

Monthly Picks

April 2026



INNOCEAN

Contents

Marketing Trend

Exploring key marketing trends shaping Korea and global markets.

Space-EX

Uncovering insights from today's trending spaces.

Rising Icon

Discovering up-and-coming brands and artists.

How Generation Alpha is Transforming Consumer Behavior and Experience

Before becoming a major consumer force, Generation Alpha is already consuming and engaging with the world in unprecedented ways. The ways they discover, experience, and choose brands are fundamentally different from previous generations.

How Generation Alpha is Redefining Consumer Experience and Behavior

Generation Alpha, the cohort born after 2010, marks a return to the beginning of the alphabet following X, Y, and Z. They are more than just the next generation in line; they represent an entirely new beginning. Comprising roughly 25% of the population in Korea and 24% globally, they are the first generation raised in an era of low birth rates. Growing up often as only children, they have learned to view the world with themselves at the center, naturally prioritizing individuality and self-expression. As true digital natives, they are accustomed to navigating the world through images, memes, and AI-driven dialogue. For Gen Alpha, the world is defined by speed, sensory experiences, and real-time interaction.

They have also internalized a deep sense of cultural pride, coming of age just as K-content took center stage globally. For this group, digital spaces became their primary reality during the pandemic. Whether socializing in the metaverse instead of playgrounds or learning in virtual spaces rather than traditional classrooms, their upbringing has set a completely different standard for what they expect from the world. We will explore what truly matters to Gen Alpha and how their ways of perceiving and interacting with the world are fundamentally changing.

Four Key Factors to Understanding Gen Alpha

Gen Alpha is raised in a horizontal relationship with their parents and is also naturally fluent in AI. They proactively navigate information, make their own consumer choices, and take the lead in shaping their own experiences.

1 Parents — On Equal Footing with Millennial Parents

Parents are the primary influence on Gen Alpha's values. Millennial parents tend to respect their children's opinions and actively involve them in purchasing decisions; as a result, Gen Alpha has gained a natural seat at the table family spending decisions. These children also seamlessly share their parents' brand preferences and lifestyle choices. This influence has been further amplified by today's family structure that focuses more resources on a single child and a lifestyle that became increasingly home-centered during the pandemic.

2 AI Natives — A New Way of Thinking

Gen Alpha is a purely digital cohort, born into an era where smartphones and online connectivity have always been the norm. Unlike Millennials or Gen Z, who experienced the transition from analog to digital, Gen Alpha has never seen a boundary between the physical and virtual worlds. Growing up alongside the explosion of social media, they experience the world through content curated by algorithms. Images and videos are their primary language, and conversing with AI feels as natural as talking to a person.



Source: Image generated by Gemini

3 Education — Developing Life Skills Early On

Modern educational policies focus on cultivating talent that can co-exist with AI. With the 2025 introduction of AI digital textbooks, Gen Alpha is growing up as a truly AI-native generation that views artificial intelligence as both a learning partner and an everyday tool. At the same time, they are developing financial literacy at a much earlier age than previous generations—learning to manage money, invest, and plan their own spending from a very young age.

4 Consumption — Exploring Personal Taste and Experience

For Gen Alpha, the consumer journey begins with discovery. Rather than simply following trends, they prefer to explore a variety of experiences to uncover what they personally enjoy. The starting point for any purchase isn't "Is this popular?" but "Is this me?" Consequently, visiting a physical store is about more than just making a purchase; it's an opportunity to discover new brands and refine their personal taste.

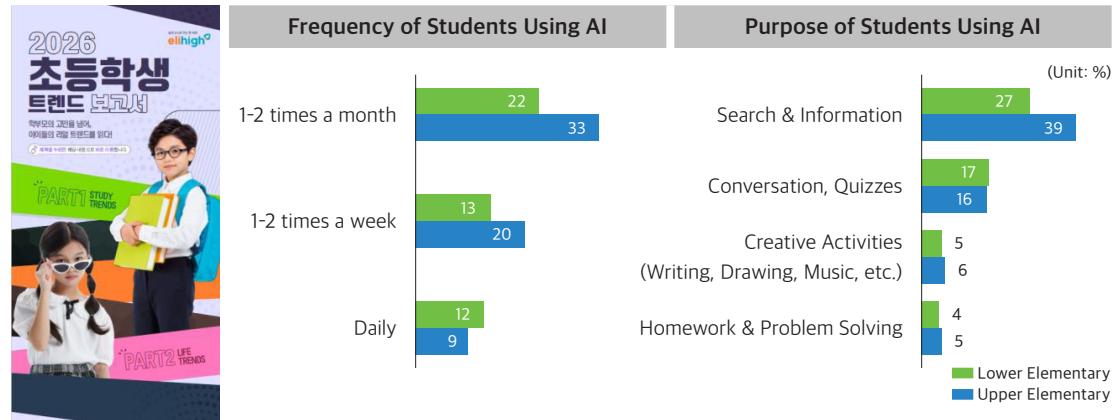
What AI Means to Gen Alpha - My Personal Supporter

Optimal Answers Over Lists of Search Results

Gen Alpha views sifting through endless search results as an inefficient process. They have moved away from traditional keyword searches in favor of natural language dialogue, fundamentally changing how they acquire information. Rather than browsing portal links, they expect immediate, refined answers from generative AI that understands the specific context of their needs.

AI as a Partner, Not Just a Tool

This generation doesn't simply ask questions; they engage with AI as a creative collaborator and problem-solver—whether they are working through homework together or generating art. This marks a shift from passive consumption to active creation. For Gen Alpha, using AI to produce results has already become an essential part of their daily lives.



Gen Alpha is more accustomed to acquiring information through conversational AI than traditional keyword searches. For them, AI is more than a simple tool; it is a collaborative partner for thinking and creating together.

Case Study Elihigh's AI Smart Math

Elihigh is a standout example of how Gen Alpha's approach to learning is evolving. The Korean platform analyzes performance data from 370,000 students to identify individual error patterns, using AI to sift through a database of 250,000 questions to curate a personalized set of exercises for each student. When a student solves a problem using a smart pen, the AI performs a real-time analysis to suggest the next optimal learning step. This creates a true collaborative partnership where the student and AI build the learning journey together. Elihigh's strong performance in the 2025 elementary education market reflects its success in adapting to the unique learning behaviors of Gen Alpha.



2026 Elementary Student Trend Report by Elihigh

Megastudy Education, a leading Korean online education company, conducts an annual survey of Elihigh members to track and analyze evolving trends in elementary students' learning behaviors and lifestyles. The resulting data serves as a vital benchmark for understanding the behavioral and consumption patterns of Gen Alpha, and it forms the primary evidence base for this report.

What Play Means to Gen Alpha - Meme-iverse

For Gen Alpha, play knows no boundaries. It begins with digital content that flows seamlessly across platforms and spills into reality, gaining new life as it is continuously reproduced.

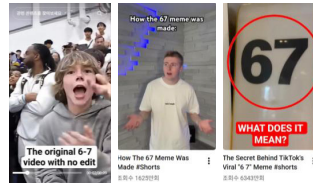
Before Gen Alpha, global trends moved with a time lag as they traveled between regions. Driven by a combination of digital play culture and algorithms, a trend now goes global the moment it hits a short-form platform. These trends then find a second life on gaming platforms like Roblox, where they are remixed and reproduced.

67 Meme

Originating in December 2024 from a track by American rapper Skrilla, the 67 (pronounced “six seven”) meme exploded worldwide via TikTok. Despite being just two random numbers, its very lack of meaning became its appeal, evolving into a form of new expression for Gen Alpha. Dictionary.com named 67 its 2025 Word of the Year—the first time a term with no clear meaning has won the title. In Korea, the trend spread rapidly through schools and social media starting in early 2025.

Italian Brainrot

Emerging on TikTok in January 2025, Italian Brainrot memes feature crude, AI-generated mashups of animals and objects paired with Italian-sounding names. It took only two months to spread across North America, Europe, South America, and Asia, with localized versions appearing by March. As the hype on short-form video slowed, the meme migrated to Roblox, where its lifespan was extended. It became the 3rd most-searched term globally on Roblox and 2nd in Korea for 2025. The game “Steal a Brainrot” even shattered platform records in September with over 25 million concurrent players. This phenomenon proves that, for Gen Alpha, geographical and cultural borders are a thing of the past.



