

Monthly Picks

March 2026

INNOCEAN



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Exploring key marketing trends shaping Korea and global markets.

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Active Recovery as a Daily Routine

Gen Z is redefining the rules of recovery. Traditional wellness practices, such as saunas and moxibustion, are being reimagined as modern recovery rituals, while sleep is now actively managed for maximum efficiency rather than treated as simple downtime.

The Changing Landscape of Recovery

Rest is traditionally viewed as a state of inactivity. However, Gen Z is shifting toward active recovery—moving beyond simply waiting for fatigue to fade to intentionally designing recovery processes tailored to their specific needs.

This shift has brought traditional thermotherapies, such as saunas, moxibustion, and enzyme baths, into the spotlight as modern recovery rituals. Furthermore, by treating sleep as a controllable variable, Gen Z seeks to optimize rest for peak efficiency.

In this issue, we explore the drivers behind the increased focus on recovery practice as a self-care method and examine the active recovery trend, focusing on saunas, traditional heat therapies, and sleep optimization.



What is Active Recovery?

Recovery is not a passive break. It is a strategic investment in recalibrating one's condition to prime for what comes next.

In sports physiology, “active recovery” traditionally refers to maintaining low-intensity movement to facilitate recovery after high-intensity activity. While “passive recovery” simply relies on rest, active recovery involves using light exercise or stimulation to proactively induce the body’s repair processes and support the transition back to a recovered state.

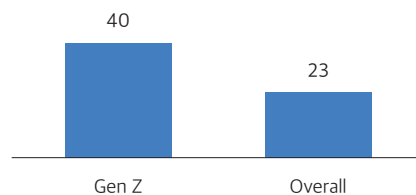
This concept has expanded beyond the athletic field to become a core self-care strategy for Gen Z. While recovery was once largely a reactive response to fatigue or illness, Gen Z now views it as a foundation-building process. They actively regulate their physical and mental states to prepare for what’s next—personally testing, verifying, and integrating the recovery methods that best align with their individual routines.

There are three primary reasons why Gen Z is gravitating toward active recovery.

The first reason is that Gen Z reports higher stress levels than previous generations, driving a desire for greater self-regulation. Constantly exposed to a digital environment, they are uniquely susceptible to information overload and cognitive fatigue. In this high-pressure environment, they feel a pressing need to monitor and manage accumulating anxiety and exhaustion.

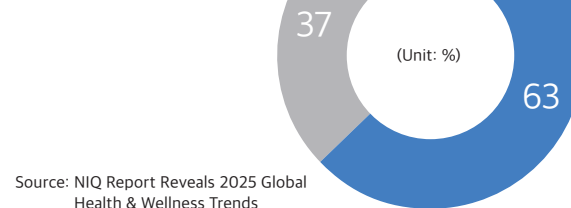
Consumers who report feeling “almost always stressed”

(Unit: %)



Source: McKinsey&Company

Consumers who prioritize quality sleep and mental health more than they did five years ago



Source: NIQ Report Reveals 2025 Global Health & Wellness Trends

The second reason is that Gen Z perceives recovery as a “strategic investment” in their future performance, viewing active recovery as an efficient way to accelerate their recovery. Research indicating a heightened awareness of sleep quality and mental health further highlights how Gen Z’s fundamental attitude toward recovery is changing.

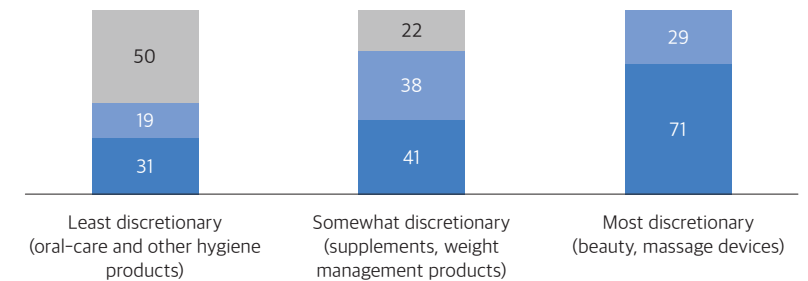
The final reason is that Gen Z prioritizes self-understanding and autonomy. They find greater meaning and maintain better consistency in recovery methods they have personally validated rather than those imposed by others. Wellness consumption data reflects this shift: compared to the average consumer, Gen Z spends more on lifestyle-aligned products—such as beauty and massage devices—than on hygiene essentials. They are actively investing in products that cater to their needs and facilitate a more efficient recovery.

Wellness purchases by Gen Z and millennials by category

Legend:
 ■ Underindex
 ■ Overindex(1-50%)
 ■ Overindex(>50%)

(Unit: %)

Source: McKinsey&Company



Sauna: No Longer Just a Space for Sweating Out

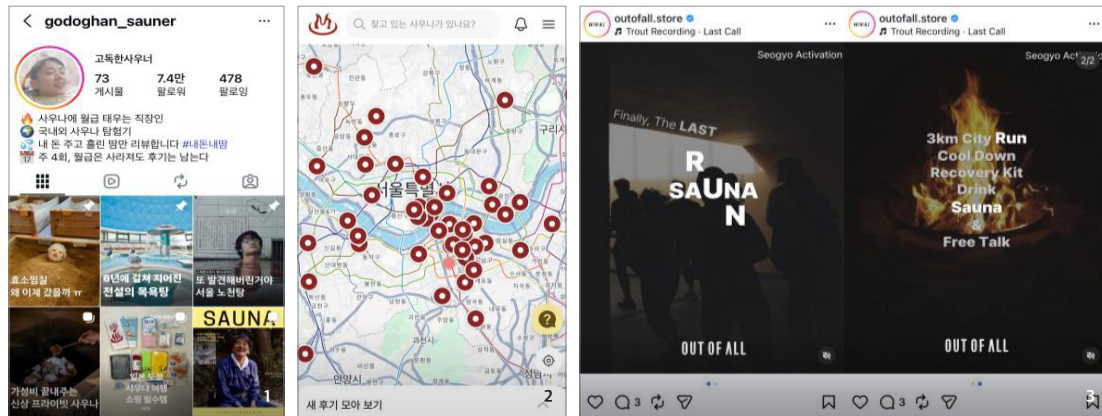
Going beyond physical recovery, the sauna optimizes body and mind through meaningful connection with others.

For Gen Z, the sauna is no longer merely a place to sweat or wash up. It is being reimagined as a sanctuary for mind-body rest—a place to disconnect from overstimulation and achieve true rest and stress relief. Simultaneously, it has become a hub for healthy social recovery. This shifting interest is evidenced by the popularity of Instagrammers who post sauna reviews and the emergence of community platforms like “Monday Sauna,” where people share sauna locations and reviews. Gen Z seeks to facilitate physical and mental recovery while maintaining their daily performance. While previous generations often relied on social drinking as a means to decompress and build relationships, Gen Z is pivoting toward the sauna as a space for making deep connections with others without compromising the next day’s condition. Anthropologist and psychologist Martha Newson notes that the social bonds forged in the sauna significantly enhance one’s sense of belonging and happiness. This suggests the sauna is functioning as a sophisticated psychological recovery mechanism that goes beyond physical restoration.

This trend was first clearly observed abroad. In the UK, the number of community saunas surged more than threefold in just two years, from 45 in 2023 to 147 in 2025. A prime example is London’s “Community Sauna Baths,” which hosts sessions like mental health forums to facilitate both meaningful dialogue and recovery. Korea is no exception. Community brand Seoul Morning Coffee Club (SMCC) and a hotel sauna co-hosted “Sauna Coffee Chat,” proving that post-sauna coffee time can serve as a viable format for authentic social exchange.

Notably, the sauna is evolving into a powerful routine as it merges with running—a core culture for Gen Z. As awareness grows regarding the benefits of post-workout sauna for muscle recovery, the “Sauna Run” has emerged as a new trend. Formats such as the tent sauna programs hosted by outdoor lifestyle shop “Out of All” are also gaining traction, allowing participants to enjoy a workout and social connection at the same time.

