October 2026

The Phygital Future: Shaping retail next evolution



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making tomorrow tangible

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What makes a physical store worth visiting?

A customer may arrive in store after an AI assistant has already helped narrow the choice. The visit should add value to that decision, whether through product testing, expert advice or the certainty of taking an item home.

This paper examines how retailers can design that value into the journey, while preserving the speed and convenience that routine purchases require.

The store as a place of demonstration and verification

As AI simplifies parts of product research, physical retail can help customers assess what remains uncertain. A visit can reveal how a product feels, whether it suits its purpose and what support the brand will provide.

Each store format needs a clear role within that journey. Its spaces and services should make the brand promise tangible and help customers act with confidence.



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AI referrals are changing product discovery.

Website referrals in one market and period. These figures do not measure all retail sales or autonomous purchases.



+ 693.4 %

Year-on-year growth in AI referrals to U.S. retail websites during the 2025 holiday season.

31 %

Higher conversion for AI referrals than for other traffic sources in the same period.

Source: Adobe Analytics · U.S. retail websites · November–December 2025
Published 12 January 2026

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Shifting consumer trends

“Shop-tainment”

Customers nowadays look at shopping as a past-time and form of entertainment, both in the digital and physical sphere



Commitment with inclusive brands

More and more people are choosing companies that have a sustainable, responsible and inclusive value proposition.





Convenience

People prioritize convenience in their purchases. This shift underscores the importance of proximity and efficiency.

Lack of loyalty

Consumers are generally unfaithful when faced with so many choices and are willing to change brands when offered an incentive, such as rewards for opening accounts.



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Trends in the retail sector: focus on experiences, sustainability and tailoring to unique needs of customers



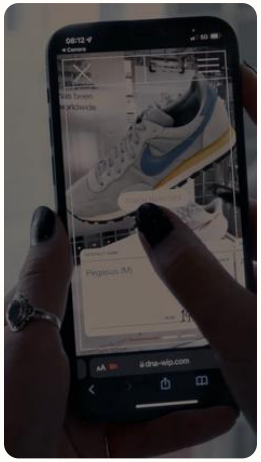
Immersive Sensory Experiences

Integrate the senses into retail environments to engage customers on multiple levels



Seamless Experience

Offering comprehensive services at all points of contact with the customer.



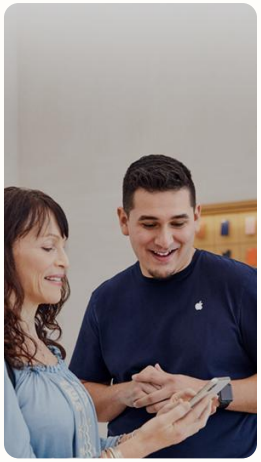
Phygital Experience

Phygital experiences merge online and offline touchpoints for immersive shopping.



Conscious Consumerism

Social responsibility emphasize eco-friendly practices and ethical standards.



Customer Care

Qualified staff for personalized customer assistance.



Sustainability Focus

Customers are becoming increasingly aware of environmental threats



Celebrate Diversity

Create environments and products that meet the needs of all customers, considering their unique needs, background and capabilities.

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The trends lead us to identify the ingredients that must be considered to create a store experience

01 Brand

Express the brand through visible choices in the space and the service.

02 Sensorial perception

Through sound, aroma and first impressions and visuals.

03 Space navigation

Clear space distribution, signage floors and structured flows.

04 Product portfolio

Define the interactive theatre and defining stock presence.

05 Services

Customization and delivery or through added value experiences.

06 Staff

Trained with approach and attitude, attire, interaction and positioning.

07 Digital

Into the in-store shopping experience.

08 Sustainability

Both perceptually and communicatively.

09 Accessibility

Ensure that physical stores are accessible to all customers.

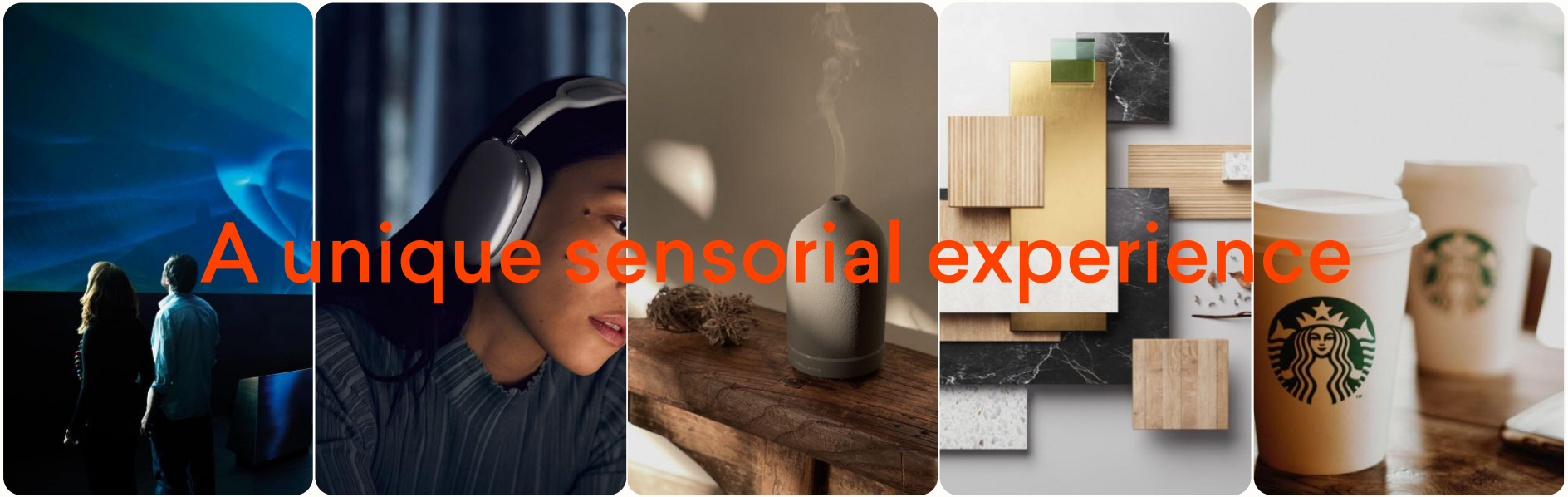
10 Inclusivity

Promote inclusion and diversity, creating spaces free of discrimination.

