

imaginestudio™

Food Meets Everything

Redefining freshness, convenience, & cultural loyalty

Trends & Inspiration Q2 2026

Image @SnoozLife

Introduction

The following sections on trends, insights, and strategy have been curated to represent Imagine Studio's collective thought leadership regarding future customer and client needs.



Andy House

Sr. Creative Director
Imagine Studio



Suling Hsu

Director,
Creative Design
Imagine Studio

Contents

06 Freshness as Currency: *The Premiumization of Everyday Food*

Overview

Need to Know & Opportunities

Key Industries:

- Grocery & Retail
- Big Box
- Wellness & Fitness Retail
- Convenience Store

27 The New Calculus of Convenience:
The Path from Tension to Transformation

Overview

Need to Know & Opportunities

Key Strategies:

QSR
Grocery & Retail
Convenience Store
Experiential & Non-Food Retail

50 The Loyalty of the Everyday:
Food as Loyalty Infrastructure

Overview

Need to Know & Opportunities

Key Strategies:

QSR
Grocery & Retail
Brand Activations & Events
Big Box

Freshness as Currency

The Premiumization of Everyday Food

Fresh food has crossed a threshold — it is no longer simply a product attribute, it is a cultural signal. Cost-of-living pressures have made freshness aspirational: consumers who can access high-quality, minimally processed, locally sourced food experience it as a marker of wellbeing and status. At the same time, the ready-to-eat and prepared meal categories are growing at sustained rates, blurring the line between retail and restaurants.

This theme examines how freshness is being operationalized across channels — from QSR's chicken platform model to grocery's deli reinvention to big box's frozen innovation push — and what the premiumization of everyday food means for buying, design, and marketing strategies.



Ammazza (Australia): “Not frozen but suspended in time”: restaurant-quality pizzas are chill blasted and vac-sealed to maintain moisture, texture and authentic flavor.

From Transaction to Relationship

Need to Know

Consumers across demographics are reorienting food decisions around freshness, quality, and health. Three structural forces are driving this:

- Economic pressure is making restaurant dining a considered luxury, pushing demand for restaurant-quality experiences into retail and prepared food channels.
- Gen Z and Millennials view fresh, premium food as a status signal — a shift from previous generations for whom health was a background consideration.
- The ready-to-eat meal category is growing rapidly across all channels, with frozen innovation narrowing the quality gap between ambient, chilled, and restaurant-prepared food.

From Transaction to Relationship

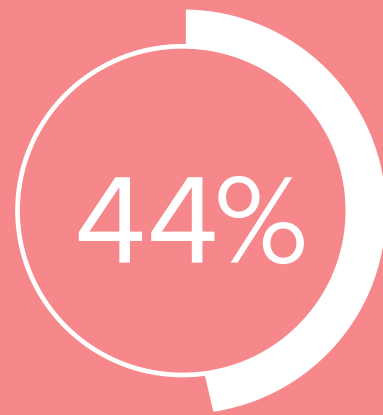
Proof Points:

Percentage of global consumers willing to pay more for locally sourced goods



WGSN

Percentage of US Gen Z that want more street food or food truck-style options in grocery delis



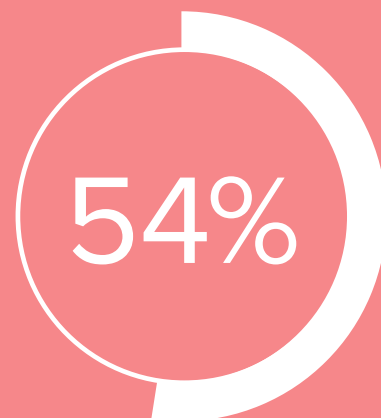
WGSN

Percentage of US consumers who say packaged fresh food increases convenience



WGSN

Percentage increase in US frozen food spending among Millennials and Gen Z



WGSN

Opportunities

Grocery & Retail: Deli reinvention as restaurant rival; prepared meals as primary freshness destination; store-as-destination design driving dwell time

- **In Action:** *Suá Superette (LA); MUJI farm-themed store (Shanghai); Trader Joe's daily delivery model*

Big Box: Frozen innovation democratizing premium; bulk fresh as value play; membership as freshness access mechanism

- **In Action:** *Rejyu frozen premium sushi (Japan); Sam's Club Gen Z membership growth; Costco prepared food expansion*

Convenience Store: Fresh-prepared grab-and-go elevation; hyperlocal and regionally tailored food; salad bars and functional snack formats; seaweed, chickpea, and health-forward SKUs

- **In Action:** *Loop convenience stores California; 7-Eleven AI-powered store Singapore; Daylesford Organic mushroom drink partnerships*

Opportunities

Wellness & Fitness Retail: Functional food and beverage integration; adaptogenic and ingredient-forward formats; food as brand extension and dwell-time driver

- ***In Action:*** Erewhon LA; Holland & Barrett H&Bean barista concept; KOIBIRD Koi 11 adaptogenic bar; Sporty & Rich NYC juice bar

Industry Lens

Why these Industries: Grocery & retail and big box are the primary commercial battlegrounds for fresh premiumization. Wellness & fitness retail represents the most elevated expression of food-as-performance and is leading the cultural framing. Convenience stores are the fastest-evolving format — the “better-for-you” c-store tier is emerging as a significant freshness channel, particularly among urban Gen Z consumers who visit weekly.

Freshness as Currency

Industry in Focus

Grocery & Retail

The grocery deli counter is undergoing its most significant reinvention in decades. As restaurant visits become a considered expense, the prepared food aisle and fresh deli case are absorbing that displaced demand — and the retailers investing in culinary talent, global flavors, and in-store production are pulling measurably ahead. Freshness in grocery is no longer a background expectation; it is the primary brand signal, the reason a consumer chooses one store over another, and increasingly the reason they stay longer and spend more. The deli is becoming a restaurant that happens to sell groceries.

Opportunities:

Deli reinvention as culinary destination; globally-inspired grab-and-go;
private label freshness tiers; hyperlocal sourcing as brand narrative

Key Strategies:

Invest in deli design and culinary talent; source globally-inspired minimally processed SKUs; build transparent ingredient storytelling into packaging and signage



Suá Superette (Los Angeles): A grab-and-go format pairing Sichuan flavors with California-grown produce, Suá Superette treats the prepared food case as a culinary statement — sourced locally, inspired globally, and designed to be eaten immediately. It is one of the clearest retail signals that the prepared meal has crossed from convenience into culture.



Freshness as Currency

Industry in Focus

Grocery & Retail



Big Fig (New Zealand): Operating under the tagline “slow food, served fast,” Big Fig brings Levantine slow-cooking traditions into a retail grab-and-go format without compromising on technique or ingredient quality. The brand demonstrates that freshness and convenience are not in tension — they are the same proposition when executed with conviction.



MUJI (Farm-Themed Store, Shanghai): MUJI’s Shanghai format integrates locally grown produce, in-store farming displays, and farm-to-table dining within a single retail environment. The store reframes grocery shopping as a relationship with food origin — turning freshness from a label claim into an observable, experiential truth.

Trader Joe's (US): Trader Joe's demand forecasting and daily replenishment model keeps fresh items at peak quality without the premium price tag. The operational discipline behind it is invisible to the consumer — what they experience is simply freshness they can trust, visit after visit.



Freshness as Currency

Industry in Focus

Big Box

Big box has always owned value. What is shifting in 2026 is its claim on quality. Driven by Gen Z and Millennial consumers entering family formation years with high convenience expectations and tighter budgets, big box operators are discovering that scale — long used to compete on price — is equally powerful as a tool for democratizing premium. Frozen innovation is the leading edge of this shift: where the frozen aisle was once synonymous with compromise, a new generation of globally-inspired, minimally processed, restaurant-quality formats is repositioning it as a credible freshness destination. The membership model amplifies this further, turning bulk buying into a curated, loyalty-driven fresh food experience.