For Gen Z, the sauna is no longer just a space for relaxation; it is evolving into an active recovery method that facilitates physical recovery alongside meaningful social connections.



- 1 — The Godoghan Sauner influencer Instagram page (Source: godoghan_sauner Instagram)
- 2 — Sauna map (Source: mondaysauna Instagram)
- 3 — The Sauna Run program (Source: Out of All)

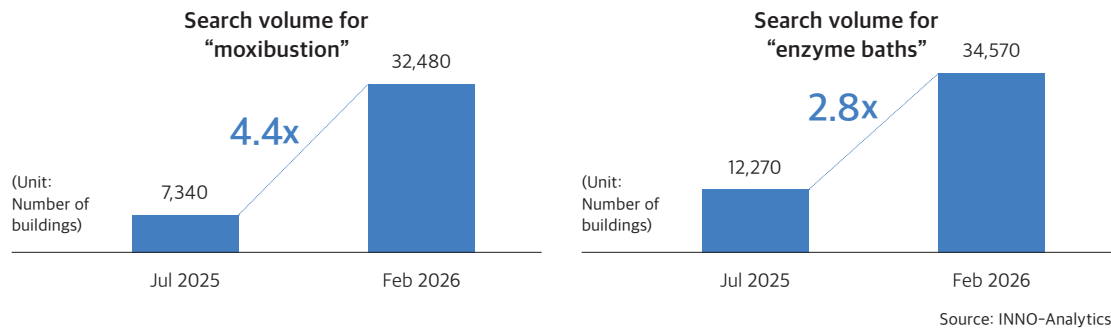
Thermotherapy: Beyond Treatment to Self-Care Ritual

Traditional thermotherapies are evolving into self-care rituals that offer immediate, visible results.

Once primarily enjoyed by middle-aged and elderly women, traditional therapies like moxibustion and enzyme baths are experiencing a modern renaissance. Historically, these practices were viewed through a therapeutic lens—a way to soothe chronic joint and muscle pain. For Gen Z, however, they have been rebranded as essential tools for active recovery, allowing them to proactively monitor and calibrate their physical state. This shifting interest is backed by clear data: Naver search volumes for both moxibustion and enzyme baths surged in February 2026 compared to the previous July. Furthermore, review-based content on Instagram Reels is racking up hundreds of thousands of views.

This heightened engagement reflects the expansion of its role from a novelty experience to a daily essential. According to the social data analysis platform Sometrend, associated keywords for moxibustion have shifted from terms like “treatment” and “efficacy” toward wellness and beauty concepts such as “inner glow,” “detox,” and “de-bloating.” This transition illustrates that recovery is no longer viewed as a reactive measure sought only during illness; instead, it has evolved into a daily lifestyle routine for maintaining one’s baseline state.

Naver search volume for moxibustion and enzyme baths



Driven by Gen Z’s needs, traditional wellness spaces are being reimagined. Once perceived as dark or reclusive, moxibustion clinics are evolving into sanctuaries that offer curated restorative experiences. Similarly, enzyme bath facilities have moved beyond their traditional role as places to sweat; they now integrate aesthetic services and body composition analysis to provide data-driven evidence of physical change. These facilities are transitioning into spaces that empower customers to manage their minds and bodies through tangible, measurable, and visible results.

Ultimately, the rise of moxibustion and enzyme baths goes beyond mere curiosity about the unfamiliar; it reflects a shift in how Gen Z approaches recovery. For this demographic, recovery is no longer about resting or getting treatment. Instead, it is a deliberate act of proactively monitoring and managing their physical conditions. Consequently, they place greater value on experiences that offer immediate, tangible results or verifiable “before-and-after” effects, seamlessly incorporating these experiences into their broader wellness routines.

1 — Instagram reels reviews on moxibustion therapy and enzyme baths (Source: Instagram)

2 — Enzyme bath course offering aesthetic treatments (Source: Friip)



명품효소 찜질 4단계 풀코스 + 에스테틱(40분)

관리 내용

효소 찜질(15분) > 스크럽 샤워 > 좌훈(15분) > 마스크팩, 복부 온돌 찜질, 에어 마사지기(15분) > 에스테틱 (수분, 영양, 미백, 여드름 피부 상담 후 맞춤형 관리 40분)

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Active Recovery as a Daily Routine

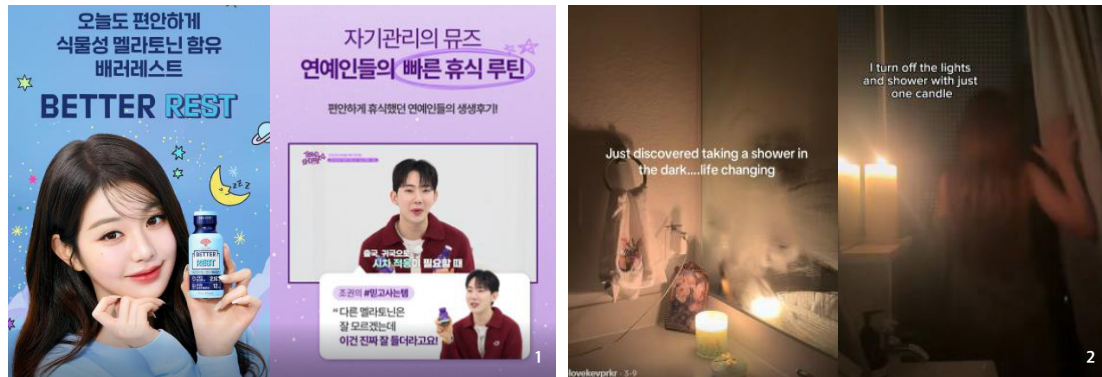
Sleep: The Start of Your Day, Not the End

Engineering every detail of the daily routine to maximize sleep efficiency and secure tomorrow's energy.

Gen Z is taking a proactive approach to sleep, seeking to maximize this daily act for optimal recovery. Treating sleep as an active recovery process rather than just daily downtime, they meticulously adjust their environments and habits and analyze sleep data to refine their routines. While older generations often deprioritize sleep—exemplified by the old adage that “sleeping more than four hours hinders success”—today’s youth view deep, efficient sleep as a strategic tool for maximizing productivity. Gen Z is so invested in sleep because they now view it as a “manageable recovery asset.” Amidst overstimulation and irregular sleep rhythms, they use wearables, morning routines, and sleep aids to determine how to sleep for optimal next-day recovery. The fact that content featuring “Sleepmaxxing”—the practice of maximizing sleep quality—has surpassed 100 million total views proves that Gen Z is no longer just waiting for sleep to happen; they are proactively taking charge of it.

Gen Z optimizes various aspects of their daily lives to engineer the perfect night’s sleep. They prioritize early returns home to ensure they get adequate sleep, purchase supplements like melatonin to aid deep sleep, and pay meticulous attention to their shower routines. Olive Young offers products like melatonin-infused collagen and sleep gummies; in fact, the selection of sleep-related items increased nearly sixfold between January and November 2025. The recent popularity of “dark showers,” which involves showering in minimal light to trigger sleep, further illustrates how Gen Z is fine-tuning every environmental variable to achieve the perfect night’s rest.

Gen Z’s focus on sleep reflects a broader desire to manage recovery with greater precision. Sleep is no longer merely a period at the end of the day; it has become a proactive mechanism for securing the energy required for tomorrow. This process of elevating the quality of rest through curated daily routines is Gen Z’s way of reclaiming a sense of agency in an increasingly uncertain world.



