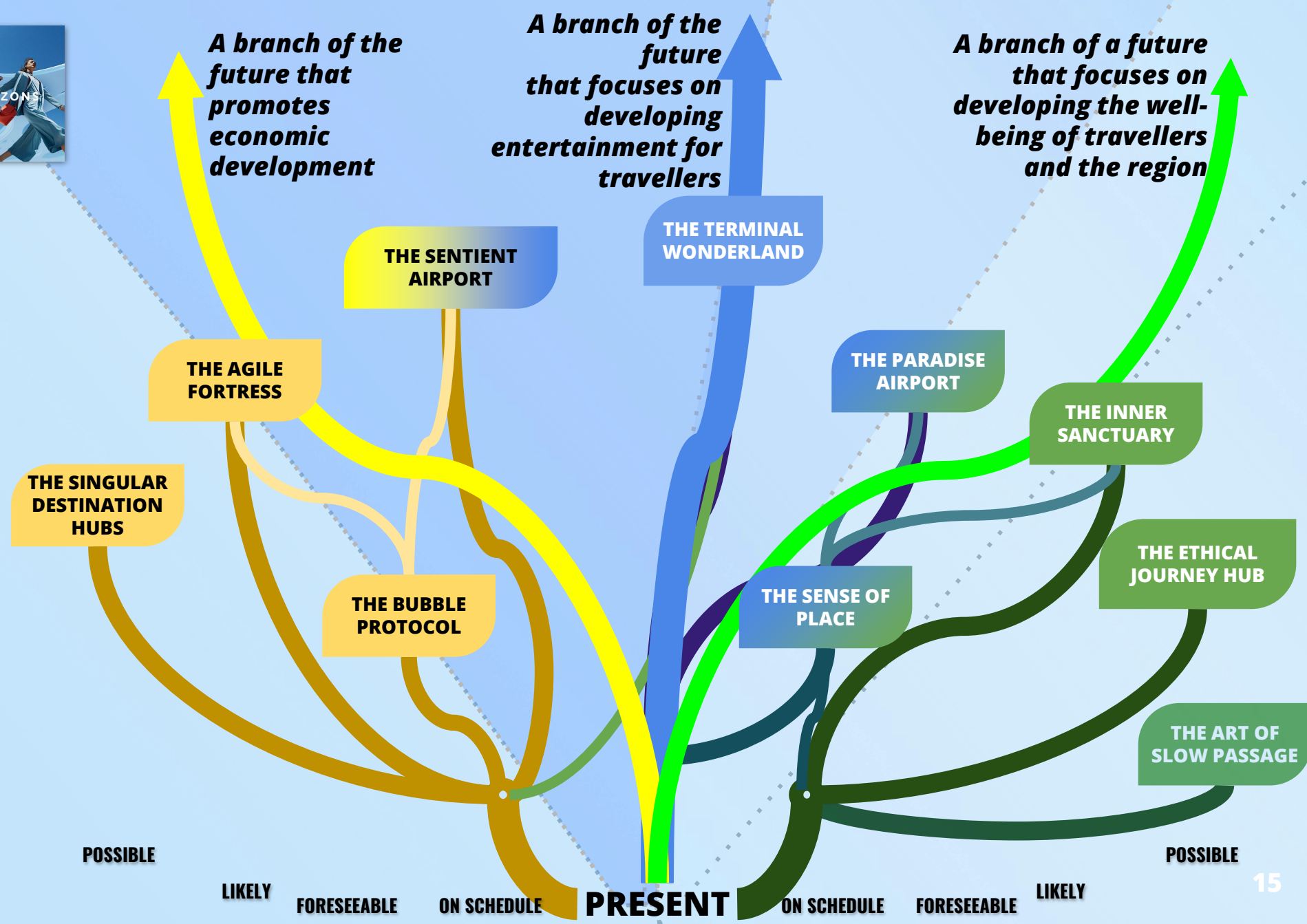
***... not all can be winners
... none to be totally dismissed
... all need to be scrutinized***