Opportunities:

Frozen range elevation with restaurant-quality profiles; bulk fresh occasion bundles; membership as freshness access and personalization mechanism

Key Strategies:

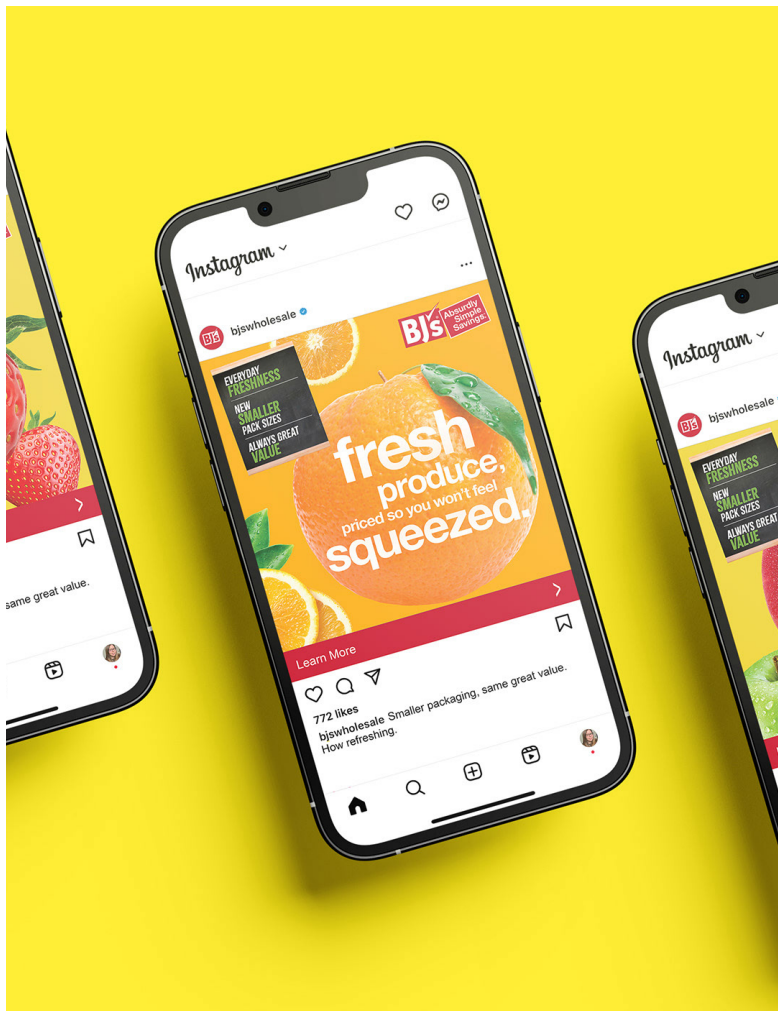
Elevate frozen range with global flavors and minimal processing; use membership data for fresh personalization; bundle fresh and prepared by household occasion

Rejyu (Japan): A frozen, thaw-and-eat sushi format designed for retail, Rejyu collapses the quality gap between restaurant sushi and home consumption without sacrificing technique or ingredient integrity. It is the clearest available proof point that frozen can be the vehicle for genuine premium freshness — not a compromise of it.

Freshness as Currency

Industry in Focus

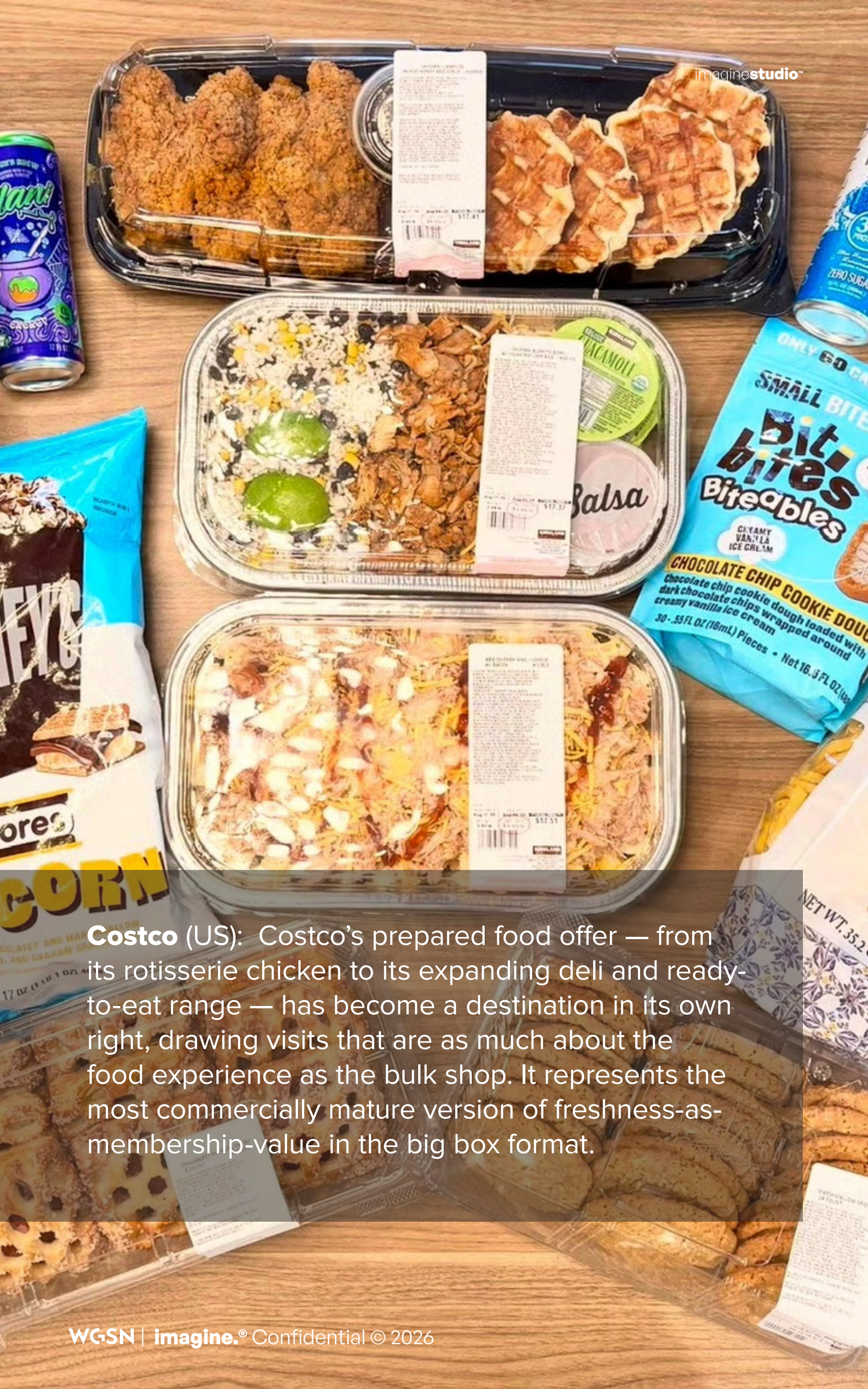
Big Box



BJ's Wholesale Club (US): BJ's Fresh 2.0 initiative has driven consistent growth in perishable categories by expanding its fresh offer across produce, meat, and seafood — at prices up to 25% below grocery store competitors. It is the clearest big box demonstration that premium freshness and bulk value are not in tension.



Kroger Simple Truth (US): Simple Truth has made natural, minimally processed food accessible rather than aspirational — spanning thousands of products across nearly 40 categories and growing at nearly three times the rate of national brands. It is the most scaled argument that freshness as a brand value belongs in mainstream grocery, not just specialty retail.



imaginestudio™

Costco (US): Costco's prepared food offer — from its rotisserie chicken to its expanding deli and ready-to-eat range — has become a destination in its own right, drawing visits that are as much about the food experience as the bulk shop. It represents the most commercially mature version of freshness-as-membership-value in the big box format.

Freshness as Currency

Industry in Focus

Wellness & Fitness Retail

Wellness and fitness retail is where the cultural framing of freshness is most elevated — and most commercially potent. Here, food is not a convenience add-on or a margin opportunity. It is the physical expression of a brand's core belief system. The brands in this space have repositioned fresh food as performance, identity, and self-care simultaneously — and in doing so have set a quality and storytelling benchmark that grocery, big box, and QSR are now being measured against. What makes this industry particularly significant for the freshness trend is not its scale, but its influence: the consumer behavior and ingredient expectations being normalized at Erewhon, Holland & Barrett, and KOIBIRD are migrating into mass retail faster than any trend cycle in recent memory.

Opportunities:

Functional food and beverage integration; adaptogenic and ingredient-forward formats; food as brand extension and dwell-time driver

Key Strategies:

Develop food offerings as brand expression, not just revenue; invest in functional ingredient storytelling; partner with wellness brands for co-created F&B



Koibird (Koi 11 Bar, London): Apparel and lifestyle retailer KOIBIRD integrated a food and drinks nutrition bar serving adaptogenic beverages directly into its Marylebone store. The Koi 11 bar is one of the most precise executions of food-as-brand-extension in non-food retail — using freshness and functional ingredients to deepen the brand relationship rather than simply extend dwell time.

