imagine**studio**™

Redefining Retail Therapy

Community, Discovery, Flexibility & Curation in the Physical Store

Trends & Inspiration Q3 2026

Image @Filmasia (Chongking Express)

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
Vice President
Imagine Studio

Suling Hsu
Director, Creative Design
Imagine Studio

Contents

The Local Chain

Cultural Connection Over Corporate Sameness

Scale used to mean sameness — the same layout, the same signage, the same assortment from Boise to Bangkok. In 2026, the chains pulling ahead are the ones that have learned to disappear into their neighborhoods, tailoring assortment, tone of voice, and physical space until a shopper could almost forget they're standing in store #4,412. This theme examines localization as operational infrastructure — not a mural bolted onto an otherwise generic box.

Target (US): American studio Something Special Studios overhauled US retail giant Target's store in SoHo, New York, for a reimagined shopping experience where design and style lead the way.

Local Chain

Need to Know

Consumers, especially younger generations, are increasingly prioritizing locally-connected, authentic, and community-driven retail experiences over standardized or purely transactional formats. This shift is driving new strategies in store design, merchandising, and brand positioning.

- Invest in hyperlocal and community-centric retail formats to capture loyalty and drive footfall.
- Leverage authenticity and local storytelling to differentiate from "corporate" competitors.
- Use community spaces and experiential activations to increase dwell time and conversion.

Proof Points:

Percentage of global consumers who say a locally owned company is important to their purchase decision

47%

McKinsey

Percentage of young US consumers (Gen Z/Millennial) that discovered a small business by wandering their own neighborhood

90%

American Express

Percentage of sales increase for every 1% increase in time spent in-store

▲ 1.3%

Path Intelligence

Percentage of Ulta's total sales volume that is generated from physical stores

80%

Glossy/Ulta

Opportunities

Big Box: Community-space design as brand trust-building; hyperlocal art commissioning at small-format stores

- ***In Action:*** *Target Bullseye Builds; Target small-format store art program*

Specialty & Big Box: Deep architectural localization as a differentiator at scale; "three-layer translation" as a repeatable design methodology

- ***In Action:*** *Starbucks regional flagships (Chengdu, Shanghai, Istanbul, Mexico City); 2026 U.S. redesign rollout (1,000 coffeehouses)*

Value & Discount: Localization as a format and assortment decision — hyperlocal curation and occasion-based nomadic retail

- ***In Action:*** *Decathlon Beijing central-city relocation; Decathlon nomadic ski-resort retail*

Luxury: Seasonal, place-bound activations as a lower-commitment alternative to permanent flagship investment

- ***In Action:*** *Lacoste x Tigu Beach (Sestri Levante, Italy); Longchamp beach clubs*

Industry Lens

Why these Industries: Big Box and the Starbucks-style specialty/big-box hybrid are the primary battlegrounds for localization at scale — the operational discipline of researching a neighborhood before breaking ground is where the real story lives. Decathlon shows localization as a format/assortment decision (small-format, sport-specific curation) rather than a decor decision. Lacoste is the report's single Luxury inclusion, chosen deliberately to show localization operating as a seasonal, place-bound activation rather than a permanent flagship investment.

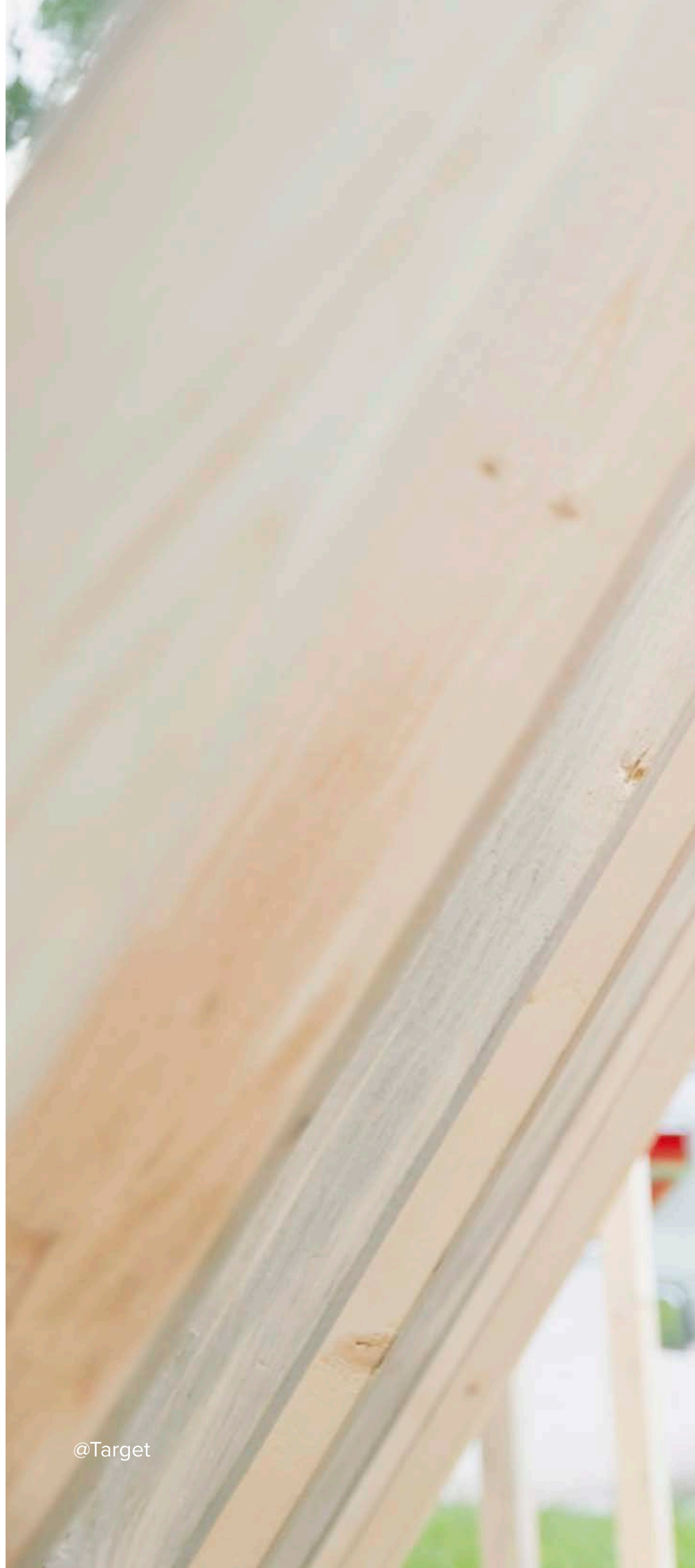
Local Chain

Industry in Focus

Big Box

Target's 2026 "Bullseye Builds" program ($1M investment, 13 cities) pairs Target's in-house design expertise with community-identified needs — murals, furniture, wellness-room upgrades — extending the brand's design language into public space rather than confining it to the store box.