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The physical store is the only channel where I can feel all the senses. Retailers craft memorable and personalized experiences to encourage customer loyalty and repeat visits.

Sight | Hearing | Smell | Touch | Taste



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Shopping missions explain what customers need from a visit. The same customer can return with a different purpose.

Replenishment



"I know what I need"

Get a familiar product quickly and with certainty.

A direct route to collection and checkout.

Collection point

Visible from the entrance. A short route to pick up and leave.

Discovery



"Show me the possibilities"

Browse relevant options and develop a preference.

Curated displays and room to explore.

Discovery zone

Products in context. Browsing routes with optional demonstrations.

Commitment decision



"Guide me feel certain"

Reduce uncertainty before an important purchase.

Testing, comparison and expert advice.

Test and advice

Room to handle products. Comfortable space for comparison and conversation.

Problem resolution



"Help me put this right"

Fix a product or resolve a service issue.

A clear support point and accountable follow-up.

Service point

Easy to find. Space for assessment with clear follow-up after the visit.

Leisure



"Give me a reason to stay"

Enjoy the visit, participate and spend time with others.

Relevant activities and shared experiences.

Shared experience

Flexible areas for participation. Enough room to pause and spend time.

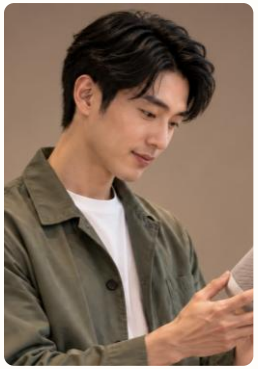
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The mission changes the support needed

Customers can move from independent exploration to advice without repeating the same work.

Assistance remains a customer choice.

Clear routes, legible information and optional help at every age and level of digital confidence.

Replenishment	Discovery	Commitment decision	Problem resolution	Leisure
				
Digital support				
• Live local stock • Order and collection status	• Product information • A shortlist to save for later	• Comparable specifications • Appointments and fulfilment	• Service history • Progress and next steps	• Events and booking • Optional participation
Human support				
• Help on demand. • Quick issue resolution	• Optional demonstrations • Advice when questions arise	• Expert product guidance • Testing and comparison	• Diagnosis and assessment • A clear owner of the issue	• Hosting and facilitation • Space to engage independently

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Connected journeys need reliable handovers

Customers should be able to move from research to a store visit, and from purchase to support, with relevant information available at each step.

Retailers need to define what transfers between channels, who takes responsibility and where the customer can ask for help.



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Data driven strategies and integrated and personalized customer experiences are now possible thanks to the use of big data and omnichannel strategies



Big Data

Refers to the vast volumes of data generated through digital interactions, which can be analyzed to uncover patterns, trends, and insights for better decision-making in retail.





Personalization

The use of data and technology to tailor the shopping experience to individual customers' preferences, behaviors, and needs, delivering customized product recommendations, offers, and content across all retail channels.



Phygital

Blends physical and digital experiences in retail, creating seamless interactions across both online and offline environments, enhancing customer engagement.



AI shopping assistants

Tools for discovery and comparison; transaction capabilities vary by platform and market.



Omnichannel

An integrated retail approach where all channels (online, in-store, mobile) are interconnected, providing a consistent and personalized shopping experience for customers.

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Empowering technologies for a more fluid and natural customer experience

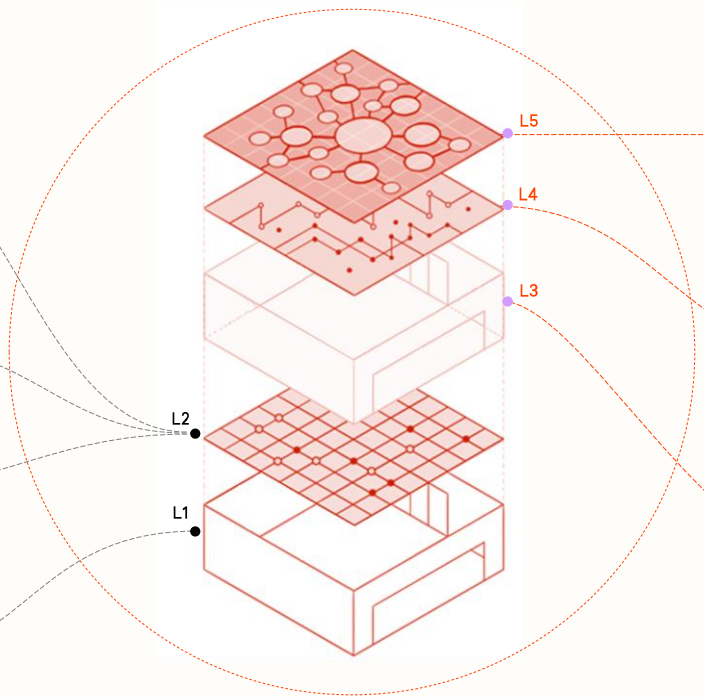
Physical Layer

Interactive Devices
Allow customers to interact with digital content through touch, motion, or other inputs and give them the capacity for self-discovery and self-sufficient depending on how they want to interact with the staff and the store.

Smart lighting and acoustics
Through these technologies, we are able to adapt the store ambiance according to the moment to influence the customer's sensory perception.

IOT & Robotic Delivery
Robots allow to automate repetitive tasks that do not provide a plus to the customer while sensors allow us to capture information from the reality and control what is happening.

Physical Store
Physical space where the experience occurs.



Digital Layers

Omnichannel technologies & Community
To implement a seamless customer experience strategy that creates connected and consistent interactions across all channels throughout the full journey. Systems and connectivity from digital to physical realm.

Data and Advance Analytics
Capture data from the real world in order to integrate it into a digital model from where we can monitor in real-time the operations of the store and have a better understanding of the customer behavior within the space.

Digital models & Immersive Technologies
Create engaging and interactive experiences which connect the digital and the physical reality. Leverage the digital world and bring it into the physical store to explore new retail strategies.