Freshness as Currency

Industry in Focus

Wellness & Fitness Retail

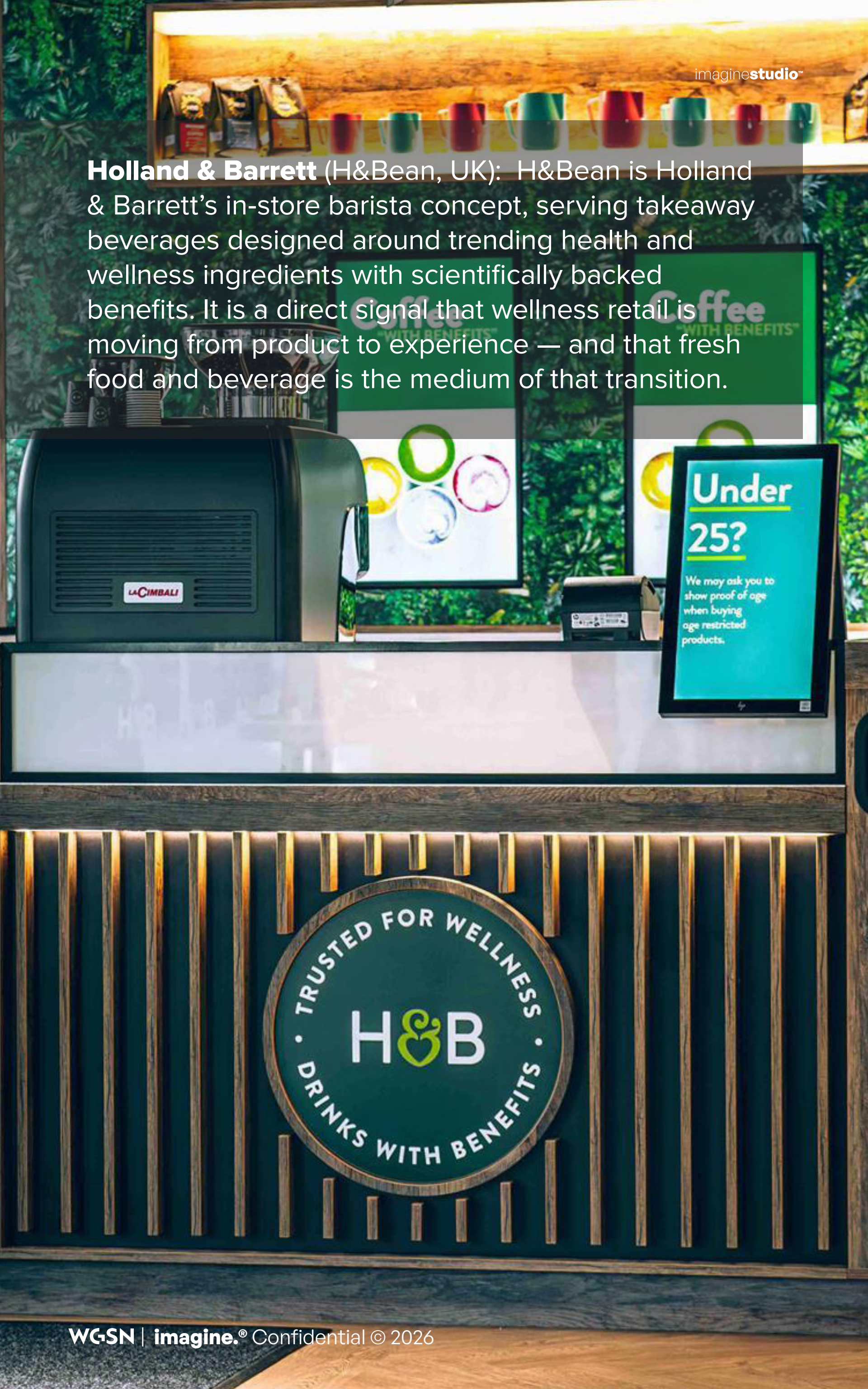


Erewhon (Los Angeles): Erewhon has made functional, ingredient-forward fresh food a full lifestyle category — its tonic bar and prepared food offer carrying the same cultural weight as its supplement aisle. The brand has demonstrated that freshness, when positioned with conviction and specificity, can command a price premium that has no ceiling.



Sporty & Rich (New York): The Sporty & Rich NYC flagship features a juice bar serving fresh smoothies made to order — a format that positions fresh food as an intrinsic part of the brand's health and lifestyle identity rather than a retail amenity. It reflects a broader shift in which fitness and lifestyle brands are using food to make their values tangible and consumable.

Holland & Barrett (H&Bean, UK): H&Bean is Holland & Barrett's in-store barista concept, serving takeaway beverages designed around trending health and wellness ingredients with scientifically backed benefits. It is a direct signal that wellness retail is moving from product to experience — and that fresh food and beverage is the medium of that transition.



Freshness as Currency

Industry in Focus

Convenience Store

Convenience stores are the most underestimated freshness story in food service right now. For decades, the format has been defined by ambient snacks, fuel, and low-quality prepared food — a reputation that is being systematically dismantled by a new generation of operators who understand that the c-store's greatest asset is not its product mix but its visit frequency. Consumers who stop in weekly, sometimes daily, are an extraordinarily valuable loyalty base — and the operators investing in genuine fresh food quality, hyperlocal sourcing, and better-for-you prepared options are converting that frequency into something far more durable. The better-for-you c-store tier is not a niche play. It is the leading edge of a format-wide reinvention that is happening faster than most of the traditional food service industry has noticed.

Opportunities:

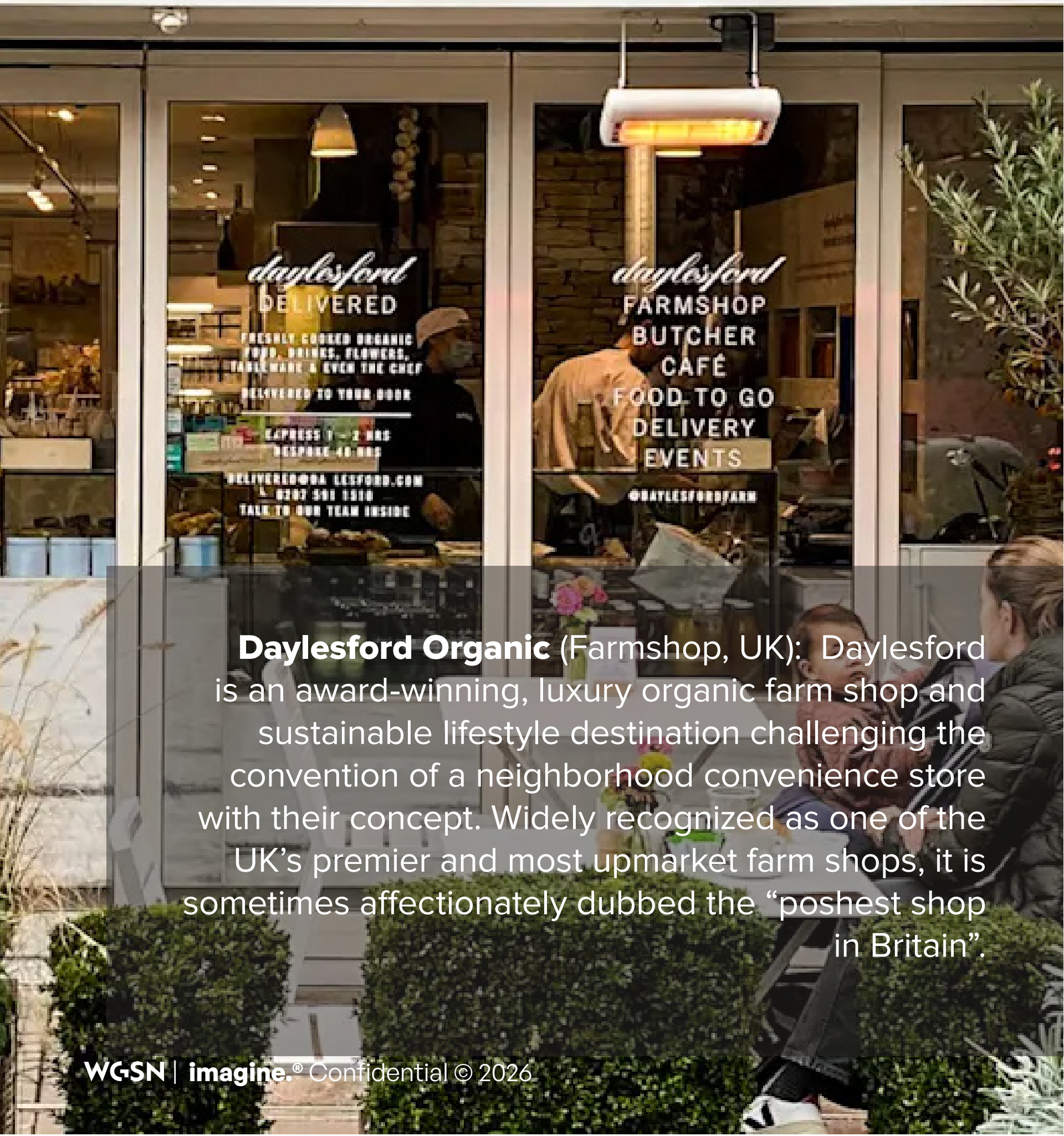
Fresh-prepared grab-and-go elevation; hyperlocal and regionally tailored food; salad bars and functional snack formats; seaweed, chickpea, and health-forward SKUs

Key Strategies:

Differentiate from standard c-store through genuine freshness investment; lean into hyperlocal sourcing as community identity; position health-forward SKUs at prominent locations

daylesford ORGA

ORGANIC TEA, COFFEE & FOOD TO GO



daylesford
DELIVERED

FRESHLY COOKED ORGANIC
FOOD, DRINKS, FLOWERS,
TABLEWARE & EVEN THE CHEF
DELIVERED TO YOUR DOOR

EXPRESS 1 - 2 HRS
RESPONSE 10 HRS

DELIVERED@DA.LCFORD.COM
& 0207 591 1510
TALK TO OUR TEAM INSIDE

daylesford
FARMSHOP
BUTCHER
CAFÉ
FOOD TO GO
DELIVERY
EVENTS

@DAYLESFORDFARM

Daylesford Organic (Farmshop, UK): Daylesford is an award-winning, luxury organic farm shop and sustainable lifestyle destination challenging the convention of a neighborhood convenience store with their concept. Widely recognized as one of the UK's premier and most upmarket farm shops, it is sometimes affectionately dubbed the “poshest shop in Britain”.