- **Opportunities:** Community co-design as loyalty infrastructure; small-format stores as a canvas for hyperlocal artist commissions.
- **Key Strategies:** Research neighborhood identity before design begins; partner with local artists/nonprofits; treat community investment as brand infrastructure, not CSR line item.



Local Chain

Industry in Focus
Big Box

Target (Bullseye Builds, US): Launched 13 city-based community design projects in 2026 ($1M investment), applying Target's design team and volunteer hours to schools, food pantries, and public spaces — creating murals and furniture as the visible layer of a deeper community-research process.

Target (Small-format Store Art Program, US): Nearly 30 local artists were commissioned across 60 small-format stores nationwide, each piece — wood-etched murals, hand-painted landscapes, ocean-inspired wallpaper — developed only after Target's properties team researches the specific neighborhood's culture and history.

@Target

Local Chain

Industry in Focus

Specialty & Big Box

Starbucks treats locality as an important design metric, not a decorative afterthought—incorporating regional architectural symbols and local lifestyle elements into the spatial grammar of each individual store.

- **Opportunities:** A repeatable “three-layer translation” methodology (symbol ➔ lifestyle ➔ spatial grammar) other multi-unit brands could adapt at smaller budget scale.

- **Key Strategies:** Site-specific research before design; empower regional design teams with real decision authority; balance heritage restoration with brand consistency.

Starbucks (Kyoto Flagship, Japan): Housed inside a century-old traditional machiya townhouse, it is the world's first Starbucks to feature traditional tatami-mat seating. It blends seamlessly with the historic, cobblestone-paved Ninenzaka slope leading to the UNESCO World Heritage-listed Kiyomizu-dera Temple.

Local Chain

Industry in Focus
Specialty & Big Box

Starbucks (Reigonal Flagships, Global): Chengdu's Kuanzhai Alley store deconstructs Sichuan opera facial-makeup patterns into colored glass partitions. The Shanghai Roastery combines 1,000+ traditional Chinese seals with 10,000 hexagonal wooden ceiling panels. Istanbul draws on Ottoman architecture while Mexico City uses traditional tilework.

Starbucks (2026 Store Redesign, US): A 1,000-coffeehouse rollout piloted in NYC and Southern California was built from asking "what's the history of this place, what is this community like" store by store — resulting in a hand-painted outdoor-themed mural at the NYC Union Square East location, unique to that block.

Starbucks (Prado Norte Flagship, Mexico): The CDMX flagship is an ode to Spanish-Colonial architecture and Talavera tilework. It is widely celebrated as one of the most romantic and beautifully designed branches in the world, featuring a central fountain, a grand double staircase, intricate tiling, and vibrant stained-glass windows.

Local Chain

Industry in Focus
Value & Discount

Decathlon (China) moved from suburban big-box locations into smaller, better-curated central Beijing stores, while experimenting with nomadic pop-up retail at ski resorts to meet demand exactly where and when it exists — proof that localization doesn't require a design department, just a willingness to rethink format.

- **Opportunities:** Occasion- and location-specific micro-formats; expanding beyond entry-level value into niche mid/high-end gear locally relevant to a market (e.g., snow sport gear where snow sport culture is growing).

- **Key Strategies:** Right-size format to neighborhood density; let local demand signal category mix rather than importing a global planogram.

Quechua (Global Design HQ, France): The Quechua global design headquarters is called the Mountain Store: it is a physical, integrated "basecamp" located at the foot of Mont Blanc in Passy, France. Established by parent company Decathlon in 2014, the building acts as both an active showroom and an all-in-one product innovation hub.

Local Chain

Industry in Focus

Value & Discount

Decathlon (Central Bejing, China): Shifted from suburban, large-format stores to smaller, more curated central-city locations — a direct response to how and where Chinese urban shoppers actually move through a day.

Decathlon (Nomadic Ski-Resort Retail): Created temporary retail placed directly at ski resorts, tied to seasonal demand. The brand layered continued expansion into mid- and high-end niche sport categories on top of its traditional value positioning.

Decathlon (Rentals for Rubbish, UK): Rentals for Rubbish is a circular economy initiative that lets customers pay for or discount sports gear rentals—such as bikes, camping equipment, and paddleboards—by collecting local litter. The program was launched in the UK in partnership with the non-profit Planet Patrol.