Practical takeaways from early signs





Three Routes to the Future of Travel Retail



***3 main horizons,
3 main routes,
3 main narratives...***





FORESEEING MULTIPLE FUTURE HORIZONS, EACH ONE RELEVANT TO, AND SHAPED BY THE LOCAL CONTEXT

***Three Routes
to the Future
of Travel Retail***

**Airport TRAVEL
RETAIL as**

**A TEMPLE OF
CONSUMPTION**

**Airport TRAVEL
RETAIL as**

**A TRANSIT
PLAYGROUND**

**Airport TRAVEL
RETAIL as**

**A GARDEN OF
SLOW TRAVEL**

***PRODUCT
is king***

***PASSENGER
is the hero***

***COMMON
GOODS
take the
wheel***



TFWA

EXPLORE NEW HORIZONS

THE TEMPLE OF CONSUMPTION

THE TEMPLE OF CONSUMPTION

Inspiration



- Immersive zones
- Waiting as a cultural and social scene
- Regeneration as a luxury product
- Exclusive airport-only products



Application



- **Where each corner is a temple**
- **Where retail meets culture in a hybrid creation**
- **Where ecology becomes a ritual of responsibility**
- **Where rarity becomes a sacred expression of uniqueness**



THE TEMPLE OF CONSUMPTION

Inspiration



- Hyper-personalized consumption
- Sensory indulgence
- Event programming
- Total transactional fluidity



Application



- **Where AI guides us to food, shopping, relaxation and entertainment experiences.**
- **Where wellness shapes immersive sanctuaries**
- **Where waiting becomes a stage of curated events**
- **Where a smile unlocks seamless payment**

THE TEMPLE OF CONSUMPTION

**Main
Inspiration**

**PRODUCT
is king**

- **The fusion between an archaic ritualized market (sacred space, storytelling, totem objects, purchasing ceremonies)**
- **Fluid hyper-modernity (empathetic AI, biometric payments, event programming).**

TFWA

EXPLORE NEW HORIZONS

THE TRANSIT PLAYGROUND



THE TRANSIT PLAYGROUND

Inspiration



- Amusement park
- Micro-stays
- Soft mobility
- Experiential gastronomy



Application



- **Where airports turn into playgrounds of pop and entertainment culture.**
- **Where transit time becomes an informal hospitality place of its own.**
- **Where soft mobility turns transit into fun pathways.**
- **Where gastronomy becomes a journey of experiences.**

THE TRANSIT PLAYGROUND

Inspiration



- Augmented experience
- Hospitality and care
- Build cross-sector partnerships
- A place people visit



Application

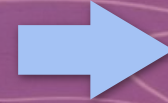


- **Where digital avatars turn the airport moment into oriented brand narratives.**
- **Where staff become hosts of care and experience.**
- **Where technology erases constraints and creates experience as a key factor.**
- **Where airports thrive through experiences beyond flying.**

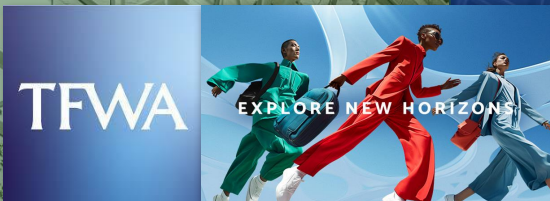
THE TRANSIT PLAYGROUND

**Main
Inspiration**

**PASSENGER
is the hero**



- Time is never 'lost' but reinvested in pleasure, discovery or renewal.
- The passenger at the center of an ecosystem blending commerce, fun and pleasure.
- A living ecosystem : modular spaces, interactive digital content and personalised offers are redefining the revenue chain.



THE GARDEN OF SLOW TRAVEL

THE GARDEN OF SLOW TRAVEL

Inspiration



- Care and regeneration
- Experiential culture
- Conscious food
- The Pioneer Ecological Airport



Application



- **Where wellness is inspired by brands and living culture.**
- **Where living and local cultures transform every journey.**
- **Where F&B is fed by partnerships with nearby suppliers.**
- **Where the airport becomes a partner of ecological alliances.**



THE GARDEN OF SLOW TRAVEL

Inspiration



- To respond to travelers' growing desire for authenticity, mindfulness, and responsibility.
- Trinity cooperates with airlines, cultural operators, territorial institutions, and local actors.



Application



- Where immersive experiences create meaningful moments.
- Where logistics becomes sustainable.
- Where products are available through short and circular supply chains.
- Where shared value reduces carbon footprint, enhances emotional satisfaction, positive social impact.



THE GARDEN OF SLOW TRAVEL

**Main
Inspiration**

**COMMON
GOODS
take the
wheel**

- **A multi-layered ecosystem: part sanctuary, part commons, part cultural stage.**

Travel retail as a space of meaningful consumption, shared experiences, and regenerative practices.