1 ——— Melatonin-infused products available at Olive Young (Source: Olive Young)

2 ——— Dark shower content on TikTok (Source: TikTok)

Brands: Integrating Recovery into Daily Life

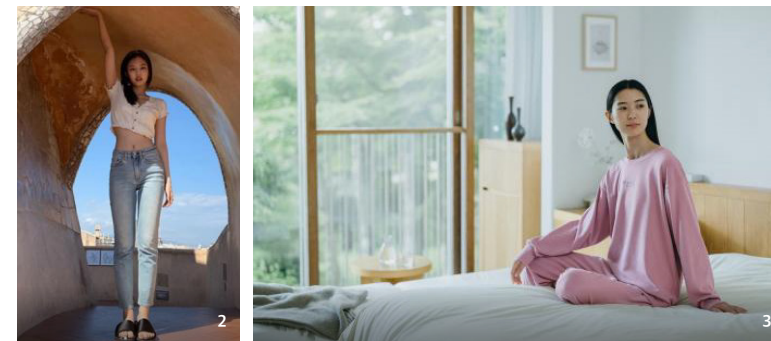
Brands are treating rest as more than a simple break. Instead, they are redefining it as a form of active self-care—something individuals can proactively measure and consume. Moving beyond simple restoration, brands are now using data-driven metrics to prove the tangible physical impact of recovery or embedding these functional benefits into everyday consumer products.

WHOOP, a U.S. wearable tech company, converts physical recovery into actionable data. By tracking metrics such as sleep quality, heart rate variability (HRV), and resting heart rate, the platform enables users to monitor their daily physical readiness. Its Stress Monitor further helps users identify stress responses that are often overlooked in high-stimulation environments. Through a strategic partnership with Hyperice, a recovery equipment brand, users can even track how specific recovery tools impact their metrics via the app. This approach transforms the once-ambiguous concept of recovery into a “quantifiable health metric,” turning it into a self-care routine that allows users to actively monitor and calibrate their mental and physical states in real time. By framing recovery not as simple rest but as a self-care routine that sustains performance, WHOOP successfully appeals to Gen Z, who view recovery as a strategic investment in their future performance.



Brands are transforming recovery into a measurable performance metric while embedding functional benefits into everyday products to create a seamless daily routine.

Active recovery is now becoming a consumer staple. In Korea, recovery footwear is experiencing rapid growth, redefining recovery from a brief post-workout ritual to a core pillar of daily self-care. New Balance, for instance, launched recovery slides and emphasizes its lifestyle benefits—such as plantar fasciitis relief, foot fatigue care, and comfortable fit—over purely athletic performance. This shift has successfully rebranded these products from specialized sports gear into “essential daily items” for managing one’s day-to-day physical condition. Similarly, the Japanese brand TENTIAL has seamlessly integrated recovery into daily life with its “BAKUNE” recovery wear. BAKUNE demonstrates that recovery is no longer a special event, but a tangible physical experience to be worn and felt every day. By allowing consumers to optimize their physical state simply by wearing apparel as comfortable as pajamas, the brand aligns perfectly with Gen Z’s proactive and self-directed approach to recovery.



- 1 — WHOOP device and health metrics dashboard (Source: WHOOP)
- 2 — Jennie wearing recovery shoes (Source: Jennie’s Instagram)
- 3 — BAKUNE recovery wear (Source: TENTIAL)

Active Recovery as a Daily Routine

PERSONAL RECOVERY DATA

Recovery Redefined: From Passive Rest to Active Self-Care

For Gen Z, recovery is no longer a passive downtime in their day; it is vital preparation for the day ahead and a core self-care ritual for sustaining performance. By leveraging these recovery practices, they monitor their physical and mental states, transforming these insights into repeatable routines. Ultimately, by choosing and adjusting their own recovery methods, they reclaim agency over their daily lives.

Self-directed recovery driven by personal insight

Rather than following a prescribed method, Gen Z pursues optimal recovery methods that best suit their needs. To create meaningful impact, brands must move beyond offering generic solutions or simply relying on their popularity. Instead, success lies in empowering users to assess their own health and providing the tools they need to build unique, personalized routines.

Recovery evolves into an empirical science

Unlike the intuitive approach of the past, Gen Z views recovery as a scientific process of measuring and optimizing one's physical and mental state. This shift requires brands to move beyond purely emotional messaging. Instead, it is essential to quantify benefits through data and metrics, allowing consumers to visualize the results and fine-tune their recovery routines based on detailed insight.

Recovery integrates into daily life

Recovery is no longer an isolated event; it is becoming a repeatable routine that seamlessly integrates into the fabric of daily life. In response, brands must design experiences that embed recovery into consumers' daily lifestyles. By creating these daily touchpoints, brands can consistently engage their audience and turn recovery into an ingrained habit.

Seoul's Landmark Spaces Transform into K-POP Stages

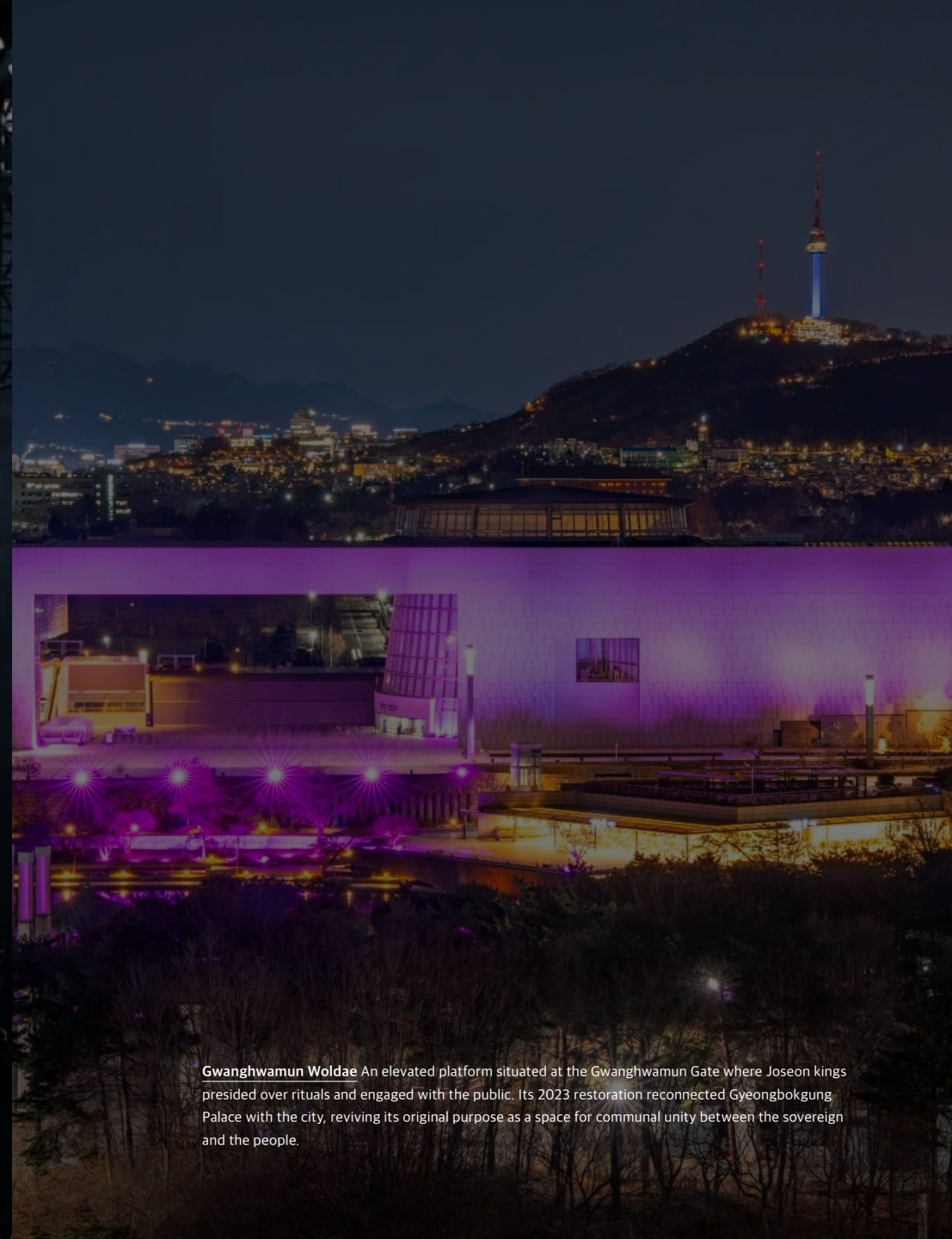
From the National Museum of Korea to Gwanghwamun Square, historic landmarks are evolving into world-class cultural stages through the vision of K-pop icons.