Source: Search results for 67 meme on TikTok, Youtube



Source: Roblox Website

Case Study Roblox

For Gen Alpha, Roblox is much more than a gaming platform. It is a space where they explore their personal tastes and build their identities through avatars. It serves as a digital plaza where global memes and cultural trends are introduced, remixed, and reproduced in real-time. Roblox users updated their avatars an average of 274 million times per day, and 87% of survey respondents said experimenting with their avatar’s style made them feel more comfortable expressing themselves in the real world. Additionally, Emotes (expressive avatar animations like dances and gestures) have evolved into a primary form of communication that often replaces text, giving rise to a culture where users create and share their own custom emotes. In this ecosystem, Gen Alpha has moved beyond simply consuming culture; they are the ones creating it. As seen with “Steal a Brainrot”—which cycled from a meme to a game and back into a meme—Roblox is now the definitive epicenter where Gen Alpha’s trends and tastes are first sparked and spread.



Source: Roblox

How Generation Alpha is Transforming Consumer Behavior and Experience

What Money Means to Gen Alpha - ETFs Over Piggy Banks

Gen Alpha is learning about money at an early age. Today, 94%¹⁾ of Millennial parents provide financial education to their children, with 62% citing it as the most essential skill for the future. As a result, 52% of parents with children in upper elementary school now give a regular allowance. The way these children manage their money reveals a financial maturity far beyond that of previous generations; while food and stationery are still the top categories, savings and investment (19%) have climbed to the top of the list. Gamified financial literacy apps, such as “iBooja” and “Firfin,” have turned asset management into a form of play. These apps help build healthy spending habits while allowing children to internalize financial concepts through play, integrating game elements such as quizzes, missions, and digital piggy banks. The rapid growth of financial literacy among this generation is clearly reflected in the data: the number of stock owners under the age of 20 increased approximately sevenfold²⁾ between 2019 and 2024.

Percentage of Elementary Students Receiving Allowances		Top 5 Ways Elementary Students Spend Their Allowance		Allowance App Usage Rate Among Elementary Students ³⁾	
Lower Elementary	36%	Food (Restaurants, Cafes, Snacks, etc.)	65%	Lower Elementary	12%
Upper Elementary	52%	Stationery, Toys & Lifestyle Goods	60%	Upper Elementary	31%
		Savings & Investment	19%		
		Leisure & Recreation	14%		
		Gaming	13%		

¹⁾ Source: Generation Alpha Insight Report by Univ Tomorrow Research Laboratory for the Twenties (2024)

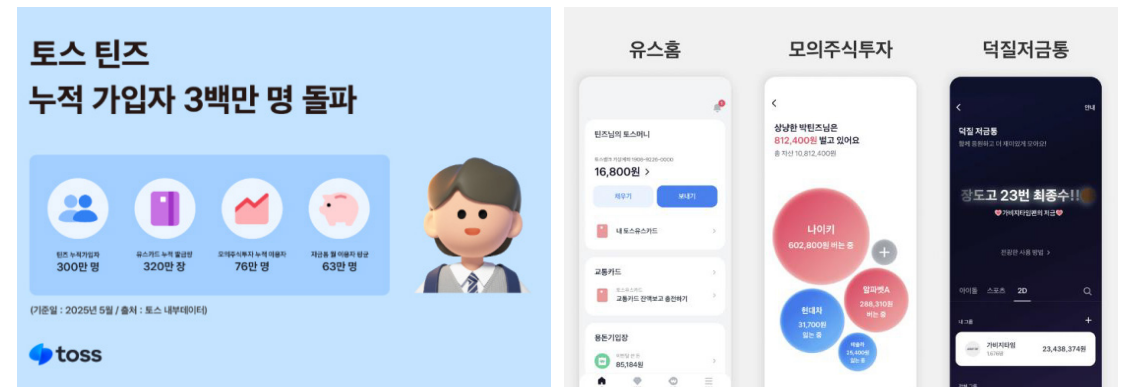
²⁾ Source: The number of stock owners under age 20 increased from 98,612 in 2019 to 773,414 in 2024, according to Korea Securities Depository.

³⁾ Source: 2026 Elementary Student Trend Report by Elihigh

Gen Alpha doesn't just receive an allowance; they save, invest, and actively manage their money. For them, financial literacy isn't a classroom subject—it's something they internalize through apps and everyday life as a form of play.

Case Study Toss Teens

Toss Teens is the financial service that has most effectively decoded the behavioral language of Gen Alpha. The service embedded their daily routines—such as school meal menus, class schedules, and “Fandom Piggy Banks”—directly into the app's ecosystem. Its mock investment feature, which allows users to trade domestic and international stocks with a virtual \$1,000, has reached 760,000 cumulative users. The platform also runs a Financial Education Ambassador Program led by elementary and middle school teachers who use the app as a teaching tool in classrooms. Additionally, more than 200,000 monthly users engage with the “Money Study Café,” a dedicated in-app financial learning space for teens. Having surpassed 3 million cumulative subscribers as of 2025, Toss Teens has become the leading standard among financial platforms for Gen Alpha.



Source: Toss Website

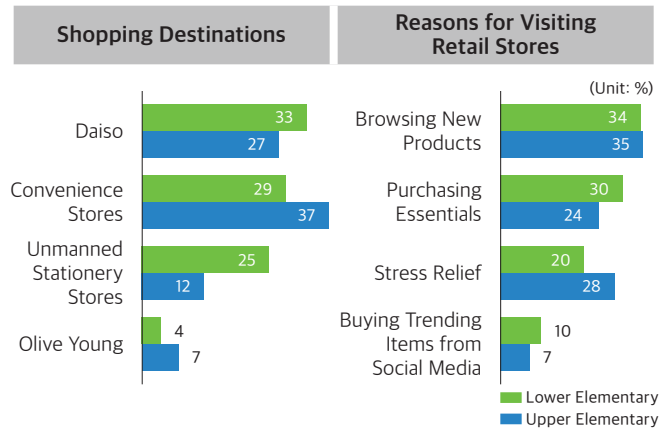
How Generation Alpha is Transforming Consumer Behavior and Experience

What Shopping Means to Gen Alpha - A Curated Treasure Trove

For Gen Alpha, shopping is not just about buying what they want; it is a journey of discovering what they love. Rather than merely following trends, they actively explore to cultivate their own unique tastes.

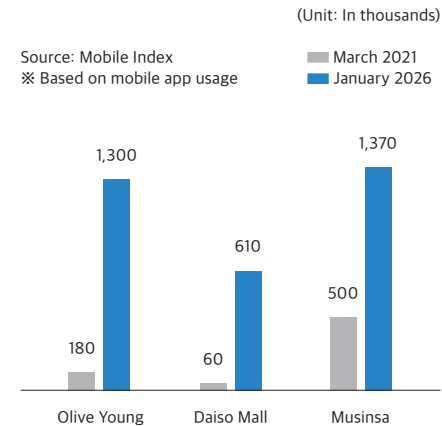
Although Gen Alpha has been surrounded by digital technology since birth, they paradoxically favor in-person experiences where they can touch and select items in person. Their primary reason for visiting retail spaces is to “browse new products.” For them, shopping is not simply about buying items; it is a journey of exploring and discovering their own personal tastes.

The key to building long-term loyalty with this generation lies in empowering their sense of choice rather than forcing a brand-designed path. It is essential to provide a tiered structure that allows them to enter at an accessible price point and evolve their tastes over time, all while creating an environment where the search itself becomes a form of play. Gen Alpha is not passive recipients of brand messaging; they are active participants who explore, select, and curate their own preferences.



Source: 2026 Elementary Student Trend Report by Elihigh

“Oldamu” MAU Among Teens (Ages 10-19)



Case Study Olive Young, Daiso, and Musinsa (The “Oldamu” Trio)

The “Oldamu” trio represents the key retail channels that dominate the initial consumption stages of Gen Alpha. By perfectly aligning with this generation’s focus on cost-effectiveness and taste exploration, these brands have become the definitive gateway to their spending lives. All three brands share a common strategy: lowering entry barriers and offering exploration-driven experiences to capture Gen Alpha early and convert them into lifelong customers.



Source: Olive Young Website

In 2024, Olive Young moved swiftly to secure its position as the gateway for Gen Alpha’s first beauty experiences by launching “Hi-TEEN Members,” the beauty industry’s first membership program dedicated to ages 14-19. This lock-in strategy has proven highly effective, with the share of premium product purchases among teenage members doubling from 12% in 2024 to 25% in 2025.



Source: Daiso Instagram

Daiso serves as a natural gateway for Gen Alpha thanks to its low price barriers. Beyond affordability, its stores are purposefully designed for discovery, encouraging users to explore a vast array of goods. This layout effectively converts casual window shoppers into active buyers. By rapidly expanding its teen-centric categories—such as character goods, stationery, and beauty—Daiso is solidifying its position as the entry point for Gen Alpha’s spending habits.