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Potential technologies to be applied

Physical Layer

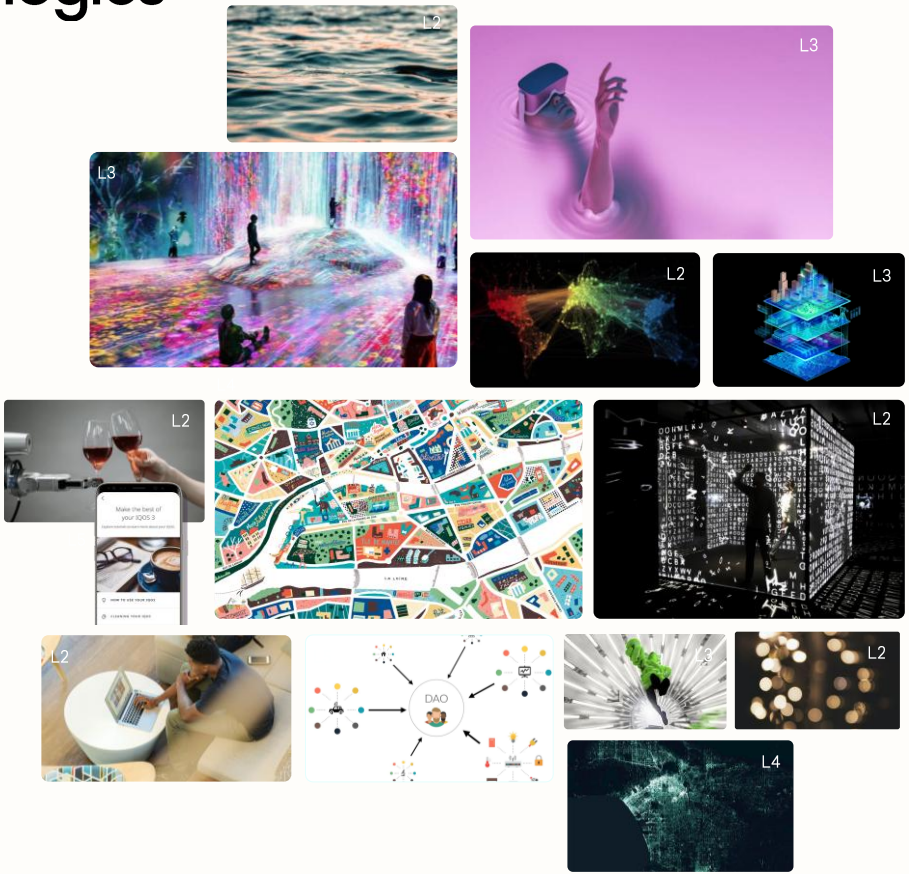
L1 Physical Store

L2 Physical elements

L2.1 IOT & Robotics
- IoT Devices
- Warehouse Automation
- Vending Machines

L2.2 Smart Lighting & Acoustics
- Smart Lighting
- Smart Acoustics
- Comfort Technologies

L2.3 Interactive Devices
- Big screens
- Interactive walls
- Other devices



Digital Layers

L3 Digital models & Immersive Technologies
- Digital Twin
- Data Visualization
- Augmented Reality
- Virtual Reality & Metaverse

L4 Data and Advance Analytics
- Advance Data Analytics
- Location Intelligence
- Video-Analytics
- AI+ML: Simulations and forecasting

L5 Connected commerce & AI discovery
- AI shopping assistants
- Identity and consent
- Structured catalogues
- Live availability and fulfilment

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Space design follows the customer mission

The store programme should make room for the tasks customers need to complete.

Its circulation can accommodate a quick collection alongside a longer visit for comparison or advice.

Different missions may share the same space at different times.

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The retail store is like a lab at the service of the customer, understanding their needs and tastes from physical product.

Demonstrations reveal product questions. Physical testing and customer feedback help teams improve information and assistance.

Measure what supports a specific decision about space or service.

Product Collaborations & Launch Events

Collaborate with designers or brands to launch new collections or exclusive products.

Host product launch events or showcases to gather feedback and excitement from customers regarding new offerings.

Sales & Preference Tracking

Utilize a Customer Relationship Management (CRM) system to track customer purchases and product preferences.

Analyze sales data to identify trends and understand which products are popular among different customer segments.

Customer Surveys & Feedback

Conduct post-purchase surveys or email follow-ups to gather customer opinions and insights on their store experience and purchased products.

Use online survey platforms for more extensive feedback to understand customer preferences.



Social Media & Digital Marketing Tracking

Use social media tracking tools to analyze customer interactions with your posts and digital campaigns.

Measure the effectiveness of digital marketing efforts in driving store traffic and encouraging repeat visits.

Physical Product Testing & Prototyping

Conduct pilot tests or offer samples of new products to collect direct customer feedback.

Observe customer reactions to new designs or ideas and adjust products accordingly.

Loyalty Programs & Rewards

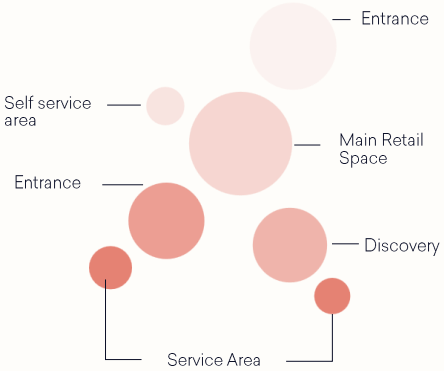
Implement loyalty programs that track customer purchases and behaviors.

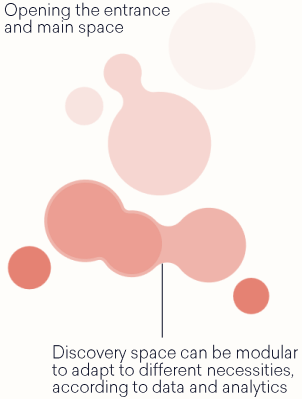
Offer personalized rewards based on individual customer preferences to incentivize return visits.

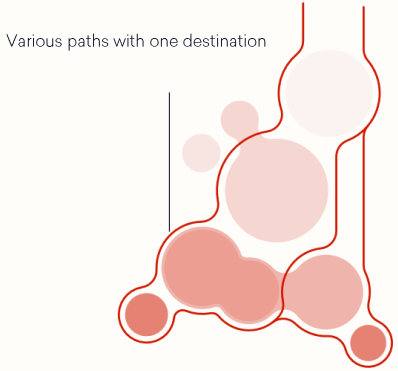
Enhance store appeal and visual merchandising to boost traffic and conversions.