Seoul's Landmark Spaces Transform into K-POP Stages

Korea's ancient legacy is reimagined through the modern aesthetic of BTS and BLACKPINK.

The stone facades of the National Museum of Korea have stood in silent witness for centuries, while the Gwanghwamun Woldae[®] was finally restored to its former glory in 2023 after a hundred years. Today, these historic landmarks are telling a new narrative by syncing with the modern rhythm of K-POP. Once viewed as static fixtures of the past, these stages are being reimagined through the lens of artists, transforming into the most vibrant, living venues of our time.

This evolution marks a significant milestone where public spaces and private-sector creativity converge, expanding the entire city into a massive arena of experience. As on-screen creations come to life in physical space, our traditional culture becomes a living, shared asset enjoyed alongside the icons we admire—building deep resonance across generations and around the globe.



Gwanghwamun Woldae An elevated platform situated at the Gwanghwamun Gate where Joseon kings presided over rituals and engaged with the public. Its 2023 restoration reconnected Gyeongbokgung Palace with the city, reviving its original purpose as a space for communal unity between the sovereign and the people.

National Museum of Korea × BLACKPINK: A New Paradigm of Collaboration

The National Museum of Korea Glows in Pink

Lighting Installation: Illuminating the Museum Exterior in Pink

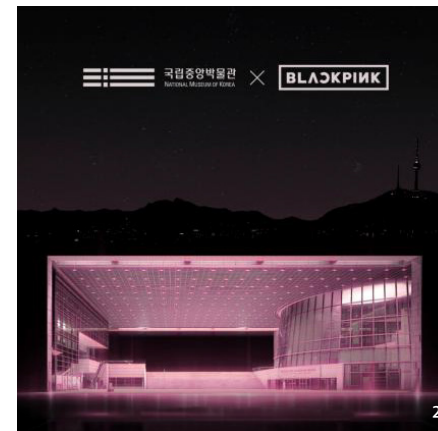
Held from February 27 to March 8, 2026, this collaboration celebrated the release of BLACKPINK's 3rd mini-album, "DEADLINE." It was a bold initiative that saturated the National Museum of Korea with the group's unique universe. The campaign transformed this classical sanctuary into a modern brand experience through a multi-sensory strategy: a Spotify listening session to captivate the ears, an audio tour narrated by the group members, and a striking pink media facade that offered a breathtaking visual transformation.

At sunset, an intense "pink lighting" installation swept across the museum's facade and the Open Plaza, breathing dynamic vitality into the static stone architecture. A highlight of the experience was the Mirror Pond, where the pink-hued reflection of the building offered a visual marvel—the result of a striking aesthetic collision between classical heritage and modern trends. From the moment visitors stepped onto the grounds, this visual immersion served as a powerful signal, intuitively marking their entry into a completely different version of the museum.

The interior was meticulously curated with a sophisticated visual language. At the entrance, large flags blending traditional Dancheong (coloring on wooden buildings and artifacts) motifs with the BLACKPINK logo signaled a harmonious collaboration. Along the "Path of History," black carpeting and pink ambient lighting transformed the corridor into an exclusive showcase venue. This journey culminated at the Ten-story Stone Pagoda of Gyeongcheonsa Temple, where a media facade layered the artist's narrative onto the relic, preserving its integrity while bridging tradition and modernity.

- 1 — Pink-hued reflection of the National Museum on the Mirror Pond
- 2 — The exterior facade of the National Museum, bathed in pink glow
- 3 — Media facade projected onto the Ten-story Stone Pagoda of Gyeongcheonsa Temple

The essence of this spatial design lies in its "unconventionality" and "boldness," achieved by layering the vibrant identity of a modern icon over a solemn, static space. By redefining the museum from a mere repository of relics into a modern cultural sanctuary for global K-pop fans, this initiative has opened a new chapter in global marketing through K-POP collaboration.



Source: National Museum of Korea Instagram

Source: awesome.kana Instagram

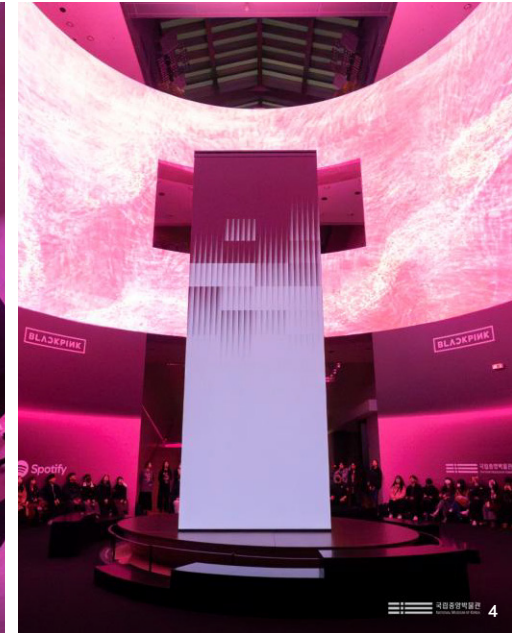
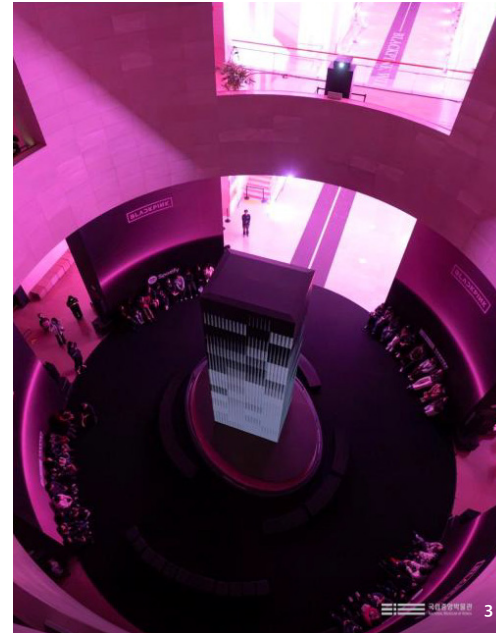
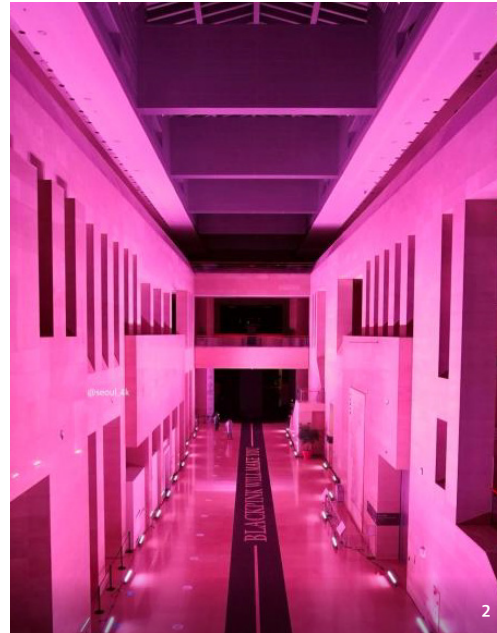
Seoul's Landmark Spaces Transform into K-POP Stages

Listening Zone: Reimagining the “Path of History” and the Gwanggaeto Stele

The museum’s main hall, the “Path of History,” was reimagined as an immersive listening zone. At its center, the 8-meter-tall digital Gwanggaeto the Great Stele served as a focal point, where dedicated kiosks allowed visitors to explore BLACKPINK’s new tracks. The accompanying media art pulsed in sync with the beat, allowing visuals and sound to converge and transform the entire hall into a sensory stage. Moving beyond the simple act of listening, this initiative realized the “premium audio space” trend within the museum, inviting visitors to fully immerse themselves in the site’s unique atmosphere through all five senses.