Freshness as Currency

Industry in Focus Convenience Store



7-Eleven (AI-Powered Store, Singapore): 7-Eleven’s checkout-free format within a Singapore MRT station removes the primary friction point of the convenience occasion — the queue — while maintaining a curated fresh food offer for commuters. The store demonstrates that tech-enabled convenience and fresh food quality are not competing priorities; they are the same proposition for the time-pressured urban consumer.



Loop Convenient Neighborhood Market (California): Loop differentiates from standard convenience retail through hyperlocal community engagement and regionally tailored food — offering salad bars, seaweed snacks, and chickpea crisps alongside traditional c-store staples. It is one of the clearest signals that freshness and local identity can be a genuine convenience store brand strategy, not just a specialty retail one.

Daylesford Organic x DIRTEA (UK): Daylesford Organic's partnership with functional mushroom brand DIRTEA — producing three supercharged takeaway mushroom drinks available at its farm shops — shows how the convenience format can carry premium functional freshness when the sourcing narrative is credible. The collaboration also signals a broader trend of wellness ingredient brands using convenience retail as a distribution and discovery channel.



The New Calculus of Convenience

The Path from Tension to Transformation

Convenience is no longer a single consumer demand — it is a set of tensions. Consumers simultaneously want speed and slowness, frictionless access and emotional warmth, technology and human connection, wide availability and curated discovery. The brands and operators winning in food service are not those choosing one side of these paradoxes. They are those building systems flexible enough to serve both.

In food service specifically, these paradoxes manifest as: the appeal of automated checkout alongside the loneliness-driven desire for human interaction, the hunger for global novelty alongside the comfort of familiar formats, and the demand for rapid delivery alongside the rise of the patient, experience-seeking shopper.

Ocado (Global): Ocado's AI-powered fulfillment platform picked over 30 million items using its robotic arm system in 2024 alone — with productivity gains delivered from a fraction of its planned installation scale. The system uses machine vision and real-time machine learning to handle thousands of grocery SKUs without expanding physical warehouse space, establishing a new cost and accuracy benchmark for what on-demand grocery fulfillment can operationally achieve.

The New Calculus of Convenience

Need to Know

Convenience in food service is more complex than in any other retail category because food is the most habitual, most emotionally loaded, and most occasion-dependent purchase a consumer makes. The tensions that define the new convenience landscape are not abstract; in food, they are felt multiple times daily, across more formats and channels than anywhere else.

The Paradox Continued:

Five paradox pairs define the terrain — each with a food-specific dimension that expands on Q1's broader retail framing:

- **Fast & slow:** The drive-thru and the deli counter are not competing formats — they are the same consumer at different moments. Food operators must engineer for both within the same physical and digital footprint.
- **Tech-forward & emotionally connected:** AI ordering and checkout-free formats remove friction, but food is inherently sensory and social. The more automated the food occasion becomes, the more important warmth, human interaction, and atmosphere become as differentiators.

The New Calculus of Convenience

Need to Know

- **Shop everywhere, not overload:** Omnichannel food access is now expected, but algorithmic recommendation has made food discovery feel flat and predictable. The operators winning in 2026 are reintroducing genuine surprise into a category that has become too efficiently curated.
- **Frictionless yet reassuring:** In food, frictionless is not enough. Consumers need to trust what they're eating — its ingredients, its sourcing, and its preparation. Removing the transaction friction while maintaining the quality signal is the defining operational challenge of food convenience in 2026.
- **Speed & discovery:** The fastest food occasion and the most exploratory one can be the same consumer on different days — or different moments in the same day. The formats that serve both without compromise are the ones building the most durable frequency.

Percentage of expected global convenience food market volume growth in 2026

▲
4%

WGSN

The New Calculus of Convenience

Need to Know

Percentage of Gen Z who value convenience above all, driving demand for heat-to-eat and instant formats



WGSN

Percentage of Millennials who cite convenience as a primary purchasing driver



WGSN

Percentage of REWE Pick&Go shoppers that rate checkout-free as significantly faster



WGSN

Percentage of convenience stores that food service consumers use these services weekly, outpacing restaurant visits



WGSN

Opportunities

QSR: Ghost kitchen as low-risk test environment; AI ordering
reducing service time 10–20%; drive-thru optimization; delivery-native LTO strategy

- **In Action:** *Yum! Brands Byte platform (17,500+ restaurants); Sweetgreen air-fried offerings; ghost kitchen expansion models*

Grocery & Retail: Rapid delivery and 15-minute fulfillment; smart store layouts reducing decision fatigue; serendipitous discovery zones; wellness-to-go formats

- **In Action:** *AEON/Ocado smart fulfillment (Japan); Waitrose human checkout signage; H&M heatmap-driven layout optimization; Loop hyperlocal c-store (California)*

Convenience Store: The fastest-evolving food service format. C-stores are moving from fuel-and-snack to genuine food destination — with the weekly visit frequency to make loyalty economics work.

- **In Action:** *Loop hyperlocal c-store (California); 7-Eleven AI checkout (Singapore); REWE Pick&Go checkout-free (Germany)*

Experiential & Non-Food Retail: Non-food brands adding food hospitality are the most unexpected and culturally significant convenience signal. Without legacy food operations, they are the freest to experiment with what convenience can mean.

- **In Action:** *Nike RunTown (London); LuLuLemon x La La Land Kind Cafe (Houston); Alaia Bookstore & Café (London)*

Industry Lens

Why These Industries: QSR is the operational frontier; ghost kitchens, AI ordering, and drive-thru optimization are being tested at scale here first. Grocery & retail is navigating the most complex version of the paradox, balancing rapid fulfillment infrastructure with in-store experience investment. Convenience stores are the most agile format and the fastest movers on food service elevation. Experiential and non-food retail (apparel, fitness, and lifestyle brands adding food) is the non-traditional entrant redefining what convenience means — these brands have no legacy food operations to defend, making them the most creative experimenters.

The New Calculus of Convenience

Industry in Focus

QSR

QSR built its entire identity around convenience — and is now being forced to redefine what that means. Speed remains non-negotiable, but it is no longer sufficient as a differentiation strategy. The operators pulling ahead in 2026 are those who have recognized that the convenience equation in quick service has a second variable: the quality and cultural relevance of what is being delivered quickly. Ghost kitchens are functioning as low-risk innovation laboratories, allowing brands to test emerging flavors and formats before committing to operational infrastructure.

Opportunities:

Ghost kitchen as low-risk flavor testing; AI ordering reducing service time 10–20%; delivery-native LTO strategy; drive-thru optimization for both speed and personalization

Key Strategies:

Invest in ghost kitchen data as flavor validation before system-wide rollout; maintain human touchpoints at high-interaction moments; design drive-thru for both efficiency-seekers and explorers



TM

Byte by Yum! (Global): Yum! Brands' proprietary AI platform now processes over 3 million transactions across 17,500+ restaurants in more than 100 countries, integrating personalized recommendations, dynamic loyalty, and real-time inventory management into a single operating system. It is the most scaled demonstration available of what happens when convenience infrastructure and personalization converge at QSR speed.

The New Calculus of Convenience

Industry in Focus


QSR



Wingstop (US, Global Expansion): Wingstop's UK expansion used delivery-only ghost kitchen locations as the primary market entry format, validating demand, refining operations, and building a consumer base before committing to physical retail. The model has since become a template for how QSR brands can test new markets and new formats with minimal capital exposure.



Sweetgreen (US): Sweetgreen's introduction of additive-free, air-fried menu items positions the brand at the intersection of QSR speed and wellness-forward ingredient philosophy. It signals that the convenience proposition in fast food is expanding; consumers are increasingly asking not just how fast, but how clean, and the brands answering both questions simultaneously are capturing a measurably different consumer.



Mixue Ice Cream & Tea (China, Global): Mixue has built the world's largest fast food chain by outlet count through a convenience proposition that is neither technological nor experiential — it is geographic. By pricing its ice cream and tea menu at a level accessible to virtually every consumer demographic and saturating high-footfall urban and suburban locations across China and Southeast Asia, Mixue has made itself the path of least resistance for an impulse food occasion. It is a reminder that the most powerful convenience infrastructure is sometimes simply being everywhere, at a price that removes hesitation entirely.

The New Calculus of Convenience

Industry in Focus

Grocery & Retail

Of any industry in food service, grocery is navigating the most complex version of the convenience paradox. It faces this paradox with more complexity than any other format because it must serve both the efficiency-seeker and the experience-seeker within the same physical footprint. The retailers winning in this environment are not choosing between these modes. They are designing for both within the same physical and digital footprint — building rapid fulfillment infrastructure on one side, and investing in store layouts, staffed checkouts, and community food programming on the other. The insight driving the best operators is that convenience in grocery is not a single consumer need. It is a spectrum, and the stores that can serve the full range of it will own more market share.