- **Waiting time is deliberately staged to meet environmental concerns.**





MAIN VALUES

← THE TEMPLE OF CONSUMPTION

- *A shrine to consumerism, with an upmarket touch and a premium experience*

- *Premium gratification*

- *"Here and nowhere else"*

- *"The treasure island"*

THE TRANSIT PLAYGROUND

- *Transforming every minute spent on site into a fun and pleasurable experience*

- *Joy and surprises*

- *The wow effect*

- *The ultimate immersive experience*

THE GARDEN OF SLOW TRAVEL →

- *The airport itself becomes a living park, a place where nature and technology intertwine.*

- *Reenchantment & good conscience*

- *A sense of responsibility*

- *Travelling as an ethical act*





FORESEEING THREE MAIN, MUTUALLY INCLUSIVE BRANCHES ON THE HORIZON

THE TEMPLE OF CONSUMPTION

"Brands must cultivate creativity with a sense of distinction and pride, while reimagining the past."

THE TRANSIT PLAYGROUND

"Brands must embody empathy, infused with wit and exuberance, to create an idealized present."

THE GARDEN OF SLOW TRAVEL

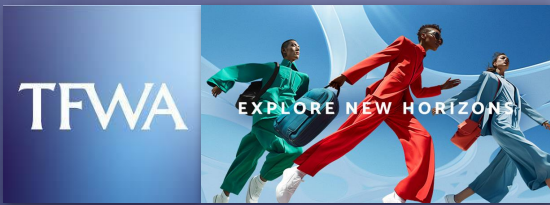
"Brands must act collectively, guided by ethics and concern, as they navigate a hesitant future."

TECHNO-OPTIMISM AND ABUNDANCE

HUMANCENTRIC RETAILTAINMENT

FRUGAL PROSPERITY





WHAT'S AHEAD?

Recommendations





Brands:

- Ethics is the new luxury.
- Subscribe to experience: the airport as-a-service.

Brands + Operators:

- Measure emotion, not just transactions.





Trinity:

- Every passenger an ambassador.
- Travel through an oasis of emotions, the airport reinvented as an experience hub.
- Open data, endless interoperability.
- Cooperate to disrupt: co-creation as the engine of Travel Retail.





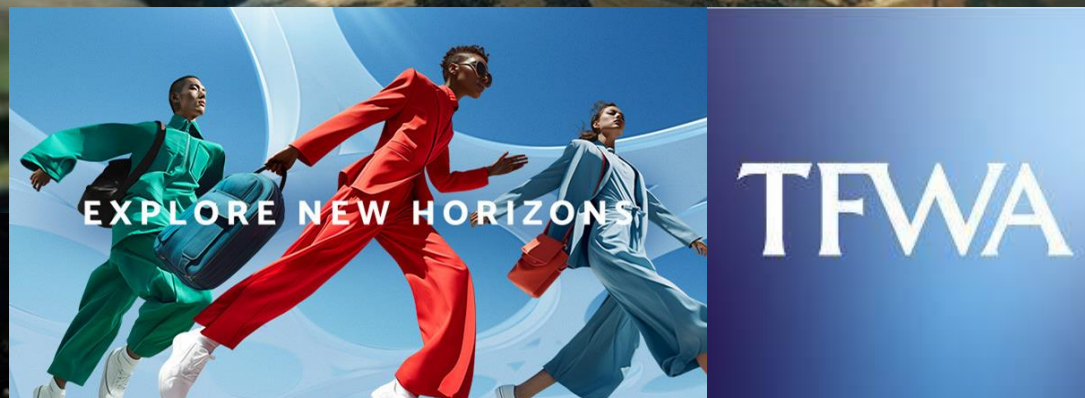
**Operators+
Airports:**

- From airport to total media: capture attention and unleash value.

Airports:

- The Pioneer Ecological Airport





Thank you for your attention

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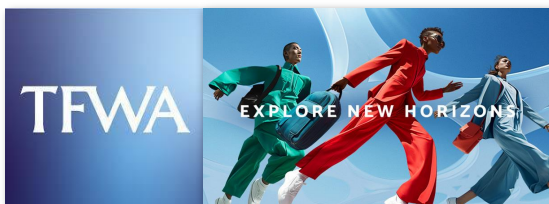
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À la découverte de vos futurs possibles par les chemins de traverse !

... sur www.prospectiviste.fr



COLLECTING YOUR OPINION

Foresight Online Participation



bitly

<https://tfwa-online-study.prospectiviste.fr>