Source: Segyeby

Musinsa recognized that 40% of its active users in their 20s are long-term members who first signed up as teenagers. Guided by this insight, the brand is doubling down on its early-acquisition strategy. Musinsa plans to expand its Musinsa Standard stores to 60 locations by the end of the year, targeting areas with high teenage foot traffic.

What Cars Mean to Gen Alpha — ①

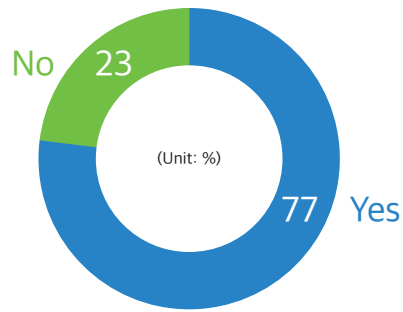
Hachuping Car Over Daddy's Car

For Gen Alpha, the relationship with an automotive brand begins with content. Brand perception is shaped by the first encounter, not the first ride.

For previous generations, the automotive experience began at the showroom where they came to see the car in person, sit in the driver's seat, and take it for a test drive. Brand relationship typically only began at the point of sale, and marketing existed primarily to drive that final decision. For Gen Alpha, first impressions are formed through content before they ever experience the ride itself. According to global digital marketing agency Razorfish, 68% have driven a car in a video game, 67% have watched car-related videos online, and nearly 60% have watched shows or movies centered on cars. These content-based experiences are now the primary force shaping their expectations and perceptions of a car brand.

Source: Razorfish, "Gen Alpha and the Future of Car Culture" (US, 2026. 2)

"I want to experience the cars I've seen in content in real life"



Source: Quick poll on automotive perceptions among Gen Alpha (n=39)

Where Elementary School Students Consume Content

Grade	1st	2nd	3rd
1st	YouTube	Roblox	TikTok
2nd	YouTube	Roblox	TikTok
3rd	YouTube	Roblox	TikTok
4th	YouTube	Roblox	TikTok
5th	YouTube	TikTok	KakaoTalk
6th	YouTube	KakaoTalk	TikTok/Instagram

Source: iBelieve (DOLabs), "Top 3 Apps by Elementary Grade" (2023-1H 2024)

Case Study Hyundai Motor × Catch! Teenieping

Instead of pushing brand messaging, Hyundai Motor collaborated with the hit animated series "Catch! Teenieping" to meet Gen Alpha where they are. Hyundai introduced IONIQ 5-inspired characters like "Racer Hachuping" and "Kkangchongping" into the Teenieping universe. Through its spin-off animations, the brand effectively wove its cars into the show's story. This strategy extended into the physical space as Hyundai created an immersive exhibition at Hyundai Motorstudio Goyang, where the characters and cars were linked into a single, cohesive experience.

Having this experience, Gen Alpha doesn't see a car as a product that they need to understand through a description. Instead, they see it as something they naturally experience as part of the content and characters they love.



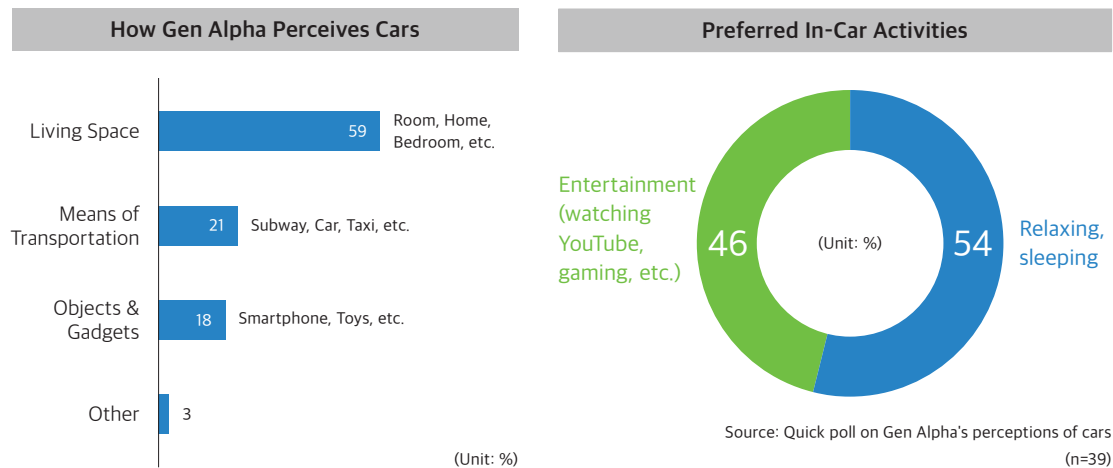
Source: Hyundai Motor Company Website

How Generation Alpha is Transforming Consumer Behavior and Experience

What Cars Mean to Gen Alpha — ② My Room on Wheels

For Gen Alpha, a car's value is no longer measured simply by how fast or safely it reaches a destination. Instead, the defining question is: "What can I do while I'm inside?" While the rise of autonomous driving has made this question relevant for all generations, Gen Alpha is unique. They didn't have to shift their perspective to embrace autonomous tech; they grew up naturally expecting travel time to be filled with their own personal experiences.

Since autonomous driving is their baseline, manual driving becomes a choice rather than a necessity. This allows their time on the road to be used entirely in their own way. To them, the ideal car is an adaptive experience space—one that adjusts to the passenger the moment they step inside.



To Gen Alpha, travel time isn't dead time—it's time for active consumption. The vehicle serves as an extension of their personal space where they rest, watch YouTube, play games, and engage in personal activities.

Case Study Kia Mobility Job Experience Center at KidZania

Starting with KidZania Seoul in 2023, Kia operates permanent mobility experience programs for children in both Seoul and Busan. These spaces go beyond simply displaying cars; rather, they are specifically designed for children to actively engage and do something inside the vehicle.

At the Driver's License Center, children practice driving via simulators that recreate real road environments, naturally encountering concepts like EV charging and OTA updates. Meanwhile, at the Automotive Lab, they build their own PBVs using bricks, allowing them to intuitively experience future mobility concepts.

As such, instead of merely explaining the car, Kia provides an experience where children can discover what they can do within the space. For Gen Alpha, a car's value doesn't start with specs or design—it starts with the question, "What can I do inside this car?" The KidZania experience center is the most tangible example of that shift in action.



Source: KidZania Instagram

[How Generation Alpha is Transforming Consumer Behavior and Experience](#)

What Cars Mean to Gen Alpha — ③ A Blank Canvas to Fill

Rather than simply following a single brand's narrative, Gen Alpha is accustomed to creating everything themselves—a mindset forged by customizing avatars in Roblox and constructing entire worlds in Minecraft. They do not passively consume what is given; instead, they combine diverse elements to curate their own unique experiences.

This digital upbringing directly shapes how they perceive cars. According to the global digital marketing agency Razorfish, 42% of Gen Alpha learn about automobiles through video games. Having grown up with instant control and deep customization in gaming environments like Roblox and Minecraft, they bring these same expectations to the automotive industry. To them, a car is no longer a static product delivered by a manufacturer, but a dynamic platform where the functions and experience shift based on the user's choices. Reflecting this trend, 58% of Gen Alpha said they would rather spend money on customization than buy a standard model. For this generation, a car's value is not defined by fixed specs or design, but by its flexibility—how seamlessly it can be configured to suit their specific needs and tastes.

Source: Razorfish, "Gen Alpha and the Future of Car Culture" (US, 2026. 2)

To Gen Alpha, a car is not a finished product, but a dynamic experience that transforms based on their own choices. What matters most is not the technical specifications, but the potential for customization and expansion.

Case Study **Lamborghini's Lanzador Lab on Roblox**

Ahead of its official 2028 release, Lamborghini unveiled its first all-electric vehicle, the Lanzador, on Roblox. This initiative allows users to customize and drive a car that does not yet exist in the physical world within a virtual space.

The experience is structured into three distinct stages: users can explore a virtual Lamborghini museum, design and customize their own digital Lanzador using various colors and materials through the brand's customization program, and race their customized cars on a virtual track. Rather than simply displaying a car, this initiative empowers users to build and experience it firsthand.

Through this project, Lamborghini reaches out to a much younger demographic. By providing an experience focused on designing and modifying vehicles—even before these users are old enough to purchase one—Lamborghini aligns itself with Gen Alpha's perception of the car as a customizable platform for creation, rather than a finished, static product.