The project’s success was driven by the black carpet area, which was strategically partitioned from the standard tour route to create a private listening sanctuary. The striking sight of visitors in high-performance headphones, absorbed in the aura of the massive stele, became a viral sensation—effectively turning the space itself into compelling shareable content. By encouraging guests to linger and savor the grandeur of the relics alongside the music, this design increased average dwell time. Ultimately, it proposed a new paradigm for the museum experience: transforming historic artifacts from mere “objects to pass by” into “content to be deeply explored.”

- 1 — The BLACKPINK Listening Zone
- 2 — The Path of History leading to the Gwanggaeto Stele
- 3, 4 — The Gwanggaeto Stele Listening Zone



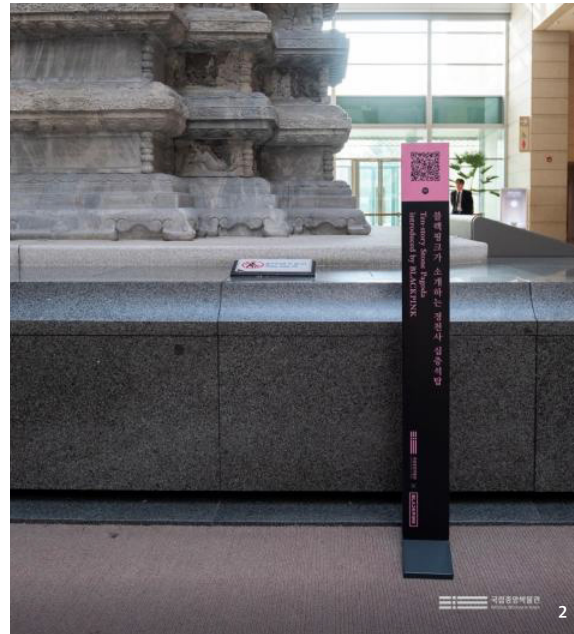
Seoul's Landmark Spaces Transform into K-POP Stages

Special Audio Docent: Through the Voice of BLACKPINK

The special audio docent featured all four members of BLACKPINK, leveraging their status as global icons to narrate the rich history of South Korea's traditional heritage. By scanning dedicated QR codes placed beside the artifacts, visitors explored the museum guided by the members' familiar voices. The eight featured National Treasures—including the Pensive Bodhisattva and the Silla Gold Crown—were personally curated by the members themselves. By narrating the stories of these millennia-old relics, the members transformed potentially dense historical information into a compelling, immersive narrative. With multilingual offerings in Korean (Jisoo, Jennie), English (Rosé), and Thai (Lisa), the project allowed the global audience to connect with Korean culture in their native tongues. Ultimately, this initiative repositioned traditional heritage from “unfamiliar cultural knowledge” into a “trendy asset” shared with beloved icons, effectively expanding K-Pop's influence into the realm of traditional culture.

The limited-edition postcard set, awarded upon completing the eight-stop docent tour, served as the primary catalyst for active visitor engagement. Each morning, the museum was met with long queues forming well before opening hours, with daily stocks consistently running out early. To secure the exclusive set, visitors navigated the expansive museum space—from the “Room of Quiet Contemplation” to the “Path of History”—as if on a treasure hunt. This approach successfully directed visitors to less-visited areas of the museum.

This unique opportunity to appreciate historical relics through the voices of BLACKPINK members ignited organic social media engagement among Gen Z and international audiences, fostering a new cultural trend of modern heritage pilgrimage. Visitors who initially came for BLACKPINK found themselves naturally captivated by the serene beauty of the Pensive Bodhisattva and the intricate craftsmanship of the Silla Gold Crown. This seamless transition—where a journey sparked by fascination with K-Pop leads to an encounter with history and cultural heritages—underscores the boundless potential of K-Branding as demonstrated by this landmark NMK × BLACKPINK collaboration.



- 1 — QR code linked to audio description of the Room of Quiet Contemplation
- 2 — QR code linked to audio description of the Ten-story Stone Pagoda of Gyeongcheonsa Temple
- 3 — Limited-edition collaboration postcard set

Source: National Museum of Korea Instagram

Source: National Museum of Korea Instagram

BTS Comeback at Gwanghwamun After a 3-Year, 9-Month Hiatus

Tradition: Beyond Obstruction to Curated Coexistence

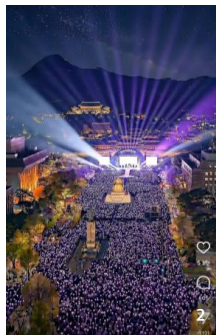
Following a long 3-year, 9-month hiatus, BTS marked their definitive return as a full group. They strategically selected Gwanghwamun—the historic heart of Seoul—as the primary stage for this landmark comeback. The members underscored the location's significance, stating, "We wanted to show you where we started." In this context, Gwanghwamun was more than a stage backdrop; it served as a symbolic space to project the group's identity. By launching their return from this historic site, BTS reinforced a powerful global message: that their artistic roots remain firmly planted in Korea.

Leading up to the performance, large-scale teasers were deployed across iconic landmarks in New York and Seoul. The campaign launched on March 18 with a massive drone show above the Brooklyn Bridge, illuminating the night sky with the question, "NEW YORK, WHAT IS YOUR LOVE SONG?" while officially announcing the group's comeback date. Two days later, on March 20, the momentum shifted to Seoul's Ttukseom Hangang River Park. For 15 minutes, approximately 2,000 drones painted the night sky in vibrant red and blue, forming the Korean national flag. As the silhouettes of the seven members appeared one by one, the cheers from the massive crowd echoed across the river. This public event, accessible to all without reservation, effectively rebranded the Seoul skyline in the signature colors of BTS, driving anticipation to a fever pitch. That same evening, the stone fortress walls of Sungnyemun Gate (National Treasure No. 1) were transformed into a media façade for the first time in their history. The projection featured silhouettes of the members carrying traditional lanterns across the fortress walls, followed by the vivid red "Arirang" logo. This spectacle further fueled the excitement for the following day's performance at Gwanghwamun. From New York to Seoul, and from the Hangang River to Sungnyemun, this series of synchronized events solidified BTS's return as a global cultural phenomenon before the first note of the concert even began.

- 1, 2 — A sea of purple Army light sticks filling Gwanghwamun Square
- 3 — BTS comeback drone show over Brooklyn Bridge, New York
- 4 — BTS comeback drone show over Ttukseom Hangang River Park
- 5 — BTS comeback media façade on Sungnyemun Gate



Source: Sisa Journal



Source: h_a_n_s_e Instagram



Source: Billboard's Official Instagram



Source: Daily Hankook



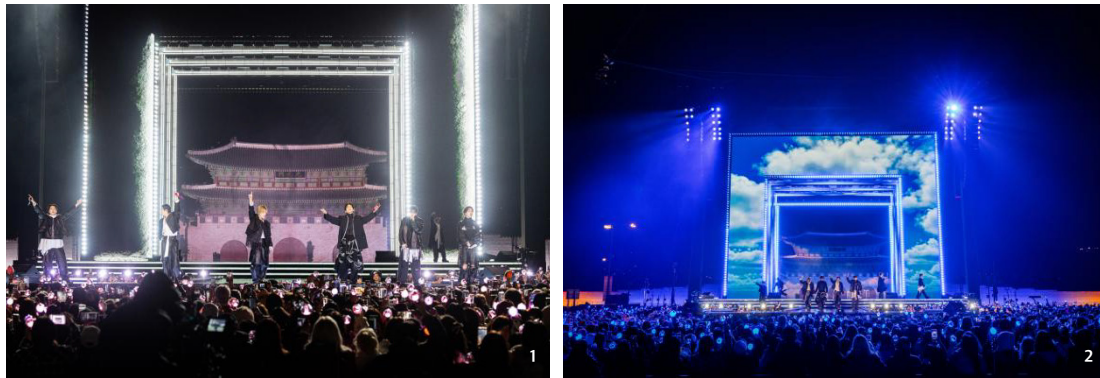
Source inews24

Seoul's Landmark Spaces Transform into K-POP Stages

The stage design for the Gwanghwamun comeback prioritized seamless spatial integration, ensuring the artists were embedded within the historic landscape without obstructing its architectural significance. To achieve this, a custom “open cube” stage was engineered. Unlike conventional stages that utilize massive LED walls to block the background, this structure remained entirely open at the rear, allowing the panoramic vista of Gwanghwamun to serve as the primary live backdrop. By employing slim frames rather than thick pillars, the design created a continuous line of sight from the artists to the historic Gwanghwamun Woldae. In this setting, the landmark functioned as an active participant in the performance, allowing tradition and modernity to coexist within a single, unified frame.