Opportunities:

Quick-commerce partnerships; smart store layouts reducing decision fatigue; serendipitous discovery zones alongside efficient routing; dual checkout strategy (self and staffed)

Key Strategies:

Partner with quick-commerce operators for last-mile; redesign stores around clarity and modularity; build meet-cute discovery spaces; resist full automation of human touchpoints

Ocado x Aeon (Japan): Ocado's smart fulfillment partnership with Japanese retail giant AEON enables rapid, highly efficient grocery delivery through automated warehouse technology — setting a new operational baseline for what on-demand grocery convenience looks like at scale. The partnership is one of the most advanced real-world demonstrations of fulfillment infrastructure as a competitive moat.



The New Calculus of Convenience

Industry in Focus

Grocery & Retail

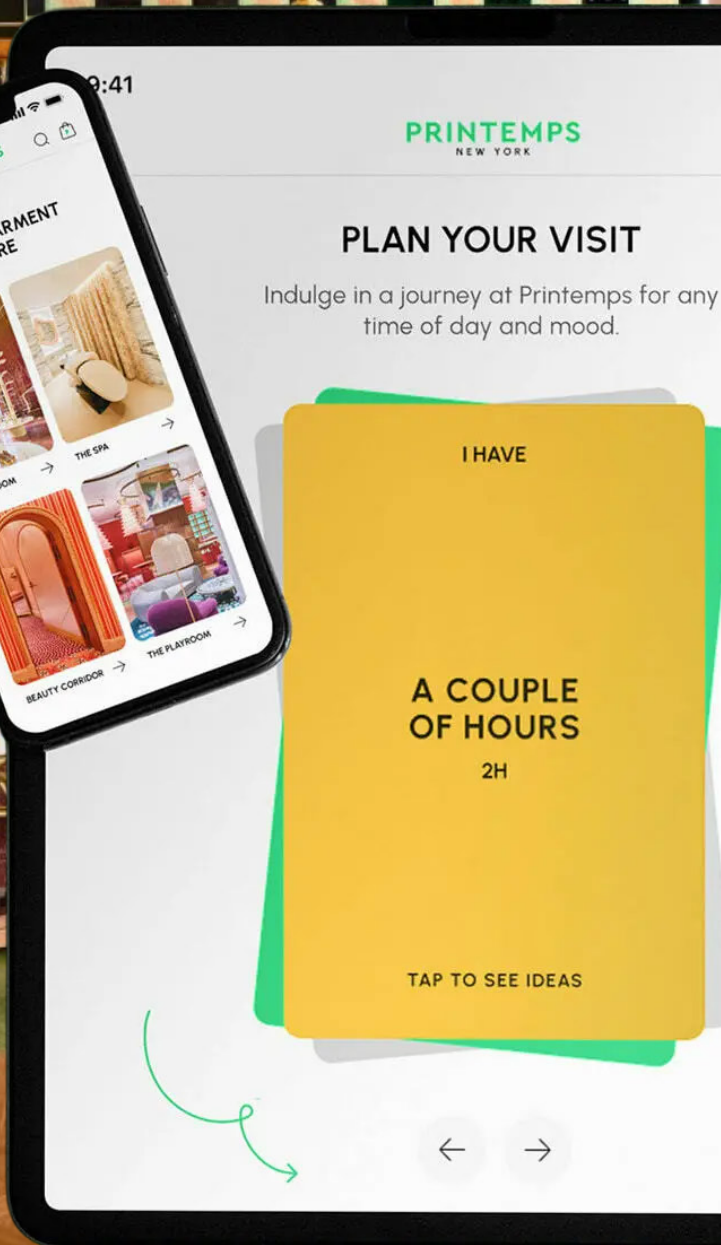
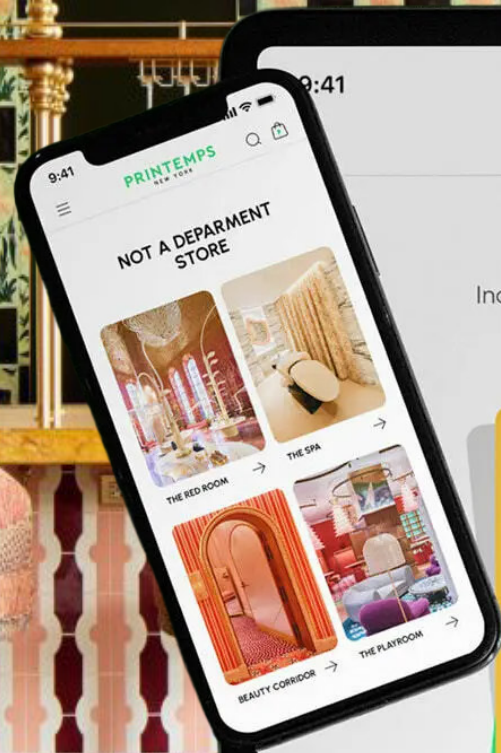
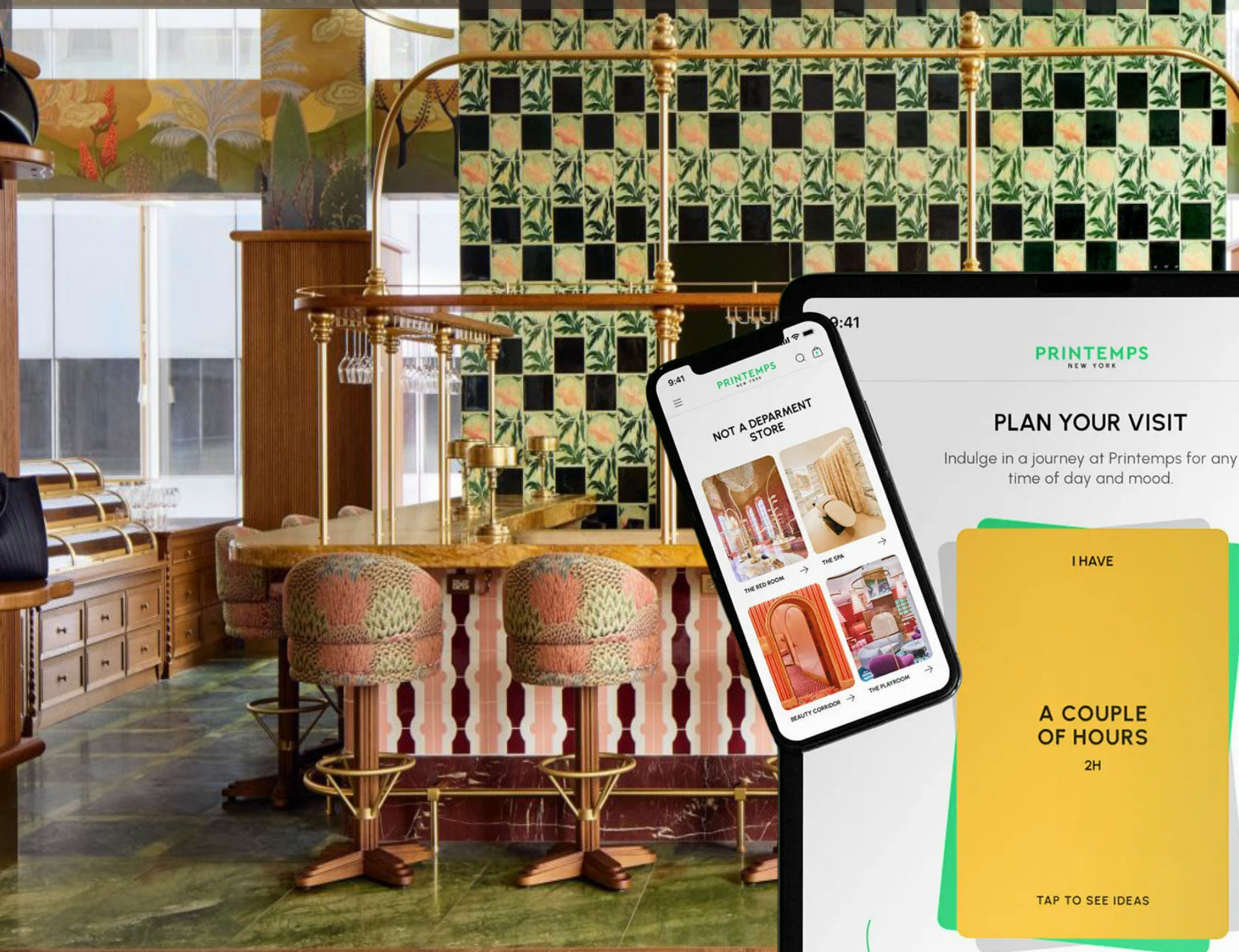


H&M (Global): H&M's integration of real-time shopper heatmap data into its visual merchandising process allows store teams to re-merchandise layouts in hours rather than weeks — responding to live consumer navigation behavior rather than seasonal planning cycles. In one documented instance, a single window adjustment driven by heatmap insight resulted in 132 sales in a single day.



Waitrose (UK): As self-checkout proliferated across UK grocery, Waitrose made the deliberate strategic decision to prominently signal its commitment to staffed, human-manned checkouts — recognizing that a meaningful segment of its consumer base experiences human service not as inefficiency but as the point. The move reframed convenience as a spectrum rather than a race to automation.