Source: Lamborghini Seoul official blog



Gen Alpha:

A Generation that Builds and Reshapes Experiences

Gen Alpha is far more than just the “next generation”; they are fundamentally redefining everything from how information is consumed to how brands are perceived. Their consumer behavior is characterized by “active curation” rather than “passive acceptance.”

Content-First Brand Experiences:

Brand Relationship Begins with Content

Gen Alpha encounters brands through content and digital experiences before they ever interact with a physical product. Algorithms now carry more weight than traditional search, while characters and creators serve as the primary bridge to brands rather than standard advertisements. To this generation, brand perception is forged through content. Through repeated exposure in videos, games, and character-driven narratives, brand awareness naturally builds, making the brand a familiar presence in their daily lives.

Active Curators:

Favor brands that enable creation, combination, and participation.

Rather than passively consuming a finished product as-is, they possess a “platform-oriented mindset,” preferring to select, edit, and customize functions to suit their needs. For this generation, consumption is not the end of the journey, but the beginning of a creative process. They see no boundary between their avatar experiences in virtual worlds and their use of physical products in reality. As a result, they respond most strongly to brands that allow them to constantly update and expand their environments to reflect their evolving identities.

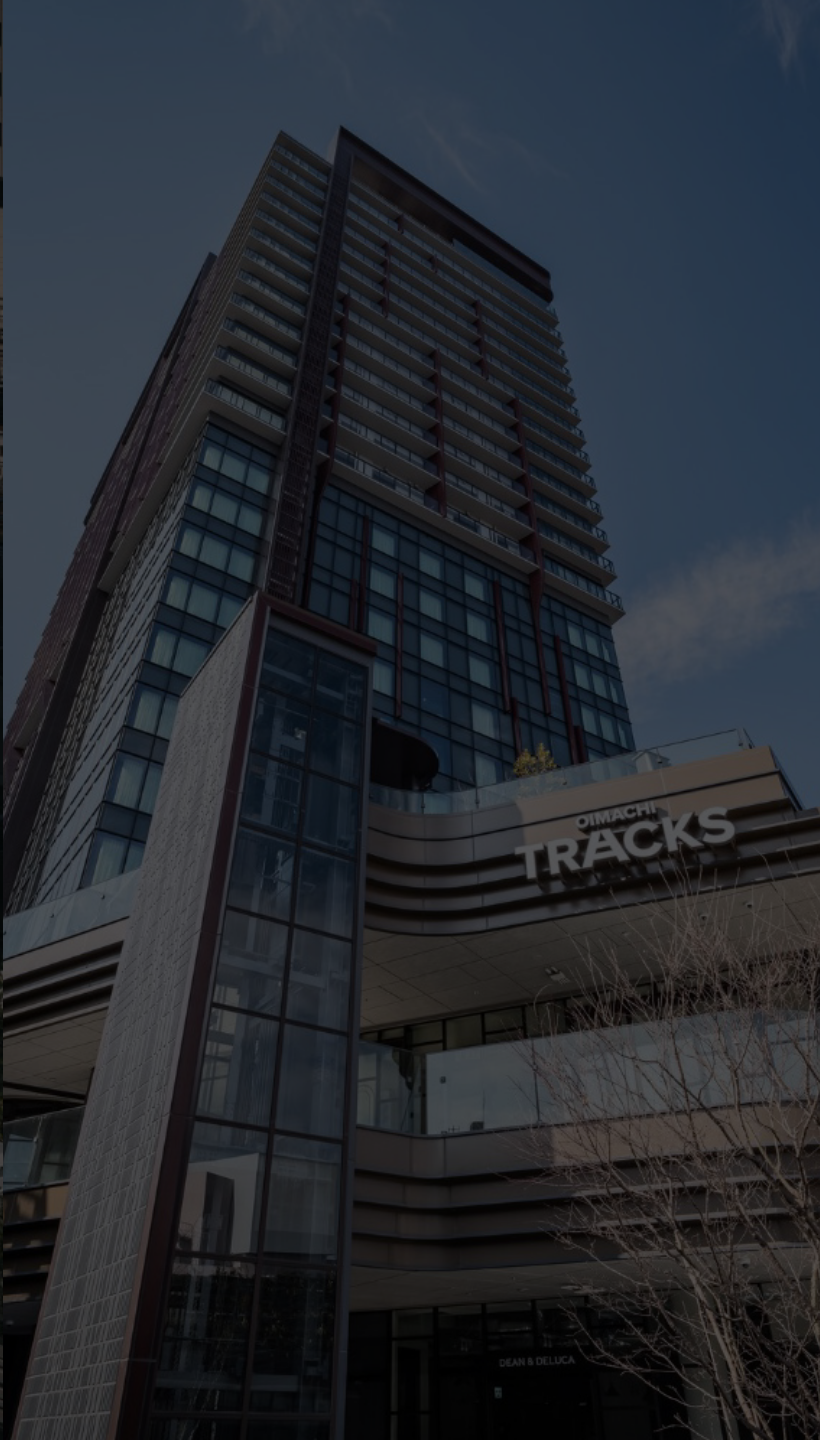
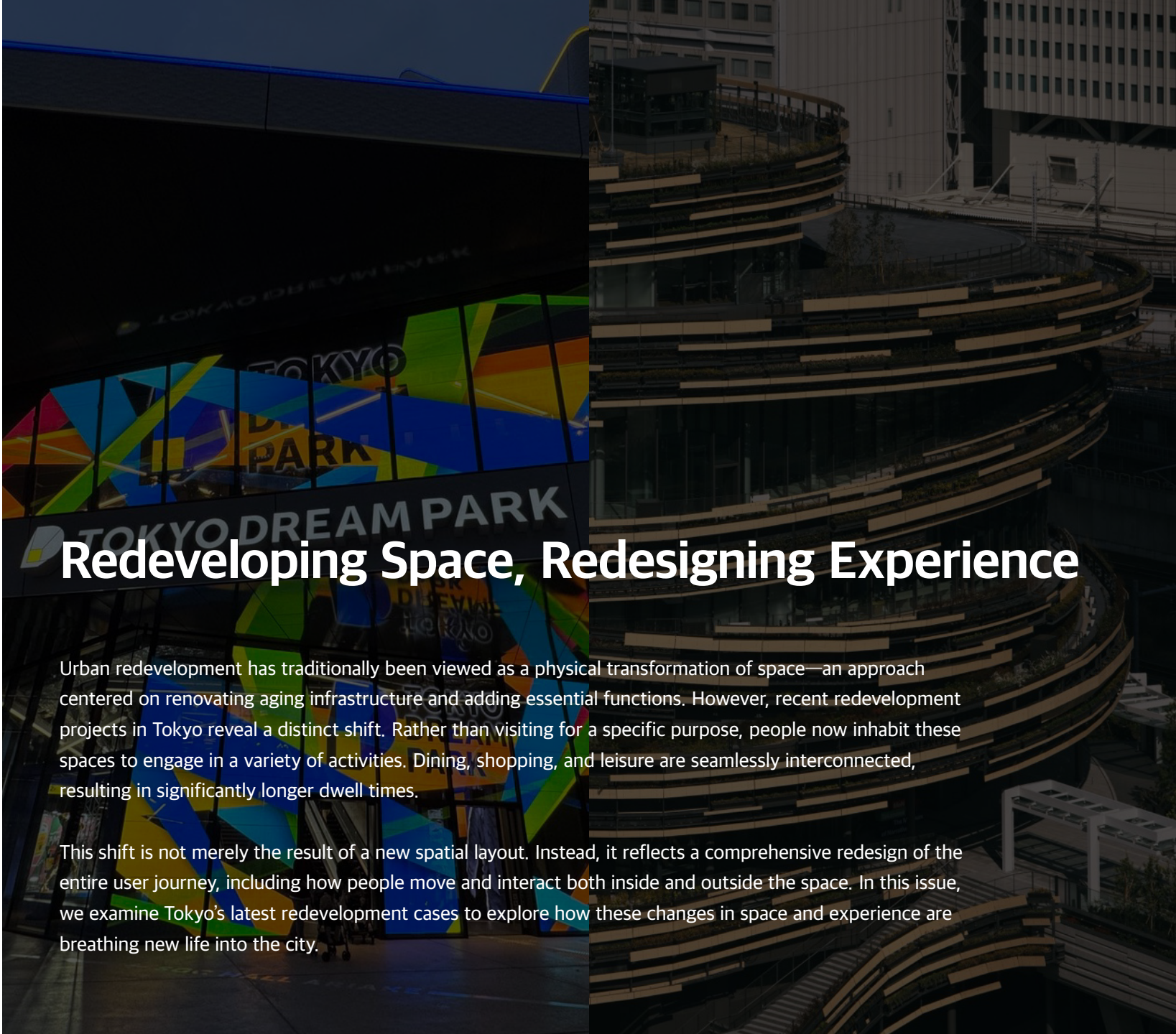
Boundless Self-Expression:

Digital Experiences Extend into Reality

For Gen Alpha, the experience of styling avatars and communicating through emotes in virtual worlds directly affects how they express themselves in the real world—from their choice of key rings to their fashion tastes. For this generation, virtual spaces are an integral part of daily life; meeting and interacting with friends within the metaverse is a standard routine. Consequently, brands must design the physical and digital realms as a single, interconnected experience. It is crucial to provide both the tools and environments that allow users to express their tastes and identities seamlessly across both dimensions.