The pinnacle of the production was the use of the “King’s Path”—a 500-meter path stretching from Geunjeongjeon Hall in Gyeongbokgung Palace to the Gwanghwamun Woldae—as the opening processional route. Instead of creating a standalone set, the production framed the stage as a seamless continuation of the historical landscape. Moreover, the strategy focused on rediscovering existing heritage rather than adding new structures. By embedding BTS’s musical narrative within this historical context rather than using tradition as a mere prop, the production successfully visualized the group’s deep connection to their Korean cultural roots. By minimizing physical installations and transforming historical assets into the stage itself, the campaign cleverly leveraged the symbolic significance of a national landmark, creating a unique aesthetic where the past and the present converge.

- 1, 2 — The open cube stage design integrating Gwanghwamun as a live backdrop
 3, 4 — Seamless visual integration of the stage and Gwanghwamun through lighting and media effects



Source: Kyunghyang News (provided by BigHit Music, Netflix)



Source: sky_doraheee Instagram

Seoul's Landmark Spaces Transform into K-POP Stages

One of the most compelling phenomena was the fan-driven “Hip-Traditional” fashion. Reports from CNN Style and Korea JoongAng Daily noted that local Hanbok (Korean traditional dress) rental shops were flooded with fans adopting traditional attire as their primary dress code. Fans went beyond simply wearing Hanbok; they showcased “Hanbok-chic” look by accessorizing light sticks with purple norigae (traditional Korean accessory) or seamlessly mixing modern streetwear with traditional skirts. One fan from the U.S. made a custom red-and-white Hanbok jacket to match the album’s concept—showing how fans are actively engaging by deeply understanding the artist’s messages and turning them into their own personal style. This scene at Gwanghwamun demonstrated how artist IP, when embraced by a creative fandom, can transform tradition from a static relic into a vibrant, modern fashion language.

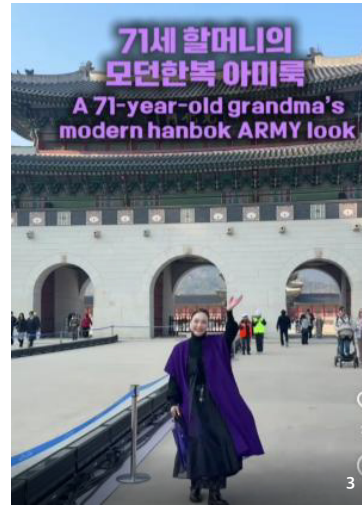
- 1, 2, 3 — Global fans’ diverse Hanbok-chic looks
 4, 5 — National Museum of Korea 2026 BTS × MU:DS
 6 — BTS THE CITY ARIRANG SEOUL



Source: ann1609_ Instagram



Source: k_garden_style Instagram



Source: gongju_halmae Instagram



Source: National Museum of Korea Instagram



Source: saranghanguk Instagram



Centered on the Gwanghwamun performance, Seoul was transformed into a massive cultural theme park. The Ministry of Culture, Sports, and Tourism and five national cultural institutions worked together to create touchpoints for global fandom to engage deeply with Korean heritage. The National Museum of Korea expanded English-language resources for iconic artifacts like the Pensive Bodhisattva and launched “MU:DS,” a collaborative merchandise line with HYBE—reimagining traditional assets as modern consumer products. Simultaneously, the National Folk Museum of Korea hosted “K-Playground,” allowing fans to experience traditional games featured in Run BTS!, alongside “K-Heung Hanmadang,” which showcased the traditional instruments and Hanbok aesthetics from the group’s music. By turning on-screen virtual content into tangible physical experiences, this initiative effectively lowered the psychological barriers to traditional culture.

These public sector initiatives harmonized with HYBE’s “BTS THE CITY” project, transforming the entire city into an expansive exhibition space. This urban curation strategy—stretching from the Sungyemun media facade to the Hangang River drone shows—represented a multidimensional integration of national infrastructure and private brand strategy. By extending the brand experience across the city, the campaign effectively directed the global fandom’s flow toward major landmarks beyond the concert venue.

Multidimensional Brand Experiences: Integrating Cultural Traditions and Spatial Symbolism

The decision by BTS and BLACKPINK to utilize the National Museum of Korea and Gwanghwamun as their stages carries a significance far beyond mere location scouting or backdrops. By intentionally positioning K-pop icons—the architects of contemporary history—upon the foundations of the past, these productions showcase a new kind of spatial marketing. This strategy seamlessly integrates the artists' aesthetic assets with the historical symbolism inherent in traditional spaces. In doing so, it elevates the brand's narrative into a compelling global epic that resonates deeply with an international audience.

Point 1 Harmonizing brand identity and cultural heritage through mutual respect

Projecting modern brand narratives onto historical heritage grants a brand a depth of authenticity that is otherwise difficult to cultivate. Simultaneously, this experiment breathes contemporary vitality into traditional spaces. Crucial to this process is mutual respect, ensuring that the unique values of both entities are not compromised but maximized. When the dignity of heritage and the identity of a brand align as equals, the space transcends its role as a mere repository of artifacts. It becomes a transformative platform that elevates the brand's status to a national caliber.

Point 2 Aligning strategic location and experiential design with brand objectives

Spatial strategies must be guided by the event's core objective—whether it seeks broad-scale diffusion or focused immersion. To maximize the audience reach, BTS utilized the open space at Gwanghwamun to engage the public and also leveraged the venue's massive visual presence to reinforce its prestige. Conversely, BLACKPINK leveraged the stately composure of the National Museum to curate a high-impact, intimate environment, etching the track's first impression into the audience's mind through refined sensory detail. When a brand's essence aligns with a venue's inherent spirit, marketing becomes a distinctive cultural phenomenon rather than a mere promotional campaign.

Coffee, Re-coded: The Rise of Alternative Coffee Brands

Rising awareness of caffeine's side effects and the climate crisis is driving a surge in demand for bean-free coffee. We explore the pioneering brands at the heart of this transformation.

Coffee, Re-coded: The Rise of Alternative Coffee Brands

Today, coffee is the second most consumed beverage after water and an essential staple of daily life. While coffee holds an absolute presence in our routines, fundamental questions are recently being raised regarding the impact this familiar drink has on our bodies and our lifestyles.

Amidst the growing wellness trend, the caffeine “jitters” have come under intense scrutiny. Characterized by increased heart rate, shakiness, and the inevitable crash that follows a caffeine high, these side effects are all too familiar to those who rely on coffee to get through the day. As the desire to avoid this price of borrowed energy spreads, a “No-Jitter” movement is gaining significant traction.

Beyond the No-Jitter trend, the macroeconomic impact of the climate crisis is further accelerating market shifts. A sharp decline in bean production due to climate change, coupled with the heavy carbon footprint associated with coffee consumption, is straining the industry’s sustainability. As more consumers begin to prioritize both their physical health and the planet’s future, interest in alternative coffee has moved beyond mere curiosity to become a primary driver of market growth. In this issue, we explore the brands stripping away the coffee bean and replacing it with sustainable ingredients.