Printemps (New York): When Printemps opened its 54,000 sq ft US flagship, it worked with design consultancy L+R to develop a low-tech luxury navigation system that uses ambient digital markers and tonal cues rather than bright signage or interactive screens to guide shoppers through zones. The approach makes wayfinding an integral part of the spatial experience rather than a visual interruption, demonstrating that convenience and atmosphere are not competing values in retail design.



The New Calculus of Convenience

Industry in Focus

Convenience Store

No format is moving faster on the convenience calculus than the c-store, and none has more to gain; its core asset of visit frequency becomes dramatically more valuable when the food offer justifies it.

Consumers who stop in out of habit can be converted into consumers who stop in out of preference.

The operators who understand this distinction are investing accordingly, and the gap between the best and worst convenience food offer is widening faster than in any other food service format.

Opportunities:

Fresh-prepared grab-and-go elevation; hyperlocal food differentiation; tech-enabled checkout (Amazon Go model); food-led store design that signals genuine quality investment

Key Strategies:

Differentiate through freshness investment and hyperlocal identity; use tech to reduce friction without removing warmth; design food zones that signal care, not just speed

Lawson (Japan): Japanese convenience stores represent the global benchmark for what the c-store format can achieve at its highest expression, and Lawson is among the most instructive examples — fresh, curated, locally specific, and operationally immaculate. Its made-fresh-daily food offer, hot counters, sitting areas, and neighborhood-specific product curation have made it a genuine community food hub rather than a transactional pit stop. For any operator rethinking the convenience calculus, Lawson is proof that speed, quality, frictionless access, and emotional warmth are fully compatible— and have been for decades..



The New Calculus of Convenience

Industry in Focus Convenience Store



Amazon Go (US): Amazon Go's checkout-free convenience format — now operating across multiple US cities — remains the most instructive case study on what genuinely frictionless retail costs to build and what it delivers experientially. Its evolution from standalone urban locations toward integration within larger Amazon Fresh stores signals that checkout-free is maturing from a novelty format into an operational layer that can sit inside existing retail infrastructure.



REWE Pick&Go (Germany): Launched in July 2024, REWE'S largest Pick&Go checkout-free store received strongly positive consumer feedback specifically around the speed of the shopping experience — with 90% of shoppers rating it as significantly faster than traditional checkout formats. It demonstrates that checkout-free technology has crossed the threshold from novelty to genuine consumer preference at grocery-adjacent scale.

Sheetz (US): Sheetz has built one of the most loyal consumer bases in American convenience retail around a made-to-order food model that sits deliberately between fast food and c-store — with touchscreen ordering, fresh ingredients, and a menu that competes directly with QSR on quality and variety. The brand’s loyalty economics are exceptional: consumers regularly drive past competitors specifically to visit, which is the clearest possible signal that convenience and genuine food quality are not in tension when executed with consistency and care.

The New Calculus of Convenience

Industry in Focus

Experiential & Non-Food Retail

The most unexpected players in the new convenience calculus are brands that have no legacy food service operations whatsoever. Apparel brands, fitness retailers, lifestyle concepts, and luxury houses are adding food and beverage programming to their physical spaces — not as a revenue stream, but as a strategic tool for dwell time, emotional warmth, and community building. What makes these entrants significant is precisely their lack of food industry baggage. The answers they are arriving at are some of the most creatively interesting in food service — and they are setting expectations that traditional food operators are increasingly being measured against. Convenience here is redefined entirely: it is not about speed or frictionless access, but about the right food experience arriving at exactly the right moment in the brand relationship.

Opportunities:

Food as dwell-time and loyalty driver in apparel, fitness, and lifestyle retail; wellness-to-go as brand extension; co-branded F&B as community signal

Key Strategies:

Position food as brand expression, not revenue stream; design for the slow occasion — the customer who lingers; use food to create the emotional warmth that product alone cannot

Nike RunTown (London): Nike's two-floor London space features product trial zones, a Nike race hub, panel talks with athletes and coaches, and free physiotherapy sessions — with food and recovery programming integrated as a natural extension of the athletic occasion rather than a retail amenity. RunTown reframes the store visit as a complete physical experience, and food plays a specific functional role within it: for fuel, recovery, and belonging.



The New Calculus of Convenience

Industry in Focus

Experiential & Non-Food Retail



Alaïa Bookstore & Café

(London): Paris-based fashion retailer Alaïa opened a bookstore and café on the second floor of its New Bond Street store — creating a cultural hangout with a genuine sense of sanctuary that has no obligation to convert into a sale. The food and beverage offer exists to deepen the relationship, extend the visit, and communicate brand values that clothing alone cannot carry. It is one of the most elegant executions of food-as-brand-architecture in non-food retail.

Lululemon (US):

Lululemon's 9,400 sq ft Houston flagship — its largest in the country — opened in December 2025 with the first-ever in-store La La Land Kind Café, serving exclusive drinks including a Double Chai Latte and Coconut Cloud Matcha, integrated directly into the Lululemon Membership perks program. The café is not an amenity — it is the social infrastructure that slows the visit down, converts a transaction into an occasion, and makes the time spent with the brand feel genuinely worth having.

Vuori (US): Activewear brand Vuori has built its community strategy around shared physical and wellness experiences — hosting local events, yoga studio meet-ups, running clubs, and sound baths — with food and beverage integrated as the social infrastructure that holds these occasions together. The brand demonstrates that convenience, in its most evolved form, is not about removing friction from a purchase. It is about making the time a consumer spends with a brand feel genuinely worth having.



vuori

The Loyalty of the Everyday

Food as Loyalty Infrastructure

Loyalty in food service is undergoing the same structural shift that Imagine Studio's Q1 2026 research identified across retail broadly: from transactional reward to emotional relationship. In food specifically, this shift is being driven by three converging forces — the decline of True Loyalty (down 5% YoY for the first time in five years), the rise of global flavor as a frequency and engagement driver, and the growing role of food as a wellbeing and community ritual.

The brands building durable loyalty in food service are those that understand flavor rotation, cultural authenticity, and store experience not as marketing tactics but as the operating system of the customer relationship. Food occasions are inherently emotional and habitual, which makes food uniquely powerful as a loyalty infrastructure and uniquely vulnerable when the emotional contract is broken.

Blank Street Coffee (New York): Blank Street Coffee built a \$500 million business by selling matcha to teenagers — leaning into sugary, colorful, TikTok-friendly drinks that teens buy multiple times a week because the influencers are drinking it and it feels like a part of life — and in doing so, created the defining loyalty template for Gen Z food culture.

The Loyalty of the Everyday

Need to Know

Three structural principles define the new food loyalty model:

- **Ritual over reward:** Consumers are building food habits around brands that play a meaningful role in their daily routines — morning beverages, weekly meal prep, post-workout snacks. Embedding into ritual is more durable than points accumulation.
- **Flavor as loyalty currency:** Globally-inspired LTOs are no longer just traffic drivers. They create seasonal anticipation, app engagement, and social sharing — converting flavor discovery into habitual return. The consumer comes back not just for the brand, but for what the brand will release next.
- **Store as fourth space:** As the distinction between food occasion and retail occasion dissolves, stores that serve as social wellness destinations — hosting events, offering in-store food and beverage, creating community — are building the kind of emotional bond that transactional loyalty programs cannot replicate.

The Loyalty of the Everyday

Percentage decline in True Loyalty YoY – first drop in 5 years



5%

WGSN

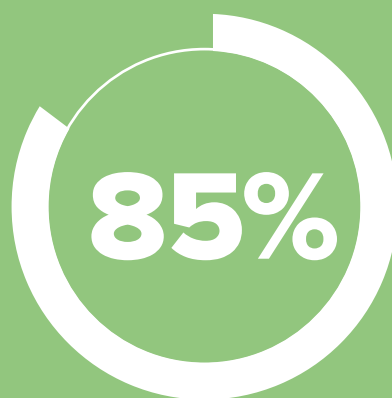
Percentage increase in lifetime spend from customers with an emotional brand relationship vs. transactional



306%

WGSN

Percentage of US Gen Z interested in receiving personalized offers from merchants



WGSN

The Loyalty of the Everyday

Percentage increase
in Gen Z membership
at Sam's Club over
two fiscal years



WGSN

Percentage of global
consumers who
indicate loyalty
programs as most
important when
shopping online



WGSN

Opportunities

QSR: Global flavor rotation as habitual engagement driver; AI-personalized recommendations; gamified loyalty via app; co-branded loyalty programs (e.g. Starbucks/BofA model)

- **In Action:** *Panera Bread Unlimited Sip Club; Shake Shack K-Shack; Starbucks/BofA co-branded rewards; McDonald's MyMcDonald's Rewards*

Grocery & Retail: Private label as trust and quality signal; deli and prepared food as experiential loyalty driver; in-store wellness services building non-transactional relationships; hyperlocal sourcing as community connection

- **In Action:** *Sainsbury's Taste the Difference (1-in-3 baskets); Tesco health zones; Pang Dong Lai in-store pharmacy (China); Target Circle frictionless loyalty program*

Brand Activations & Events: Food as the medium of belonging, not the product. Brand activations using food as a strategic engagement tool — not catering — are the most culturally significant frontier of food loyalty.