Redeveloping Space, Redesigning Experience

Tokyo's latest urban redevelopment projects are enriching urban life, focusing on the experiences that unfold within and around these spaces.



Redeveloping Space, Redesigning Experience

Urban redevelopment has traditionally been viewed as a physical transformation of space—an approach centered on renovating aging infrastructure and adding essential functions. However, recent redevelopment projects in Tokyo reveal a distinct shift. Rather than visiting for a specific purpose, people now inhabit these spaces to engage in a variety of activities. Dining, shopping, and leisure are seamlessly interconnected, resulting in significantly longer dwell times.

This shift is not merely the result of a new spatial layout. Instead, it reflects a comprehensive redesign of the entire user journey, including how people move and interact both inside and outside the space. In this issue, we examine Tokyo's latest redevelopment cases to explore how these changes in space and experience are breathing new life into the city.

Tokyo Dream Park

A World of Immersion Unfolded Through Content

TOKYO DREAM PARK is a massive multi-purpose entertainment complex opened in March 2026 by TV Asahi, a major Japanese private broadcaster, in Ariake, Koto-ku, Tokyo. Situated within an integrated development area created as part of a broader urban redevelopment project, this space serves to create content-driven experiences that draw people into a new urban environment. The name “Dream Park” stems from the concept that everything begins with immersion, signifying that powerful content can unfold into a new, surreal experience. Accordingly, TV Asahi planned this space as an experiential hub where its content is extended into the offline space. By leveraging its own content IP for various programs, TV Asahi allows its audience to engage directly with its content in the real world, expanding the broadcast experience from simply “viewing” to “directly experiencing.”

This intent is brought to life through various programs that allow the audience to experience content in a physical setting. The broadcaster holds exhibitions and events using their flagship IPs in ways that allow visitors to participate and interact, rather than simply observe. The first example is the Doraemon event, held on the opening day. Outside, Doraemon figures with diverse expressions and poses greet visitors, while large screens on the building’s exterior draw them into the world of Doraemon before they even enter. Moving indoors, visitors are further immersed as they walk through a recreation of the workshop where Doraemon was created and spaces that faithfully recreate iconic scenes from the series. Visitors can further enrich their experience by enjoying themed food items, such as Doraemon-inspired sandwiches, sushi, and ice cream.

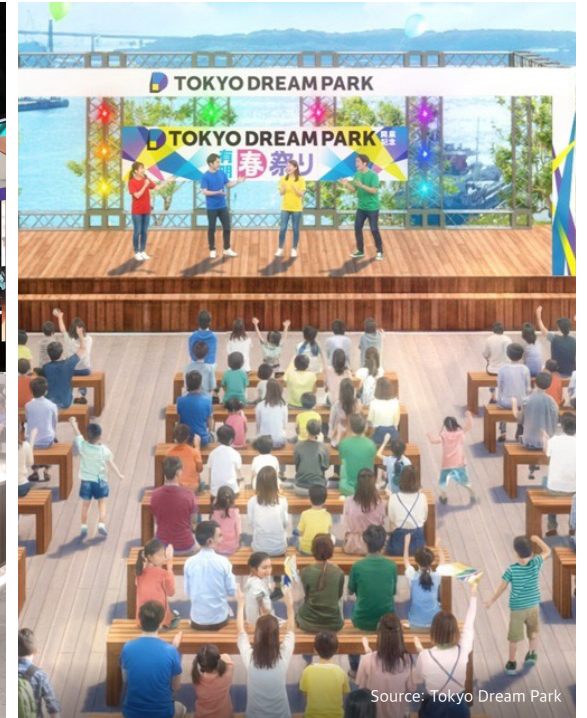
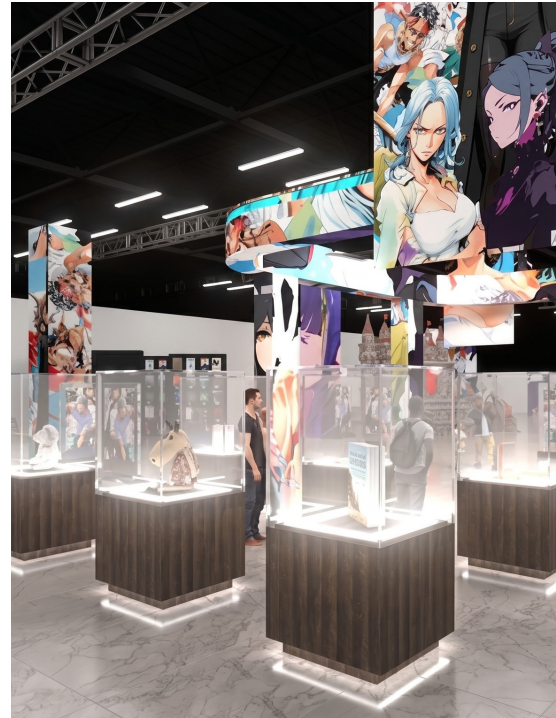


Source: Tokyo Dream Park

Redeveloping Space, Redesigning Experience

Tokyo Dream Park spans ten floors, with the lower levels dedicated to large-scale performances and live content. On the first floor, SGC HALL ARIAKE hosts concerts and major events, accommodating thousands of spectators. Here, visitors experience the energy of a live crowd, where music, lighting, and large screen displays create a powerful atmosphere. Once a show begins, the entire space functions as a unified stage, making the audience feel like an integral part of the performance. On the third floor, EX THEATER ARIAKE provides a more intimate setting for plays and live shows. This venue allows visitors to observe the actors' expressions and movements up close, focusing on every subtle detail. In this space, the audience naturally becomes immersed in the narrative, reacting and laughing along with the story.

Moving to the upper floors, the focus shifts toward interactive, hands-on content. On the seventh and eighth floors, EX STUDIO 7 and EX STUDIO 8 host exhibitions and events where visitors can join various experiential programs. In these spaces, exhibitions are meant to be touched and engaged with rather than just viewed from a distance. Whether stepping into a physical recreation of a content's universe or participating in a character-driven interactive event, visitors feel as if they have truly entered the world of the story. Finally, the DREAM TERRACE, an outdoor rooftop space, offers a venue for live performances and seasonal events, as well as a place to relax while taking in panoramic views of Tokyo Bay.



Source: Tokyo Dream Park

Redeveloping Space, Redesigning Experience

MoN Takanawa

A Space Where Narratives Shape the Experience

MON TAKANAWA, which opened in late March 2026, is a multi-purpose cultural space directly connected to JR Takanawa Gateway Station in Mita, Minato-ku, Tokyo. Directly connected to the station, it allows commuters and visitors to naturally stop by, explore exhibitions, and linger as part of their journey. The name 'MoN: The Museum of Narratives' signifies that it is not a traditional gallery dedicated to a single theme, but a space where multiple narratives are experienced simultaneously. Diverse programs—ranging from traditional crafts and fine arts to technology and digital content—are integrated into a single environment. The 'Life as Culture' concept stems from the idea that everyday activities are stories in themselves. Experiences such as dining, conversation, and relaxation flow into exhibitions and programs, forming a continuous, unified journey throughout the space.

At MoN Takanawa, visitors do not simply view exhibitions and leave; instead, they engage with a central theme through various approaches. The 'MoN Festival,' held to commemorate the grand opening, perfectly illustrates this approach. In the exhibition areas, visitors encounter works that showcase how culture is created and passed down. During talk sessions, creators from various fields discuss new approaches to cultural innovation, allowing visitors to understand the context and philosophy behind the art while participating in the dialogue by asking questions. In the craft art area, master artisans demonstrate traditional techniques, providing an up-close look at skills perfected over generations. As exhibitions, talk sessions, and demonstrations unfold under a shared theme, visitors gain a multi-dimensional understanding by seeing, hearing, and feeling the content.