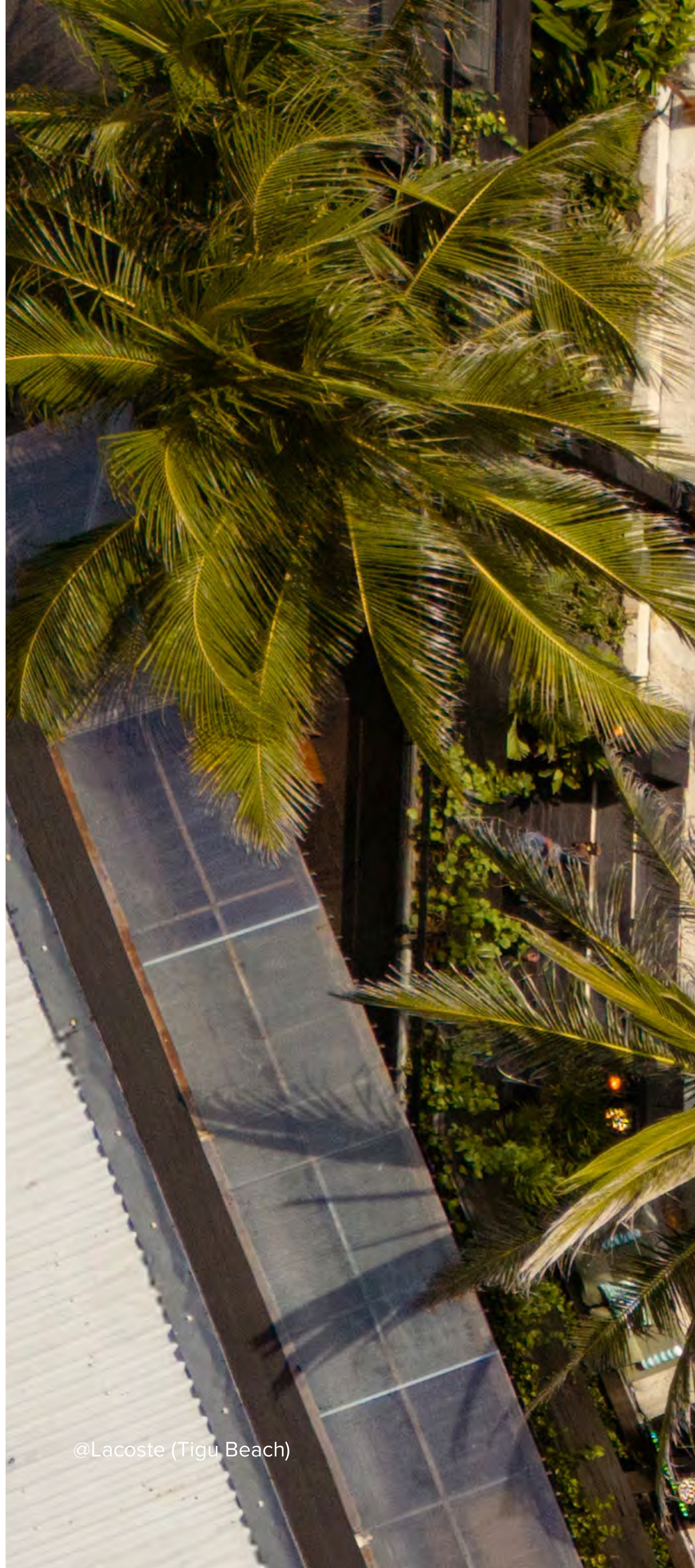
Local Chain

Industry in Focus
Luxury

European luxury and heritage-fashion brands are localizing through tourist-flow-timed pop-ups rather than architecture — taking over a specific coastal destination for a season, branding it fully, and folding a curated product selection into a place people already choose to be.

- **Opportunities:** Tourism-calendar-timed activations; product curation scaled to the specific destination rather than the full brand catalog.

- **Key Strategies:** Choose destinations with existing brand-relevant traffic; treat the activation as a full environment (branded sunbeds, towels, signage), not a product table.

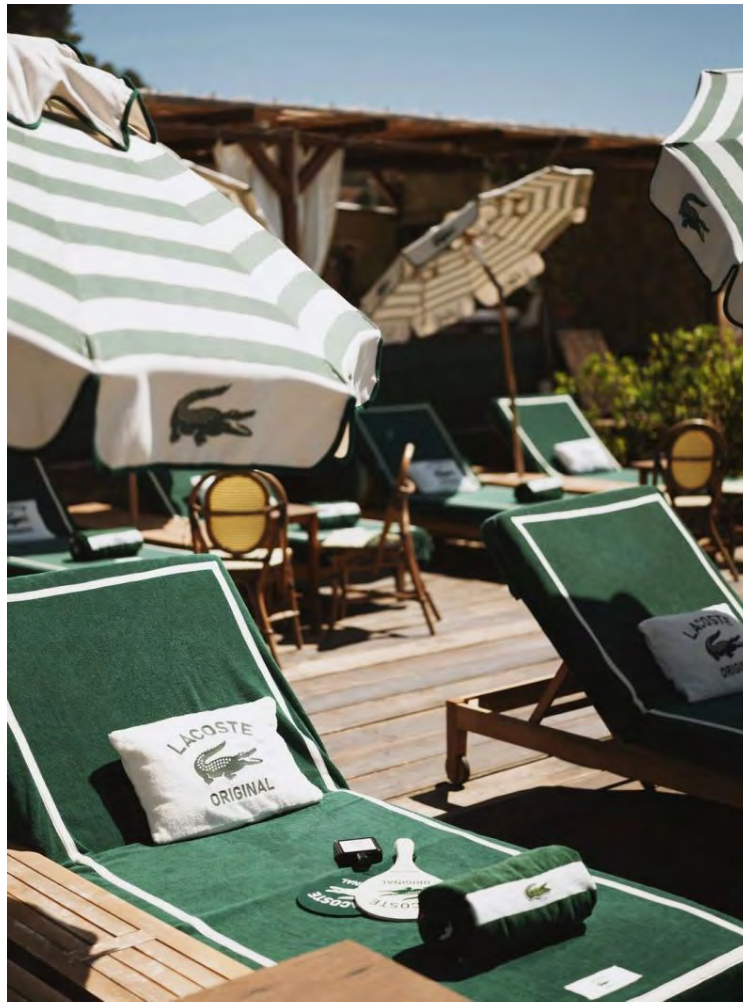


@Lacoste (Tigu Beach)

Local Chain

Industry in Focus

Luxury



Lacoste (Tigu Beach, Italy): A full seasonal takeover of Tigu Beach in Sestri Levante, an up-and-coming Ligurian coastal destination, included Lacoste-branded sunbeds, towels, and cushions featuring the signature crocodile, plus a curated Reina Olga swimwear selection available for sale.

@Lacoste (Tigu Beach)

Retail as Play

Gamification & Discovery as Designed Delight

The most commercially aggressive retail story of the last two years didn't come from a discount play or a loyalty overhaul — it came from a box you can't see into until you've already paid for it. This theme examines gamification and embedded discovery as decor strategy: environments engineered to reward attention, create shareable moments, and convert a transaction into a small, repeatable thrill.

Louis Vuitton (Murakami Café, Global): The Louis Vuitton x Murakami Café is a limited-time, immersive pop-up experience celebrating the iconic collaboration between the French fashion house and Japanese artist Takashi Murakami. Featuring vibrant decor, Superflat flower motifs, and LV-branded pastries, these cafes are strictly temporary installations tied to global collection launches and typically operate for a few weeks in major cities.

Retail as Play

Need to Know

The collectibles and designer-toy retail sector is experiencing rapid growth, driven by the rise of “kidult” consumers, fandom culture, and immersive retail strategies. In turn, discovery-driven, gamified retail is outperforming category norms by a wide margin — and physical stores remain the primary stage for it, not e-commerce.

- The global collectibles and designer-toy market is expanding rapidly, especially in Asia-Pacific, with strong growth in blind-box and IP-driven products.
- Experiential retail, gamified engagement, and fandom activations are proven to drive footfall, dwell time, and repeat visits, particularly among Gen Z, Millennials, and Gen Alpha.