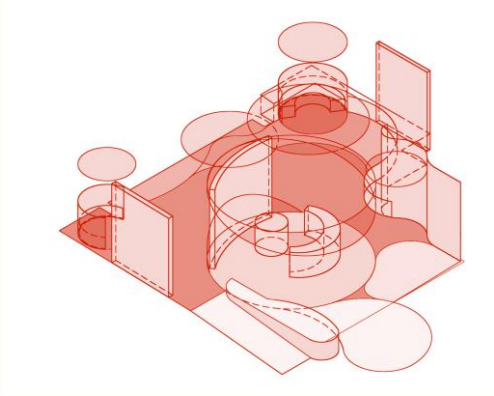
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Retail spaces can be adapted by establishing the connections between uses, circulation and volume that responds to the customer journey









01 Program

The spaces within the retail environment can be adapted to best suit the customer journey.

02 Connection

Establish connection areas between spaces that can be used for various purposes, according to the adjacent uses.

03 Circulation

Establish pathways that follow the customer journeys for the specific space

04 Volumes

Playing with height, depth and various three dimensional elements will define the overall experience of the retail space

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When things do not go as planned …

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Amazon Go: the limits of scaling a retail format

In January 2026, **Amazon announced the closure of its Amazon Go and Amazon Fresh physical stores**. The company said the formats had yet to combine a distinctive customer experience with an economic model that could support expansion.

Just Walk Out continues in third party locations. The lesson for retailers is to evaluate the customer proposition and store economics alongside operational improvements such as faster checkout.

Source: Amazon · 2026 announcement, updated 12 May 2026











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Bonobos: concept, fulfilment and ownership history

Bonobos' Guideshops connect physical fitting and personal advice with fulfilment by delivery. WHP Global and Express acquired the business in 2023. Following Express's 2024 Chapter 11 proceedings, Phoenix took over U.S. direct-to-consumer operations for Express and Bonobos.

The design lesson is to assess store service and fulfilment alongside the wider economics of the business.

The corporate restructuring alone offers insufficient evidence to judge the Guideshop experience.

Sources: WHP Global · 2023 acquisition; Phoenix transaction · 21 June 2024











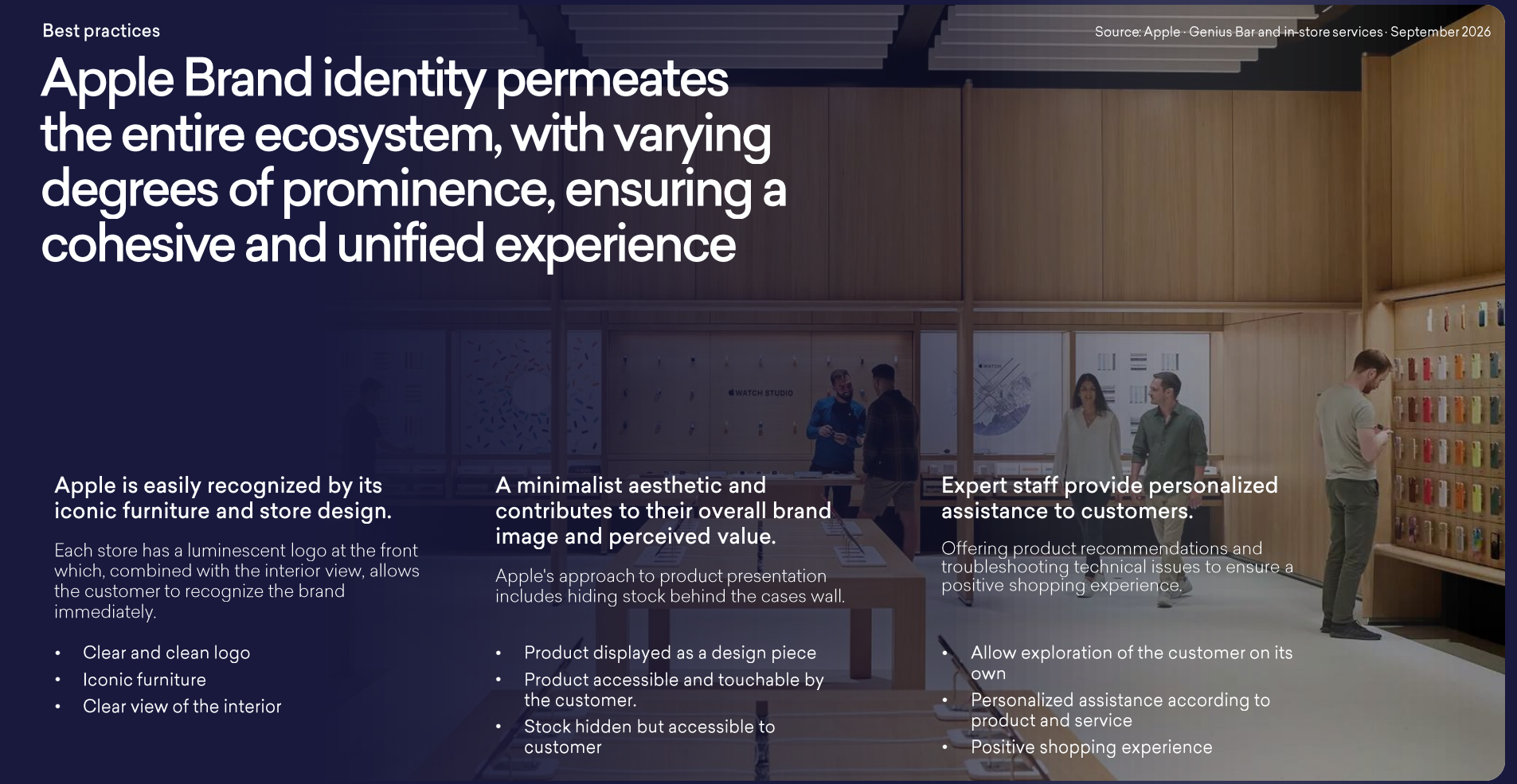
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What does the future retail journey look like?