Source: MoN Takanawa

Redeveloping Space, Redesigning Experience

The first through third floors serve as exhibition and program space. Rather than being divided by walls, this area is designed as a single open space that transforms depending on its current function. During exhibitions, the layout creates a flow for visitors to move through and appreciate the artwork; when a program begins, that same space transforms into a gathering point for dialogue or performances. A key feature of this design is that the user experience is reshaped through the arrangement of pieces and the flow of movement rather than through structural changes. Additionally, a tatami (soft mats used as a flooring material in traditional Japanese-style rooms) area is provided where visitors remove their shoes to experience Japan's traditional seating culture. During live performances, there is no formal distinction between the stage and the audience, and when no events are scheduled, the space remains open for visitors to sit and relax freely.

The sixth floor and the rooftop are dedicated resting spaces where visitors can linger after viewing the exhibitions. These areas encourage visitors to relax without participating in specific programs, successfully shifting the focus from active movement to a more stationary, lingering experience. At the MoN Garden Restaurant LAUBE on the sixth floor, guests can enjoy a leisurely meal, while the nearby footbath terrace offers a unique place to sit and soak their feet in comfort. This ensures a seamless transition where visitors remain in the space even after they have finished viewing the exhibitions. On the rooftop, MoN FARM provides a garden setting for visitors to immerse themselves in greenery and nature in the heart of the city. HANAMI TERRACE is a place where visitors can sit and observe the changing seasonal landscape, encouraging them to linger even without participating in a specific activity.



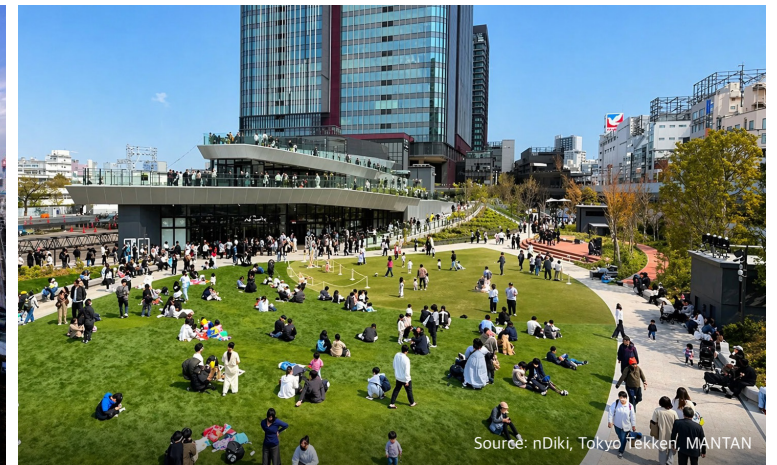
Redeveloping Space, Redesigning Experience

Oimachi Tracks

An Urban Lifestyle Platform Integrated with the City

OIMACHI TRACKS is a mixed-use district connected to Oimachi Station in Hiromachi, Shinagawa-ku, Tokyo, which opened in late March 2026. The project redeveloped a site formerly used as a railway depot, transforming a once-restricted industrial facility into a central hub for urban life to revitalize the surrounding area. What was once a maintenance space for trains has been reborn as a complex integrating shopping, business, hospitality, and residential functions. By leveraging its location directly connected to the station, the site facilitates a natural influx of people, enabling activities such as dining, shopping, movie-watching, and overnight stays to occur seamlessly within a single space. While the area was previously a place people merely passed through, it has now become a destination where they can linger and enjoy various activities.

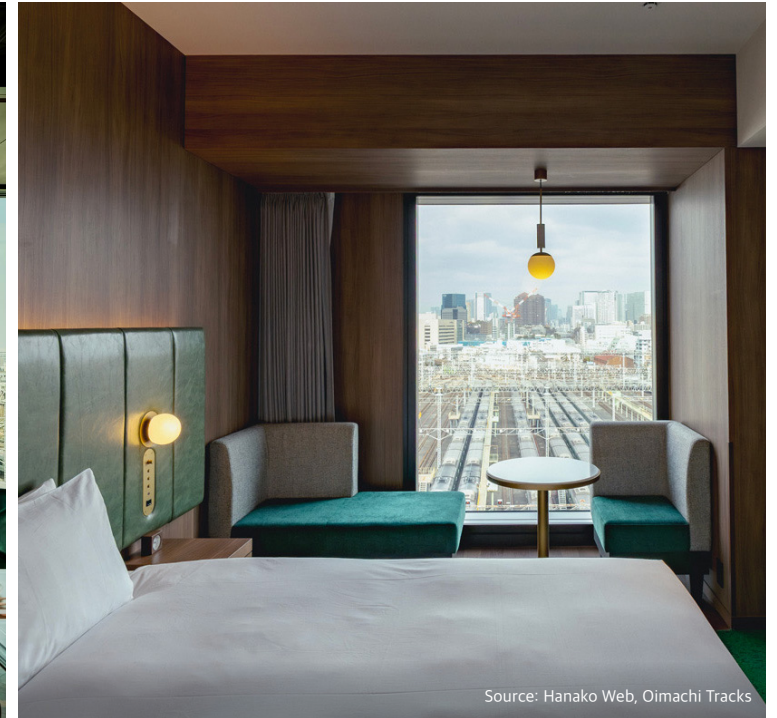
The defining characteristic of Oimachi Tracks lies in its structure, where the interior space and the city are organically connected. Notably, a large green space called TRACKS PARK sits between the building and its surroundings. This area connects to the neighboring pedestrian paths, creating a natural flow that draws people into the site without a formal entry process. Designed as an open environment accessible to all, the space naturally draws in a wide range of users, regardless of whether they plan to use the specific facilities. Alongside this, the adjacent CROSS PLAZA serves as a junction where pedestrian routes from various directions intersect. Pedestrians arriving from the station and visitors from within the building pass through this plaza to access shops or enter and exit the complex.



Redeveloping Space, Redesigning Experience

The Starbucks at Oimachi Tracks is designed to extend beyond its interior walls, expanding the dwell area to blend with the adjacent park. As the indoor space and the green expanse of TRACKS PARK merge into a single zone, visitors are given the flexibility to choose how they engage with the environment—whether by lingering in the cafe or relaxing in the park. In particular, the store's open-front design and outdoor seating ensure the cafe experience is not confined to a fixed location, but instead naturally extends throughout the park. Complementing this, takeout-oriented F&B and retail spaces along the park create an environment where visitors can consume as they move, allowing them to purchase food and enjoy a break anywhere within the open space. This layout transforms the entire park into a cohesive consumption zone, where various activities unfold without being tied to a single store.

Another defining feature of the project is the unique view of the railway depot from the restaurants, hotels, and residences. Notably, HOTEL METROPOLITAN and OAKWOOD, which offers extended stays, provide unobstructed views of the depot, allowing guests to observe trains idling on the tracks or moving through the yard while dining or resting in their rooms. This scenery provides a sense of why the space is named 'Tracks.' Furthermore, the site is organically connected to business areas. The layout connects offices, shops, hotels, and living areas into a continuous journey, making it easy for daily life to flow naturally from work to dining and relaxation. By offering both hotel stays and long-term residences, the space supports diverse lifestyles, enabling people to work and live in a single seamless space.



Source: Hanako Web, Oimachi Tracks

Urban Redevelopment: Designing for Transformation, Not Completion

Tokyo's urban redevelopment goes beyond simply assigning permanent functions or roles to a space. Instead, the focus has shifted to creating versatile environments, adapting fluidly to changing situations and needs. This shift demands a fundamental change in mindset for the companies and brands that shape urban landscapes. Rather than building a "complete" space for a single purpose, it is becoming vital to leave room for flexibility, focusing on how new value can be generated through the experiences created within. Future redevelopments must focus on building spaces that evolve dynamically through ongoing management and operation. From a long-term perspective, it is essential to build a structure that sustains and enhances a space's value over time.

Point 1 Shifting Toward Versatile Urban Spaces

Historically, urban redevelopment has focused on segmenting spaces into distinct functional zones, such as retail, business, culture, or leisure. Each area was purpose-built for a pre-defined role, resulting in a fixed physical form tailored to a single use. Recently, however, the industry has moved away from this rigid model in favor of designs that allow a single space to serve multiple roles depending on the context and operational strategy. Rather than being confined to a specific function, modern spaces are engineered for versatility. Urban redevelopment is transitioning from building defined spaces to designing versatile spaces.