Percentage of year-over-year revenue growth, Pop Mart, 2024

▲ **106.9%**

PopMart

Percentage of sales increase for Labubu in 2024, driven by social virality and gamified exclusive drops

▲ **725%**

WGSN

Percentage of US Gen Z who consumers prefer discovering new products in-store

61%

PwC

Percentage of single-day footfall increase at Hong Kong’s K11 Musea during its Doraemon exhibition

40%

Retail Asia

Opportunities

Specialty/Boutique: Blind-box/mystery mechanics as retail architecture; scent- and sensory-led visual merchandising as engagement driver

- ***In Action:*** *Pop Mart Robo Shops; Bath & Body Works Gingham+ concept*

Value & Discount: "Treasure hunt" layout as a category-wide format shift for discount retail

- ***In Action:*** *Dollar General 2026 store redesign; TJX/Costco discovery-format lineage*

Big Box: App-based gamified loyalty at grocery/variety scale; festival-scale live events as retail extension

- ***In Action:*** *Don Don Donki x dMiles; Fanatics Fest*

QSR: Theatrical production display as engagement; timed brand takeovers as a low-risk, high-visibility test of "loosening the reins"

- ***In Action:*** *Bojangles Biscuit Theater; Bojangles x F1 (Las Vegas)*

Industry Lens

Why These Industries: Specialty retail is where the physical environment itself does the most work — Pop Mart and Bath & Body Works both reject an app-only or product-only engagement strategy, but land on opposite ends of the spectrum: one stimulates through surprise and scale, the other soothes through restraint and sensory testing. Value/Discount shows the same instinct adapted to a completely different price point and customer. Big Box demonstrates two very different flavors of "play" — app-based gamified loyalty (Don Don Donki) versus festival-scale live events (Fanatics). QSR is included as a bonus category, carried over from the food-service report cycle, to show the tactic isn't confined to lifestyle retail.

Retail as Play

Industry in Focus
Specialty & Boutique

Pop Mart has built physical stores explicitly for discovery — oversized character installations, immersive visual storytelling, and a blind-box mechanic its own North America head, Larry Lu, describes as making "every visit feel like a game." Bath & Body Works' Gingham+ concept bets on the opposite instinct: rather than amplifying stimulation, it calms the environment down — a softer, neutral palette and scent bars built for Gen Z's stated preference for hands-on testing over visual noise. Together, the two show gamification and restraint as equally valid strategies for making a physical store feel worth the visit.

- **Opportunities:** Store-as-discovery-engine design; scent bars and augmented layouts as a non-collectible version of the same engagement principle.

- **Key Strategies:** Design for the unboxing/discovery moment physically, not just digitally; layer app-based collection/loyalty mechanics on top of an already-engaging store; use vending-format (Robo Shop) placements to extend reach beyond flagship locations.

Pop Mart Flagship (Bangkok, Thailand): At 760 sqm across two floors, this is Pop Mart's largest store in the world — a two-story, Thai-inspired dreamscape drawing on water culture, traditional architecture, and the Chao Phraya River, complete with a retro-futuristic wind-up-toy façade and the brand's first café outside China. It's proof that Pop Mart's "retail as play" mechanic scales up to flagship-level immersive architecture, not just the blind-box counter.

The New Calculus of Convenience

Industry in Focus

Specialty & Boutique

Pop Mart (Retail Lottery, Global): Its blind-box format functions as a "retail lottery" — stores built around discovery, oversized character installations, and Robo Shop vending machines; the companion app adds daily check-in loyalty, collection grids, and tiered membership on top.

Bath & Body Works (Global): This concept store is built around highly visual scent bars, augmented layouts, and tech-integrated features aimed squarely at Gen Z shopping behavior — sensory discovery as the engagement mechanic in place of chance-based collectibility.

Bath & Body Works (Gingham+, Global): Rolled out to 15+ stores since March 2025 (including South Korea, Los Angeles, and Texas), Gingham+ replaces the brand's typically saturated look with a softer, neutral palette and wider aisles, anchored by in-store scent bars where shoppers can test candles, Wallflowers, and fragrance mists before buying. Led by Group VP of Store Design Eduardo Tonietto, the redesign was built specifically around Gen Z's stated preference for hands-on product testing and a calmer, "toned down" shopping environment — sensory discovery replacing visual noise as the engagement mechanic.

Retail as Play

Industry in Focus
Value & Discount

Dollar General's 2026 redesign explicitly borrows the open, browsable "treasure hunt" layout long associated with off-price and warehouse formats — a direct bet that discovery-driven browsing outperforms the dense, mission-shopping layout that has defined dollar stores for decades. Notably, this isn't a first-time experiment: it's a scaled-up version of a mechanic Dollar General already proved out in its own pOpshelf banner.

- **Opportunities:** Open floor plans that expose more categories per visit; non-consumable brand rotation to keep the "hunt" fresh; using a smaller-format spinoff banner to pilot a discovery mechanic before retrofitting it into the core chain.

- **Key Strategies:** Replace dense high-shelf configurations with open sightlines; launch new non-consumable brands on a rolling basis to sustain discovery; pilot before system-wide rollout — ideally in a lower-risk spinoff format first.


OLLAR GENERAL®
OLLAR GENERAL
1370
PARKING
ONLY

Retail as Play

Industry in Focus

Value & Discount

Dollar General (2026 Core Format Redesign, US): This 2026 format redesign pivoted from dense, high-shelf, in-and-out layouts to an open, browsable "treasure hunt" floor plan, paired with 15+ new non-consumable brand launches through the year to keep the discovery mechanic continuously refreshed. The format was piloted in a portion of 2025 remodels and delivered an incremental sales lift plus lower store-manager turnover versus the chain average.

Dollar General (pOpshelf, US): Launched in 2020 as a standalone banner (targeting 1,000+ locations), pOpshelf is bright, colorful, and explicitly built for "fun, affordable, and stress-free" browsing. Nearly all items are priced at $5 or less, with home décor, beauty, and party goods refreshed frequently to sustain a treasure-hunt ambience. On its March 2026 earnings call, CEO Todd Vasos credited pOpshelf's outperformance as the direct inspiration for the core-chain redesign — the smaller, lower-risk banner proved the mechanic before it got retrofitted into thousands of mainline stores.


checkout
beauty
cleaning
household
popshelf
popshelf
popshelf
sign up for popshelf rewards
all the treasure without the hunt

@pOpshelf

Retail as Play

Industry in Focus

Big Box

Big Box shows two distinct expressions of "play": Don Don Donki's dMiles integration turns everyday loyalty into a continuous digital treasure hunt (points, spin wheels, surprise bonuses), while Fanatics extends its retail brand into full-scale, in-person fan festivals — gamification as a live event rather than an app mechanic.

- **Opportunities:** App-native gamified loyalty layered onto routine grocery/ variety purchasing; branded live events as a retail-adjacent revenue and engagement channel.
- **Key Strategies:** Make gamified loyalty low-friction and habitual (daily spins, surprise bonuses); treat large-scale events as retail infrastructure, not just marketing spend.