We examine how these brands are offering a new alternative—retaining coffee’s signature flavor while cleverly delivering the alertness modern consumers need.

SANS:

A Coffee Heaven Without Beans



The name of the Korean alternative coffee brand “SANS” is derived from the French word for “without.” True to its name, SANS products are entirely bean-free—a branding choice that promises freedom from the side effects of caffeine and the supply chain vulnerability caused by climate change. By blending 12 plant-based ingredients, including date seeds, green apples, rye, barley, and hibiscus, and utilizing a specialized fermentation process, SANS successfully recreates the distinct aroma and flavor profile of traditional coffee. Though it is a strictly zero-caffeine beverage, it has earned acclaim for its remarkable similarity to conventional coffee in taste, scent, and texture.

SANS was born out of a response to the global climate crisis. CEO Kim Kyung-hoon was inspired to develop a coffee alternative during his doctoral studies after encountering a paper in the international journal “Science Advances” on the potential extinction of coffee species. As temperatures climb in major coffee-producing regions, growing conditions are deteriorating, leading to shrinking yields and price hikes. The environmental footprint of traditional coffee is equally staggering: coffee production generates 2.2 times more carbon than pork and has roughly 1.2 times more water footprint than beef.

SANS integrates this environmental awareness directly into its cultivation methods. All 12 of its raw ingredients are produced through smart farming, utilizing indoor agricultural environments where soil and climate conditions are precisely controlled. This controlled-environment agriculture ensures that production remains unaffected by weather volatility or regional instability, enabling a stable supply regardless of location. While traditional coffee remains tethered to specific geographic regions, SANS has effectively decoupled its supply chain from the impact of climate change.



Coffee, Re-coded: The Rise of Alternative Coffee Brands

This experimental spirit comes to life in the brand's physical space. At its Ikseon-dong flagship store, SANS reimagines the traditional "roastery" as a "foundry." While a roastery centers on the artisanal craft of roasting beans, the foundry serves as a stage that visualizes the processing and extraction of raw ingredients as a seamless, technical journey. This spatial design is a bold statement of confidence, proving that a true coffee experience can be achieved without a single bean. With all 12 botanical ingredients on display, the space offers consumers a sensory journey into the very origins of their beverage. Beyond its core offering, SANS expands consumer choice through tailored functionality. For those seeking mental alertness, the menu offers a natural, caffeine-based "Wake Booster," while those seeking relaxation can opt for a sleep-inducing "Sleep Booster." Because the base beverage is entirely bean-free, it can also be enjoyed as a naturally caffeine-free option. This versatility has fueled the brand's expansion into new categories, most notably with its wellness line, "TEAFFEE." By integrating high-demand benefits like "glow skin" and "slow aging" directly into the menu, SANS seamlessly incorporates beauty and self-care into daily coffee rituals.

Ultimately, SANS represents more than just a coffee alternative; it is a brand pioneering a new production paradigm that effectively decouples coffee from the bean, addressing the structural vulnerabilities of a climate-threatened industry. SANS has successfully reimagined the coffee ritual through botanical innovation and fermentation. By offering functional boosters that allow for a highly personalized experience, the brand is actively redefining how consumers engage with coffee. SANS has proven that the "coffee experience" can be brilliantly recreated—even without beans.

- 1 ——— Pouring coffee on tap at SANS Foundry in Ikseon-dong (Source: SANS Website)
- 2 ——— SANS pop-up store at Shinsegae Department Store, Gangnam (Source: SANS Instagram)
- 3 ——— SANS's new "TEAFFEE" wellness lineup (Source: SANS Instagram)



Coffee, Re-coded: The Rise of Alternative Coffee Brands

MUD\WTR®:

The Mud Water Fueling Silicon Valley's Workaholics

MUD\WTR®

MUD\WTR® is an alternative coffee brand powered by “functional mushrooms” designed to boost mental clarity and focus without the side effects of caffeine. The brand blends four types of functional mushrooms (Lion's Mane, Cordyceps, Reishi, and Chaga) with chai and cacao, delivering the taste and alertness benefit of coffee while stripping away the associated anxiety and sleep disruption. Despite its unconventional “mud-like” appearance, the beverage has garnered a cult following as a healthy way to boost energy and productivity.

The brand's origins stem from founder Shane Heath's personal struggle. While working as a designer in the high-pressure environment of Silicon Valley, Heath found himself relying on over five cups of coffee a day just to keep up. The toll was significant: chronic insomnia and anxiety began eroding his well-being, eventually stifling the very creativity his career depended on. Realizing that pushing his body to the breaking point for the sake of productivity was unsustainable, he set out to create a new ritual—one that offered deep focus without the “caffeine jitters.”

Heath found his solution during a work trip to Goa, India. There, he discovered that traditional chai and turmeric provided a morning energy boost without negative side effects. Combining this insight with his mother's expertise in mushroom cultivation, he began prototyping his own blend. His colleagues—many of whom were also battling caffeine dependency—started requesting their own batches. This grassroots demand sparked the birth of MUD\WTR®: a brand dedicated to solving a universal pain point for the modern workaholic.



Source: MUD\WTR® Instagram

MUD\WTR® positions itself as more than just a morning coffee alternative; it aims to redesign the modern consumer's entire lifestyle. By framing the circadian rhythm as an integrated management system, the brand offers a suite of products that fulfill the body's natural needs throughout the daily cycle: “:rise” for morning alertness, “:balance” for afternoon composure, and “:rest” for deep nightly sleep. The “Starter Kit” acts as the essential entry point, inviting consumers to physically inhabit this new ritual and integrate the brand's philosophy into their daily lives.

This experience extends into media and physical spaces. MUD\WTR® defines itself as a media company that sells drinks, providing high-caliber content on neuroscience, mental health, and productivity through its own magazine and podcast. By delivering brand values through intellectual discourse rather than traditional marketing messages, the brand allows consumers to naturally internalize its philosophy as they engage with the content.

The brand's online narrative finds its physical manifestation in the offline space known as “:gather.” Serving as a community hub for meditation and breathwork classes, this space allows consumers to fully immerse themselves in MUD\WTR®'s vision of “mental wellness” through all five senses. Ultimately, MUD\WTR® is not just designing a beverage; it is architecting a daily rhythm. By integrating products, media, and physical space into a single experience, the brand offers a way of life that harmonizes productivity with well-being.



1

Trends w/ Benefits

March 15 2020 Made by MUD\WTR

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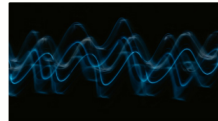
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#8 Design Your Ideal Day (try it)
MUD\WTR: Trends with Benefits



Paul Stamets is a mycologist.
Joe Rogan Experience



Exploring the Frontiers of Psychedelics.
The Tim Ferris Show



Fasting Made Simple
Big Sky Health

2



3

- 1 — MUD\WTR® product lineup (Source: MUD\WTR® Instagram)
- 2 — MUD\WTR®'s online magazine, “Trends w/ Benefits” (Source: Trends w/ Benefits Website)
- 3 — MUD\WTR®'s physical space, “:gather” (Source: :gather Website)

WOODEN SPOON HERBS: The Most Aesthetic Herbal Coffee Today



Wooden Spoon Herbs is a brand that offers wellness in the most sensory way within the alternative coffee market. Their signature “Herbal Coffee” recreates the rich flavor and ritual of coffee using only root vegetables, entirely without beans. By blending earth-grown plants like chicory, dandelion root, and maca, and infusing them with stress-regulating adaptogens, the brew helps ease tension and restore balance. It provides a gentle energy boost without caffeine, targeting consumers who want to maintain their morning ritual without the overstimulation.