- **In Action:** *Aesop free books + beverages IWD activation; Blank Street Picnic surprise kits; Louis Vuitton invite-only culinary experiences; Zegna Casa Zegna cafe + retail Shanghai*

Opportunities

Big Box: Membership as premium freshness access; Gen Z loyalty through value and discovery; bulk + occasion bundling; co-opetition with food brands and delivery platforms

- **In Action:** *Sam's Club Gen Z membership surge; Costco food service expansion; Hyatt/Peloton co-opetition model (adaptable to food)*

Industry Lens

Why These Industries: QSR is where flavor as loyalty currency is most operationally advanced; the infrastructure of loyalty ecosystems, AI personalization, and LTO architecture is most developed here. Grocery & retail is building non-transactional loyalty through private label trust, community food programming, and store-as-destination design. Brand activations and events represent the frontier of food-as-emotional-infrastructure — where food is the medium of belonging, not the product being sold. Big box is the most interesting membership loyalty story in food, particularly with Gen Z, whose bulk membership behavior is rising faster than any other demographic.

The Loyalty of the Everyday

Industry in Focus

QSR

QSR has the most sophisticated loyalty infrastructure in food service — and is discovering that infrastructure alone is not enough. The proliferation of app-based rewards programs across the category has created a new problem: when every major chain offers points, personalized offers, and digital exclusives, the loyalty program itself stops being a differentiator. What is emerging as the new competitive variable is the emotional quality of the loyalty relationship — whether a consumer feels genuinely anticipated, surprised, and culturally understood by a brand, or simply tracked and given discounts. The QSR brands pulling ahead are those using flavor rotation, cultural specificity, and genuine culinary surprise as the content that makes their loyalty infrastructure worth engaging with. The program is the mechanism. The food is the reason.

Opportunities:

Global flavor rotation as habitual engagement driver; AI-personalized flavor recommendations; gamified loyalty via app; co-branded loyalty programs crossing food and finance

Key Strategies:

Build LTO cadence into loyalty program architecture; invest in cultural authenticity to sustain credibility; use app data to personalize flavor timing and format; design for Gen Z's anticipation behavior

Panera Bread Unlimited Sip Club (US): Panera's flat-fee beverage subscription reframes QSR loyalty entirely — moving the relationship from points accumulation and transactional reward toward daily ritual and habitual visit cadence. The Sip Club has driven measurable increases in visit frequency by embedding Panera into the consumer's morning routine rather than their rewards balance. It demonstrates that the most durable loyalty is built around rhythm, not incentive.



The Loyalty of the Everyday

Industry in Focus QSR



McDonald's MyMcDonald's Rewards

(Global): The most scaled loyalty program in QSR globally — and its recent evolution is as instructive as its reach. Having built a program large enough to become transactionally routine, McDonald's is now actively injecting surprise, personalization, and digital exclusives to prevent it from becoming emotionally inert. It is the industry's most honest navigation of the central Trend 03 tension: at sufficient scale, infrastructure stops feeling like a relationship.



Starbucks & Bank of America Co-Branded Rewards (US): Starbucks and Bank of America's joint rewards program — offering BofA cardholders 2% cash back on Starbucks purchases and bonus stars for linked account holders — is the most prominent current example of co-competition loyalty in food service. It demonstrates that the most durable loyalty ecosystems in QSR will increasingly be built across category lines, pooling consumer relationships rather than competing for them.

Shake Shack K-Shack (US): Shake Shack’s culinary team first visited South Korea in 2015, opening its first location there a year later — bringing the gochujang chicken concept that became a hit with Korean locals back to American menus in 2021, returning in 2024 bigger and spicier, and again in January 2026 with new additions. The K-Shack’s multi-year return arc is the argument: consumers don’t just come back for the sandwich, they come back for the next iteration of it — which is global flavor rotation functioning as a loyalty mechanism rather than a marketing tactic.

The Loyalty of the Everyday

Industry in Focus

Grocery & Retail

Grocery loyalty is the oldest and most structurally entrenched loyalty model in food service — and the one most in need of reinvention. Points programs and weekly circulars built the category, but the consumer relationship they created was fundamentally transactional: show up, save money, leave. What is shifting in 2026 is a recognition among the most progressive grocery operators that the visit frequency inherent to the format — weekly, sometimes more — is an extraordinary asset that transactional loyalty programs have historically underutilized. The brands converting that frequency into genuine emotional loyalty are doing so through three mechanisms: private label ranges that reward trust with quality escalation, in-store food and wellness experiences that make the store visit worth having independent of the shop, and community programming that positions the grocery store as a neighborhood institution rather than a commodity channel. The deli counter, the in-store café, the local producer partnership — these are not amenities. They are the new loyalty infrastructure.

Opportunities:

Private label tiers as loyalty reward; deli and prepared food as experiential loyalty driver; in-store wellness food services; hyperlocal sourcing as community connection and identity

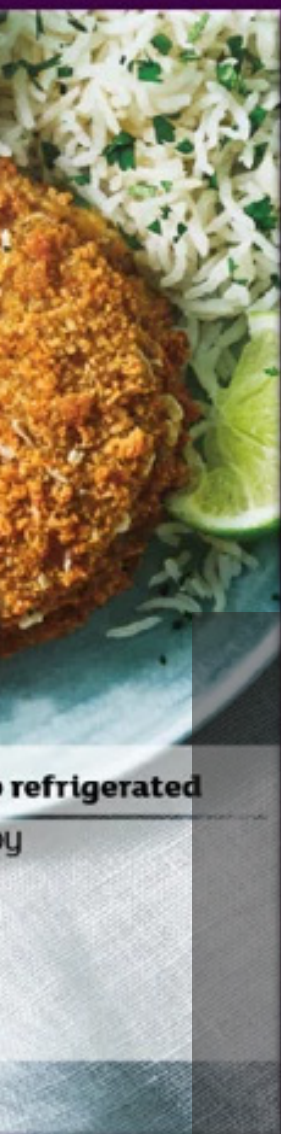
The Loyalty of the Everyday

Industry in Focus
Grocery & Retail

Key Strategies:

Develop tiered private label ranges that reward loyalty with quality escalation; position deli as brand expression; host community food events and wellness activations; use sourcing narrative as differentiator





Sainsbury Taste the Difference (UK): Sainsbury's premium own-label range now appears in one in three customer baskets — a penetration rate that reflects something more significant than price-driven private label adoption. Taste the Difference has become a trust signal: a shorthand for the store's culinary judgment that consumers return to habitually. It is one of the most commercially mature examples of private label as emotional loyalty rather than value substitution.



The Loyalty of the Everyday

Industry in Focus

Grocery & Retail



Tesco Better Baskets (UK): Tesco's in-store health zones — offering shoppers advice, treatment, and consultations for a range of health-related concerns alongside their grocery shop — extend the purpose of the store visit beyond the transactional entirely. By positioning the store as a place that actively supports consumer well-being, Tesco is building a category of loyalty that no points program can replicate: the loyalty of feeling genuinely cared for.



Wegmans (US): Wegmans has built one of the most devotional grocery loyalty relationships in American retail not through its points program, but through the store itself — 300 cheeses, prepared food bars spanning sushi to comfort food, and local farm partnerships within 100 miles of each location. The digital infrastructure tracks over 12 million weekly transactions; the store experience is what earns them.

Pang Dong Lai (China): Chinese grocery retailer Pang Dong Lai offers free blood pressure and blood sugar checks to shoppers within its in-store pharmacy — a gesture that is simultaneously a health service and a profound loyalty signal. In a market where grocery retail is intensely competitive and price-driven, Pang Dong Lai has built cult-level consumer devotion through the simple act of treating shoppers as people whose wellbeing matters beyond the basket.

The Loyalty of the Everyday

Industry in Focus

Brand Activations

Brand activations and events represent the frontier of food loyalty — and the most creative rethinking of what loyalty means in a food context. Here, food is not the product being sold or the reward being redeemed. It is the medium through which a brand communicates its values, creates a shared memory, and earns a place in a consumer's life that no points program can access. What distinguishes the most impactful food activations from catering is intentionality: the food experience is designed around the brand relationship, not the occasion. The brands doing this most effectively are not primarily food companies — they are fashion houses, beauty brands, and lifestyle concepts that have recognized food as the most immediate, sensory, and emotionally direct tool available for building genuine human connection. In a loyalty landscape crowded with digital programs and discount mechanics, a shared meal or an unexpected food gesture cuts through with a simplicity and warmth that no app notification can replicate.

The Loyalty of the Everyday

Industry in Focus

Brand Activations

Opportunities:

Food as community signal at brand events; limited food experiences as exclusivity and IYKYK driver; co-created food activations with local culinary talent; food surprise-and-delight as brand imprinting

Key Strategies:

Design food activations around brand values, not just entertainment; partner with culturally credible local food talent; create food experiences that are shareable but not performative; use food to signal brand generosity without obligation to purchase

Blank Street Coffee's Picnic (US): Blank Street Coffee's "Press for Picnic" activation surprised consumers with free picnic kits to celebrate spontaneous spring moments — an unexpected gesture designed around joy rather than conversion. The activation worked because it was genuinely surprising, genuinely generous, and genuinely on-brand: a coffee company using food to say something about how it wants its consumers to feel, not what it wants them to buy.