DON DON DONKI KAPOLEI
STORE MAP
imaginestudio™
BUTCHER BLOCK
MEAT
DAIRY
COLD DRINKS
ABURI
OKAZUYA
DELICA
PRODUCE
JAPANESE CHILLED FOODS
FROZEN DELIGHTS
CHILLED FOODS
JAPANESE CHILLED DRINKS
SEAFOOD
POKE
OKAKEN SUSHI
WAKA SAKURA
SUSHI RESTAURANT
OUTDOOR
KITCHEN ESSENTIALS
DAILY ESSENTIALS
JAPAN GROCERY
JAPAN CONFECTIONERY
CHECKOUT
JAPANESE SWEET POTATO
YASUDA'S FRESH RICE
AUTOMOTIVE
HOME
SSENTIALS
CAFÉ KYRA
ISLAND STYLE
FLORAL
GROCERY
CONFECTIONERY
SELF CHECKOUT
DINING AREA
COMING SOON
WAGYU KUSHI
OPEN TERRACE DINING AREA
OYS
SEASONAL PROMO
CUSTOMER SERVICE
KARAAGE
JAPANESE FRIED CHICKEN
COMING SOON
KATSUMITEI
KATSUDON
COMING SOON
BEAUTY
LIQUOR
COMING SOON
KRIS' BAKE FACTORY
TROOMS
RESTROOMS
ENTRANCE EXIT
OPEN 24 HOURS

Retail as Play

Industry in Focus

Big Box

Don Don Donki (dMiles, China): App-based gamification drives loyalty — customers earn points for purchases, spin virtual prize wheels for daily rewards, and receive surprise bonuses, turning the shopping journey into a continuous treasure hunt.

Fanatics (FanFest, US): Blends sports apparel retail with large-scale, live entertainment fan festivals — an event-driven, experiential model distinct from in-app or in-store mechanics, extending the brand into a full weekend occasion.

@Fanatics (FanFest NYC)

Retail as Play

From the Field:

Imagine continues to partner with Bojangles on their next chapter of brand experience

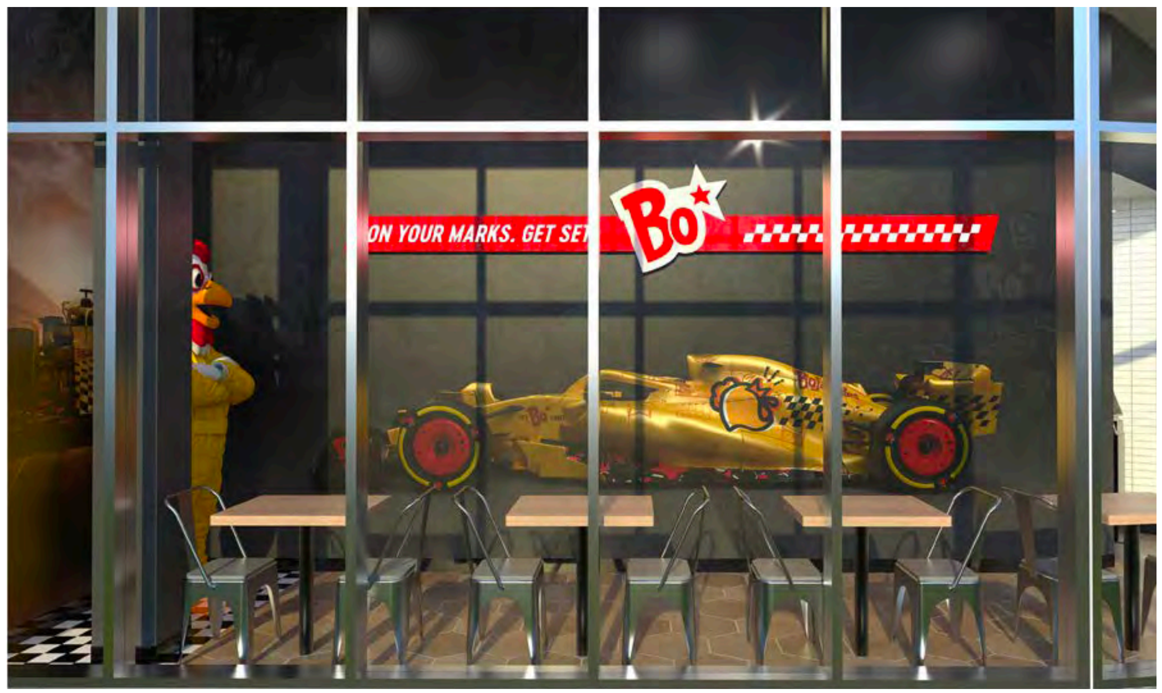
As Bojangles' brand experience partner, Imagine led a nationwide in-restaurant transformation — refining and value-engineering décor, signage, and supporting environmental elements to ensure feasibility without compromising the integrity of the creative vision. Imagine managed creative development, production, and rollout simultaneously across a rapid, multi-location execution, taking the program from initial conversations to transformed restaurants in roughly six months.

A look at the retail-as-play structural principles within Bojangles' offerings:

- **Theater as engagement infrastructure:** Live-production display, embedded permanently into the store rather than treated as a one-off activation, turns routine food prep into an ongoing source of in-store discovery.
- **Cultural takeover as controlled risk:** A limited-run, high-visibility partnership tests brand flexibility in a single market before any system-wide commitment — play without redesigning the whole brand system.
- **Scalable warmth:** Per Andy House, VP of Imagine Studio: "By connecting strategy, creativity, and execution, we were able to bring Bojangles' brand to life in a way that feels warm, authentic, and unmistakably them — while still being scalable."

@Bojangles (McKinney, Texas)

Biscuit Theater: A glass-enclosed live-production display where Master Biscuit Makers work every 20 minutes, turning operations into a permanent engagement fixture rather than a temporary attraction.



Rolling out this fall — Bojangles x F1 (Las Vegas): A store takeover tied to Formula 1's Las Vegas presence, testing a culturally unexpected partnership in a single high-visibility market.

Built to Flex, Built to Last

The Economics of Adaptable Decor

Every retailer now runs the same math: rebuild everything every seven-to-ten years at multimillion-dollar cost, or build once and refresh constantly at a fraction of the price. The operators pulling ahead have stopped treating that as a binary choice — building permanent architectural “bones” once, then layering modular fixtures, surface refreshes, and temporary takeovers on top, on a cycle measured in weeks, not years. Of any in the report, this theme is the most direct match to Imagine’s own service model.

J.Crew (190 Bowery Takeover, NYC): For two days during NYFW (September 12–13, 2025), J.Crew took over the landmark 190 Bowery building and transformed it into a multiroom “catalog come to life” — each room built around one of the brand’s core style pillars (a cozy bedroom for cashmere, a “city worker” study for stripes), with on-site embroidery customization, live music, and a limited-edition capsule and vintage archive pieces sold nowhere else. It’s a compact case study in “classic bones, refreshed surface”: the product and brand codes stay period-accurate, while the format (a temporary, emotionally-staged, single-address takeover) is entirely of-the-moment.