Point 2 Spaces Evolving Through Content and Connectivity

As spaces become more versatile, content and programs are becoming the primary drivers of how spaces are used. Elements such as exhibitions, performances, and interactive experiences constantly redefine a space's purpose, allowing a single venue to function differently depending on the occasion. Meanwhile, parks, shops, and paths are being woven together into a single, connected landscape. This allows users to move intuitively between spaces instead of entering a specific, closed-off space. Within this structure, a space is no longer defined by a single function; instead, it constantly takes on new meaning as different activities blend and interact.

The Rise of Next Fragrance: A New Chapter in Niche Perfumery

A great scent is now just the baseline requirement. We spotlight three fragrance brands tearing up the traditional industry playbook and rewriting the rules with a language of their own.

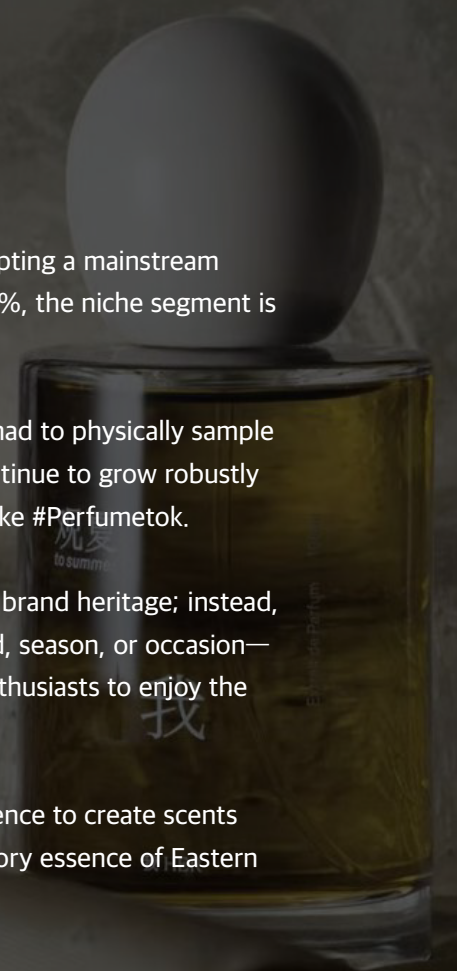
The Rise of Next Fragrance: A New Chapter in Niche Perfumery

Fragrance is currently the fastest-growing category in the beauty industry. In particular, independent niche brands are seeing remarkable success, disrupting a mainstream market long dominated by legacy houses. According to global market research firm Euromonitor, while the broader global market grows at a steady 5-7%, the niche segment is expanding even more rapidly at over 10% annually.

As competition intensifies, brands must now navigate a shift in consumer behavior. Moving away from an offline-centric approach—where consumers had to physically sample products to find the right fit—digital channels and online shopping have become central to the fragrance-buying experience. Online fragrance sales continue to grow robustly year over year, while social media has emerged as the primary frontier for product discovery, with consumers actively sharing reviews under hashtags like #Perfumetok.

Individual preferences are becoming increasingly fragmented and diverse. We have moved beyond the era of sticking to a single signature scent tied to brand heritage; instead, consumers now prioritize building a versatile fragrance wardrobe. This shift is characterized by scent layering—mixing fragrances to suit a specific mood, season, or occasion—with these custom fragrance recipes frequently shared as social content. This shift has normalized the purchase of smaller-capacity bottles, allowing enthusiasts to enjoy the widest possible range of scents.

Against this backdrop, several brands are defining the next chapter of the market through their own unique narratives. The Nue Co. leverages neuroscience to create scents that offer emotional healing; PHLUR communicates through storytelling that resonates with consumers; To Summer (观夏) captures the authentic, sensory essence of Eastern daily life. In this issue, we spotlight these three brands that are reshaping the fragrance landscape in their own distinct way.



The Nue Co.:

Science-based scents for emotional balance

THE N U E
C O

The Nue Co. redefines fragrance as more than just a fashion accessory; it is an “emotional wellness toolkit.” The brand’s origins lie in nutritional supplements, not perfume. The founder, Jules Miller, discovered the deep link between mental and physical health while managing her own chronic illness; this realization led her to explore the connection between the olfactory system and the brain. Her path to fragrance began not with an interest in the perfume industry, but through her profound exploration of human emotional responses—a journey that ultimately led her into the world of fragrance.

To develop their first fragrance, the brand turned to a laboratory rather than perfume houses. Through a five-year collaboration with the University of Geneva’s Brain & Behavior Laboratory, they mapped the precise pathways where olfactory stimuli trigger emotional responses. Partnering with world-renowned perfumer Frank Voelkl, the brand translated these findings into a fragrance. The resulting debut, “Functional Fragrance,” delivered striking clinical results: 96% of users reported feeling an immediate sense of calm, while 93% said it helped reduce stress.

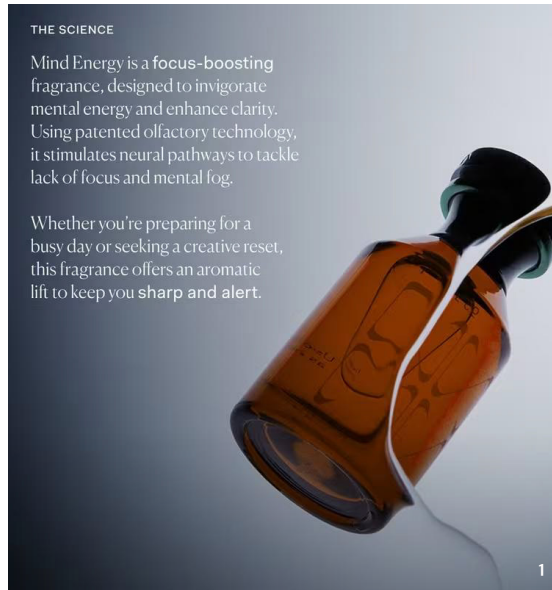
By pioneering the functional fragrance category, The Nue Co. secured a unique position that neither traditional perfume houses nor wellness brands had yet explored. As neuroperfumery emerges as a major industry focal point—with global giants like Unilever now investing in neuroscience-based scent—The Nue Co. stands out as the first brand to successfully translate this new trend into a relatable, everyday experience.



The Rise of Next Fragrance: A New Chapter in Niche Perfumery

The brand's recent lineup continues to push fragrance further into the realms of wellness and emotional health. This trajectory is clearly seen in products like 'Mind Energy' for focus, 'Forest Lungs' for relaxation, and 'Water Therapy' for soothing. Even the sales strategy mirrors the supplement industry; instead of being treated as traditional perfumes, these scents are positioned within the wellness category and designed to be layered. By creating a framework that amplifies synergy between ingredients, the brand encourages consumers to move away from using a single signature scent and instead strategically mix fragrances based on their immediate needs and goals.

This approach has fundamentally altered consumer purchasing behavior. The criteria for choosing a fragrance have shifted from finding a pleasant smell to seeking a stress-relief solution. Customer reviews reflect this shift, with feedback focusing less on traditional scent notes and more on functional outcomes like "stabilized heart rate" or "enhanced concentration at work." Notably, the brand has seen a surge in customers purchasing three to four scents at once, even on their initial order. As a result, the fragrance category has emerged as a core revenue driver, accounting for over 60% of total sales last year. Repurchase cycles are now as frequent as those of daily nutritional supplements.



- 1 — Mind Energy product description (Source: The Nue Co. Instagram)
 2 — The Nue Co. wellness product lineup (Source: The Nue Co. Website)
 3 — Layering guide for each product (Source: The Nue Co. Website)



The Rise of Next Fragrance: A New Chapter in Niche Perfumery

PHLUR: A Fragrance Brand That Sparks Conversation

PHLUR

PHLUR was revived in 2022 by fashion stylist and content creator Chriselle Lim. Originally, PHLUR pioneered the industry by championing transparency and sustainability through full ingredient disclosure and eco-friendly packaging. Upon acquiring the brand, Lim built on this foundation, layering it with personal memories and storytelling.

PHLUR's fragrances tap into memories and emotions that are deeply personal yet universally shared. The brand's signature scent, "Missing Person," perfectly illustrates this philosophy. Rather than focusing on a traditional fragrance pyramid, the fragrance is built around an emotion—the lingering scent of a loved one and the profound sense of their absence. This approach extends to titles like "Father Figure" and "Not Your Baby." PHLUR's names don't try to describe how a scent smells; they describe the intimate feelings it summons.