The Loyalty of the Everyday

Industry in Focus Brand Activations



Aesop (Global): Aesop's International Women's Day activation — free books, complimentary beverages and baked goods, no purchase required — is one of the most precise executions of food and hospitality as pure brand generosity: operationally modest, emotionally resonant, and impossible to mistake for a transaction.



Zegna's Casa Zegna (Shanghai): Zegna's Casa Zegna pop-up in Shanghai used a café not as a hospitality amenity but as social infrastructure — slowing the experience down, creating the conditions for genuine conversation, and making the brand relationship feel human rather than commercial.



Louis Vuitton Park Avenue Townhouse (New York): Louis Vuitton curated an invite-only experience across seven floors of a Park Avenue townhouse — featuring rare pieces, bespoke creations, heritage craftsmanship, interactive workshops, and culinary experiences designed to solidify client relationships and build emotional bonds. The food and hospitality programming was not incidental to the experience; it was the architecture of intimacy that made the brand encounter feel personal rather than commercial.

The Loyalty of the Everyday

Industry in Focus

Big Box

Big box loyalty has always been built on one proposition: unbeatable value at scale. The membership model created something transactional in mechanism but genuinely emotional in outcome — consumers who feel they are getting extraordinary value develop a fierce, almost irrational affection for the brands delivering it. What is shifting in 2026 is what membership is being asked to deliver. Value remains the foundation, but the consumers entering big box loyalty ecosystems in the largest numbers — Gen Z, whose membership at Sam’s Club has grown 63% over two fiscal years — are arriving with expectations shaped by QSR personalization and experiential brand programming. They expect bulk value and culinary discovery simultaneously. The operators who recognize that membership is a relationship architecture, not just an access mechanism, and invest in food programming and global flavor curation accordingly, are building loyalty that will compound as this cohort reaches peak spending.

Opportunities:

Membership tiers with food-forward perks; Gen Z loyalty through globally inspired SKUs and discovery; bulk occasion bundling as habitual engagement; co-opetition with food brands and delivery platforms

The Loyalty of the Everyday

Industry in Focus

Big Box

Key Strategies:

Design membership with food-specific perks and freshness access; use bulk occasion bundles to build habitual visit cadence; partner with food brands for co-branded loyalty; leverage Gen Z membership data for globally inspired SKU development





Sam's Club (US): Gen Z membership at Sam's Club has grown 63% over two fiscal years — the single most significant demographic loyalty signal in big box retail. The growth reflects a generational reframing of bulk buying: where previous generations joined for family necessity, Gen Z is joining for value-forward access to quality. The food offer is central to that calculus, and Sam's Club's investment in fresh, prepared, and globally inspired SKUs is directly responsive to the cohort driving its growth.

The Loyalty of the Everyday

Industry in Focus

Big Box



Costco Food Court (US):

Costco's \$1.50 hot dog and soda — unchanged in price since 1985 — is not a profit center. It is a brand promise made tangible and edible on every visit: in an era of shrinkflation and quiet price increases, the food court is one of Costco's strongest acts of institutional loyalty to its members.



Walmart Bettergoods

(US): Walmart's largest private label food launch in 20 years, bettergoods positions quality, trend-forward, chef-inspired products at accessible price points — not as a value substitution play, but as a culinary credibility claim. It signals that big box understands the new loyalty equation: value is the baseline, but culinary interest is what converts a habitual shopper into an invested one.

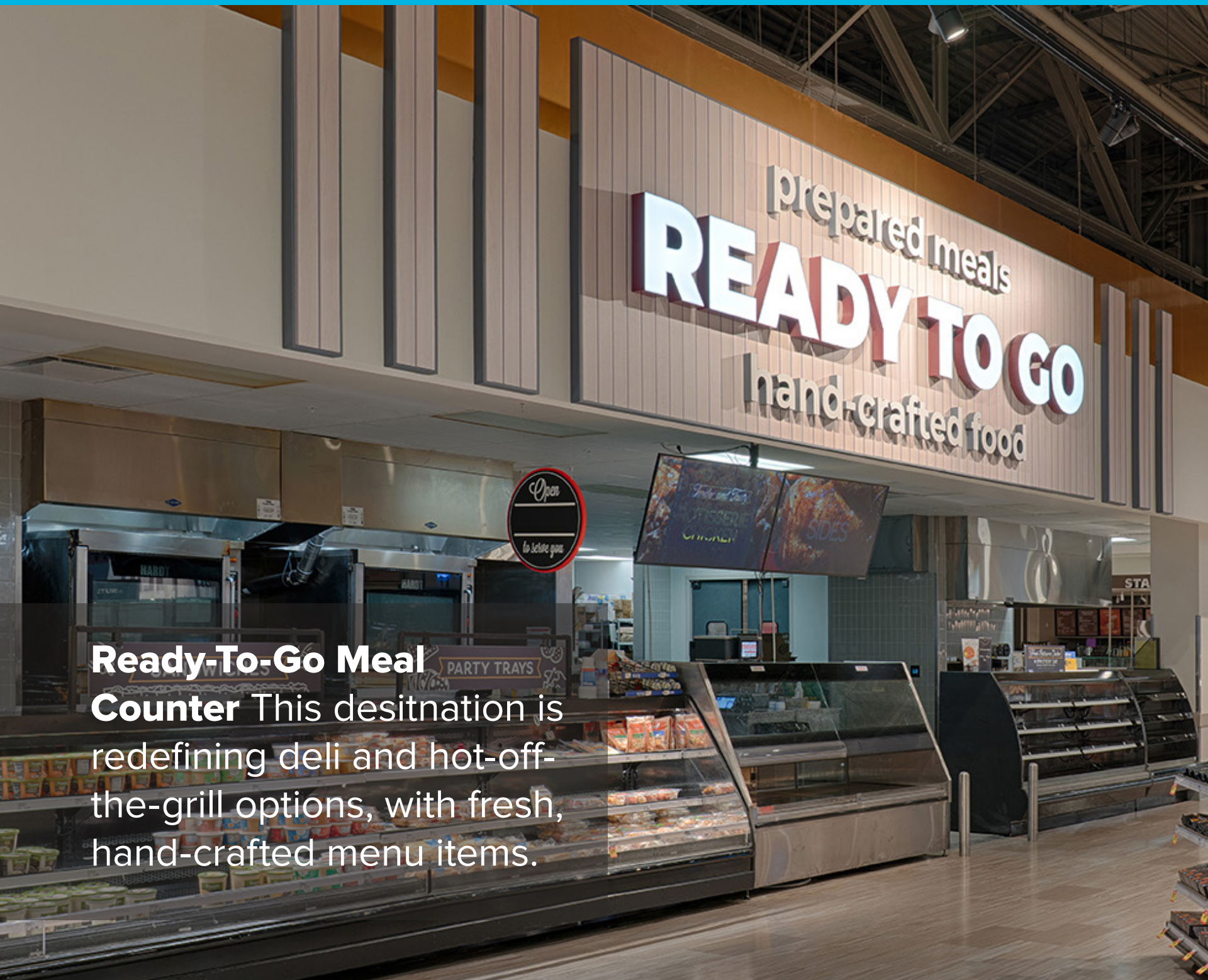


Costco Kirkland Signature (US): Costco’s private label —spanning food, beverage, and household — has achieved something almost unprecedented in retail: a private label brand with genuine consumer advocacy. Members actively seek out Kirkland products, recommend them, and measure Costco’s quality commitment through them. In food specifically, Kirkland functions as a loyalty signal in both directions: the member trusts Costco’s culinary judgment, and Costco responds by consistently delivering products that justify that trust.

The Loyalty of the Everyday

From the Field:

Imagine continues to partner with Meijer on their store of the future



Ready-To-Go Meal Counter This destination is redefining deli and hot-off-the-grill options, with fresh, hand-crafted menu items.

As Meijer's premier print, decor and signage production and installation partner, Imagine continues to raise the bar of excellence in crafting the environments and experience for the food service destinations within the produce, deli and specialty foods sections of the grocery store.

The Loyalty of the Everyday

A look at the food loyalty structural principles within Meijer's offerings:

- **Ritual over reward:** Meijer's food destinations allow for strategic dayparting, aligning with hungry customers' food habits and offering enticing meal and snacking options that suit their daily routines.
- **Flavor as loyalty currency:** Globally-inspired LTOs are no longer just traffic drivers. They create seasonal anticipation, app engagement, and social sharing — converting flavor discovery into habitual return. Loyal Meijer consumers are coming back not just for the brand, but for what the brand will release next.
- **Store as fourth space:** As the distinction between food occasion and retail occasion dissolves, Meijer stores are also serving as social wellness destinations — hosting events, offering in-store food and beverage, creating community — and building the kind of emotional bond that transactional loyalty programs cannot replicate.



The Loyalty of the Everyday



Hissho Sushi: A modern outpost for premium sushi selections, thoughtfully mixed with complimentary grocery store items.



Delightful Bites Snacking Station: Features tasty goods of the best hyper-local makers within a highly visible island.



@Arisandrinks

imagine.® Confidential ©2026

The information in these materials, including related supplemental information, is the confidential, proprietary property of The Imagine Group and its affiliates. Any unauthorized use, reproduction, or disclosure to any third party is strictly prohibited.