Built to Flex, Built to Last

Need to Know

As physical retail regains strategic importance, brands are rethinking store investments to balance capital efficiency, agility, and consumer engagement. The shift from traditional, high-cost remodels to modular and semi-permanent refresh strategies is accelerating, driven by the need for faster ROI, more frequent updates, and the ability to respond to evolving shopper expectations.

Percentage of global consumers who say a pleasant store atmosphere drives repeat visits

WGSN

Percentage of beauty shoppers that want clear, intuitive store layouts

WGSN

Percentage of global consumers who say shopping should be a multisensory experience

WGSN

Percentage of increase in new-customer sales in the year following a store remodel, typically recouped in 2–3 years vs. a 7–10 year remodel cycle

▲ **43-44%**

Journal of Marketing

Opportunities

Value & Discount: Globally unified, modularly adaptable formats; fixturing-level technology as a customer-facing flex signal

- ***In Action:*** *ALDI x Landini Associates (5 territories); ALDI Sydney Corner Store concept*

Big Box: Business-model flexibility (resale, cross-retailer pickup) as a form of store flex; real-time, data-driven merchandising as rapid-refresh infrastructure

- ***In Action:*** *REWE Berlin (demountable timber frame); Migros Zurich (movable furnishings); ICA Stop Sweden (modular, design-led format); Best Buy Store Takeover Packages*

Specialty & Boutique: Curatorial rotation as flexible decor; heritage silhouette preserved while surface/marketing layer modernizes

- ***In Action:*** *Merci No. 2 rotating thematic rooms; J.Crew heritage revival*

Industry Lens

Why These Industries: Value/Discount carries the clearest global infrastructure story (ALDI) alongside a literal fixturing-technology example (Lefties). Big Box pairs a business-model flexibility story (IKEA) with an infrastructure-as-media-platform story (Best Buy's Store Takeover Packages) — two different definitions of "flex" under one roof, with IKEA notably appearing as one of Best Buy's own early takeover partners. Specialty shows flexibility operating at the curatorial level (Merci No. 2's rotating rooms) alongside a heritage-brand's "classic bones, refreshed surface" argument (J.Crew). Luxury is deliberately omitted from this theme's case studies — its "architectural permanence" point is folded into this page's framing language rather than given a dedicated spread, since the strongest luxury examples we sourced were generic rather than brand-specific.

Built to Flex, Built to Last

Industry in Focus

Value & Discount

ALDI's new global format, developed with Landini Associates over a 14-year collaboration, is explicitly built as one modularly adaptable system across five territories and multiple store types — from full-size suburban stores to a Sydney "Corner Store" concept for dense urban infill — without compromising ALDI's low-cost operational core.

- **Opportunities:** One flexible system (architecture, signage, packaging, tone of voice) deployable across radically different formats and real estate constraints; RFID and automated fixturing as a literal expression of "flexible fixturing."

- **Key Strategies:** Design one adaptable system rather than format-specific one-offs; pilot in a single market (Aventura, FL) before global rollout; pair fixturing technology with the customer-facing brand story, not just back-of-house efficiency.

ALDI (Shanghai, China): Ahead of ALDI's first entry into China, Landini Associates evolved its Australian ALDI format into a smaller-footprint store tailored to local shopping habits — Chinese consumers tend to visit multiple small shops weekly rather than one large one. The team developed over 40 custom messaging boards conveying freshness, value, and quality, replaced hanging signage with perimeter-based category cues to encourage cross-store browsing, and studied local retail conventions (like the regional use of mascots) to shape the visual system.

Built to Flex, Built to Last

Industry in Focus

Value & Discount

Aldi (w/ Landini Assosciates, Global): Created a singular, globally unified trading format — architecture, interior design, signage, packaging, and tone of voice — modularly adaptable across five territories and building types, including a Sydney “Corner Store” concept for dense urban markets that refurbishes existing buildings rather than building new.

Lefties (Inditex, Global): Merges Inditex value pricing with premium fixturing technology — RFID-enabled smart fitting rooms and automated hanger replacement systems — making “flexibility in fixturing” a literal, physical, customer-visible feature rather than a back-of-house efficiency play.

Lefties (In-Store Checkout, Global): Lefties' digital store format (launched in Barcelona, 2022, and now rolling into "EasyGo" quick-checkout counters across newer European locations) eliminates manned checkout lines entirely — RFID tags let shoppers self-pay directly, with no scanning required. It's paired with a drop box for unwanted fitting-room garments and robotized online order pickup, meaning the entire path from fitting room to exit is designed to run with minimal staff friction.

Built to Flex, Built to Last

Industry in Focus

Big Box

IKEA and Best Buy represent two different definitions of "flex" inside Big Box — and the two are now directly connected. IKEA's flexibility shows up as business-model innovation (IKEA Preowned, pickup partnerships with Best Buy) that changes what a store needs to physically support. Best Buy's flexibility is infrastructural: turning its existing fixtures and screens into a fully rentable, brand-ownable environment for a 30-day stretch, without building or bolting on anything new. IKEA is, notably, among the first brands to buy into that exact infrastructure.

- **Opportunities:** Secondhand/resale infrastructure and cross-retailer pickup partnerships as new physical requirements for store design; real-time shopper-behavior data feeding merchandising decisions in hours, not weeks.

- **Key Strategies:** Design flexible zones anticipating new business models (resale counters, third-party pickup); invest in the data infrastructure that makes hours-not-weeks merchandising possible; treat existing fixtures as a monetizable media platform where relevant (Best Buy model).

@IKEA (Preowned)

Built to Flex, Built to Last

Industry in Focus

Big Box

IKEA (IKEA Preowned / IKEA x Best Buy): Recognized among the most innovative companies for expanding into secondhand peer-to-peer marketplaces (IKEA Preowned) and forging pickup partnerships with stores like Best Buy, Ikea demonstrates how flexibility expressed as business-model innovation can reshape what physical space needs to do.

Best Buy (Store Takeover Packages, US): Launched in 2026 after Best Buy's inaugural "We Got Next" Ads Showcase, Store Takeover Packages let one brand own a store's entire footprint for 30 days — windows, entrances, checkout, TV walls, PC displays, and interactive screens — using existing fixtures rather than building anything new. By early 2026 the packages were nearly booked solid and called the single biggest driver of Best Buy's ad business. IKEA is among the first partners, turning its existing pickup relationship into a media one too.

IKEA (IKEA Preowned, Global): A commission-free, peer-to-peer resale marketplace where AI auto-populates listings with a piece's original dimensions, photos, and assembly manual straight from IKEA's own database — turning secondhand IKEA furniture into a searchable, professionally-presented category rather than a Craigslist scramble. Now live in five countries and targeting 170,000 listings in 2026, it reframes "flexibility" as a business-model shift: IKEA profiting from its products' second life, not just their first sale.