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Source: Apple · Genius Bar and in-store services · September 2026

Apple Brand identity permeates the entire ecosystem, with varying degrees of prominence, ensuring a cohesive and unified experience



Apple is easily recognized by its iconic furniture and store design.

Each store has a luminescent logo at the front which, combined with the interior view, allows the customer to recognize the brand immediately.

- Clear and clean logo
- Iconic furniture
- Clear view of the interior

A minimalist aesthetic and contributes to their overall brand image and perceived value.

Apple's approach to product presentation includes hiding stock behind the cases wall.

- Product displayed as a design piece
- Product accessible and touchable by the customer.
- Stock hidden but accessible to customer

Expert staff provide personalized assistance to customers.

Offering product recommendations and troubleshooting technical issues to ensure a positive shopping experience.

- Allow exploration of the customer on its own
- Personalized assistance according to product and service
- Positive shopping experience

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Source: Nike · FY26 Q1 earnings call · 30 September 2025

Nike's 2025 New York House of Innovation refresh organised the experience around sport with an immersive and a clear sporting purpose



Nike integrates AR experiences into their stores,

allowing customers to visualize products in real-world settings and customize their purchases.

- AR experiences
- Visualize products in real live comparing with AR

Nike's 'House of Innovation' merges digital technology with retail,

offering real-time sports experiences and weather simulation for scanned products, driving foot traffic and conversation in physical stores.

- Weather simulation
- Try product at the store
- Comparing products via technology

With Nike By You, customers can personalize their footwear, apparel, and accessories,

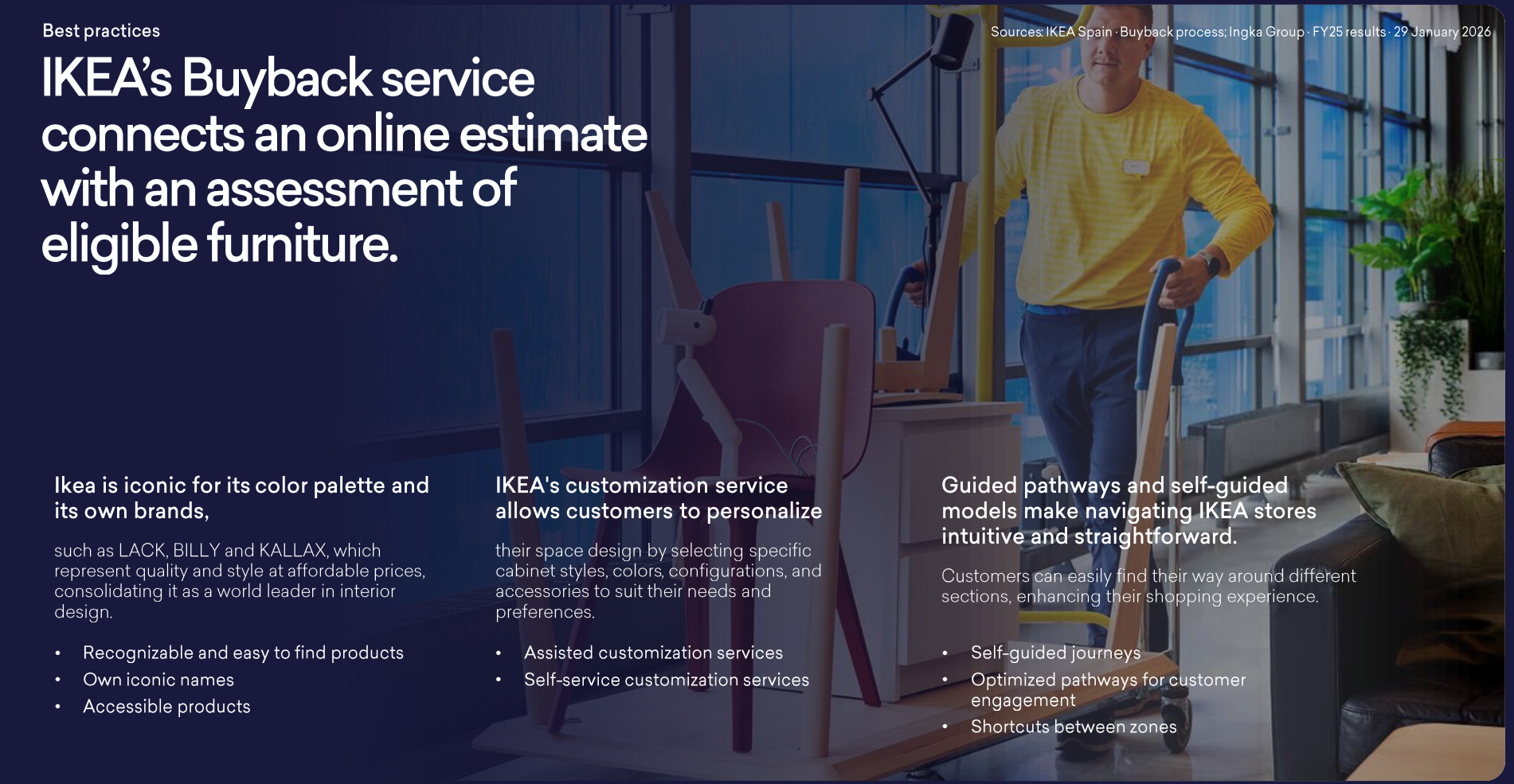
by choosing from a variety of colors, materials, and design options.

- Design your own product
- Customize from a base design
- Online and in store customization tool

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Sources: IKEA Spain · Buyback process; Ingka Group · FY25 results · 29 January 2026

IKEA's Buyback service connects an online estimate with an assessment of eligible furniture.



Ikea is iconic for its color palette and its own brands,

such as LACK, BILLY and KALLAX, which represent quality and style at affordable prices, consolidating it as a world leader in interior design.

- Recognizable and easy to find products
- Own iconic names
- Accessible products

IKEA's customization service allows customers to personalize

their space design by selecting specific cabinet styles, colors, configurations, and accessories to suit their needs and preferences.

- Assisted customization services
- Self-service customization services

Guided pathways and self-guided models make navigating IKEA stores intuitive and straightforward.