Founder Lauren Haynes is a trained herbalist. She noticed that while the healing power of herbs is time-tested, they were typically trapped in dull brown bottles and clinical, medicinal designs that felt disconnected from modern daily life. Wooden Spoon Herbs began as an attempt to take herbalism out of an inaccessible, unfamiliar realm and redefine it as something anyone can naturally enjoy as part of their lifestyle.

While most alternative coffee brands focus on ingredient lists or how closely they mimic the taste of traditional coffee to win over consumers, Wooden Spoon Herbs takes a different path. While the functional benefits are certainly there, the brand focus on aesthetic and sensory appeal rather than technical persuasion.



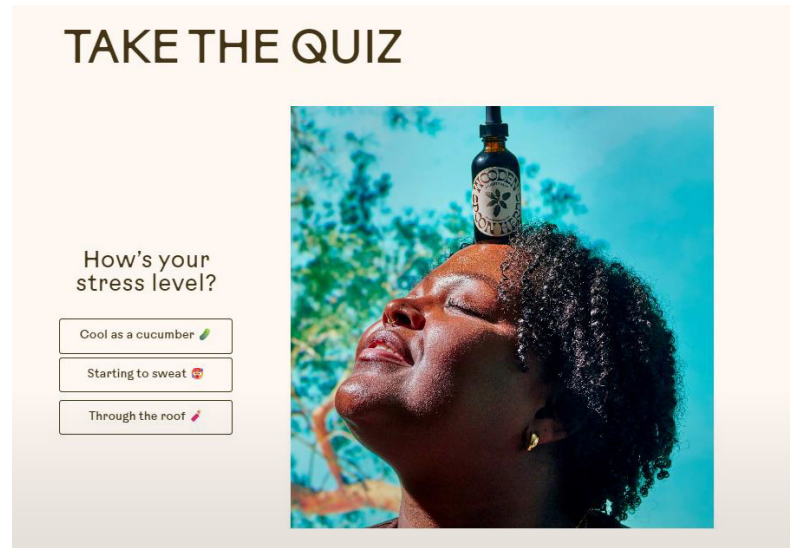
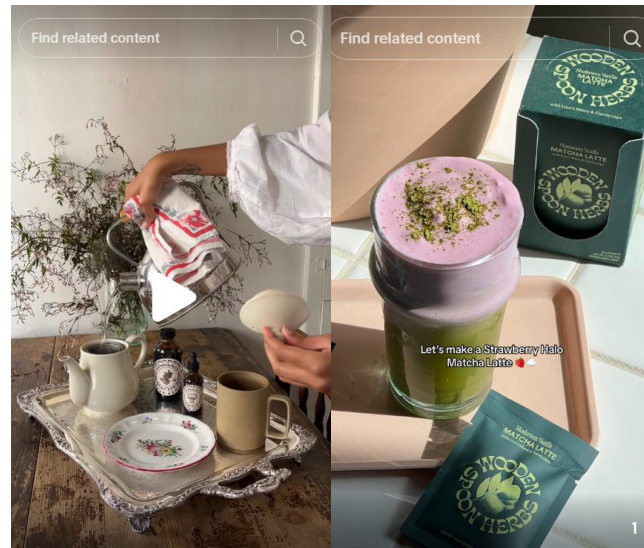
Coffee, Re-coded: The Rise of Alternative Coffee Brands

The brand's unique packaging evokes the feel of a mystical potion, transforming these herbs from mere supplements into coveted desk or kitchen shelf items. By positioning the product as a "statement of personal taste" rather than a simple "health product," Wooden Spoon Herbs has established a distinct competitive edge in the alternative coffee market.

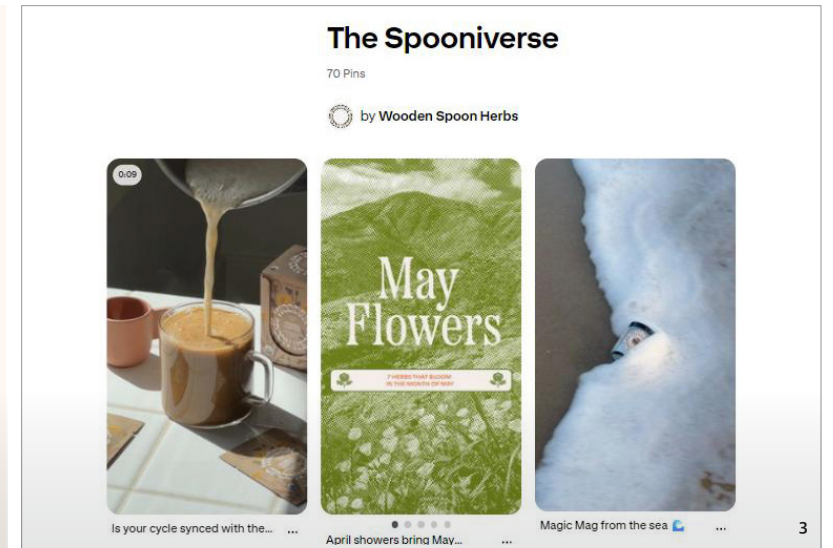
This sensory-led strategy carries through every communication channel. On TikTok, the brand builds a distinct mood through videos featuring aesthetic interiors, natural textures, and unique recipes. On Pinterest, the brand acts more like a fashion lookbook, using curated imagery to weave its products into an aspirational lifestyle. For a Gen Z audience that explores their tastes through imagery and mood, Wooden Spoon Herbs has successfully become a coveted lifestyle item for their personal space.

Furthering this journey is the website's digital prescription feature, offered through an interactive "Take the Quiz" tool. By tailoring product recommendations to an individual's unique lifestyle and needs, the brand integrates self-discovery into its core brand experience—speaking directly to Gen Z's appetite for self-exploration and expression.

Ultimately, what Wooden Spoon Herbs has introduced to the alternative coffee market is not just a new ingredient but a new mode of consumption. By redefining herbs from a "functional necessity" into "lifestyle choice that signals personal taste," the brand has successfully carved out a unique space defined by sensory experiences.



- 1 ——— Wooden Spoon Herbs' TikTok content (Source: Wooden Spoon Herbs TikTok)
- 2 ——— Interactive quiz for personalized product recommendation (Source: Wooden Spoon Herbs Website)
- 3 ——— Wooden Spoon Herbs' brand mood board (Source: Wooden Spoon Herbs Pinterest)



Breaking Convention: A New Standard for the Coffee Experience

In the alternative coffee market, quality ingredients and taste are now merely the baseline requirements for a consumer's first purchase. For a brand to achieve sustainable growth and true customer retention, it must offer a differentiated experience that goes beyond the product itself. The future potential of alternative coffee brands is being built on two core pillars: providing a novel brewing experience that transcends traditional extraction methods, and seamlessly integrating into daily life by offering functional alternatives that traditional coffee cannot provide.

New Brewing Experience

Technology Beyond the Espresso Machine

Traditionally, coffee has been the domain of artisans, defined by origin and roasting. Alternative coffee brands are deconstructing this formula and redefining the brewing process itself. As seen in the use of fermentation and molecular reverse-engineering to recreate a consistent coffee experience without beans, the technology behind extraction and blending is becoming a brand's core asset. The new standard for the coffee experience is shifting from "the origin of the bean" to "the technology used and how it is crafted."

Core Strategies

- Translate technological prowess into a brand story to create a lasting impression on consumers
- Develop consumer touchpoints that allow users to directly see and experience the ingredients and manufacturing process

Ritual Design

Integrating Beverages into Daily Life

Alternative coffee brands focus less on the beverage itself and more on the significance of the rituals. From functional boosters that allow users to choose between caffeine-fueled alertness and relaxation to interactive quizzes that help them discover exactly what their body needs, these brands design functional, personalized experiences that traditional coffee simply cannot match. By offering these tailored benefits, they create a compelling case for consumers to replace their traditional coffee habits with a more bean-free routine.

Core Strategies

- Build a unique value proposition by offering functional benefits that traditional coffee cannot provide
- Establish brand routines through personalized experiences that empower consumers to make their own wellness choices

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