Built to Flex, Built to Last

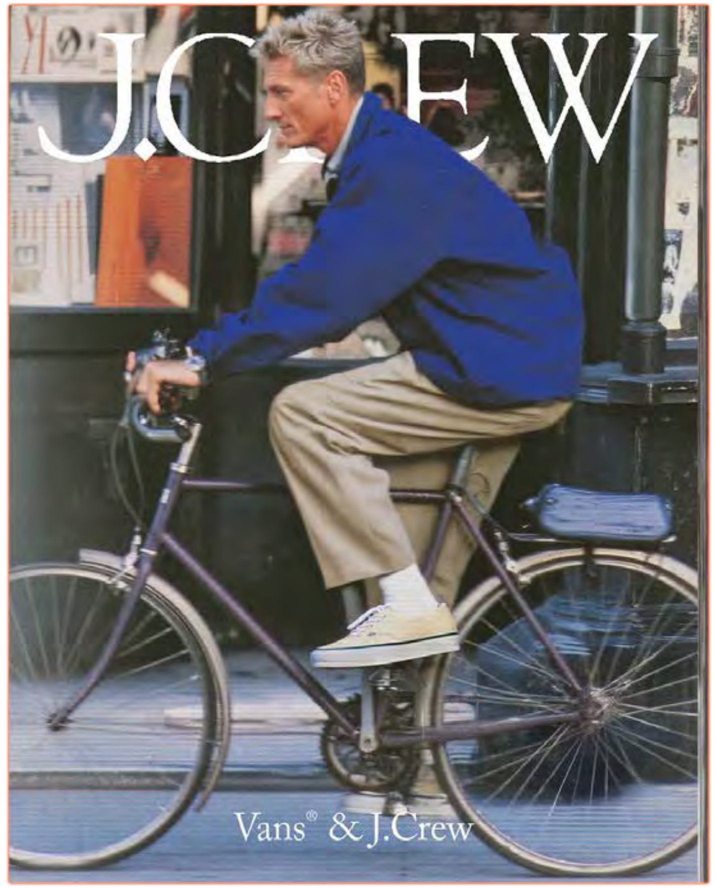
Industry in Focus

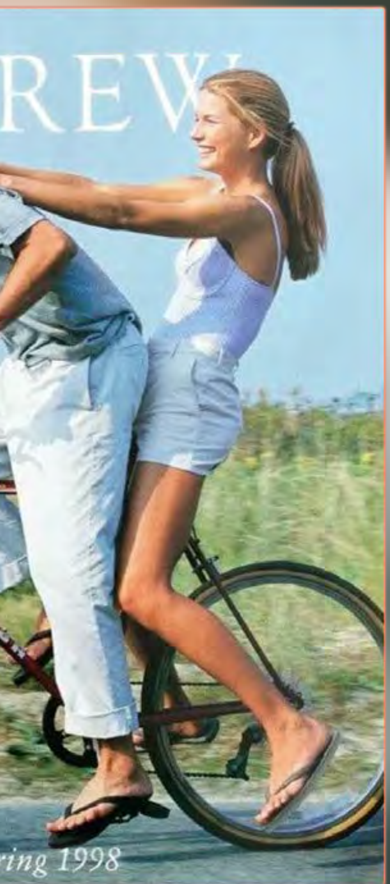
Specialty & Boutique

Merci No. 2 reimagined its multi-brand edit as rotating thematic rooms curated by external creatives — flexible, semi-permanent decor supporting ongoing storytelling on top of stable architectural bones. J.Crew shows the inverse discipline: classic silhouettes and store identity held constant while digital and marketing strategy modernizes around them.

- **Opportunities:** External-creative-curated rotating installations as a low-capex refresh mechanism; “what stays vs. what flexes” as an explicit design brief for heritage brands.

- **Key Strategies:** Build a stable architectural shell designed to host frequent curatorial change; separate what must stay classic (silhouette, materials) from what can modernize freely (digital, marketing, seasonal merchandising).





J. Crew (Internal AI Lab, US): Under CIO Danielle Schmelkin, J.Crew built an internal AI lab called Second Thread, spanning personalization, trend prediction, and digital design alongside the brand's traditional IT function. It's part of the operational turnaround credited with pulling J.Crew from 2020 bankruptcy to an estimated $2.7 billion in 2024 sales.

Built to Flex, Built to Last

Industry in Focus

Specialty & Boutique

Merci No. 2 (Concept Store, Paris): The iconic concept store reimagined its multi-brand edit as rotating thematic rooms curated by external creatives — a model built around flexible, quickly-refreshed decor that supports ongoing storytelling while classic architectural bones stay fixed.

J. Crew (Heritage Revival, US): Successfully revived a heritage brand by pairing sharp, modernized classic styling with cutting-edge web strategy — proof that "built to last" can apply to product and brand identity even as the customer-facing digital layer moves fast.

@J.Crew (190 Bowery Takeover)

The Edit

Curation, Simplification & the Death of Decision Fatigue

Product catalogs have been expanding for two decades on the assumption that more choice means more sales. The data increasingly says otherwise: nearly three-quarters of consumers report abandoning a purchase because they felt overwhelmed by options, and retailers running disciplined SKU-reduction programs are seeing measurable margin and revenue gains, not losses, from carrying less. As economic caution rises and shoppers grow warier of clutter, the brands pulling ahead are acting like editors, not warehouses. This section covers curation as a design discipline, not just a buying strategy.

Trader Joe's (Curated SKUs, US): About 80% of Trader Joe's products are private label — four to five times the industry average — meaning nothing coasts on outside brand recognition. Every item competes for its shelf slot on merit alone; if it doesn't sell, it's quietly killed, keeping the assortment permanently sharp instead of accumulating dead inventory.

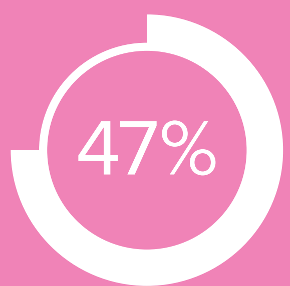
The Edit

Need to Know

In a retail landscape shaped by digital abundance and economic pressure, our research shows a marked shift in consumer sentiment toward curated assortments and reduced SKU counts. This is driven by rising decision fatigue, a desire for trust and authority in retail, and evolving generational preferences.

- Consumers across regions are experiencing decision fatigue and are increasingly valuing curated, authoritative assortments over maximal choice.
- Retailers are responding by reducing SKUs, simplifying store layouts, and positioning curation as a premium service.
- Generational differences are emerging, with Gen Z and Millennials showing a stronger preference for curated, value-aligned assortments, while Gen X remains more accustomed to broader choice but is also showing signs of fatigue.