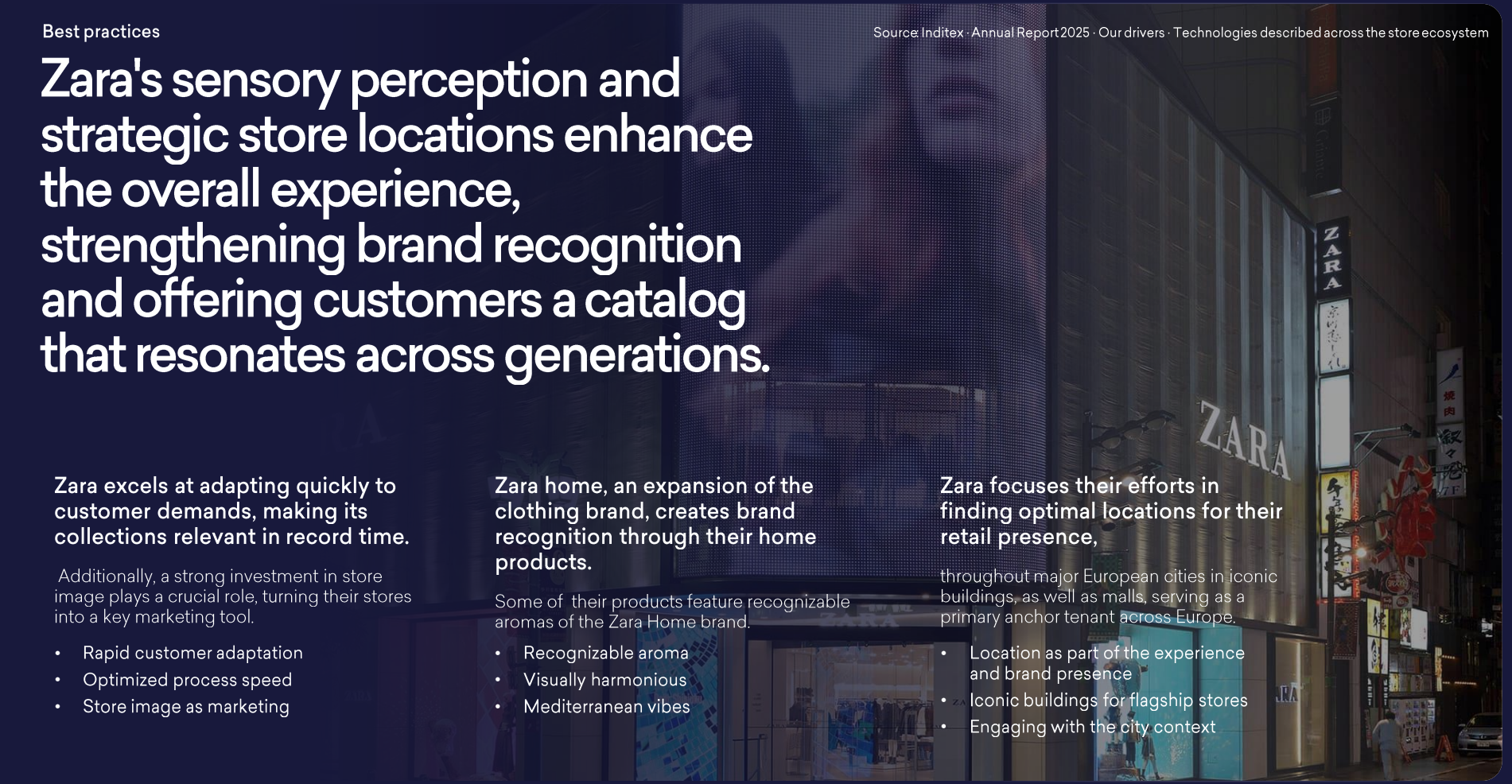
Customers can easily find their way around different sections, enhancing their shopping experience.

- Self-guided journeys
- Optimized pathways for customer engagement
- Shortcuts between zones

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Source: Inditex · Annual Report 2025 · Our drivers · Technologies described across the store ecosystem

Zara's sensory perception and strategic store locations enhance the overall experience, strengthening brand recognition and offering customers a catalog that resonates across generations.



Zara excels at adapting quickly to customer demands, making its collections relevant in record time.

Additionally, a strong investment in store image plays a crucial role, turning their stores into a key marketing tool.

- Rapid customer adaptation
- Optimized process speed
- Store image as marketing

Zara home, an expansion of the clothing brand, creates brand recognition through their home products.

Some of their products feature recognizable aromas of the Zara Home brand.

- Recognizable aroma
- Visually harmonious
- Mediterranean vibes

Zara focuses their efforts in finding optimal locations for their retail presence,