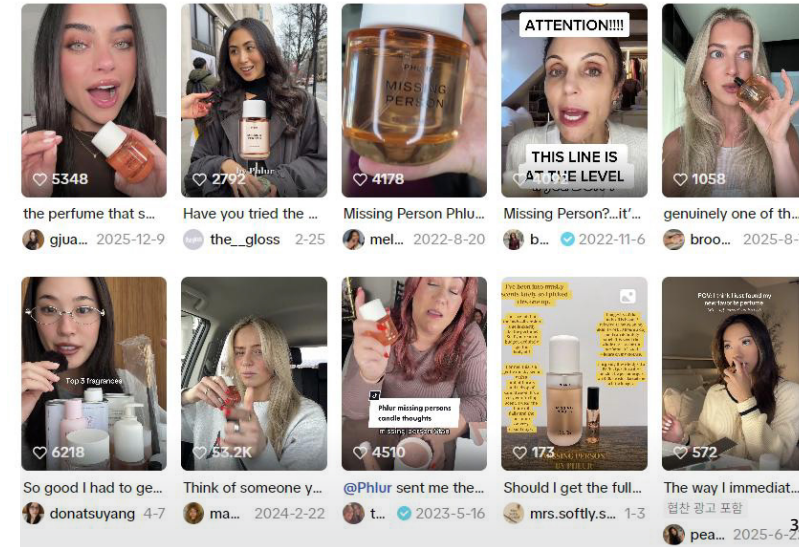
Under Lim's leadership, the brand's commitment to transparency and sustainability evolved with a touch of candor. She openly communicates that natural isn't always better, explaining that lab-engineered synthetics can often be more sustainable than harvesting natural resources that damage ecosystems. Furthermore, these synthetics are often safer for controlling allergens. This level of candor has fostered deep trust among consumers who have grown weary of the vague claims often found in the clean beauty market.



The Rise of Next Fragrance: A New Chapter in Niche Perfumery

Through its innovative approach of linking fragrance to personal memory, PHLUR has positioned itself at the absolute center of the industry conversation. Its signature scent, “Missing Person,” became an instant sensation, selling out immediately upon launch and amassing a waitlist of over 200,000 people. The fragrance went viral as influencers described it in emotional terms, such as “the scent of someone you miss” or “the scent of loneliness.” According to social data firm RetailBoss, PHLUR surpassed legacy giants like Chanel and Dior to become the most influential fragrance brand on social media in 2025.

The conversations surrounding PHLUR on social media rarely focus on ingredients or technical scent profiles; instead, they center on memory and sentiment. This makes PHLUR’s brand language uniquely shareable and deeply relatable, ensuring sustained algorithmic longevity. Effectively, the brand has built a framework that empowers consumers to translate and share the product through their own personal lenses. In an era where success belongs to brands that treat digital natives as co-creators, PHLUR represents the most rapid and vivid realization of this shift.



- 1 ——— Missing Person
(Source: PHLUR Instagram)
- 2 ——— Father Figure
(Source: PHLUR Instagram)
- 3 ——— PHLUR TikTok Viral
(Source: TikTok)

The Rise of Next Fragrance: A New Chapter in Niche Perfumery

To Summer (观夏): Capturing the True Scent and Spirit of China

观夏
to summer

In the fragrance market, oriental notes have long been a Western fantasy projected onto the East. These heavy, spice-laden scents often felt disconnected from the actual sensory experiences of Asian cultures. To Summer (观夏) directly challenges this narrative. Instead of catering to a Western imagination, the brand recreates the authentic, everyday sensory memories of life in China.

To Summer's philosophy goes beyond merely using traditional Chinese ingredients; it seeks to bottle the spirit of specific places and sentiments. To ensure the scents remain authentic to China, the brand has developed its own proprietary extracts from plants deeply rooted in Chinese heritage, such as osmanthus and orchid. These carefully crafted scents are given names that evoke a vivid sense of their origins: "Kunlun Snow" (昆仑煮雪) captures the winter in the Kunlun Mountains, while "Summer Palace Golden Osmanthus" (颐和金桂) evokes the golden osmanthus spotted at the Summer Palace. By bottling the scenes and seasons of the East, the brand sparks imagination.

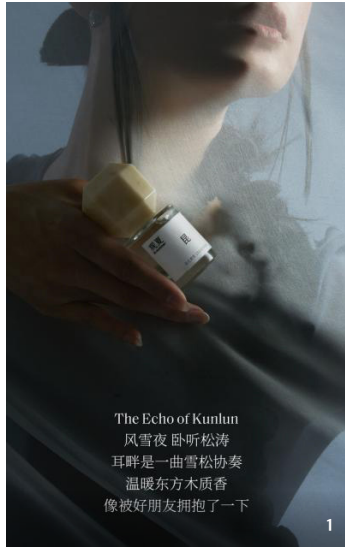
This commitment to authentic Eastern scents has not only resonated deeply with domestic consumers but has also captivated the global audience. Since its founding in 2018, To Summer has surpassed \$13 billion in annual sales within seven years. Most recently, the brand made headlines as the second Chinese fragrance brand to secure investment from L'Oréal.



The Rise of Next Fragrance: A New Chapter in Niche Perfumery

To Summer's sales strategy is as distinctive as its fragrances. From its inception, the brand concentrated its efforts on WeChat, utilizing text and photography to cultivate a cohesive brand philosophy and universe. Rather than relying on standard product descriptions, they present their scents through poetry that draws connection between raw ingredients and traditional culture. The brand even curates its own content into a magazine. Their in-house content team often spends six months developing the content for a single product launch—a level of dedication that resonated quickly, garnering over one million subscribers within their first year.

This brand universe, meticulously built through products and content, finds its physical expression in To Summer's offline spaces. The brand selects locations steeped in history and culture, preserving the original architecture and narrative while infusing them with its own unique language. A prime example is its Beijing flagship, located within the historic Guozijian (Imperial Academy). The brand repurposed the site into an open space that preserves the traditional rectangular-shaped Siheyuan (courtyard house) structure. By creating garden-like sanctuaries where visitors can pause and breathe, the brand seamlessly integrates its philosophy of "rest" into the customer journey. This space is more than a traditional retail store; it is a living space designed for a truly immersive brand experience.



The Echo of Kunlun
风雪夜 卧听松涛
耳畔是一曲雪松协奏
温暖东方木质香
像被好朋友拥抱了一下

1

(Translation)

Kunlun Snow(昆仑煮雪) — The Echo of Kunlun

On a night of swirling snow,
I lie down to the sound of pine-tree waves.
A concerto of snow-covered pine plays in
my ear,
While the warm, woody scent of the East
Embraces me like the hug of a dear friend.



2



3

- 1 — Product description for "Snow" (雪)
(Source: To Summer Website)
- 2 — In-house magazine, "Kunlun"
(Source: To Summer Website)
- 3 — To Summer Beijing flagship store
(Source: ArchDaily)

Fragrance Industry Moves Beyond the Scent

As the fragrance market expands with unprecedented speed and diversity, consumer expectations are shifting. The competitive landscape has broadened to encompass every dimension of the business—from raw ingredients and brand narratives to communication strategies and the post-purchase experience. In this evolving environment, the winning strategy is to embed a unique, proprietary language across each consumer touchpoint.

Beyond Scent

Connecting through a diverse mix of functions, sentiments, and cultures.

Fragrance consumer trends are shifting away from the mere uniqueness of a scent to how deeply it resonates with the individual. Rather than simply describing the beauty of a fragrance, the three brands are designing the profound experiences that a scent can trigger. Moving forward, fragrance brands must look beyond olfactory excellence and craft narratives that actively weave into the consumer's lifestyle.

- Key Strategies**
- Explore creative positioning that transcends the traditional beauty category, and define specific ways the brand can integrate into the consumer's lifestyle.
 - Move beyond standard product descriptions; instead, develop products and content centered on the specific experience consumers will have through the fragrance.

Culture as Channel

Leverage shifting fragrance consumer trends as a growth engine

Viral trends like #PerfumeTok have the power to turn unknown brands into overnight sell-outs, while the fragrance layering trend has inspired users to share their own "scent recipes." These shifts in consumer behavior are fueling a user-led content ecosystem. The most powerful marketing today lies in seamlessly positioning a brand within these cultural currents.

- Key Strategies**
- Integrate viral elements into the marketing strategy that leverage consumer-led cultural trends.
 - Develop content frameworks and community experiences that empower consumers to translate the brand's language and share it as their own.

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