Percentage of consumers who did not complete a purchase due to feeling overwhelmed by choice, Q4 2023



Accenture

Increase in conversion rate at 6 product varieties vs. 24 (30% vs. 3% purchase rate)

10X

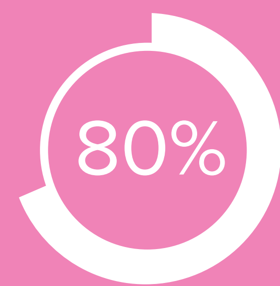
Iyengar & Lepper

Margin improvement / 2–5% revenue uplift typical of SKU-reduction programs

6-10pts

McKinsey

Percentage of global online cart abandonment rate, with decision paralysis a contributing factor



Statista

Opportunities

Value & Discount: Radically reduced SKU count as brand-defining strategy; tiered curation to layer premium into a value core

- ***In Action:*** *ALDI (~1,400–2,000 SKUs) vs. Trader Joe's (~4,000 SKUs); Uniqlo's LifeWear ("volume through depth, not breadth")*

Big Box: Breadth-with-shallow-depth as the most commercially proven curation model at scale

- ***In Action:*** *Costco Kirkland Signature; #costcofinds (6.3bn+ TikTok views)*

Specialty & Boutique: Reduced visual density as sensory/emotional strategy; calm, slow-shopping environments as a differentiator from maximal retail

- ***In Action:*** *Alo Yoga curated community model; Coach's "Amplify" SKU reduction (Q2 FY26 sell-through gains); Saie's "earn its place" product policy*

Industry Lens

Why These Industries: Value/Discount offers the clearest paired case study in the whole report — ALDI and Trader Joe's run the same curation logic (radically reduced SKU count relative to a standard supermarket) toward two different value propositions, while Uniqlo proves the identical logic holds outside of grocery entirely. Big Box is anchored by Costco, whose famously shallow ~4,000-SKU assortment is the most commercially proven curation story available. Specialty carries the most experiential examples — reduced visual density as an actual sensory/emotional strategy, not just an inventory discipline — with Alo Yoga, Coach, and Saie as brand-level proof points rather than full spreads.

The Edit

Industry in Focus

Value & Discount

ALDI and Trader Joe's — corporate cousins under Aldi Nord/Süd — run the same fundamental discipline (a fraction of a typical supermarket's ~40,000 SKUs) toward opposite ends of the value spectrum: ALDI toward price-floor efficiency, Trader Joe's toward curated discovery. Uniqlo proves the same restraint works outside grocery entirely: rather than chasing Zara's every-two-to-three-weeks trend churn, its LifeWear core collection barely shifts season to season — fewer styles, sold in far greater depth per style.

- **Opportunities:** Curation as either a price-efficiency lever or a discovery/experience lever, depending on brand positioning; "volume through depth, not breadth" as a curation mechanism distinct from SKU-count reduction — proof the underlying logic isn't grocery-specific.

- **Key Strategies:** Commit to a hard SKU ceiling rather than letting assortment creep upward; use private label as the trust mechanism that makes a small assortment feel sufficient rather than limited.

@ALDI (“Dave”, Fragrance Campaign)

The Edit

Industry in Focus

Value & Discount

Aldi & Trader Joe’s (Fraternal Twins, Global): ALDI runs roughly 1,400–2,000 SKUs against a typical supermarket’s ~40,000, built purely for price-floor efficiency; Trader Joe’s runs about 4,000 curated SKUs as a discovery-and-experience play. Same curation logic, two entirely different value propositions.

Uniqlo (Lifewear, Global): While Zara refreshes its shelves every two to three weeks, Uniqlo’s core collection changes minimally season to season — deliberately fewer styles moved in enormous depth per style, rather than constant micro-trend turnover. Uniqlo’s own global head of R&D, Yukihiro Katsuta, puts it directly: “Some people say Uniqlo is like fast fashion, but I say: no, actually, we are pretty slow.”

@Uniqlo (LifePark Exhibition, 2022 CIIE)

The Edit

Industry in Focus

Big Box

Costco maintains roughly 4,000 SKUs against a typical supermarket's ~40,000 — breadth across categories, shallow depth within each — reducing decision fatigue and increasing turnover while still generating genuine cultural excitement through limited-run "Treasure Hunt" finds.

- **Opportunities:** Shallow-depth, high-breadth assortment as an operational and cultural strategy simultaneously; limited-run finds as a curation-compatible way to sustain discovery.

- **Key Strategies:** Cap SKU depth per category deliberately; let private label (Kirkland) carry the trust burden that a wider assortment would otherwise need to earn; treat limited-run "finds" as planned discovery moments, not overstock clearance.

@Costco

The Edit

Industry in Focus

Big Box

Costco (US): Roughly 4,000 SKUs vs. 30,000+ at a typical supermarket, offering breadth across categories but shallow depth within each — reducing decision fatigue and increasing turnover. Limited-run products and curated “Treasure Hunt” assortments drive #costcofinds to over 6.3 billion TikTok views.

@Costco

The Edit

Industry in Focus

Specialty & Boutique

Nonfiction and theboyhasnopatience both treat reduced product count as an environmental design choice, not just a buying decision — creating literal physical space for pause and contemplation. Alo Yoga, Coach, and Saie extend the same logic into curated community spaces and disciplined SKU governance respectively.

- **Opportunities:** Doubling down on discoverability, sensory relief, and slow-shopping as a specialty-retail differentiator; capsule edits and rotating exclusive drops in place of broad, static assortments.

- **Key Strategies:** Curate capsule edits deliberately; design for pause (fewer fixtures, more negative space); rotate exclusives to sustain interest without expanding total SKU count.

@Nonfiction (NYC Flagship)

The Edit

Industry in Focus
Specialty & Boutique

Nonfiction (Niche Perfume, NYC): Systematically reduced visual clutter and product count in-store, creating literal space for pause and contemplation — the minimalist approach enhances product focus and emotional connection rather than showcasing maximum inventory.

theboyhasnopatience (Boutique & Temp. Retail: Shanghai, China): Minimal displays and a monolithic, sculptural façade create a calm, contemplative environment; the store's central circular structure and stripped-back materials foster a ceremonial, slow-shopping experience.

theboyhasnopatience (The Shape of Shadows Pop-Up: Shanghai, China): A temporary, 60 sqm concept space on Yongyuan Road in Shanghai's Jing'an District, built as a mysterious, symmetrical conical structure inspired by TBHNP's "Prince of Darkness" collection. Working within tight time and cost constraints, Fon Studio translated the brand's "cutting with strength" ethos into pure geometry — a design built explicitly to be dismantled, with the intention that the spatial experience outlasts the physical structure in visitors' memory.

imaginestudio™

@FanetteGuilloud