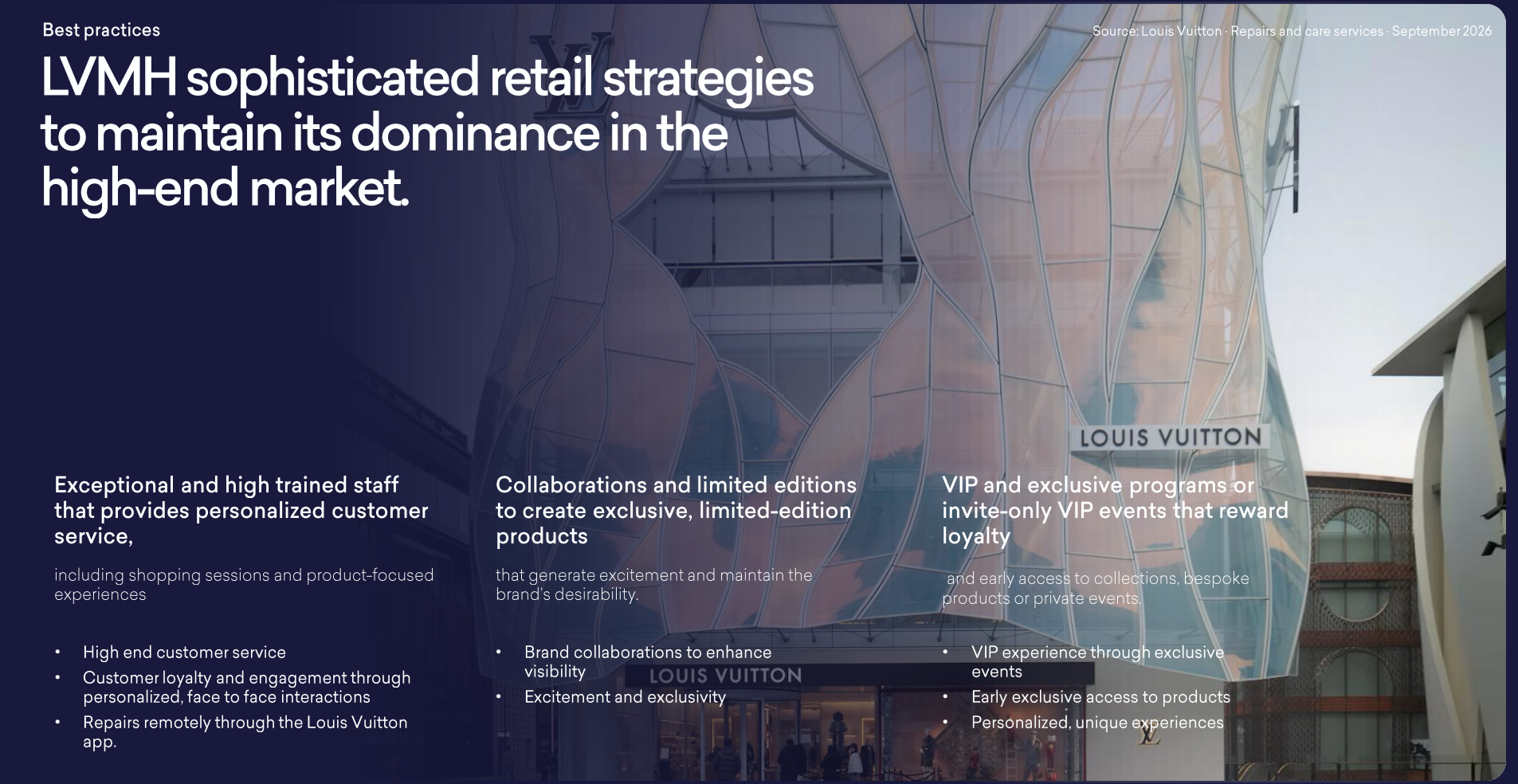
throughout major European cities in iconic buildings, as well as malls, serving as a primary anchor tenant across Europe.

- Location as part of the experience and brand presence
- Iconic buildings for flagship stores
- Engaging with the city context

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Source: Louis Vuitton · Repairs and care services · September 2026

LVMH sophisticated retail strategies to maintain its dominance in the high-end market.



Exceptional and high trained staff that provides personalized customer service,

including shopping sessions and product-focused experiences

- High end customer service
- Customer loyalty and engagement through personalized, face to face interactions
- Repairs remotely through the Louis Vuitton app.

Collaborations and limited editions to create exclusive, limited-edition products

that generate excitement and maintain the brand's desirability.

- Brand collaborations to enhance visibility
- Excitement and exclusivity

VIP and exclusive programs or invite-only VIP events that reward loyalty

and early access to collections, bespoke products or private events.

- VIP experience through exclusive events
- Early exclusive access to products
- Personalized, unique experiences

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Design priorities for the next retail format, a store visit should add value to the wider journey

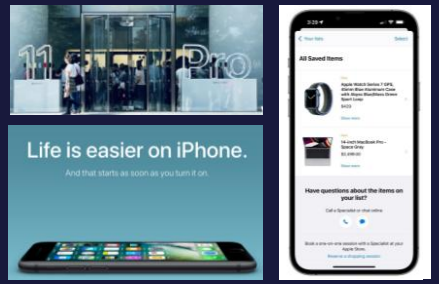
A visit may begin with a digital shortlist and continue afterwards through delivery or product support.

The retailer's task is to identify where physical presence makes the decision easier, then connect those moments to accurate information and reliable service.



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Connecting the customer to the brand throughout their journey by engaging both digital and physical layers at all steps



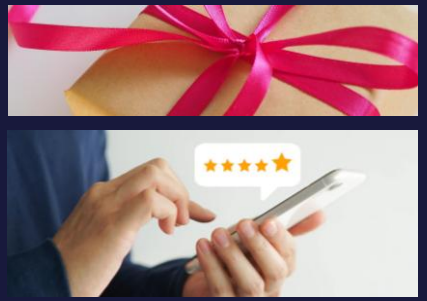
Awareness & Approach

Design a unique and differential customer experience, open to brand and product awareness and discovery



Discovery & Engage

Allow the customer to explore the products physically and digitally, both in-store and at home.

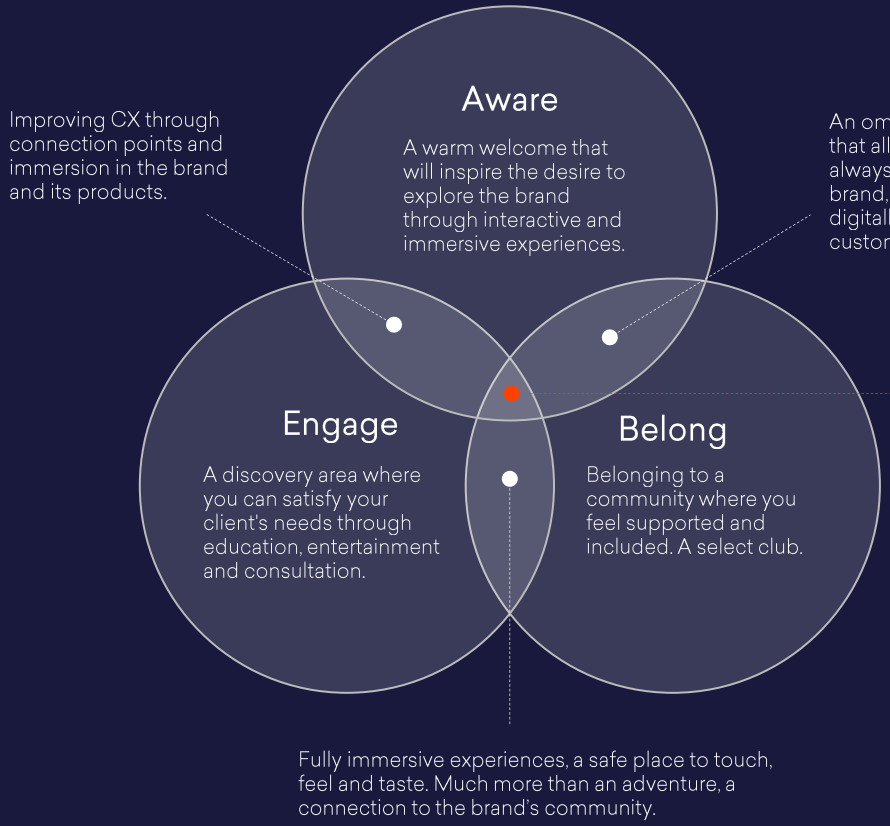


Feedback & Belong

Create a community for customers, aimed at brand loyalty. Generate channels for seamless customer feedback to make the customer feel listened to and attended.

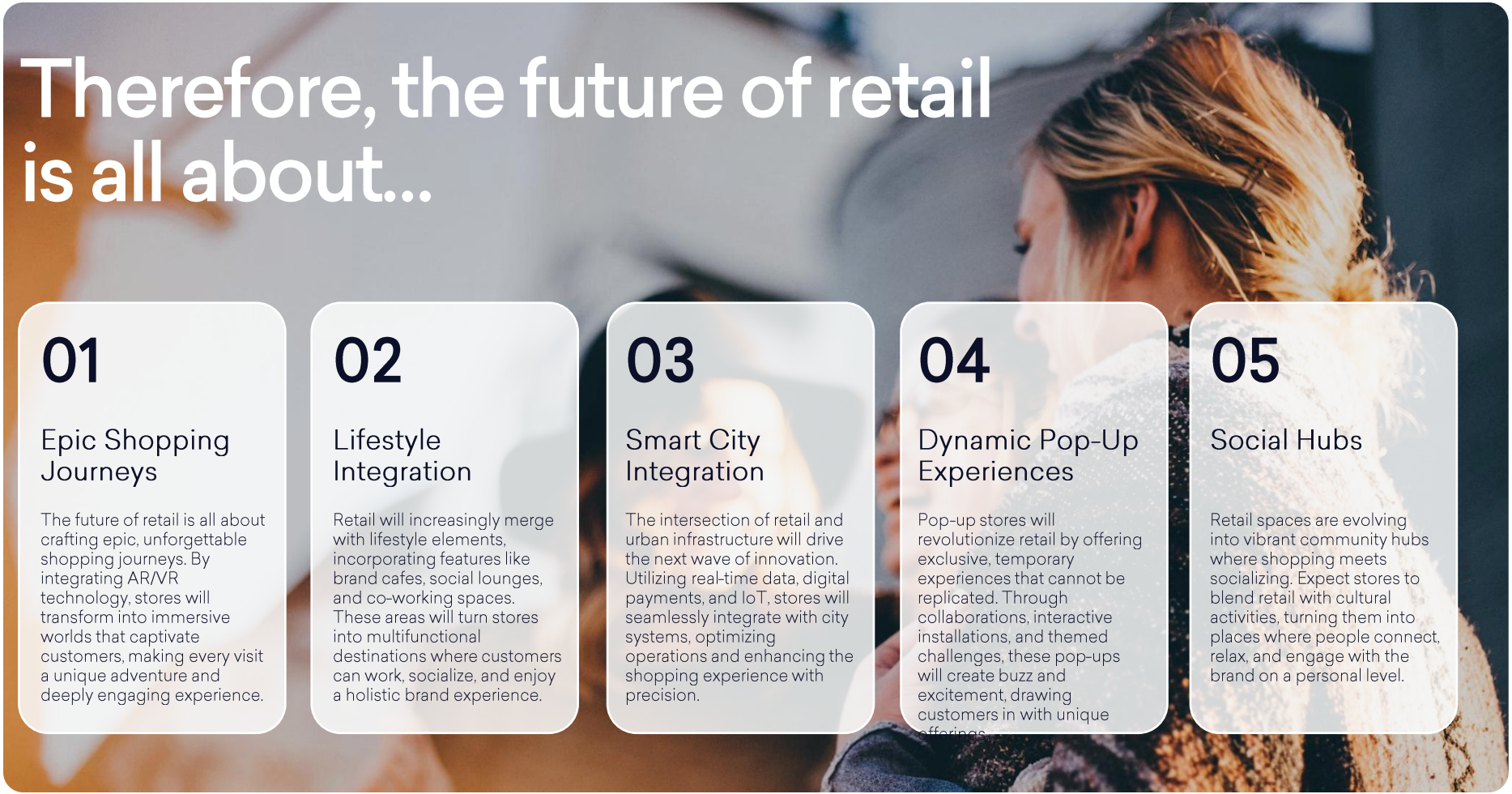
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The connection between the pillars creates a seamless & natural experience



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Therefore, the future of retail is all about...



01

Epic Shopping Journeys

The future of retail is all about crafting epic, unforgettable shopping journeys. By integrating AR/VR technology, stores will transform into immersive worlds that captivate customers, making every visit a unique adventure and deeply engaging experience.

02

Lifestyle Integration

Retail will increasingly merge with lifestyle elements, incorporating features like brand cafes, social lounges, and co-working spaces. These areas will turn stores into multifunctional destinations where customers can work, socialize, and enjoy a holistic brand experience.

03

Smart City Integration

The intersection of retail and urban infrastructure will drive the next wave of innovation. Utilizing real-time data, digital payments, and IoT, stores will seamlessly integrate with city systems, optimizing operations and enhancing the shopping experience with precision.

04

Dynamic Pop-Up Experiences

Pop-up stores will revolutionize retail by offering exclusive, temporary experiences that cannot be replicated. Through collaborations, interactive installations, and themed challenges, these pop-ups will create buzz and excitement, drawing customers in with unique offerings.

05

Social Hubs

Retail spaces are evolving into vibrant community hubs where shopping meets socializing. Expect stores to blend retail with cultural activities, turning them into places where people connect, relax, and engage with the brand on a personal level.

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A clear role for every store

A focused store and journey review can identify where customers need physical proof or support.

Mormedi can translate those needs into spatial and service concepts, then define a pilot that measures customer value alongside operating cost.

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Do you have your company ready for these challenges?

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muchas gracias ;)

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